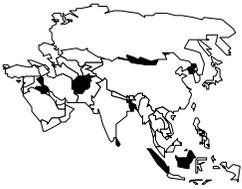


FOODCROPS AND SHORTAGES

No. 3

October 2004

	<p>AFRICA: In eastern Africa, the food situation remains precarious due to the impact of drought and armed conflicts. Currently more than 17 million people need emergency food assistance. In southern Africa, the 2004 cereal production in Zimbabwe was well below average levels, with anticipated serious food shortages in rural and urban areas. In drought-hit Lesotho, the 2004 cereal harvest was sharply down, necessitating emergency food assistance to large numbers of people. In western Africa, Desert Locusts continue to pose a serious threat to agricultural production across the Sahel, notably in Mauritania, Mali, Senegal and Niger. Joint FAO/CILSS/WFP missions are currently in the sub-region assessing the impact of the locusts on food production.</p>
	<p>ASIA/NEAR EAST: Millions of people in Asia have been affected by heavy and extensive monsoon rains and floods. The worst affected countries include Bangladesh, India, Nepal, and China. In Korea DPR, despite a recovery in food production, the country will still depend on international assistance to meet its minimum food needs. In Afghanistan, drought conditions and crop diseases have seriously compromised harvests, prompting increased food aid needs. Drought has also affected production in Sri Lanka, Mongolia and Pakistan. In Iraq, insecurity and the reduced numbers of international aid workers are hampering humanitarian assistance.</p>
	<p>LATIN AMERICA AND THE CARIBBEAN: Devastating floods in several Caribbean countries due to hurricanes have caused loss of life and serious damage to infrastructure and crops. In Haiti, tropical storm Jeanne caused loss of some 3 000 lives and extensive damage to infrastructure in Artibonite and North-West regions. By contrast, prolonged dry spells reduced the main season cereal production in Nicaragua, Honduras and Guatemala. Elsewhere, prospects are generally favourable, although dry weather conditions could lead to yield reductions in the main wheat producing South American countries.</p>
	<p>EUROPE: Cereal production rebounded sharply in 2004 after the poor drought-reduced crops last year. Weather conditions are generally satisfactory for planting and establishment of the 2005 winter cereals although more precipitation would be beneficial in some southern parts of the region. In the European CIS, cereal harvests, though significantly up on last year, are below expectations to match the good harvests in 2001 and 2002.</p>
	<p>NORTH AMERICA: Planting of the 2005 winter wheat crop is progressing on schedule in the United States and plants are emerging well under generally favourable conditions. The maize harvest is well underway and a record output of 295 million tonnes is forecast. In Canada, predominantly cool and wet conditions during the 2004 growing season have resulted in slow crop development, a later than normal harvest and poorer quality crops. Nevertheless, output of wheat could still be up from the previous year when drought affected yields in parts.</p>
	<p>OCEANIA: The 2004 cereal output in Australia is set to fall from last year's bumper level but should be about the average of the past five years. Soil moisture conditions are favourable for the summer coarse grain planting and the area of sorghum and maize, for harvest in 2005, is forecast to increase sharply.</p>



AFFECTED COUNTRIES^{1/}

COUNTRIES REQUIRING EXTERNAL FOOD ASSISTANCE (total: 35 countries)

<u>Region/Country</u>	<u>Reason for emergency</u>	<u>Region/Country</u>	<u>Reason for emergency</u>
AFRICA (23 countries)		ASIA/NEAR EAST (6 countries)	
Angola	Returnees	Afghanistan*	Drought and civil strife
Burundi*	Civil strife, IDPs and returnees	Bangladesh	Floods
Chad	Refugees	Iraq*	Recent war, shortage of inputs
Central Afr. Rep.	Civil strife	Korea, DPR*	Economic constraints
Congo, Dem.Rep.*	Civil strife, IDPs and refugees	Mongolia*	Drought and economic constraints
Congo Rep. of	Civil strife, IDPs		
Côte d'Ivoire	Civil strife, IDPs	Sri Lanka	Drought
Eritrea*	Drought, IDPs, returnees		
Ethiopia*	Drought in parts, IDPs	LATIN AMERICA (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, drought, floods
Liberia*	Civil strife, IDPs	Honduras*	Effects of adverse weather and economic shocks
Madagascar	Drought in southern parts, cyclones	Nicaragua*	Effects of adverse weather and economic shocks
Mauritania	Drought		
Malawi*	Drought in parts	EUROPE (1 country)	
Sierra Leone*	Returnees	Russian Federation (Chechnya)	Civil strife
Somalia*	Civil strife, drought in parts		
Sudan*	Civil strife, drought in parts		
Swaziland*	Drought in parts		
Tanzania, U.R.	Drought in parts, refugees		
Uganda*	Civil strife, IDPs		
Zimbabwe*	Adverse weather, economic crisis		

COUNTRIES WITH UNFAVOURABLE PROSPECTS FOR CURRENT CROPS

<u>Country</u>	<u>Main contributing factor</u>	<u>Country</u>	<u>Main contributing factor</u>
Angola	Adverse weather, returnees	Malawi*	Drought
Bangladesh	Floods	Mali	Desert locusts
Cape Verde	Desert locusts, drought	Mauritania	Desert Locusts
Chad	Refugees	Mongolia*	Drought
Cuba	Flooding	Somalia*	Drought, civil strife
Eritrea*	Erratic rainfall, input shortages	Sri Lanka	Drought
Ethiopia*	Erratic rainfall	Sudan*	Adverse weather, civil strife
Kenya*	Erratic rainfall	Swaziland*	Drought
Lesotho*	Drought	Zimbabwe*	Economic crisis

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

Afghanistan

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

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

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

CROP AND FOOD SUPPLY SITUATION

OVERVIEW

As of October 2004, the number of countries facing serious food shortages throughout the world stands at 35 with 23 in Africa, 6 in Asia/Near East, 5 in Latin America and 1 in Europe. The causes are varied but civil strife and adverse weather, including drought predominate. In many of these countries, the HIV/AIDS pandemic is a major contributing factor. Recently published joint FAO/WFP Crop and Food Supply Assessment reports highlighting these factors in greater detail can be found at <http://www.fao.org/giews/english/alertes/sptoc.htm>.

In **eastern Africa**, despite beneficial rains in parts, the food situation remains precarious due to lingering effects of drought and conflict. Currently more than 17 million people depend on emergency food assistance. The food shortages are expected to persist well into 2005 and large volumes of cereal imports, mostly in the form of food aid, are still needed to stave off starvation. In Sudan, the grave humanitarian crisis in Darfur has resulted in the death of tens of thousands and the displacement of more than a million people. Looting and burning of assets, including food and livestock have severely disrupted food availability and access for both rural and urban communities. In Somalia, early secondary "deyr" season rains have brought some relief in northern pastoral areas but it is too early to determine the impact on the emergency situation. Pre-famine conditions exist in several parts of the country with an estimated 700 000 people depending on food assistance and an additional half a million needing assistance until April 2005. In Kenya, the drought-induced food shortages persist with nearly 2.3 million people in need of food assistance. In Eritrea, poor seasonal rains and input availability have affected crop production and compounded the already precarious food situation. An estimated 1.4 million people depend on food assistance. In Ethiopia, the overall food supply situation remains highly precarious. An estimated 7.8 million people are in need of food assistance.

In **southern Africa**, land preparation for planting of the 2005 cereal crops has begun under seasonal forecast of normal weather conditions. A FAO/WFP Crop and Food Supply Assessment Missions visited Malawi, Mozambique, Zimbabwe¹, Lesotho, Swaziland and Angola in April-May this year. FAO's revised estimate of total 2004 cereal harvest for the sub-region is 21 million tonnes, similar to last year's about average output. Production of maize, the region's most important staple crop, at about 14.9 million tonnes, was the hardest hit by a drought in the eastern part of the sub-region, with a decline of about 5.5 percent from last year. Reduced harvest of cereals in Lesotho, Malawi, Swaziland and Zimbabwe is expected to cause food shortages in these countries at varying degree of severity. On the other hand, production increased in Angola, Botswana, Madagascar, Mozambique, Namibia and Zambia. The overall reduction of maize and other summer crops this year is expected to result in a net coarse grain import requirement for the sub-region as a whole of about 2 million tonnes for the 2004/05 marketing year. WFP has launched a three-year regional Protracted Relief and Recovery Operation (PRRO) requiring US\$ 405 million and involving 656 573 tonnes of food commodities to assist food insecure and AIDS affected populations in the sub-region.

In the **Great Lakes region**, planting of the 2005 first-season foodcrops, to be harvested from January, has begun under normal weather forecast for the season. Harvesting of the 2004 second season crops, mainly sorghum, maize and beans, is complete. Preliminary results indicate a normal to slight improvement in the overall food availability. However, resettlement of returning refugees and the food security situation continue to be hampered in parts of the region due to sporadic disturbances.

In **central Africa**, growing conditions are favourable for the second maize crop in Cameroon, where a satisfactory first maize crop was harvested. In Central African Republic, in spite of good weather conditions and seed distributions, production is not expected to recover significantly due to persistent insecurity.

In **northern Africa**, land preparation and early sowing of winter grain crops to be harvested from May next year are underway. An earlier potential threat of a Desert Locust infestation was avoided by a large-scale control operation. Thus, the full potential of this year's increased plantings, better input supply and favourable weather was realized and wheat output in the sub-region is provisionally estimated at a record 17.4 million tonnes, 38 percent higher than the average for the previous five years. In Egypt and Morocco, the largest wheat producers in the sub-region, wheat production is forecast at about 7 million tonnes and 5.5 million tonnes respectively. Aggregate coarse grain output is estimated at about 12.8 million tonnes, similar to the previous year's good crop.

¹ The Mission was curtailed after 12 of the planned 19 days.

In **western Africa**, after limited and erratic rains at the beginning of the growing season in the Sahel, precipitation improved significantly from July and crops are maturing satisfactorily in most countries. As a result, an above-average harvest is anticipated, but the deteriorating Desert Locust situation continues to pose a serious threat to agricultural production across the Sahel. Following widespread breeding in the Sahelian zone in Mauritania, Mali, Senegal, Niger and Burkina Faso, numerous new swarms formed recently. Chad and Cape Verde are also being increasingly infested. Some three to four million hectares are estimated to be infested across the Sahel. The annual CILSS meeting held in early September on crop prospects in the Sahel estimated that 2004 cereal production could be close to last year's record level if current rainfall patterns continue and if Desert Locusts do not cause substantial damage to crops. However, the meeting estimated that up to 25 percent of the Sahel cereal production could be lost if large scale damage occurs. Although FAO anticipates a lower level of crop loss at regional level, the food security impact of Desert Locusts could be locally severe in some countries, notably in Mauritania, Mali, Senegal and Niger. A series of joint FAO/CILSS Crop Assessment Missions are currently visiting each country to estimate with national services the 2004 cereal production. In Mauritania, Mali, Niger and Senegal, the most affected countries, the Missions are jointly with CILSS and WFP for a full assessment of the impact of Desert Locust on agricultural production and food security. In the southern parts of the coastal countries along the Gulf of Guinea, an average maize crop has been harvested while the secondary maize crop is developing satisfactorily. In the northern parts, harvesting of coarse grains is underway.

In **Asia**, millions of people have been affected by heavy and extensive monsoon rains and floods. The floods have caused considerable loss of crops and livestock and seriously damaged property and infrastructure in a number of countries, mainly in Bangladesh, India, Nepal, and China. On the other hand, several countries have experienced severe drought that negatively impacted 2004 crop production. These countries include Sri Lanka, Mongolia, India, and Pakistan. In spite of an improved harvest in 2004, DPR Korea will still face a large import requirement of cereals. The country's double cropping programme seems to be severely constrained by declining soil fertility and lack of farm power. Despite a good harvest in 2004, China is expected to change its net trade position in cereals from a net exporter in 2003/04 (with net export of 9.6 million tonnes) to a net importer in 2004/05 (with net import 3 million tonnes). India's rice and wheat exports are expected to decline due to reduced production and tight stocks.

In Afghanistan, drought conditions and crop pests and diseases as well as unusually high temperatures in Spring significantly compromised cereal harvests this year.

In the **Asian CIS**, cereal harvesting is nearly complete from an aggregate area of about 19 million hectares. Aggregate cereal harvest is estimated at more than 26 million tonnes, which is some 2.2 million tonnes down on last year's above average harvest. This total includes some 22 million tonnes of wheat and nearly 4 million tonnes of coarse grains.

In several countries of the **Near East**, drought and conflict have affected last season's crops. A severe drought in Jordan has decimated crops and left thousands of herders in need of assistance. In Iraq, insecurity and the reduced numbers of international humanitarian workers is affecting delivery of food and other types of assistance.

In **Central America and the Caribbean**, harvesting of the 2004 main season cereal crop is complete or well advanced. Outturns have been mixed with satisfactory maize and sorghum crops in Mexico and reduced harvests in Guatemala, Honduras and Nicaragua following prolonged dry weather during the season. In Costa Rica, paddy production was reduced by a mite infestation. In the Caribbean, torrential rains due to the passage of hurricanes in September and excessive precipitation early in the season, resulted in severe crop damage and reduced cereal production in the Dominican Republic, Cuba and Jamaica. However, the abundant rains of September improved soil conditions for planting of the second season cereal crops.

In **South America**, the 2004 wheat crop is about to be harvested in southern countries. Prospects are uncertain. Despite an increase in plantings, dry weather during the season in several countries, including Argentina and Brazil, is likely to have resulted in yield reductions. The 2004 coarse grain crops, harvested earlier in the year, were below the record levels of 2003 but still above average. In Andean countries, a bumper maize crop has been gathered in Colombia but production was reduced in Venezuela. In Peru, Ecuador, and parts of Bolivia, dry weather reduced outputs of the recently harvested cereal crops.

In **Europe**, cereal output has rebounded sharply in 2004 throughout the region after the poor drought-struck crops last year. The increase has been most pronounced for winter wheat, output of which is estimated to have increased to well above the average of the past five years. Winter cereals for harvest in 2005 have

already been planted in many northern parts and planting is ongoing in central parts under generally satisfactory conditions. However, more precipitation would be beneficial for the planting in southern parts of the region such as Spain, southern France and Italy, where topsoil's moisture is lacking after several weeks of dry weather.

In the **European CIS**, late Summer precipitation as well as March and April frost damaged nearly three million hectares of cereals, mainly in the Russian Federation and the Ukraine. In addition, insufficient access to farm inputs prevented many farmers in the two large producing countries to match the high areas planted in 2001 and 2002. An aggregate of about 59 million hectares of cereals were planted in the region. Cereal harvests are nearly complete and aggregate production in the region is tentatively estimated at about 120 million tonnes. This total includes more than 65 million tonnes of wheat and about 54 million tonnes of coarse grains.

In **North America**, planting of the 2005 winter wheat crop is progressing on schedule in the United States and plants are emerging well under generally favourable conditions. The aggregate output of wheat in 2004 was officially estimated in October at 58.9 million tonnes, 7.7 percent down from 2003 after a reduction in winter wheat area and yields. By contrast, coarse grains output should rise sharply, largely due to the record maize crop now being harvested. Maize output is forecast to reach 295 million tonnes, 38 million tonnes up from 2003. In Canada, predominantly cool and wet conditions during the 2004 growing season have resulted in slow crop development, a later than normal harvest and poorer quality crops. Nevertheless, the wheat output is forecast to increase by almost 4 percent to 24.5 million tonnes, reflecting a higher average yield compared to 2003 when drought affected some parts.

In **Oceania**, the 2004 cereal output in Australia is set to fall from last year's bumper level but should be about the average of the past five years. Some widespread rainfall in late August improved conditions for developing crops after a prolonged dry spell. Wheat production is forecast at just over 22 million tonnes. Soil moisture conditions are favourable for the summer coarse grain planting in the key-producing parts of northern New South Wales and southern Queensland, and the area of sorghum and maize, for harvest in 2005, is forecast to increase sharply.

COUNTRY REPORTS

AFRICA

NORTHERN AFRICA

ALGERIA (22 October)

Sowing of wheat and barley crops for harvesting from June next year will start soon. Intensive and large scale control operations during the 2003/04 agricultural season made it possible to bring the widespread Desert Locust infestation under control and limit damage to agriculture. Thus, a good cereal production has been gathered in 2004, for the second consecutive year. This is the result of overall favourable weather conditions, larger area sown and adequate availability of agricultural inputs, as well as the implementation of the Agricultural Development Plan set up by the Government in 2000. Aggregate cereal output is provisionally estimated at 3.95 million tonnes, which is similar to the bumper crop harvested last year and 75 percent above average. As a consequence, imports of cereals, mostly wheat, are forecast at about 5.12 million tonnes, virtually unchanged from last year.

EGYPT (22 October)

Harvesting of the 2004 maize and sorghum crops has been completed while that of paddy is well advanced. The output of the mainly irrigated wheat crop, harvested earlier in the year, is estimated at 7.18 million tonnes, up 5 percent from the above average production of 2003. Barley output is estimated to have almost doubled to a record 264 000 tonnes compared to the good crop harvested last year, driven mainly by a significant expansion in the area sown.

Wheat imports in marketing year 2004/05 (July/June) are expected to increase by some 3 percent to 6.6 million tonnes. Imports of maize, mostly used as animal feed, are forecast at about 4.7 million tonnes, about 200 000 tonnes more than the previous year.

MOROCCO (22 October)

Land preparation is underway for the planting of the 2004/05 winter grain crops. Intensive and large scale control operations made it possible to bring this year widespread Desert Locust infestation under control, and limit damage to agriculture. This, in addition to favourable weather conditions, larger area sown and adequate availability of agricultural inputs, resulted in increased cereal production for the second consecutive year. The aggregate 2004 cereal production, mostly wheat and barley, is estimated at a record 8.47 million tonnes, about 7 percent more than the bumper crop harvested in the previous year. Output of wheat, by far the most important crop, increased by 393 000 tonnes to 5.54 million tonnes. Production of barley, the main coarse grain grown in the country, was somewhat higher than last year's record level of 2.62 million tonnes.

Reflecting two consecutive years of bumper harvests, import of cereals in the marketing year 2004/05 (July/June) are forecast to decline to about 2.97 million tonnes.

TUNISIA (22 October)

Sowings of wheat and barley crops to be harvested from May 2005 are underway. Favourable weather conditions, larger area sown and adequate availability of agricultural inputs resulted in good 2004 cereal production for the second successive year. Aggregate cereal output, estimated at 2.5 million tonnes, although 14 percent below the bumper crop harvested in previous year was almost 63 more than the average for the previous five years. Production of wheat is estimated at 1.65 million tonnes, compared to the past five year's average of 1.15 million tonnes. Barley output,

estimated at 846 000 tonnes, is 7 percent below last year's bumper harvest but over twice as high as the average for the previous five years.

Import of cereals in 2004/05 (July/July), mostly wheat and maize are forecast at 1.62 million tonnes, about 232 000 tonnes more than in the previous year.

WESTERN AFRICA

BENIN (13 October)

The prospects for the 2004 cereal crop are favourable reflecting overall good weather during the growing season. In the south the first maize crop has been harvested while the second maize crop is heading/flowering. In the North, harvesting of millet and sorghum is underway.

Following last year's good cereal output and the arrival of the first season crops on the markets, the food supply situation remains satisfactory. The cereal import requirement for 2004 is estimated at 138 000 tonnes, including 8 000 tonnes of food aid. The country is being affected by Nigeria's increasingly protectionist policy and the tightening of controls against re-export trade. Economic growth is forecast to slow down in 2004 and households' income and access to food is negatively affected.

BURKINA FASO (17 October)

After reduced and erratic rains at the beginning of the growing season, precipitation increased significantly from July over the entire country and remained widespread and above average in August. Limited rains affected crops in September in some locations in the North and the Sahel zone, but overall soil moisture reserves remained adequate for cereal crops to develop. As a result, millet and sorghum crops, which are generally in the heading and early maturation stages, are developing satisfactorily in most regions. An above average harvest is anticipated at national level.

In August, some mature locust swarms reached northern Burkina Faso, where hatching and band formation occurred. Some 29 villages were reportedly affected and nearly 20 000 hectares were estimated to be infested. About 5 600 hectares have been treated so far.

Although Desert Locusts may cause severe damage to crop and pasture locally in the north near the Mali border, they are not expected to significantly affect national food supply. A joint FAO/CILSS Crop Assessment Mission is currently in the country to estimate the 2004 cereal production and assess the impact of Desert Locusts on food security in the country.

CAPE VERDE (15 October)

Following irregular and limited rains in August, precipitation increased significantly in September and early October on Santiago and Fogo islands improving crop prospects, but remained limited on Santo Antao and Sao Nicolau islands, where crops suffered water stress. Moreover, several islands have been invaded by Desert Locust swarms in July and August, and hatching and band formation occurred, notably on Santiago, Maio and Boa Vista Islands. Swarms from current infestations in Senegal and Mauritania continue to invade the country. Therefore, overall crop harvest prospects are unfavourable. However, even in a normal year, domestic production covers only one-fifth of the country's cereal utilization requirement and the balance has to be imported.

A joint FAO/CILSS Crop Assessment Mission will visit the country towards the end of the month to estimate the 2004 cereal production and assess the impact of Desert Locusts on food security.

CHAD (21 October)

Widespread and above normal rainfall since July benefited crop development in most producing areas. Millet and sorghum are maturing in the Sudanian zone while they are developing in the Sahelian zone. Crop prospects are favourable. Small-scale breeding of Desert Locusts was in progress in the central province of Batha, in the north-eastern region of Ennedi and in the eastern region of Ouaddai where crop losses were reported. However, cereal production at national level is not expected to be significantly affected.

As of early October, the estimated number of Sudanese refugees in eastern Chad was 196 000. A recent survey by the Centre for Disease Control (CDC) revealed alarming malnutrition rates and a worrisome health situation among refugees.

A joint FAO/CILSS Crop Assessment Mission is currently in the country to estimate the 2004 cereal production and assess the impact of Desert Locusts on food security.

COTE D'IVOIRE (13 October)

The harvesting of the first maize crop and the sowing of the second crop has been completed. In spite of overall adequate weather conditions, a strong agricultural recovery is not expected this year due to persistent insecurity, conflict-induced population displacement and the prolonged partition of the country that continue to hamper inputs distribution and marketing activities.

In spite of reduced agricultural production in 2003, the overall food supply position remains adequate and inflation moderate, due mainly to sustained food imports in the government-held south and cross-border trade with Burkina Faso and Mali in the rebels-controlled North. However, lack of cash is a major constraint to imports from Burkina Faso and Mali – conversely, Ivorian cereals are being sold in neighbouring countries. WFP has extended the May–December 2003 emergency operation to December 2004. This operation is targeting returnees and displaced individuals as well as other vulnerable populations in the north and west. In the regions under rebels control the health situation is almost totally dependent on humanitarian intervention and seems to run at only 30 percent of its normal capacity, according to OCHA. Food security for many households continues to be hampered by disruption of livelihoods especially in the west. In addition, due to continuous unfavourable market situation, smallholder cash-crop producers are experiencing a significant loss of income. Cotton production in 2003/04 has been estimated at 230 000 tonnes, about half of the previous year's level, and marketing of the produce has been seriously disturbed. The sugar industry is about to collapse, since three of the four sugar growing areas and processing plants are in the north and have been hard hit by the crisis.

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

GAMBIA, REPUBLIC OF (25 October)

After inadequate rains in June that delayed plantings and stressed crops, notably in the Western Division, precipitation improved significantly in July and remained regular and widespread for the remainder of the growing season. Reflecting the overall favourable weather most crops have completed or are about to complete their cycles satisfactorily. Groundnut crop are pegging/maturing countrywide while harvesting of early millet is completed in most parts of the country. Sorghum is generally heading/flowering in Upper River Division and in some parts of Central River Division where it is predominant. Harvesting of maize is almost completed except the late sowed fields in Western Division and in other isolated areas in the country. Most upland rice fields have reached maturity and harvesting is well in progress in many Divisions while transplanting continues in the

lowland fields. Area under cereal is estimated to have increased by some 6 percent over last year's 173 000 hectares.

Although grasshopper, blister beetles and striga infestations have been reported in several areas, overall damage to crops has been limited. The Desert Locust situation remains calm. However, a small share of the swarms that form in the Sahel may invade the country through Senegal late this month. The Government has undertaken several actions to enhance the country's preparedness for any eventual attack.

A joint FAO/CILSS Crop Assessment Mission, which visited the country recently, is preparing its report which will be issued shortly.

GHANA (12 October)

Satellite imagery indicates that overall growing conditions have been satisfactory. The first maize crop has been harvested in the south. Millet and sorghum are developing satisfactorily in the north.

Following an above average cereal harvest in 2003 and the arrival of the first season crops on the markets, the food supply situation remains satisfactory. The record 2003 cocoa production along with higher producer prices have improved access to food for the estimated 1.6 million peasant farmers who produce most of the country's cocoa.

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

GUINEA* (12 October)

Precipitation has been generally adequate, and the main cereal crops are maturing. Following a strong depreciation of the Guinea Franc, the price of rice - the staple food for Guineans - more than doubled over the past six months seriously affecting access to food by urban and rural populations. In an attempt to bring down increasing food prices, the Government decided to provide a subsidy to rice importers. The official price of a 50 kg bag of rice has been fixed at 40 000 GF but on the markets the price is between 80 000 GF and 100 000 GF.

The repatriation of Sierra Leonean refugees in Guinea was completed in late July. About 12 170 people have been repatriated this year, bringing the number of refugees repatriated since the beginning of the operation in October 2001 to about 56 000. Although the restoration of peace in Sierra Leone has resulted in a decrease of the number of refugees in Guinea, the country still hosts a large number of refugees. According to the results of a refugee verification exercise carried out by WFP in June, 80 806 refugees are still living in the country, in addition to some 80 000 IDPs and over 100 000 returnees from Côte D'Ivoire in 2002 in Guinea Forestière.

GUINEA-BISSAU (21 October)

Regular and widespread rains have been received since the beginning of the rainy season, benefiting crop development in most producing areas. Coarse grains (mostly millet and sorghum) are flowering/maturing. Maize has already been harvested. Swamp rice fields have been desalinated and transplanting is underway. A good 2004 cereal harvest is anticipated. However, the country may be invaded by Desert Locusts in the near future starting from the border with Senegal.

A joint FAO/CILSS Crop Assessment Mission which visited the country recently, has provisionally estimated the aggregate output of cereals in 2004 at some 208 000 tonnes, 71 percent above last year's level and well above average. Rice, the main crop, is expected to increase by 91 percent to 126 000 tonnes.

Guinea-Bissau faced a particularly difficult lean season this year due to a steep rise in rice price in the country, due mainly to a decline in commercial imports caused by an increase in the world price. The low producer price of cashew, the main export of the country, has further limited access to food notably for farmers living in the structurally food deficit regions of Pirada and Pitche in the East, and Biombo and Cacheu in the North.

LIBERIA* (12 October)

Satellite imagery indicates that rains have been generally below average, which may have affected the paddy crop, virtually the only cereal grown in the country and now being harvested. However, with the end of the civil war and the consequent return of many displaced farmers, agricultural production in 2004 is expected to recover somewhat from last year's very low level, although shortage of seeds and tools are reportedly preventing most of the farmers from cultivating. Aggregate cereal imports in 2004 are estimated at 187 000 tonnes; food aid is estimated at 50 000 tonnes.

Since 1 October, UNHCR has organised repatriation of over 300 000 Liberian refugees scattered across West Africa. Moreover, an official programme to resettle some 300 000 IDPs will begin on 1 November, after completion of the UN disarmament programme on 31 October. With the improvement of the security situation, WFP, which had launched a large-scale distribution programme, has extended its operation to other parts of the country outside the capital of Monrovia. Seven additional offices have been opened throughout Liberia in early October. However, WFP is facing a serious shortfall in resources and has been forced, since June, to distribute reduced rations to the approximate 500 000 refugees, returnees and IDPs receiving WFP assistance in the country.

MALI (12 October)

Although good rains fell from July through September, benefiting crops countrywide, harvest prospects remain bleak due to a deteriorating pest situation. Desert Locust swarms that were previously reported in the north, are now breeding in cereal producing areas in the south and the centre. Hopper bands are developing in Kayes, Koulikoro, Segou and Mopti, the main food baskets of the country, raising serious concerns over the food supply and economic outlooks. As of early September, only 10 percent of infested areas had been treated.

Mali accounts for almost 25 percent of the total Sahel cereal production. A severe locust impact will strongly affect food supply not only in the country but also in other neighbouring countries, particularly Mauritania. Large scale damage to crops may also have severe macroeconomic and poverty consequences, since cotton, which is the main foreign exchange earner of the country, is the main source of income for millions of farmers and contributes up to 45 percent to total exports. A joint FAO/CILSS/WFP Crop and Food Supply Assessment Mission is currently in the country to estimate the 2004 cereal production and assess the impact of Desert Locusts on food security.

MAURITANIA (21 October)

Desert Locusts have invaded most central and southern agricultural areas and their number is likely to continue to increase as hatching and hopper band formation are occurring in all regions across the country. Control operations are underway but need to be intensified to contain the invasion. As of early October, about 1 million hectares had been infested, of which about 250 000 hectares have been treated.

According to the national food security authority, the country may lose up to 75 percent of its cereal production. Although FAO anticipates a lower level of crop loss, the food security impact of the Desert Locust invasion will be severe in several regions of the country. Mauritania is a food import dependent country whose domestic production covers less than 40

percent of total food requirement in a normal year. The country already faces a tight food situation due to past years of drought (which necessitated emergency food assistance to 420 000 people in 2003) and the depreciation of the Ouguiya (the national currency), which led to a significant increase in food prices. The food security and poverty impacts of the current Desert Locust outbreak could be tremendous, as the rural population has become very vulnerable to food production shocks because their coping strategies have been exhausted. A joint FAO/CILSS/WFP Crop and Food Supply Assessment Mission is currently visiting the country to estimate the 2004 cereal production and assess the impact of desert locusts on food security.

NIGER (12 October)

Rains were insufficient in May and June delaying planting and stressing crops in several locations, notably in Maradi and Zinder regions. But precipitation increased significantly with widespread and regular rains over most producing areas from July, benefiting crops. However, an estimated 800 000 hectares have been infested by Desert Locusts as of mid-September, mainly in the Sahelian zone. About 106 000 hectares have been treated as of early October, following improved aerial spraying capacity in the country.

Serious food shortages are not anticipated at national level, due to overall good weather conditions and the current distribution and forecast dynamic of Desert Locusts. However, the impact on food security may be severe in some regions, notably in the Sahelian zone. Over 85 percent of Niger's population depend on farming for its livelihood and agriculture accounts for 40 percent of GDP; large scale damage to crops would have disastrous food security and economic consequences, notably for the poor 60 percent. A joint FAO/CILSS/WFP Crop and Food Supply Assessment Mission is currently in the country to estimate the 2004 cereal production and assess the impact of desert locusts on food security.

NIGERIA (13 October)

In the south, the first maize crop has been harvested while the second maize crop is heading/flowering. In the North, harvesting of millet and sorghum is underway. Reflecting generally favourable growing conditions during the rainy season, an average to above average harvest is anticipated.

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

Cereal imports have trended upwards in recent years, due mainly to high urban population growth and changing consumption pattern. However, following a tightening of controls against illegal trade, imports of cereals, mostly wheat and rice, are forecast to decrease by some 6 percent to 3.79 million tonnes in 2004. The Government is planning to ban the importation of rice by 2006.

SENEGAL (12 October)

Following limited and erratic first rains that delayed plantings in several regions in the north, precipitation increased significantly and has been generally regular and widespread in August and September. Crops are developing satisfactorily in most agricultural regions.

The 2004 cereal production could be close to last year's record level of 1.4 million tonnes mainly due to renewal of several government agricultural programs including subsidizing maize and groundnuts seeds and fertilizers. However, crop yields may be seriously affected in the north of the country which is severely infested by Desert Locusts. Control operations are underway and more than one third of infested areas have been treated, but a part of the swarms in the Sahel are expected to be still in northern Senegal during the cereal harvest. Although FAO does not anticipate significant crop

losses and a large reduction in national food supply, Desert Locusts may cause localized food shortages, notably in Matam, Saint-Louis, Diourbel and Louga regions. The north-western Departments where the onset of rains was significantly delayed are also at risk of food insecurity. A joint FAO/CILSS/WFP Crop and Food Supply Assessment Mission is currently in the country to estimate the 2004 cereal production and assess the impact of desert locusts on food security.

SIERRA LEONE* (13 October)

Rice production is expected to further increase this year compared to the estimate of 250 000 tonnes harvested in 2003, reflecting an improved security situation, increased plantings following the return of refugees and farmers previously displaced, as well as improved availabilities of agricultural inputs. The harvesting of millet and sorghum crops has recently started. Production in a normal year amounts to some 20 000 tonnes.

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

TOGO (13 October)

The prospects for the 2004 cereal crop are favourable reflecting overall good weather during the growing season. In the south the first maize crop has been harvested while the second maize crop is heading. In the North, harvesting of millet and sorghum is underway.

Following last year's good cereal output, estimated at 0.8 million tonnes, and the arrival of the first season crops on the markets, the food supply situation is satisfactory. Cereal imports in 2004, mainly rice and wheat, are anticipated to remain at last year's level of about 170 000 tonnes, including re-exports.

CENTRAL AFRICA

CAMEROON (12 October)

A satisfactory first maize crop has been harvested. Satellite imagery indicates that rains have been generally widespread, favouring the second maize crop.

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

CENTRAL AFRICAN REPUBLIC (CAR) (12 October)

Rainfall has been abundant and widespread in general since the beginning of the growing season in March. Following previous distributions in late 2003 and early 2004, FAO distributed groundnuts, maize and rice seeds to some 80 farmers associations in early May in the provinces of Lobaye, Mbomou and Basse-Kotto, which were adversely affected by last year's rebellion. However, in spite of good weather conditions and seed distributions, a strong agricultural recovery is not expected this year due to persistent insecurity.

Cotton production, a major source of income for farmers, was also strongly affected by the crisis, mainly significant population displacement from the cotton-producing region of Ouham Pendé in the north. The cotton sector almost collapsed, production having dropped

from 24 500 tonnes in 2000/01 to only 1 500 tonnes in 2003/04. Harvesting, marketing and ginning of the 12 500 tonnes produced in 2002/03 have been disrupted. Inflation jumped to 7 percent in 2003 due to higher food prices resulting from transport disruptions, while GDP growth fell by 7 percent. Although most of the 230 000 IDPs have returned home, an estimated 41 000 refugees from CAR are still living in Chad.

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

CONGO, DEMOCRATIC REPUBLIC OF* (15 October)

Harvesting of the 2004 second season food crops, principally maize, has been completed. No estimates are yet available but satellite based data suggest that production should be near normal. The relative improvement in the security situation in the country and assistance provided to the internally displaced persons and returning refugees have had some positive impact. However, recent violent clashes in the east of the country, particularly around the town of Bukavu, give cause for concern. Thus insecurity is still a major constraint to food production and food security. The country has received a US\$ 39 million loan by the International Monetary Fund (IMF) under the Poverty Reduction and Growth Facility (PRGF). The nutritional situation of the population is generally very poor throughout the country.

CONGO, REP OF (12 October)

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

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

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

EQUATORIAL GUINEA (12 October)

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

GABON (12 October)

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 (12 October)

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

EASTERN AFRICA

BURUNDI* (15 October)

Harvesting of the 2004B (second) season foodcrops, mainly sorghum and beans, was completed in July. Total cereal harvest of this season has been estimated at 180 000 tonnes, a slight improvement of 3 percent over the 2003B season. However, there is a decline in the production of legumes due to an early start of the dry season, and in roots and tubers due to an outbreak of cassava mosaic virus; prices have increased by 50 to 100 percent in some markets. Total cereal production (including paddy) for 2004 has been estimated at 281 000 tonnes, about 3 percent higher than the year before.

On the security front, insecurity continues to be reported in some areas of Bujumbura Rural province. Thus the slow-moving peace process remains very fragile. According to UNHCR estimate some 220 000 Burundian refugees have returned since 2002, but the situation has been complicated by the arrival more refugees from eastern DRC into north-western Burundi, numbering over 25 000. Moreover, due to recent violent clashes in the rural communes of Kabezi and Mutambu, an estimated 50 000 civilians have been displaced, according to Human Rights Watch.

ERITREA*(15 October)

Harvesting of the 2004 cereal and pulse crops is about to start. Prospects are unfavourable following erratic and inadequate rainfall. The main season "keremti" rains which normally occur between June and September were below the long-term average in most parts of the country. Most parts of Maekel, Gash Barka, Anseba, and eastern parts of Debub zones have particularly received poor rains. Preliminary crop estimates by the Ministry of Agriculture indicate a cereal output of about 109 000 tonnes, almost similar to last year's well below average crop. In Debub and Maekel zones, planting of late season crops (chick pea and vetch) was also constrained partly due to high market prices that have made seeds inaccessible to many. Pasture and forage availability was unsatisfactory in most parts of the country, due to the inadequate rains.

The food supply situation remains tight as a result of consecutive poor harvests and lingering effects of war with neighbouring Ethiopia compounded by serious macro-economic imbalances. High cereal prices continue to impact on purchasing power and the food security of large numbers of people. According to a recent Ministry of Health (MoH) nutrition survey the prevalence of acute malnutrition in the lowland areas of the surveyed zones was found to be very high and had increased significantly since the December 2003 surveys. This was especially true in Gash Barka and Anseba zones where prevalence of Global Acute Malnutrition rates was 19.1 and 18.4 respectively placing them both above the World Health Organization's (WHO) critical cut off point of 15 percent. An Emergency Operation was jointly approved in July 2004 by FAO and WFP for food assistance to about 600 000 people affected by crop failure, worth a total sum of US\$49 million for a period of 9 months (July 2004 to March 2005).

An FAO/WFP Crop and Food Supply Assessment Mission is planned to visit the country from mid-November to assess the main season production and estimate food assistance requirements in 2005. The Government currently estimates food aid needs at approximately 500 000 tonnes.

ETHIOPIA* (15 October)

Harvesting of the 2004 main "Meher" cereal crop is about to start and prospects are mixed. The main producing regions in western and central parts of the country are expected to have an average crop while the eastern crop producing and agro-pastoral areas are facing serious

problems due to late and erratic seasonal rains coupled with inadequate seed supplies. Furthermore, in the secondary "belg" season dependent areas crop and livestock production were adversely affected by insufficient and poorly distributed rains. Normally, the belg season rains extend from February to May and the crop accounts for some 10 percent of total grain production but in some areas it provides the bulk of annual grain production.

The pastoral areas of south-central and eastern parts of the country are particularly affected with unusual migration of livestock being reported in parts. A recent inter-agency impact assessment of belg dependent and pastoral areas has that the emergency food needs have risen with 7.8 million people now requiring assistance for the remainder of 2004. The gross relief food requirement for August-December 2004 is estimated about 523 000 tonnes. An FAO/WFP Crop and Food Supply Assessment Mission is planned to visit the country from mid-November to assess the "Meher" production and estimate food assistance requirements in 2005.

KENYA* (15 October)

Planting of the secondary short rains crops has started. Weather forecasts indicate that the short rains would be favourable in most parts of the country, but are expected to be below-normal in the pastoral areas of northern Kenya. Heavy rains were recorded in late September in the western and north-western parts of the country raising fears of renewed flooding. Parts of Central and coastal areas have also received unseasonable rains improving water availability in pastoral districts.

Harvesting of the 2004 main "long rains" cereal crops is underway in the main growing areas of the Rift Valley, Western and Nyanza Provinces. The main rainy season (March-May), which normally accounts for 80 percent of total annual food production, has largely been unfavourable resulting in tightening of food supply in most parts of the country. Preliminary estimates for the season were revised downward from 2.3 million tonnes to about 1.7 million tonnes of maize. Prolonged dry spells during the long rains season in Eastern, Coast and North Eastern Provinces have affected large numbers of people. As a result of the tightening food supply situation, maize prices remained high. In September prices were 40 to 60 percent higher than average. Prices are expected to start declining from November.

An Emergency Operation was jointly approved in August 2004 by FAO and WFP for food assistance to about 2.3 million people affected by drought, worth a total sum of US\$81 million for a period of 6 months (August 2004 to January 2005).

RWANDA (15 October)

Harvesting of 2004 second season crops (beans, maize and sorghum) is completed in Rwanda. Rainfall has been normal to above normal until early May. The early start of the dry season in May has had a negative impact on the bean harvest except for the early planted crops. FEWSNET reports increased prices of several important food commodities since April 2004 in Butare Province compared to the same time in 2003 and 2002. About 250 000 to 400 000 chronically food insecure people in these districts will need 15 000 to 25 000 tonnes of food assistance till the end of this year.

For the new season currently underway, shortages of seeds are anticipated due to lower than expected stocks from last season and high prices.

SOMALIA*(15 October)

Recent good rains, which were particularly abundant in several parts of drought affected northern pastoral regions, signalled an early start to the secondary "deyr" season in most of northern Somalia. This has resulted in increased water availability and improved grazing conditions. However, major crop producing areas in southern Somalia remain largely dry.

The recently harvested main “gu” season cereal crop in southern Somalia is estimated at about 125 000 tonnes, about 25 percent below average.

Food prices have started to ease with the arrival of the current “gu” harvest. However, the humanitarian emergency in the country is expected to continue due to the previous high loss of livestock assets, poor rangeland conditions, high household debt, and destitution. Recent nutrition survey found wasting levels of 20 percent, confirming the severe humanitarian emergency. In the South, both Gedo and Middle Juba regions remain in critical need of humanitarian assistance following poor “gu” harvests on top of chronic vulnerability. Currently, an estimated 700 000 people are in need of humanitarian assistance.

The Food Security Assessment Unit (FSAU) has recently issued estimates of the 2004/05 Cereal Balance, indicating a national cereal shortfall of about 36 000 tonnes. Further information and analysis can be accessed at: www.unsomalialia.net under the FSAU web page.

SUDAN* (15 October)

A humanitarian crisis prevails in Greater Darfur, where fighting has forced more than 1.2 million people from their homes and farms, with large numbers crossing into neighbouring Chad. Reports paint a grim picture where the conflict has engulfed almost all parts of Greater Darfur, making it very difficult for agricultural activities and humanitarian assistance.

In southern Sudan, the March to May rains were normal to above normal. An FAO/WFP Crop and Food Supply Assessment Mission (CFSAM) is currently in southern Sudan to evaluate the outcome of the current season. In central and northern Sudan, harvesting of the 2004 main season cereal crops is about to start. An CFSA Mission is planned to visit the northern parts of the country from mid-November to assess the 2004 main season cereal production and estimate overall commercial imports/exports and food aid requirements in 2005.

A revised Emergency Operation was jointly approved by FAO and WFP on 9 July 2004 for food assistance to 2.1 million people affected by war and drought, worth US\$158 million until the end of 2004.

TANZANIA, UNITED REPUBLIC OF (15 October)

Planting of the 2005 main season cereal crops in the unimodal central and southern areas, as well as that of 2004/05 short season (“Vuli”) crops in bi-modal northern areas, is underway. With normal to above normal rainfall predicted in September to December in most parts of the country, prospects are generally favourable.

The 2003/04 cereal crop, mainly maize, is estimated at about 4.9 million tonnes, more than 20 percent above last year’s crop and the previous five years average. The overall food supply situation is satisfactory with stable or declining cereal prices in central, east coast, lake and northern Tanzania. However, sharp price increases were observed in southern highlands and southern coast areas due partly to the increased cereal demand from neighbouring countries like Democratic Republic of Congo and Malawi which saw major deficits due to adverse weather or insecurity. Furthermore, some 12 districts in northern and central Tanzania, mainly in the regions of Arusha, Kilimanjaro, Dodoma, Morogoro, Shinyanga and Singida are reported to face varying degrees of food insecurity.

UGANDA* (15 October)

Prospects for the 2004 second season food crops, to be harvested from next January, are uncertain. Sporadic rains since August have raised concern over the development of crops.

The overall food supply situation remains stable but prices are relatively high following the reduced 2004 main season food crops. Maize prices, for instance, have remained particularly

high over the last nine months, with prices in Kampala being nearly 30 percent higher than average. However, the flow of crops to major markets, including conflict affected areas, is normal. The North-eastern Karamoja region is of particular concern. WFP in October provided emergency food relief to over 200 000 people in West Nile and Karamoja Regions due to drought conditions.

The civil strife in northern Uganda, despite reduced rebel attacks in recent months, continues to severely constrain the food situation of the population. Over 1.4 million displaced persons sheltering in over 100 congested protected camps, continue to depend on WFP food assistance for survival. WFP faces a shortfall of about 22 000 tonnes of food representing a funding gap of approximately US\$ 10 million.

SOUTHERN AFRICA

ANGOLA (14 October)

The FAO/WFP Crop and Food Supply Assessment Mission in June estimated 2004 cereal harvest at 713 000 tonnes, about 9 percent over last year or 27 percent over the previous five year average. This was mainly the result of the increased areas under cultivation, favourable weather, re-establishment of many internally displaced people and refugees and substantial distribution of agricultural inputs. Improved harvests in the northern and southern parts of the country and mixed results in the central highlands were experienced. Other crops such as cassava and in particular sweet and Irish potatoes, also increased from last year's levels, while groundnuts significantly decreased because of unfavourable climatic conditions. Cereal import requirements for 2004/05 are estimated at 820 000 tonnes, of which 642 000 tonnes are expected to be in the form of commercial imports and 178 000 tonnes as emergency food aid.

Challenges to improving food production in the country include access to productive assets such as animals for traction and fertilizer and provision of agriculture extension services.

With the improvement in the security situation, large numbers of internally displaced persons (IDPs) and refugees have returned to their areas of origin. However, there are about 185 000 refugees still to be repatriated to Angola from neighbouring countries in the region (principally the Democratic Republic of the Congo, Zambia and Namibia). Vulnerability analysis indicates 334 000 people as food insecure and 717 000 as highly vulnerable to food insecurity. Those in need are mainly concentrated in the central provinces and those border provinces that continue to receive large numbers of returning refugees to Angola. About 245 000 people in Huambo, one of the central provinces, are likely to face food shortages in the coming months according to FEWS-NET. Also, severe water shortages for nomadic cattle herders are reported in southern Huila province.

BOTSWANA (13 October)

Cereal production in Botswana typically amounts to 5 to 10 percent of the country's total needs. The 2004 cereal production, mainly sorghum, has been provisionally estimated to recover from last year's drought affected harvest to a more normal level of about 15 000 tonnes. In September, to deal with recent outbreak of anthrax among wild life the country has placed its department of animal health and veterinary services on high alert.

LESOTHO* (14 October)

An FAO/WFP Crop and Food Supply Assessment Mission in May estimated the 2004 cereal output at 49 400 tonnes, less than half of last year's production. Late and poorly distributed rainfall, reduced cultivated area and a drastic cut in the use of fertiliser and improved seed following removal of subsidies accounted for the decline in production. Cereal import

requirements are estimated at 352 000 tonnes (including rice), most of it to be covered on a commercial basis. Food relief estimated at about 48 500 tonnes of cereals would be needed for the most vulnerable people affected by crop failure and by HIV/AIDS. Currently WFP feeds up to 400 000 people through general and targeted distributions. A new regional PRRO will target about 171 000 beneficiaries.

MADAGASCAR (22 September)

In spite of three major cyclones, which caused considerable crop and property damage, the latest official estimate of 2004 national rice (paddy) production is put at 3 million tonnes, some 8 percent higher than the harvest year before. Rice accounts for over 90 percent of the country's cereal production. Maize production is expected at average level of 170 000 tonnes representing an increase of about 10 percent on last year's drought reduced harvest. The impact of cyclones, rising cost of oil imports, and depressed prices of its main exports such as vanilla and shrimp have caused serious problems for the vulnerable groups. Rapid rise in price of rice, primarily due to high world prices and devaluation of local currency, has worsened the food security situation. Reportedly more than 75 percent of Madagascar's 16 million people live below the poverty line of US\$1 a day. According to WFP 4 000 tonnes of food is required to feed 100 000 people in the southern part of the island. In June the European Union committed 70 million euros to its biggest ever African project to rehabilitate the main north-south road.

MALAWI* (23 September)

An FAO/WFP Crop and Food Supply Assessment Mission in April 2004 estimated the 2004 cereal output at 1.8 million tonnes, a decline of about 14 percent from the near-average production of last year. Much of this output is maize estimated at 1.7 million tonnes. Delayed, erratic and generally inadequate rainfall especially in the southern half of the country was responsible for this decline. In addition, the mission estimated an increase of about 14 percent over the previous year in the production of roots and tubers (cassava and potatoes) to 4.2 million tonnes fresh weight or 1.2 million tonnes in cereal equivalent. Total cereal import requirement is estimated at 408 000 tonnes, which is expected to be largely met through commercial imports.

The Vulnerability Assessment Committee (VAC) estimated that about 1.26 million vulnerable people including those in areas that experienced crop failures and those seriously affected by HIV/AIDS would require emergency food assistance to the tune of 56 000 tonnes of cereals during the 2004/05 marketing year (April/March).

The World Bank (US\$ 25 million) and Norway (about US\$ 3 million) recently announced disbursements to Malawi in support of the country's Poverty Reduction Strategy Paper (PRSP) and in balance of payments support.

During the post-harvest period (since May) maize prices in most markets slowed down their usual decline. In most markets September 2004 prices were consistently higher than the September 2003 prices (FEWS-NET). However, these prices are generally lower than the 2002 corresponding prices. Maize from Mozambique has been coming into southern Malawi indicating significant cross-border informal trade activity helping to stabilize prices around 17-20 MK/kg. Recently ADMARC has set price of maize at 17 MK/kg.

The importance of winter maize in Malawi has been increasing in recent years. The National Statistics Office (NSO) has forecast production of 226 000 tonnes for this year's October-November harvest which will be slightly over the previous year's output.

MAURITIUS (13 October)

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

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

MOZAMBIQUE (24 September)

An FAO/WFP Crop and Food Supply Assessment Mission in April-May estimated the 2004 cereal production at 2 million tonnes, some 11 percent above the good harvest of 2003. Improved harvests were realized particularly in the southern and central provinces, while production was similar to last year's in the northern provinces. The mission also reported that brown streak disease of cassava was seriously affecting yields in Memba and to a lesser extent in parts of the neighbouring districts.

Despite the overall satisfactory national production, there are specific areas such as the southern districts of Tete province, the northern and southern tips of Manica province and some localities in southern provinces, where harvests were reduced. Some 187 000 people will need 49 000 tonnes of relief food assistance in marketing year 2004/05 due to the impact of floods/droughts in the previous years and to cope with the HIV/AIDS problem. A part of the food assistance could be procured locally in view of a maize surplus in northern and central areas but, because of high internal transport cost to southern parts, some amounts will need to be imported while informal exports from northern Mozambique will go to Malawi. The marked regional differences in maize production and consumption, coupled with high cost of transportation from the surplus North and Centre to deficit South, are reflected in maize prices in the South (for example in Maputo) being almost twice as much as prices in the Centre (for example in Manica province). As reported by SIMA/MADER, maize retail prices have stabilized in most markets in the country. Due to higher than expected production in the region, maize prices are lower this September compared to the same month in 2003 and 2002 in Maputo and Beira markets. On the other hand, prices in Nampula are higher relative to the year before as an indication of stronger cross-border demand from Malawi.

FEWSNET reported recently the lifting of the ban on livestock movement by National Livestock Directorate (DINAP) in Maputo, Gaza, and Manica Provinces. This is expected to improve the internal trade of livestock and help the farmers.

NAMIBIA (13 October)

Despite heavy rains and flooding in recent months in Caprivi and Kavago, the north-eastern provinces, the 2004 total cereal production has been estimated by the Namibia Early Warning and Food Information Unit (NEWFIU) at 131 000 tonnes, 28 percent higher than last year's above average output. At the current level of consumption, this would result in about 150 000 tonnes of cereal imports, largely on commercial basis.

Farmers who suffered crop and infrastructure damage due to flooding, as well as HIV/AIDS orphaned and vulnerable children (OVC) are recognized as the most vulnerable groups requiring emergency assistance.

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

SOUTH AFRICA (13 October)

The final estimate of total maize harvest of 2003/04 main agricultural season by the country's Crop Estimation Committee (CEC), has upgraded the previous estimate to a total of 8.9 million tonnes. This is still about 9 percent below the harvest of the previous season primarily due to drought. Maize plantings this season were down by about 18 percent compared to the year before. Production of white maize is forecast at 5.5 million tonnes compared to 6.6 million tonnes last year. This would translate into an exportable surplus of white maize in 2004/05 of about 2.3 million tonnes available to countries in the sub-region, while maintaining about 545 000 tonnes of South Africa's own desired level of stocks. A small deficit for yellow maize is projected. With the fear of a severe drought in the country, the SAFEX price of white maize had soared to US\$ 216/tonne in early February 2004 which later declined to US\$ 145/tonne by mid-July with improved rains. This latter price is still about 25 percent higher than the same period last year.

The third official production estimate for the winter wheat crop, planted in June, indicates an increase in production by about 28 percent over the previous year to an average level of about 2 million tonnes.

SWAZILAND* (15 October)

The maize crop affected by poor rainfall for the fourth consecutive year has been estimated by the FAO/WFP Crop and Food Supply Assessment Mission in April-May at mere 64 000 tonnes, 12 percent below last year and about 30 percent below the average of the previous five years. Consequently, the cereal import requirement in the 2004/05 marketing year (May/April) is expected to reach about 132 000 tonnes of which about 100 000 tonnes are likely to be imported commercially.

The Mission recommends food aid of 32 000 tonnes targeted to the most vulnerable people numbering 142 000, primarily for mitigating the impact of HIV/AIDS, and providing direct support to households unable to access available food and agricultural inputs.

ZAMBIA (13 October)

The revised estimate of the 2004 harvest puts the main season maize production in Zambia at 1.21 million tonnes, 4.8 percent higher than last year's above average 1.16 million tonnes output. Favourable rainfall over much of the country and the Government's fertilizer distribution through its extended input subsidy programme helped boost food maize yields. Considering the country's total utilization, and substantial carry over stocks, an export capacity of about 185 000 tonnes is expected during the 2004/05 marketing year. As a result of two consecutive good harvests maize prices are observed below 10-year average (FEWSNET). According to the Ministry of Agriculture and Cooperatives, the area under mature cassava increased by 47 percent from 140 251 hectares in 2002/03 to 206 051 hectares in 2003/04 resulting in a production increase of 46 percent to about 1.4 million tonnes.

An outbreak of foot and mouth disease has spread from the traditional Kazungula District (Southern Province) and Nakonde and Mbala districts (Northern Province) to new areas of Southern and Central Provinces putting over 200 000 cattle at risk.

ZIMBABWE* (13 October)

Various reports indicate that maize purchases by the government's Grain Marketing Board (GMB) have been significantly lower than expected. As stated by the FEWS-NET this year the average price of maize during post-harvest period in April was much higher than normal, between Zim\$ 5 000 – 8 000 per bucket (equivalent to 18kg). Prices soared to Zim\$ 10 000-12 000 a bucket in mid-September. A joint FAO/WFP Crop and Food Supply Assessment Mission in April 2004 estimated 2004 total cereal production (excluding barley) at about

950 000 tonnes with a margin of error of 10 percent. This compares with last year's about 1 million tonnes. Assuming relatively low levels of stocks, the country needs to import over one million tonnes of cereals for 2004/05 marketing year (April/March).

According to some reports, maize seed required for October/November main season planting is already in short supply with an expected deficit of more than 40 000 tonnes.

Hyper inflation estimated at annual rate of 314 percent in August 2004 combined with extremely high levels of unemployment greatly limit access to food for the most vulnerable population groups. According to the Vulnerability Assessment Committee (VAC) about 2.3 million people in rural areas alone will not be able to cover their food needs, and possibly just as many in the urban areas. According to WFP, poor households in the traditionally grain deficit areas along the Zambezi River and in the southern parts of Manicaland, Masvingo and the Matebeleland provinces, are some of the worst hit.

NEAR EAST

CYPRUS (15 October)

Sowing of the 2005 wheat and barley crops has commenced. Aggregate cereal output in 2004 is estimated at 107 000 tonnes, slightly higher than the previous five year's average.

Imports of wheat in 2004/05 (May/April) are forecast at 100 000 tonnes, while aggregate imports of barley and maize are forecast at some 540 000 tonnes, unchanged from last year.

IRAN, ISLAMIC REPUBLIC OF (4 October)

The outcome of the winter wheat crop harvested in June-July in 2004 is estimated at record 14 million tonnes, up 3.7 percent from last year and up 34.2 percent over the average of previous five years, due to guaranteed prices by government and favourable weather. Harvesting of irrigated paddy was also completed in August. The 2004 output of paddy is provisionally estimated at 3.4 million tonnes, up 2 percent on last year's record production. Coarse production situation is mixed. The maize, recently harvested, is estimated at record high of 1.9 million tonnes, while barley which was harvested in March is down from 3.2 million tonnes last year to 2.7 million tonnes this year.

With a consecutive four-year increase in production, the total cereal import requirement has significantly reduced. Total cereal import in 1999/2000 was 10.5 million tonnes, while the 2004/05 import is forecast at only 2.63 million tonnes.

The basic living conditions of some 155 000 quake victims in Bam in tent camps and/or pre-fabricated housing are maintained. The International Federation of the Red Cross together with the Iranian Red Crescent Society plans to transit from relief to longer-term recovery, rehabilitation and reconstruction.

IRAQ* (15 October)

Cereal production may be affected by serious shortages of fertilizers and other agricultural inputs. The 2004 total cereal production has been tentatively estimated at 2.4 million tonnes almost half of the previous year's crop.

Despite the fact that all Iraqis continue to receive their monthly food ration from the Public Distribution System (PDS), the food security situation in the country remains extremely fragile. Recent events indicate a deterioration of security conditions which led to an increase in humanitarian needs in crisis areas. UN agencies are monitoring the evolution of the situation and providing assistance as needed.

ISRAEL (15 October)

Planting of the 2005 wheat and barley crops, to be harvested during April/May next year, is underway. Production of the wheat crop in 2004 is estimated at 120 000 tonnes, more than a third below last year's crop. Imports of cereals in 2004/05 (July/June) are forecast at some 3 million tonnes.

JORDAN (15 October)

Sowing of the 2005 wheat and barley crops, for harvest in May/June next year, is about to start. A severe drought in 2003/04 has seriously damaged cereal and horticultural crops. In 2004, aggregate output of wheat and barley, estimated at 25 000 tonnes, was more than 50 percent below average. The livestock sector was also affected and many sheep farms were seriously affected.

LEBANON (15 October)

The planting of the wheat and barley crops is underway. However, domestic cereal production usually covers only about 10 percent of the consumption requirements. Aggregate production of wheat and barley crops in 2004 is estimated at 125 000 tonnes, slightly lower than last year. Imports of wheat in 2004/05 (July/June) are forecast at some 550 000 tonnes, slightly higher than last year.

SAUDI ARABIA (15 October)

Planting of the wheat crop for harvest in April/May next year is about to start. Production of wheat in 2004 is estimated at 1.6 million tonnes, well below last year's crop and the average. Total import of cereals in 2004/05 (July/June) is currently estimated at about 8.8 million tonnes, including about 6.2 million tonnes of barley.

SYRIA (15 October)

Sowing of the 2005 wheat and barley crops is underway and is expected to continue until mid-January next year. The 2004 wheat production, estimated at 4.7 million tonnes, is about 4 percent below last year's crop but is well above average. Barley production, which is almost entirely rainfed, is estimated at 1.1 million tonnes, slightly above last year's crop.

ASIA

AFGHANISTAN* (21 September)

A recent FAO/WFP Crop and Food Supply Assessment Mission (CFSAM) reports that cereal harvest at just over 3 million tonnes is down by 43 percent on last year's record harvest and 18 percent down on the average 1998 harvest. Drought conditions existed throughout the western, south-western, southern and parts of eastern Afghanistan, which damaged significant areas planted with cereals. In some parts of the mentioned regions the situation was similar to the worst drought years of 2000 and 2001. In the provinces north of the Hindukush mountains pests and diseases had damaged between 15-20 percent of the cereals. Pests and diseases had also affected significant areas of orchards and livestock. This year's cereal harvest includes about 2.3 million tonnes of wheat, 310 000 tonnes of rice, 234 000 tonnes of maize and 220 000 tonnes of barley. At this level cereal import requirement for the 2004/05 marketing year is estimated at over 1.7 million tonnes. Domestic capacity to import is estimated at 1.4 million tonnes of cereals, which leaves a deficit of 326 000 tonnes of wheat equivalent cereals.

The National Risk and Vulnerability Assessment (NRVA) indicates that about 35 percent (more than 6 million people) of the rural population are likely to face increased food insecurity and will require targeted food assistance. In addition to nearly 4 million people who will have access to employment and relief through national programmes, WFP's

Protracted Relief and Recovery Operation (PRRO) will target a total of 2.3 million vulnerable beneficiaries, including 1.4 million people targeted under the recent government/UN appeal. An estimated 153 000 tonnes of mixed food commodities with a monetary value of US\$ 89 million will need to be resourced in order to assist the target beneficiaries during the 2004/05 marketing year.

ARMENIA (20 September)

Latest reports point to an aggregate cereal harvest of about 424 000 tonnes, which is about 26 percent up on the average production of the past five years. This aggregate includes some 350 000 tonnes of wheat and 62 000 tonnes of barley. Area planted with cereals for harvest this year was 23 000 hectares up on the average of the past five years and generally favourable weather conditions helped improve yields. Despite a bumper harvest this year, Armenia will continue to depend on cereal imports, totalling 144 000 tonnes, to meet domestic requirements of about 543 000 tonnes of cereals. Total imports include some 50 000 tonnes of food aid requirement.

AZERBAIJAN (20 September)

Aggregate cereal harvest, which has just been completed, is estimated at 2.1 million tonnes, similar to the good harvest in 2003. Total area planted with cereals this year was estimated at 815 000 hectares. The aggregate harvest this year includes over 1.64 million tonnes of wheat, 232 000 tonnes of barley and 150 000 tonnes of maize. Generally favourable weather conditions and adequate soil moisture as well as improved access to purchased inputs have contributed to this year's good harvest. Azerbaijan is a net cereal importer and requires over 2.6 million tonnes per year to meet domestic needs. Aggregate cereal import requirement for 2004/05 marketing year is, therefore, forecast at about 536 000 tonnes, mainly food quality wheat.

BANGLADESH (4 October)

The 2004 massive flooding in July and August of 2004 has affected some 33 million people in 43 districts out of 64, displaced some 1.5 million, and claimed more than 700 people's lives. A second round of rains of the monsoon arrived in mid-September, and sparked off floods in parts of the southern and central regions, while the third and latest wave has affected the southwest. 350 people have reportedly been killed by waterborne disease and more than 330 000 others affected.

The floods have devastating effects on the agriculture sector. Aus rice, accounting for some 10 percent of paddy production, was damaged during harvesting period. Newly planted Aman rice, the largest crop in the country with area more than 50 percent and production over 40 percent in total cereal production, has been severely affected. Losses occurred in the livestock sector are also very substantial.

Bangladesh is classified as a least developed country as well as a low-income, food deficit country and urgent international assistance is needed for the sectors of food, agriculture, health, nutrition, water, sanitation, family shelter, non-food items, education, protection, economic recovery and infrastructure. An EMOP launched in August appealed for US\$ 210 million for projects across nine sectors. The Bangladesh Food and Disaster Management Ministry has reportedly allocated 3 350 tonnes of rice for eight districts in the southwest region. WFP to date has received less than 20 percent of the US\$ 74 million needed for the emergency operation, through which people will get food aid in return for repairing roads and building dykes and embankments.

CAMBODIA (4 October)

Planting of the main paddy crop, normally accounting for 80 percent of annual production started in May and was completed in July. The 2004 aggregate paddy output is forecast at 4.7 million tonnes, virtually unchanged from last year's highest ever production, reflecting favourable weather

conditions, improved irrigation system, and reasonable profit for paddy producers. With this production, 140 000 tonnes rice is forecast to be available for export.

CHINA (4 October)

Floods in China (Mainland) this year killed more than 1 000 people, affected about 114.7 million and destroyed 650 000 village homes. The direct economic losses are estimated at 64.7 billion yuan (or US\$7.82 billion).

Harvesting of winter wheat was completed in May-June and spring wheat in July-August. Despite a 1 percent decline in planted area, the aggregate 2004 wheat output is estimated at 91 million tonnes, up 4.5 million tonnes or 5 percent on last year. However, this production is still 6 percent below the average of the previous five years. China's wheat net import requirement in 2004/05 is forecast to increase from last year's 1 million tonnes to 6 million tonnes, reflecting a very low level of beginning stock.

Harvesting of maize in southern areas was completed in August, while it is still ongoing in northern provinces. The latest estimate points to an output of 120 million tonnes, up 4 percent on last year and 4 percent over the average of the previous five years. The maize area planted in 2004 is also below last year and average, but yield is estimated higher. Despite this increase in production, China's maize net export in 2004/05 is still expected to decline to some 4 million tonnes (July-June) from last year's 11.3 million tonnes, due to low beginning stocks.

Aggregate paddy production in 2004 is forecast at 181 million tonnes, 12.5 percent higher than 2003 and 0.5 percent above the average of the previous five years, reflecting both larger area and higher yield. With this rice production, China's rice net export in 2004/05 is expected to increase to 1.2 million tonnes from last year's 0.6 million tonnes.

Total cereal production in 2004 is forecast at 350 million tonnes, up 8.2 percent on last year, marking the first increase in year on year production since 1998, as a result of good weather and a series of government incentive support policies. However, China is expected to change its net trade position in cereals from a net exporter in 2003/04 (July-June with net export of 9.6 million tonnes) to a net importer in 2004/05 (with net import 3 million tonnes).

GEORGIA (22 October)

Cereal harvest in Georgia is nearly complete and aggregate harvest is estimated at about 711 000 tonnes from 425 000 hectares of planted area. This year's harvest is about 57 000 tonnes up on the average harvest of the past five years and includes some 250 000 tonnes of wheat, 400 000 tonnes of maize and some 50 000 tonnes of barley. Ample precipitation and good soil moisture, in addition to improved access to purchased inputs, have contributed to the above average harvest. Georgia requires some 1.2 million tonnes per year to meet domestic requirements. Cereal import requirement is, therefore, estimated at about 479 000 tonnes including some 125 000 tonnes in food aid.

WFP, under a three-year Protracted Relief and Recovery Operation (PRRO), has distributed a total of 13 950 tonnes of food to some 300 000 beneficiaries since the start of the PRRO in July 2003. This includes emergency free distribution of wheat flour to the most destitute groups of population severely affected by the unusual rise in prices of wheat flour and bread in May-June 2004. About 72 500 beneficiaries received a total of 1 860 tonnes of wheat flour for a sixty-day supplementary ration. The current PRRO, which is scheduled to come to an end by June 2006, comprises of relief and recovery components, mainly food distribution to vulnerable groups and Food for Work programme.

INDIA (4 October)

Heavy rains in July caused severe floods, which killed at least 1 200 people. The worst-hit northeast states of Bihar and Assam, the major rice growing region, were badly affected by monsoon rains. At least 33 million people were affected in these two states with more than 900 killed in the disaster and some 1.3 million forced to take refuge in relief camps. According to United Nations Development Programme (UNDP) assessment, 1.15 million hectares of crops in Bihar have been affected and nearly 600 000 dwellings have been damaged or destroyed. The situation in both Assam and Bihar, however, continues to improve with no further heavy rainfalls in the past month. With the monsoon season approaching its conclusion, the threat of further flooding is diminishing. On the other hand, some states in northern and western India have experienced drought conditions.

Harvesting of Kharif paddy and coarse grains is underway. Paddy production is tentatively forecast at 127.5 million tonnes, almost 9 million tonnes below the previous forecast and 3 million tonnes less than in 2003, reflecting the negative impact of both floods and droughts. However, this production level is almost the same as the average of the previous five years. Maize output is expected to be 15 million tonnes, some 2 percent above the record output of last year, and 20 percent above the average of the previous years.

The wheat crop in India, harvested in April/May, is officially estimated at almost 73 million tonnes, about 12 percent up on 2003, reflecting a significant increase in areas and a recovery of yields.

India was one of the world's largest exporters in wheat and rice in 2003/04 and exported 5 million tonnes of wheat and 2.8 million tonnes of rice. The export levels in 2004/05 are expected to be lower due to reduced production and tight stocks and are forecast at 1 million tonnes of wheat and 2 million tonnes of rice.

INDONESIA (22 October)

Harvesting of the second season paddy and maize is underway. The aggregate 2004 paddy production is officially forecast at 53.7 million tonnes, some 3 percent above last years and 4.5 percent higher than the average of the previous five years. The Government has extended its ban on rice imports until the end of the year to protect local farmers by supporting prices. A bumper maize crop of some 11 million tonnes is also anticipated, representing a 1.6 percent increase over the level of last year and 13.4 percent above the average of the previous five years. Reflecting the higher production and rising world maize price, the 2004/05 maize import is expected to be lower at some 1 million tonnes.

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

Despite a satisfactory situation overall, concerns remain for food security in parts of the country with continued social and political unrest, mainly caused by conflicts over independence/autonomy and compounded by the ongoing economic crisis. Some 627 000 people remained displaced throughout the country in mid-2004 and need humanitarian and recovery assistance. The country also suffered a number of serious natural disasters including floods, landslides, volcanic eruption and health emergency. The Red Cross continues to provide relief assistance to the vulnerable people. The Government of Indonesia has exempted humanitarian agencies from its ban on rice imports. WFP has resumed its normal operations in feeding 1.7 million people.

JAPAN (4 October)

Japan produces only about one-quarter of its domestic cereal requirement. Rice accounts for 90 percent of cereal production. Harvesting of the 2004 paddy crop started in the late September and will extend into November. The 2004 paddy production is forecast at some 11.4 million tonnes, 17.5

percent above last year's weather-affected production and 3.1 percent above the average of the previous five years, reflecting the favourable weather.

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

KAZAKHSTAN (20 September)

In Kazakhstan cereal harvest is nearly complete, except for maize and rice. Latest estimates point to an aggregate cereal harvest of about 12.4 million tonnes, which is some 2.5 million tonnes down on the good harvest in 2003 and nearly 3.5 million tonnes down on the bumper harvests in 2001 and 2002. Late frost in April in the Northern grain belt of the country damaged significant cereal crops causing a decline in yields. This year's aggregate harvest includes some 10.2 million tonnes of wheat, 1.3 million tonnes of barley and 320 000 tonnes of maize.

Aggregate cereal export during 2004/05 marketing year is forecast at about 5.3 million tonnes compared with nearly 5.5 million tonnes during the 2003/04 marketing year. Wheat is, by far, the most important crop in the country both in terms of production and exports.

KOREA, DEMOCRATIC PEOPLE'S REPUBLIC OF* (22 October)

An FAO/WFP Crop and Food Supply Assessment Mission visited the country from 28 September to 9 October 2004 and is currently finalizing its report. The general findings of the mission point to a slight improvement in the total cereal production (including potatoes in cereal equivalent) over last year's revised harvest. Generally favourable weather, relatively pest- and disease-free cropping season, application of fertilizer (although slightly reduced from last year) provided through international assistance, improved irrigation facilities in the main Cereal Bowl region of the country due to completion of the Kechan-Taesong Lake canal funded by the OPEC, were responsible for this year's relatively good harvest.

Despite the recovery, domestic production is expected to fall well below the minimum food needs and the country will again have to depend on external assistance as its capacity to import commercially remains highly constrained. Vulnerability analysis by the mission indicates that the ability of low-income families to obtain food from the market, over and above their low rations from the Public Distribution System, is severely restricted due to their deteriorating purchasing power affected by under- or unemployment and sharp rises in food prices in the market. Consequently, a larger number of people are expected to require more food assistance during 2004/05 as compared to the previous year.

KOREA, REPUBLIC OF (4 October)

Harvesting of the 2004 paddy crop just started at the beginning of this month and will continue into November. The total area of rice cultivation has shrunk three years in a row to 987 000 hectares, 1.5 percent decrease from last year and the smallest since the Government began tabulating the data in 1967. The paddy production in 2004 is forecast at 6.62 million tonnes, some 10 percent above the weather-affected last year, but 3.6 percent below the average of the previous five years.

The country produces only about one third of its cereal consumption requirement. Cereal imports in the 2003/04 are estimated at 3.1 million tonnes of wheat and 9.5 million tonnes of maize.

KYRGYZ REPUBLIC (21 September)

Cereal harvesting is complete and latest reports point to an aggregate cereal harvest of about 1.7 million tonnes, which compares with 1.65 million tonnes average harvest of the past five years. This aggregate includes some 1.25 million tonnes of wheat, 320 000 tonnes of maize, 110 000 tonnes of barley and 16 000 tonnes of rice. Aggregate area planted with cereals for harvest in 2004 was estimated at about 610 000 hectares, up by about 25 000 hectares on 2003. Total cereal import

requirement for the 2004/05 marketing year is estimated at about 122 000 tonnes of mainly food quality wheat.

LAO PEOPLE'S DEMOCRATIC REPUBLIC (4 October)

Harvesting of the wet season paddy, accounting for about 85 percent of annual cereal production, is underway and will continue to December. Wet paddy is predominantly grown in the lowland of the Mekong River basin while a smaller low performing monsoon crop is cultivated in the uplands. The 2004 paddy production is estimated at 2.5 million tonnes, unchanged from last year's record harvest. The country can almost maintain food self-sufficiency.

Although this production virtually covers national consumption requirements, the poorer sections of the population, predominantly in upland areas, have inadequate access to rice and are chronically food insecure and in need of assistance.

MALAYSIA (4 October)

In general, Malaysia has been relatively dry with most places recording below-normal rainfall in August and the first dekad of September. The national cumulative rainfall from 1 June to 10 September was 10 percent below normal. The dry conditions are worse over Sarawak and Sabah. Planting of the main paddy crop is underway for harvesting from December. Paddy production in 2004 is forecast at 2.1 million tonnes, slightly below last year's record harvest. A third of domestic consumption of is imported. Practically all wheat and maize requirements are imported. Wheat import is expected to increase slightly to 1.37 million tonnes for 2004, compared to 1.35 million tonnes last year. But maize imports in 2004/05 are expected at 2.55 million tonnes.

MONGOLIA* (4 October)

After four years of consecutive dzud (severe winter with drought summer), the 2003/04 winter turned out to be not so harsh and severe and loss of livestock was much less. The number of livestock at the end of 2003 had increased by some 6 percent compared with 2002. In the first quarter of 2003, Mongolia lost 624 000 adult animals compared to 93 000 in the first quarter of 2004.

Harvesting of the 2004 wheat crop, virtually the only cereal produced in the country, is underway. The summer rains from May to September this year were much less than normal, nationally, and very poor in the major wheat growing regions with the cumulative seasonal rainfall 40-50 percent below normal by the end of September. 2004 wheat output is tentatively estimated at 112 000 tonnes, 34 percent below last year. Other crops, mainly potatoes and vegetables, also are forecast to be a very poor harvest this year.

To cover domestic consumption requirements for the 2004/05 marketing year (October/September) the country will need to import an estimated 283 000 tonnes of cereals. Given that the country has a serious balance of payment problem, commercial imports will only cover part of this requirement and food aid will be necessary to meet the deficit. Dzud and drought conditions in Mongolia have substantially depleted household coping mechanisms and have resulted in an increase in poverty.

MYANMAR (4 October)

Harvesting of the 2004 main season rice crop is underway. This crop normally accounts for 85 percent of annual production, while the remaining 15 percent is produced during the dry season and harvested in April. The 2004 paddy production is forecast at 23 million tonnes, 6.7 percent below the record production last year. However, this level is still 3.8 percent higher than the average of the previous five years. Reflecting steady increases in paddy production in the last several years, the overall cereal supply situation is satisfactory in the country. Rice export in 2004/05 is forecast at 600 000 tonnes.

Since the onset of the annual monsoon season in May, floods have killed hundreds of people and made more than 25 000 people homeless. No official records of damage to crops are available. WFP distributed 1124 tonnes of rice in Northern Rakhine State, 146 tonnes of rice in Northern Shan State, and 30 tonnes of rice in Magway in August.

NEPAL (4 October)

Heavy rains which began in early July resulted in widespread flooding and landslides, affecting some 800 000 people in 25 of Nepal's 75 districts with 185 people killed. Parts of southern Nepal were submerged for over two weeks. A total of 68 000 houses were reported destroyed or damaged. Up to mid-September, emergency relief was provided by the Red Cross and over 8 000 families had been assisted with food relief. There is an urgent need for further funding to allow the rehabilitation phase of the operation.

The rice crop, planted in July-August, is due for harvest in November-December. The 2004 paddy output of the harvest is provisionally forecast at 4.0 million tonnes, 3.7 percent below last year and 3.4 below the average of the previous five years, reflecting the impact of floods. Harvesting of maize is just completed and the output is estimated 1.4 million tonnes, some 3 percent below last year.

PAKISTAN (4 October)

Harvesting of the 2004 wheat crop planted in October-December 2003 was completed in June and the output is officially estimated at 19.4 million tonnes, some 1 percent up on last year's level and 1.6 percent above the average of the previous five years due to a higher yield. Despite the larger wheat crop, the country is expected to need one million tonnes of wheat imports due to low stock and growing population.

Major Kharif crops are rice, maize, cotton, and groundnut and harvestings are underway. Weather/drought induced problems were reported from different parts of the country. The Kharif crops are growing normally elsewhere in the country. The forecast for the 2004 paddy crop is 7.4 million tonnes, 1.8 percent above the previous year. Pakistan is a major exporter of rice and the 2004/05 export volume is forecast at 2.1 million tonnes.

PHILIPPINES (4 October)

In late August 2004, the typhoons Aere and Chaba brought torrential rainfall in Metro Manila and over the island of Luzon causing heavy floods and landslides affecting at least 1.6 million people and killing at least 43 people in more than 100 towns and cities. Reports indicate that overall, the flooding has affected vast plains of rice fields and fishponds with a total damage to agriculture and infrastructure estimated at US\$8 million.

Planting of this year's main rice and maize crops was completed in July for harvesting from November. Despite flood damage, early production forecasts point to 14.2 million tonnes, slightly higher than last year but some 10 percent over the average of the previous five years reflecting the increase in area cultivated to hybrid rice. The national average yield per hectare of rice has risen from 3.07 tonnes in 2000 to 3.56 tonnes this year. The 2004/05 rice import is expected at 900 000 tonnes. 2004 maize output is also expected to be higher than in 2003 at a record of 5.3 million tonnes as a result of the attractive price and the hybrid technology adoption. With this production, 2004/05 maize import is forecast at 100 000 tonnes compared to 250 000 tonnes last year.

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

SRI LANKA (4 October)

Much below-normal rainfall during *Maha* season from September 2003 to March 2004 caused a reduction in rice production, especially in the North-Central districts. *Maha* season rice normally accounts for some 60 percent of total rice production. Based on the recent FAO/WFP Crop, Food Supply and Nutrition Assessment Mission to Sri Lanka, paddy production for *Maha* season declined by 77.5 percent in Kurunegala, 37.0 percent in Anuradhapura, and 63.3 percent in Puttalam compared to the previous year, due to the droughts. Nationally, the decrease in paddy production in *Maha* season was 7.2 percent below the previous five-year average and 13.8 percent compared to the previous year.

Harvesting of in Yala season rice started from early August and the prospects for the output are also poor due to reduced availability of water in major irrigation tanks.

Reflecting the low production in 2004, total cereal import requirements have been estimated at 1.30 million tonnes for 2004 and 1.32 million tonnes for 2005.

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

TAJIKISTAN (20 September)

Cereal harvesting is complete and early estimates point to an aggregate output of about 700 000 tonnes from an total area of about 395 000 hectares. This total is some 100 000 tonnes down on the bumper harvest of 2003 but about 164 000 tonnes up on the five year average production levels. The slight decline in cereal output is due to unusually high temperatures and erratic precipitation, which caused some damage to rainfed cereals. Tajikistan requires just about a million tonnes of cereals, mainly wheat, to meet domestic consumption requirements. Cereal import requirement for the 2004/05 marketing year is forecast at about 296 000 tonnes, including 103 000 tonnes in food aid.

THAILAND (4 October)

Harvesting of the main rice crop is about to start. This crop accounts for about 75 percent of annual rice production. The remainder is produced mainly under irrigation, being planted in January-March and harvested in May-July. Reflecting the good rainfall for the main crop and government price intervention programmes, the 2004 output of paddy is provisionally forecast at about 27 million tonnes, 1.8 percent above the record output last year and 5 percent above the average of the previous five years. Harvest of maize is just completed and an output of 4.3 million tonnes is estimated. This is virtually unchanged from last year.

Thailand is the world's largest rice exporter. Following several bumper rice crops and high prices, rice exports in 2004 is expected to reach a record level at 9.2 million tonnes.

TIMOR-LESTE, DEMOCRATIC REPUBLIC OF (4 October)

The 2004 maize crop is estimated at 91 000 tonnes, some 30 percent increase on drought-affected last year. Harvesting of wet season rice planted in December/January in almost completed in northern areas, but will continue until the end of November in southern areas. The paddy production is forecast at 70 000 tonnes, an increase of 7 percent from last year.

To meet cereal consumption needs, the import requirement for 2004/05 is estimated at 42 000 tonnes, which is much lower compared to the last year's over 60 000 tonnes, reflecting the recovery

in production. The country suffered two consecutive years of drought (2001/02 and 2002/03) resulting in lower production. WFP provided some 7 000 metric tonnes for 110 000 beneficiaries from 1 October 2003 to 30 June 2004. FAO also provided seeds and fertilizer to drought and flood-affected farmers.

TURKEY (15 October)

Sowing of the 2005 wheat crop is underway. The 2004 wheat production, harvested from last July, is estimated at 20.5 million tonnes, 5 percent above last year and the previous five year's average. Similarly, the barley crop estimated at about 7.8 million tonnes, is slightly above last year's crop.

Wheat and maize imports in the current 2004/05 (July/June) marketing year are both expected to be around 700 000 tonnes.

TURKMENISTAN (21 September)

Latest official reports indicate that cereal harvests total a record 2.8 million tonnes from an aggregate area of just over a million hectares. This aggregate includes some 2.6 million tonnes of wheat, 73 000 tonnes of milled rice, 60 000 tonnes of barley and 20 000 tonnes of maize. The estimated harvests are usually not verified by independent sources. Turkmenistan has been attempting to achieve cereal self-sufficiency by expanding area planted with cereals and improving yields. The government has also been building up cereal stocks, while exports during the 2004/05 marketing year are estimated at 120 000 tonnes of wheat.

UZBEKISTAN (21 September)

Recent official reports indicate that Uzbekistan has collected a record harvested of 5.57 million tonnes, which is some 22 000 tonnes up on the highest recorded harvest in 2003. This aggregate includes some 5.1 million tonnes of wheat, 133 000 tonnes of rice, 140 000 tonnes of maize and 120 000 tonnes of barley. Increased area under cereals, at the expense of cotton, generally favourable weather conditions and improved access to agricultural inputs have contributed to good harvests in the past couple of years.

During 2003/04 marketing year 450 000 tonnes of wheat were exported to neighbouring countries and the government plans to export some 500 000 tonnes of wheat during the 2004/05 marketing year. Only as recently as 2002/03 Uzbekistan was a net cereal importer.

VIET NAM (4 October)

Torrential rains in mid July caused flash floods in the northern province of Ha Giang, especially in the remote mountainous communes in Yen Minh district. At least 34 people were reported dead or missing and considerable damage was inflicted on property and infrastructure.

In northern parts of the country the 10th month rice is normally planted in June/July for harvest from the middle of September, whilst in the south, the growing period is longer, with harvesting commencing from late October onwards. A second paddy harvest comes from the main winter/spring crop, planted from January to March, for harvest in April to July depending on location. Despite a smaller area (some 1 percent less than last year and 1.7 percent below the five years average), the aggregate 2004 paddy output is forecast at 35.2 million tonnes, some 2 percent above last year's record production, reflecting favourable weather.

The output of the 2004 maize crop is estimated at 3.5 million tonnes, 18.4 percent increase over last year and 53.2 percent above the average of the previous five years, as a result of larger planted area and higher yields. The increased output reflects government policy to encourage farmers to shift part of their rice area to other crops.

Viet Nam, the world's second-largest rice exporter, raised the rice export target for 2004 by 8.6 percent to 3.8 million tonnes from 3.5 million tonnes set earlier, as a result of the higher domestic output and attractive prices.

YEMEN (15 October)

The output of the sorghum crop, now being harvested, is forecast at about 200 000 tonnes, almost similar to last year's crop but some 40 percent below the average for the previous five years. Local breeding of desert locusts has occurred on the Red Sea coastal plains of Yemen where hoppers were forming groups in a few places and in adjacent areas in Saudi Arabia. But this is reported to have no connection with the upsurge in parts of Africa.

CENTRAL
AMERICA
(including the
Caribbean)

COSTA RICA (1 October)

Harvesting of the 2004 first season cereal and bean crop is underway under normal weather conditions, while in some areas planting of the second season crops just started. Output of the main paddy crop is estimated to be reduced at 200 000 tonnes. This is essentially due to the presence of the rice mite "Steneotarsonemus spinki" that was responsible for the reduction of about 20 per cent of paddy production in the provinces of Limon and Guanacaste. In the latter province, to break the cycle of this mite, which is able to survive only on the rice plant, sowing of the second season irrigated paddy crop has been regulated by the Ministry of Agriculture and it is not allowed to start before December 1st. Minor maize crops are anticipated to be about 15 000 tonnes, a reduction of about 10 percent compared to previous year, reflecting reduced plantings. The country has a structural deficit of maize and wheat, and requirements in marketing year 2004/05 (July/June) are forecast at about 600 000 tonnes of maize and 205 000 tonnes of wheat.

CUBA (1 October)

Hurricane "Ivan" in mid-September affected the western provinces of Pinar del Rio and La Habana and the municipality of Isla de la Juventud, with losses of citrus, tobacco and plantain crops. The effective precautionary measures taken by the Government, which included the evacuation of over 2 million persons before the passage of the hurricane, successfully avoided losses of human lives. Hurricane "Ivan" followed hurricane "Charley" that in mid-August hit the north-western provinces of La Havana and Ciudad de La Habana, destroying infrastructure and causing damages to food and cash crops, including citrus (oranges and grapefruits), sugar cane, plantain, yucca and vegetables. Damages were also reported to the poultry sector. However, rains resumed in mid-September in the eastern provinces of Camaguey, Holguin and Las Tunas giving some relief to the food crops affected by prolonged drought. Harvest of the 2004 main paddy crop just started and production is expected to be about 650 000 tonnes, a significant decline from last year record production of 716 000 tonnes due to reduced availability of irrigation water. Rice import requirements for marketing year 2004 (January/December) are forecast at 600 000 tonnes.

DOMINICAN REPUBLIC (1 October)

Heavy rains in September, as a result of Hurricane "Ivan" and tropical storm "Jeanne" caused damage to housing, infrastructure and negatively affected food and cash crops in several areas of the country. Although an official assessment is not yet available, major losses are reported to the paddy crop about to be harvested in north-eastern area of Bajo Yuna, to cocoa, avocado and citrus crops in the eastern provinces of Higüey, El Seibo and La Altagracia, and to bananas plantations (with losses up to 75 per cent of production) in the important producing area of central Cibao. Food

shortages and significant price increases are reported in some eastern provinces, seriously affecting the most vulnerable groups.

Early estimates indicate a 2004 paddy crop of about 580 000 tonnes, 20 percent lower than the previous record forecast and 9 percent below last year's level. This decline is due to the negative impact on paddy crop of the abundant rains of September but also of heavy precipitation that affected South-West and North-East provinces at the end of May. In marketing year 2004/05 (July/June), imports of wheat and maize (mostly yellow maize for the animal feed industry) are expected to be 330 000 tonnes and 700 000 tonnes respectively, similar to those of the previous year.

EL SALVADOR* (1 October)

Harvesting of the 2004/05 main first season maize crop has been completed and, despite some crop losses in the eastern departments, following a dry spell in August, production prospects are above average. Normal to abundant rains in the past few weeks benefited the start of plantings of the second season 'de postrera' maize and bean crops.

Food assistance continues to be delivered by the international community, targeting in particular children living in the rural and urban areas of the country's most food insecure departments like Ahuachapán, Chalatenango, Cabañas and Morazán.

GUATEMALA* (1 October)

Harvesting of 2004/05 first season crops has been virtually completed. White maize and bean production has been affected by a prolonged 'canicula', the dry period that usually takes place in August during the rainy season, which this year extended its duration from the normal 2-3 weeks to 30-40 days. The most affected departments were Retalhuleu and Suchitepéquez in the south-west and El Progreso, Zacapa and Chiquimula in the east. In particular, the adverse weather conditions affected those farmers that, due to late arrival of the rainy season, had to postpone maize plantings until the second half of May. Unofficial early forecast of 2004 maize production were pointing at 1 million tonnes, but the negative effects of the dry weather would imply a further downward revision of these figures. Wheat import requirements in marketing year 2004/05 (July/June) are forecast to be about 550 000 tonnes, similar to the previous year. Maize imports are anticipated to increase from previous year's 620 000 tonnes to 660 000 tonnes.

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

HAITI (20 October)

At the end of September, tropical storm Jeanne hit the northern departments of Artibonite and North-West causing loss of about 3 000 human lives and extensive damages to urban infrastructure of the city of Gonaïves. A FAO early evaluation of agricultural damage indicates that the heavy rains destroyed about 5 000 hectares of banana and vegetables (mainly onions, eggplants and potatoes) and caused serious damage to the irrigation system. Despite this situation, the current rainy season has been very favourable in the main producing areas and prospects are good for second season crops (maize, sorghum and beans) to be harvested in November/December. Maize crop production for 2003/04 (October/September) is estimated at 240 000 tonnes, approximately 20 percent higher than the previous year due to increased planted area in the main season (harvested in June/July) and favourable weather conditions. In rural areas, maize prices show a considerable decline compared to the same period of the previous year due to the presence of armed gangs and security problems along the roads that are limiting the transport of maize production surplus to the main market of Port-au-Prince. Paddy production has been marginally affected by recent flooding. However paddy production in the department of Artibonite, which represents

about 80 per cent of national output, is expected to continue the downward trend started at the beginning of the 1990s with reduction in area planted and yields mainly due to drainage problems and lack of maintenance of the irrigation infrastructure. Import requirements for marketing year 2004/05 (October/September) are expected at about 330 000 tonnes of rice and 230 000 tonnes of wheat. The international community continues delivering food aid to the communities that were affected by flooding in May (the district of Mapou in South-Est department) and in September (the city of Gonaïves in the Artibonite department) and to the drought-prone department of North-West.

HONDURAS* (1 October)

Harvesting of 2004/05 marketing year first season maize and bean crop has been virtually completed. First season maize production, which represents about 80 percent of the national production, is tentatively estimated at 400 000 tonnes, which declined from previous year's same season due to a 20 percent reduction in plantings and to a severe drought that affected the departments of Francisco Morazán, El Paraiso, Choluteca, Intibucá and Gracias a Dios in July. In these departments, some 30 000 rural families partially lost their subsistence food crops, and food assistance is being delivered by the international community. In order to support production of the second season crops, which are currently being planted in southern and western departments, the Ministry of Agriculture is distributing certified seeds of bean and sorghum and fertilizers to drought-affected farmers. Wheat and maize import requirements in marketing year 2004/05 (July/June) are forecast at about 260 000 tonnes and 320 000 tonnes respectively.

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

JAMAICA (24 September)

The country was hit by two major hurricanes in just one month. On 11 August, Hurricane "Charley" affected southern parishes of Manchester and St. Elizabeth, while on 11 September Hurricane "Ivan" caused serious damage to housing and infrastructures in western and southern coasts. Although a comprehensive assessment of the damage to the agricultural sector is not yet available, heavy losses – between 60 and 30 per cent of production - have been inflicted to all main foreign exchange earner crops such as coffee, sugar cane, bananas, cocoa, citrus and vegetables. About 20 per cent of the poultry production is also reported to be destroyed.

MEXICO (1 October)

Harvesting of the 2004/05 important rain-fed spring/summer maize crop is about to start and output is tentatively estimated at 16.5 million tonnes, similar to previous year's output of the same season. Harvesting of the 2004 summer sorghum crop just started in the state of Sinaloa and early forecast point out to a total 2004 sorghum production of 6.7 million tonnes, well above the last five years average output of 6 million tonnes. Harvesting of the main 2004 paddy crop (mainly rain-fed) is about to start in the main producing states of Veracruz and Campeche and output is forecast at the average level of 303 000 tonnes. Land is being prepared for planting of the 2004/05 winter wheat crop in the irrigated areas of the northwest. Imports in marketing year 2004/05 (July/June) are expected to be about 5.4 million tonnes of maize, 4.0 million tonnes of wheat and 3.2 million tonnes of sorghum. Rice import in marketing year 2004/05 are estimated at 500 000 tonnes.

NICARAGUA* (1 October)

Harvesting of the 2004/05 first season maize and beans crops is complete. Prolonged dry weather from May to the end of July caused extensive damage to the 2004/05 first season food crops, mainly maize and beans. The most affected municipalities, with losses between 50 and 100 per cent of plantings, are in the north and north-west departments of León, Chinandega, Madriz, Esteli and Matagalpa. Preliminary estimates of the Ministry of Agriculture indicate that about 63 000 hectares of maize and to 22 000 hectares of beans have been lost. This represents a reduction of the area to be

harvested for maize of about 23 per cent from the good level of last year's same season. The first season accounts for some 60 per cent of the aggregate (first, second and third seasons) annual production of maize and, therefore, the prolonged dry weather of the current season will negatively affect the 2004 output. For beans, which are mostly cultivated in the third season, the reduction of the area harvested in the first season is estimated at about 8 per cent. In order to support production of the second "de postrera" season maize and bean crops, which are currently being planted, the Ministry of Agriculture distributed certified seeds and fertilizers to drought-affected farmers in the departments of León and Chinandega using funds of the programme 'Libra por libra'. Import requirements in marketing year 2004/05 (July/June) are forecast at 125 000 tonnes of wheat, 80 000 tonnes of maize and 110 000 tonnes of rice.

Food assistance continues to be delivered by the international community in particular to the municipalities of Río Blanco and Matiguás in the department of Matagalpa and of Prinzapolka in the Autonomous Region of the North Atlantic that were seriously affected by floods at the beginning of July.

PANAMA (28 September)

In mid-September, torrential rains caused rivers to overflow resulting in several flash floods and mudslides, with damage to housing and loss of human lives in the provinces of Panama and Colón. Harvesting of the 2004/05 first season cereal crops is underway. Although an official assessment is not yet available, paddy production suffered serious losses caused by the rice mite "Stenotarsonemus spinki".

SOUTH AMERICA

ARGENTINA (1 October)

Planting of the 2004/05 marketing year wheat crop has been completed at the end of August and harvest is due from late October/early November. Official estimates point to an area planted of 6.2 million hectares, with an increase of about 8.8 per cent compared to previous year and mainly concentrated in the south of the province of Buenos Aires. Dry weather conditions are affecting the wheat crop in north and centre of Santa Fe and Cordoba provinces, with likely negative impacts on yields. Early forecasts indicate an output of 14.8 million tonnes, slightly higher than the 14.5 million tonnes gathered last year. Planting of the 2004/05 maize crop, to be harvested from March 2005, started at the beginning of September and some delay is reported in the provinces of Buenos Aires, Cordoba and Santa Fe due to inadequate soil moisture. If rains resume, intended plantings are provisionally forecast at 3.1 million hectares, about 10 per cent above the area planted in 2003/04. The increase in the area planted is mainly the result of the more attractive price ratio between maize and soybean. Early unofficial estimates point to a maize crop production for 2004/05 of about 15.5 million tonnes, well above the previous year's harvest of 13 million tonnes that was seriously affected by dry weather conditions. Planting of 2004/05 paddy crop has just started in the province of Entre Rios under normal weather conditions.

BOLIVIA (1 October)

Harvesting of the 2004/05 winter cereal crops is well advanced in tropical areas of the Departments of Santa Cruz and Chuquisaca and yields are expected to be above last five-year average of 1 tonne per hectare. At the same time, land is being prepared for the planting of the second-season wheat and maize crops beginning in October/November. In August, dry weather conditions affected maize and beans crops in the Chaco region with negative consequences on food security of local rural families that are receiving food assistance from the international community. Wheat imports in marketing year 2004/05 (July/June) are forecast to remain similar to the level of 250 000 tonnes imported in the previous year.

BRAZIL (1 October)

Harvest of 2004 winter wheat crop has started in some parts of the main producing southern states of Paraná and Rio Grande do Sul, which account to approximately 90 percent of national production. Normal to abundant rains resumed at the beginning of September, but the adverse effects of a previous dry spell may induce a downward revision of early official forecasts that anticipated a bumper crop of 6.2 million tonnes, about 1.5 per cent higher than the very good output obtained the previous year. Harvesting of the 2004 second season maize crop (safrinha) is well advanced in Centre-South producing states and production is estimated at 10.6 million tonnes. This represents a decline of about 20 per cent compared to last year's record crop and it is essentially due to the negative effects of dry and hot weather at the beginning of the season and of heavy rains at the end of it. In particular, maize crop output in the key producing state of Parana is expected to decline about 34 percent, from 5.5 million tonnes in 2003 to 3.7 million tonnes in 2004. Total maize production for 2004 is provisionally estimated at 42 million tonnes, about 13 per cent less than 2003 record crop. Despite this reduction and due to stocks available from the previous harvest, the country is not likely to face any problems with maize supply and exports of some 4.8 million tonnes are presently forecast in marketing year 2004/05 (April/March). 2004 paddy production is also estimated at record level of 12.8 million tonnes, largely due to high prices and favourable weather conditions that determined an increase in area planted and better yields.

CHILE (1 October)

Planting of 2004/05 winter wheat crop, for harvesting from December, has been recently completed and early official forecast estimates that the area planted is very similar to previous year's 420 000 hectares. Planting of 2004/05 maize crop is about to start in departments VI, VII and north of VIII and the area planted is tentatively forecast to increase between 5 and 10 per cent from the record level of 119 000 hectares of the campaign 2003/04. This increase is mainly due to farmers' decision to divert land from rice that last year recorded less attractive prices. Plantings of barley crop in 2004/05 are expected to increase about 50 per cent following the establishment of new production contracts with the national beer industry. Import requirements for the marketing year 2004/05 (July/June) are forecast at 1.1 million tonnes of maize (mostly yellow maize), 400 000 tonnes of wheat and 110 000 tonnes of rice.

COLOMBIA (1 October)

Harvesting of 2004 main maize crop (two thirds are yellow maize and one third is white maize) is well advanced and early forecast point to a production of some 890 000 tonnes, with about a 20 per cent increase compared to last year's same season. This result is mainly due to favourable weather conditions in the Caribbean coastal areas at sowing and to a 10 per cent increase in plantings as a consequence of government incentives in traditional coffee regions. At the same time, planting of the second season cereal crops to be harvested from January is about to start. Production of paddy is provisionally estimated at 2.5 million tonnes this year, some 10 per cent higher than the previous five-year average. Wheat import requirements in marketing year 2004 (January/December) are forecast at 1.2 million tonnes as in the previous year. Maize imports (almost entirely yellow maize for feed industry) are also expected to be similar to the volume of 2.1 million tonnes imported in marketing year 2003 (January/December). The international community is providing food assistance in various parts of the country to the internally displaced population, victims of the civil strife affecting the nation.

ECUADOR (1 October)

Harvesting of the 2004 second season paddy crop has started. As a consequence of the prolonged dry weather at the beginning of the year that seriously affected the winter paddy crop, total paddy production in year 2004 is forecast at low 1.1 million tonnes, some 9 per cent below the average of last five years. Planting of the maize summer crop (mainly white) for harvesting from October has been completed in the inter-Andean departments of Azuay, Chimborazo and Pichincha. Prospects

for total 2004 maize production are below average as plantings of the first season crop, which accounts for about 75 per cent of domestic output, were affected by reduced soil moisture, especially in the coastal main growing area of Los Rios. Maize import requirements for marketing year 2004/05 (January/December) are expected to increase considerably from last year's 200 000 tonnes to some 300 000 tonnes. Wheat imports in marketing year 2004/05 (July/June) are forecast to increase from 475 000 tonnes in the previous year to some 500 000 tonnes.

PERU (1 October)

At the end of July, a severe cold wave affected 15 departments in southern highlands of Peru. The Government declared a state of emergency in the departments of Arequipa, Cusco, Huancavelica, Moquegua and Puno. The adverse weather conditions essentially affected the livestock sector, while damage to food crops has been limited, because the harvest of the principal crops in this area, namely potatoes, white maize and rice, was completed by the end of June. International food assistance is being distributed in the affected areas.

The peak of the wheat crop harvest operations in 2004 has been reached and the output collected is below that of 2003 for the same period. The harvest should continue through October and total wheat production for 2004 is provisionally estimated at below-average 165 000 tonnes, mainly due to dry weather conditions at sowing that caused a reduction in area planted. Harvesting of the 2004 white maize crop has been completed, while the yellow maize crop harvest is well advanced in the departments of Cajamarca, Apurimac and Cusco. 2004 aggregate production is expected near last five year's average volume of 1.3 million tonnes. Harvesting of the paddy crop in the northern main growing areas of La Libertad, Lambayeque and Piura has been completed. Due to insufficient rains at planting (January and February), 2004 paddy output is forecast at 2.0 million tonnes, with a reduction of about 6.5 percent compared to the record crop of the previous year. Rice imports requirements in marketing year 2004 are consequently expected to increase significantly from 35 000 to 200 000 tonnes. Import requirements in marketing year 2004/05 (July/June) are estimated at 1.4 million tonnes of wheat and 800 000 tonnes of maize (mostly yellow for the feed industry).

URUGUAY (1 October)

Planting of the 2004 winter wheat crop was completed at the end of August and total area planted is officially forecast at high 185 000 hectares. Under normal weather condition, 2004/05 marketing year wheat production is expected to total 440 000 tonnes, well above last five year's average of 277 000 tonnes and with the possibility of export about 100 000 tonnes. Official forecast indicate that a record level of 145 000 hectares of barley have been planted in 2004/05. In the north of the country, reduced rains and reservoirs 30 per cent below their normal level for this time of the year may affect planting of 2004/05 main paddy crop that is due to start in October. If rains do not resume paddy area planted will likely not reach the good level of 187 000 hectares of the previous campaign.

VENEZUELA (1 October)

Harvesting of 2004/05 marketing year summer maize crop is underway and production (mainly white maize for human consumption) is estimated at 1.4 million tonnes, below last five years' average of 1.5 million tonnes. This is mainly due to the abundant rains at planting that prevented a significant area to be sown in the key growing state of Portuguesa. Harvesting of the important paddy crop is underway and an above-average output is tentatively forecast. Wheat and yellow maize import requirements for marketing year 2004/05 are expected to increase slightly from the previous year and reach 1.3 million tonnes and 800 000 tonnes respectively.

EUROPE

EU (11 October)

Cereal output in the EU-25 is estimated to total some 275 million tonnes, 41 million tonnes more than the drought-struck output for these countries in 2003 and well above the average of the past

five years. By cereal type, the largest increase, in percentage terms, has been for wheat, output of which is estimated at almost 130 million tonnes, compared to just 107 million tonnes last year. A substantial rise in coarse grains production is also estimated, with the aggregate output for the 25 countries now put at 144 million tonnes, 15 percent up from 2003. While improved harvests were gathered this year in most countries throughout the EU, compared to 2003, the crops in Spain, and the new member countries Hungary and Romania, are estimated to be particularly good compared to the average of the past five years. Following the increased in production, the aggregate cereal inventories of the EU-25 at the end of the 2004/05 marketing year (July/June) are expected to increase by about 4 million tonnes compared to their reduced opening level.

The winter cereal crops for harvest in 2005 are already mostly planted and germinated in northern parts of the EU, where topsoil moisture for establishment has been generally adequate. Further to the south in parts of Spain, France and Italy, prevailing dry weather in the past few weeks has aided summer crop harvesting and field preparation for winter crop planting but some precipitation would be beneficial in October to ensure good winter crop germination and establishment.

In Estonia, harvesting is nearly complete and aggregate cereal harvest is estimated at about 515 000 tonnes from a planted area of 254 000 hectares. This aggregate is about 18 000 tonnes down on last year's harvest and includes some 240 000 tonnes of barley, 150 000 tonnes of wheat and 40 000 tonnes of rye. Estonia relies on commercial imports to meet consumption requirements. Aggregate cereal import requirement for the 2004/05 marketing year is forecast at about 258 000 tonnes.

In Latvia, cereal harvesting is nearly complete and aggregate harvest is estimated at about 980 000 tonnes, which is similar to the harvests of the past few years from an estimated area of 369 000 hectares. This aggregate includes some 400 000 tonnes of wheat, 295 000 tonnes of barley and 150 000 tonnes of rye. Aggregate cereal import requirement for the 2004/05 marketing year is estimated at about 156 000 tonnes and exports at 72 000 tonnes.

In Lithuania, latest reports point to an estimated aggregate cereal harvest of 2.3 million tonnes, nearly 200 000 tonnes down on last year's good harvest. This aggregate includes some 790 000 tonnes of wheat, 970 000 tonnes of barley and 420 000 tonnes of rye. Aggregate cereal exports during the 2004/05 marketing year is forecast at about 261 000 tonnes, while imports during the same period is estimated at 264 000 tonnes.

ALBANIA (11 October)

Cereal output in 2004 is estimated at some 500 000 tonnes, close to the average of the past five years. Weather conditions during the season were generally favourable. Wheat is estimated to account for about 285 000 tonnes. The cereal import requirement for 2004/05 is expected to remain about the average of the past five years at around 380 000 tonnes, most of which is expected to be wheat.

BELARUS (20 September)

Cereal harvesting is nearly complete and aggregate harvest is estimated at a record 5.6 million tonnes from a total area of about 2.2 million hectares. At this level cereal harvest is about 700 000 tonnes up on last year's average crop and nearly 300 000 tonnes up on the good harvest in 2002. Generally favourable weather conditions coupled with adequate availability of seeds, machinery and other inputs have resulted in good harvest this year. During the 2003/04 marketing year cereal imports amounted to about 675 000 tonnes of mainly wheat and maize. Cereal import requirement for the 2004/05 marketing year is forecast at 406 000 tonnes, while rye exports for the same period is forecast at 140 000 tonnes.

BOSNIA-HERZEGOVINA (21 September)

Cereal harvesting is nearly complete and latest reports point to an aggregate cereal harvest of just over 1 million tonnes, which is similar to last year but somewhat below the average crop in 2002/03 marketing year. This aggregate includes some 800 000 tonnes of maize (harvest in progress), 250 000 tonnes of wheat and 57 000 tonnes of barely. April floods damaged some 20 000 hectares of crops in Banja Luka, Prijedor, Mrkonjic-Grad and Doboje regions. Some of the damaged crops were, however, replanted with summer crops. Aggregate cereal import requirements during the 2004/05 marketing year is forecast at about 400 000 tonnes, including some 60 000 tonnes in food aid requirement.

BULGARIA (11 October)

Cereal output in 2004 recovered sharply from the drought-reduced crop in the previous year. Favourable weather and adequate access to quality seeds contributed to raising total production to almost 6.5 million tonnes. Of the total, wheat is estimated to have accounted for 3.8 million tonnes, almost double last year's poor crop and well above the average of the past five years. This would give the country a significant export surplus even after allowing for a major replenishment of stocks after last year's drawdown.

As of mid-September the 2004/05 winter cereal sowing campaign was well underway, with a reported 700 000 hectares of wheat already planted under favourable conditions. Producers are expected to achieve the normal planted area of about 1 million hectares well within the normal planting season, which ends in October.

CROATIA (21 September)

Latest reports point to an aggregate cereal harvest of about 3.1 million tonnes, which is almost 594 000 tonnes up on last year's poor harvest but nearly 600 000 tonnes down on the good harvest in 2002/03 marketing year. The aggregate harvest this year includes about 2.1 million tonnes of maize, 849 000 tonnes of wheat and 153 000 tonnes of barley. Aggregate cereal imports are estimated at 92 000 tonnes and exports at 30 000 tonnes during the 2004/05 marketing year.

MOLDOVA (20 September)

In Moldova cereal harvesting, except maize, is complete with an estimated aggregate harvest of about 2.27 million tonnes from an area of 916 000 hectares. At this level cereal harvest is about 36 percent up on the drought reduced harvest in 2003 but some 10 percent above the five year average production. Aggregate cereal exports, wheat and maize, during the 2004/05 marketing year is forecast at 200 000 tonnes. Last year cereal imports totalled some 259 000 tonnes following crop failure.

ROMANIA (11 October)

Total cereal output in 2004 is estimated at a bumper 22.6 million tonnes, 10 million tonnes up from last year's drought-reduced crop. Of the total, wheat accounted for an estimated 7.7 million tonnes. The sharp improvement in domestic cereal supplies is expected to lead to a significant replenishment of stocks after a drawdown last year, and would still leave a significant export surplus for the 2004/05 (July/June) marketing year.

The autumn planting campaign for the 2004/05 winter cereals is underway under generally favourable conditions. The Agriculture Ministry reported in early September that sufficient wheat seed had been procured from this year's domestic crop to meet the requirements for the autumn planting.

RUSSIAN FEDERATION (20 September)

Cereal harvest in the Russian Federation is nearly complete and aggregate grain harvest is estimated at more than 77 million tonnes from a total area of over 44 million hectares. At this level aggregate harvest is nearly 10.4 million tonnes up on last year's poor harvest but nearly 8 million tonnes down on the average harvest in 2001 and 2002. Frost in April reportedly killed more than one million hectares of winter cereals, while yields were down on spring cereals following unusually cold weather conditions during planting. Aggregate cereal exports during the 2003/04 marketing year totalled some 7.3 million tonnes, and exports during the 2004/05 marketing year are forecast at over 8 million tonnes.

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

SERBIA AND MONTENEGRO (21 September)

Cereal harvesting, except for maize, is complete and early estimates indicate an aggregate harvest of about 7.8 million tonnes, which is nearly 41 percent up on last year but about 5 percent down on the good harvest of 2002/03 marketing year. This aggregate includes some 5 million tonnes of maize, about 2.4 million tonnes of wheat and 289 000 tonnes of barley. Cereal import requirement during the 2004/05 marketing year is forecast at 123 000 tonnes, while exports are forecast at 210 000 tonnes of mainly wheat and maize.

THE FORMER YUGOSLAV REPUBLIC OF MACEDONIA (11 October)

Cereal output in 2004 was well above the average of the past five years, mainly due to favourable weather conditions. Output of wheat, the main cereal grown, was estimated at about 370 000 tonnes. As a result, imports of wheat in the 2004/05 (July/June) marketing year are expected to return to a more normal level of about 65 000 tonnes, after rising to over 100 000 tonnes in the previous year. Regarding the winter cereal planting for the 2005 harvest, early official reports indicated that an average area would be sown. Weather conditions have been generally favourable for the autumn fieldwork.

UKRAINE (20 September)

Cereal harvesting in the Ukraine is almost complete and aggregate harvest is tentatively estimated at about 36.2 million tonnes, which is more than 16 million tonnes up on last year's drought reduced harvest but more than 2 million tonnes down on the good harvest in 2001. Late frost in April has damaged more than one million hectares of winter cereals, while late spring planting following unusually cold and inadequate soil moisture during early spring reduced yields. In addition, late summer precipitation significantly compromised maize yields. This year's cereal harvest includes some 17.5 million tonnes of wheat, 9.8 million tonnes of barley and 6 million tonnes of maize.

Aggregate cereal exports are tentatively forecast at more than 8.3 million tonnes during the 2004/05 marketing year. Last year the Ukraine, for the first time in the past decade, became a net cereal importer with imports totalling some 3.8 million tonnes following crop failure in 2003/04.

NORTH AMERICA

CANADA (11 October)

Predominantly cool and wet conditions during the 2004 growing season have resulted in slow crop development and a later than normal harvest. As of early October, when the wheat harvest in Western Canada should normally be almost complete, only about 50 percent of the wheat crop had been gathered, and the quality was reported to be below average. However, despite expectation that the final area of wheat harvested this year will be down by about 5 percent compared to last year, the aggregate output is forecast to increase by almost 4 percent to 24.5 million tonnes, reflecting a higher average yield compared to 2003 when drought affected some parts. Output of barley, the main small coarse grain crop is also expected to increase by about 6 percent compared to last year, to reach 13 million tonnes. Output of maize will drop because of reduced plantings and lower yields expected.

UNITED STATES (12 October)

The last of the spring wheat crops were gathered by the end of September and aggregate output of wheat in 2004 was officially estimated in October at 58.9 million tonnes, 7.7 percent down from 2003. Reduced winter wheat area and yields accounted for the bulk of the decline. As of 10 October, it was reported that about 70 percent of next year's winter wheat crop had been planted, which was on par with last year's planting pace and the 5-year average. Plants are emerging well under generally favourable conditions. In contrast to wheat, the 2004 coarse grain output is forecast to rise sharply. Production of maize is forecast to reach a record 295 million tonnes, 38 million tonnes up from 2003. As of 10 October the maize harvest was reported to be 34 percent complete, which was just slightly behind the average harvest pace.

OCEANIA

AUSTRALIA (11 October)

A drier than average winter hampered the development of the 2004 winter grain crops. Although some widespread rainfall in late August improved the prospects, especially in the important producing state of New South Wales, the total winter grain output is forecast to decline by 11 percent from last year's good level. The latest official forecast in September foresees wheat production at just over 22 million tonnes, about 2.7 million tonnes down from last year because of poorer yield prospects. Similarly, output of barley is expected to fall to 7.3 million tonnes, 1.3 million tonnes down from 2003.

The summer coarse grain crop area, for harvest in 2005, is forecast to rise by 21 percent to 1.3 million hectares. The late winter rainfall in northern New South Wales and southern Queensland, the key sorghum and maize producing areas, greatly improved subsoil moisture conditions for planting in October.

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		33 463.6	4 072.9	37 536.5	33 181.4	27 622.5	2 729.6	24 892.9
Northern Africa		15 927.8	15.4	15 943.2	14 100.0	14 168.0	20.1	14 147.9
Egypt	July/June	11 709.6	11.0	11 720.6	10 900.0	10 900.0	20.1	10 879.9
Morocco	July/June	4 218.2	4.4	4 222.6	3 200.0	3 268.0	0.0	3 268.0
Eastern Africa		3 443.7	2 449.8	5 893.5	5 178.5	4 349.6	1 194.5	3 155.1
Burundi	Jan./Dec.	47.4	49.4	96.8	82.0	46.3	46.3	0.0
Comoros	Jan./Dec.	23.6	0.0	23.6	33.0	13.7	0.0	13.7
Djibouti	Jan./Dec.	56.6	6.4	63.0	63.0	50.1	3.6	46.5
Eritrea	Jan./Dec.	270.4	310.3	580.7	415.0	203.0	171.4	31.6
Ethiopia	Jan./Dec.	264.4	1 683.9	1 948.3	430.0	442.6	424.3	18.3
Kenya	Oct./Sept.	935.6	84.4	1 020.0	1 600.0	1 600.0	57.9	1 542.1
Rwanda	Jan./Dec.	205.2	21.2	226.4	231.0	31.2	22.7	8.5
Somalia	Aug./July	250.6	19.4	270.0	267.0	267.0	21.6	245.4
Sudan	Nov./Oct.	1 023.5	111.0	1 134.5	1 275.0	939.8	199.9	739.9
Tanzania, U.R.	June/May	307.0	40.1	347.1	617.5	617.5	134.3	483.2
Uganda	Jan./Dec.	59.4	123.7	183.1	165.0	138.4	112.5	25.9
Southern Africa		3 453.0	1 100.8	4 553.8	3 720.3	3 720.5	1 028.2	2 692.3
Angola	April/March	521.2	223.9	745.1	832.0	832.0	218.8	613.2
Lesotho	April/March	212.0	41.7	253.7	241.0	241.0	19.0	222.0
Madagascar	April/March	295.5	51.5	347.0	367.0	366.6	43.5	323.1
Malawi	April/March	450.3	181.4	631.7	99.0	99.1	15.2	83.9
Mozambique	April/March	614.0	176.4	790.4	871.0	871.2	274.8	596.4
Swaziland	May/April	78.0	20.1	98.1	127.0	127.0	15.5	111.5
Zambia	May/April	300.0	89.7	389.7	297.3	297.3	65.2	232.1
Zimbabwe 2/	April/March	982.0	316.1	1 298.1	886.0	886.3	376.2	510.1
Western Africa		9 663.5	438.6	10 102.1	9 237.0	4 807.1	399.1	4 408.0
Coastal Countries		7 037.9	227.0	7 264.9	6 830.5	3 593.9	195.7	3 398.2
Benin	Jan./Dec.	125.7	11.7	137.4	133.0	51.1	13.3	37.8
Côte d'Ivoire	Jan./Dec.	1 395.1	10.9	1 406.0	1 391.5	578.2	32.6	545.6
Ghana	Jan./Dec.	542.0	70.5	612.5	506.0	494.0	54.3	439.7
Guinea	Jan./Dec.	445.8	33.2	479.0	425.0	75.3	8.5	66.8
Liberia	Jan./Dec.	122.1	47.1	169.2	187.0	56.2	51.1	5.1
Nigeria	Jan./Dec.	4 042.0	0.0	4 042.0	3 791.0	2 175.7	10.5	2 165.2
Sierra Leone	Jan./Dec.	250.4	45.6	296.0	287.0	60.4	25.4	35.0
Togo	Jan./Dec.	114.8	8.0	122.8	110.0	103.0	0.0	103.0
Sahelian Countries		2 625.6	211.6	2 837.2	2 406.5	1 213.2	203.4	1 009.8
Burkina faso	Nov./Oct.	243.1	27.4	270.5	267.6	33.2	25.6	7.6
Cape Verde	Nov./Oct.	42.9	35.4	78.3	85.7	56.0	46.1	9.9
Chad	Nov./Oct.	80.0	15.8	95.8	97.3	37.6	24.0	13.6
Gambia	Nov./Oct.	150.3	6.9	157.2	100.1	100.1	3.6	96.5
Guinea Bissau	Nov./Oct.	62.9	14.0	76.9	75.0	39.0	5.8	33.2
Mali	Nov./Oct.	288.2	6.8	295.0	170.1	29.0	0.9	28.1
Mauritania	Nov./Oct.	390.2	80.5	470.7	285.0	132.0	53.5	78.5
Niger	Nov./Oct.	336.8	9.9	346.7	398.0	38.3	20.3	18.0
Senegal	Nov./Oct.	1 031.2	14.9	1 046.1	927.7	748.0	23.6	724.4
Central Africa		975.6	68.3	1 043.9	945.6	577.3	87.7	489.6
Cameroon	Jan./Dec.	403.4	7.0	410.4	387.0	241.5	28.0	213.5
Cent.Afr.Rep.	Jan./Dec.	55.4	3.5	58.9	46.0	3.9	1.8	2.1
Congo, Dem.Rep.	Jan./Dec.	305.4	51.0	356.4	300.0	198.1	51.3	146.8
Congo, Rep.	Jan./Dec.	184.3	5.7	190.0	185.0	123.6	3.7	119.9
Eq. Guinea	Jan./Dec.	17.2	0.0	17.2	16.0	6.9	0.0	6.9
Sao Tome	Jan./Dec.	9.9	1.1	11.0	11.6	3.3	2.9	0.4

**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/NEAR EAST		38 159.5	3 676.2	41 835.7	40 721.9	38 090.3	3 018.1	35 072.2
Afghanistan	July/June	1 021.0	376.8	1 397.8	506.0	506.0	159.1	346.9
Armenia	July/June	123.0	29.0	152.0	171.0	165.0	42.0	123.0
Azerbaijan	July/June	701.0	9.0	710.0	491.0	721.0	6.0	715.0
Bangladesh	July/June	3 112.9	383.9	3 496.8	2 932.0	2 931.6	256.9	2 674.7
Bhutan	July/June	67.9	3.1	71.0	60.0	60.2	3.5	56.7
Cambodia	Jan./Dec.	135.8	13.1	148.9	60.0	27.8	27.8	0.0
China 3/	July/June	9 114.9	85.1	9 200.0	11 500.0	11 500.0	21.8	11 478.2
Georgia	July/June	479.0	18.0	497.0	485.0	512.0	67.0	445.0
India	April/March	33.9	188.5	222.4	254.9	254.9	36.8	218.1
Indonesia	April/March	9 025.9	178.5	9 204.4	8 091.0	8 090.9	219.9	7 871.0
Iraq	July/June	2 430.8	916.1	3 346.9	3 510.0	3 510.0	1 070.1	2 439.9
Korea, D.P.R.	Nov./Oct.	541.5	963.7	1 505.2	949.0	878.0	578.0	300.0
Kyrgyz Republic	July/June	127.0	8.0	135.0	182.0	34.0	1.0	33.0
Lao, P.D.R.	Jan./Dec.	7.0	19.3	26.3	17.0	4.7	4.7	0.0
Maldives	Jan./Dec.	24.4	14.6	39.0	40.0	9.5	7.5	2.0
Mongolia	Oct./Sept.	238.0	0.0	238.0	248.0	248.0	48.7	199.3
Nepal	July/June	96.1	3.9	100.0	101.0	101.3	8.8	92.5
Pakistan	May/April	142.1	74.2	216.3	401.0	405.9	14.0	391.9
Philippines	July/June	4 473.4	68.2	4 541.6	4 318.0	4 318.2	106.1	4 212.1
Sri Lanka	Jan./Dec.	1 133.6	25.4	1 159.0	1 301.0	424.3	32.4	391.9
Syria	July/June	1 894.8	9.2	1 904.0	1 765.0	1 765.0	7.3	1 757.7
Tajikistan	July/June	437.0	140.0	577.0	226.0	256.0	49.0	207.0
Turkmenistan	July/June	60.0	0.0	60.0	34.0	34.0	0.0	34.0
Uzbekistan	July/June	255.0	118.0	373.0	409.0	379.0	82.1	296.9
Yemen	Jan./Dec.	2 483.5	30.6	2 514.1	2 670.0	953.0	167.6	785.4
CENTRAL AMERICA		3 070.7	245.9	3 316.6	3 645.0	3 645.4	155.8	3 489.6
Cuba	July/June	1 773.8	1.2	1 775.0	2 084.0	2 084.0	0.0	2 084.0
Haiti	July/June	464.8	160.2	625.0	620.0	620.0	56.9	563.1
Honduras	July/June	573.1	28.9	602.0	630.0	630.0	64.4	565.6
Nicaragua	July/June	259.0	55.6	314.6	311.0	311.4	34.5	276.9
SOUTH AMERICA		780.4	62.9	843.3	889.0	889.0	5.3	883.7
Ecuador	July/June	780.4	62.9	843.3	889.0	889.0	5.3	883.7
OCEANIA		401.2	0.0	401.2	402.8	57.3	0.0	57.3
Kiribati	Jan./Dec.	8.6	0.0	8.6	8.7	0.0	0.0	0.0
Papua New Guinea	Jan./Dec.	335.5	0.0	335.5	336.0	57.3	0.0	57.3
Samoa	Jan./Dec.	15.5	0.0	15.5	15.5	0.0	0.0	0.0
Solomon Isl.	Jan./Dec.	29.5	0.0	29.5	29.5	0.0	0.0	0.0
Tuvalu	Jan./Dec.	1.1	0.0	1.1	1.1	0.0	0.0	0.0
Vanuatu	Jan./Dec.	11.0	0.0	11.0	12.0	0.0	0.0	0.0
EUROPE		1 356.4	111.6	1 468.0	1 670.0	1 679.8	26.5	1 653.3
Albania	July/June	361.8	27.2	389.0	390.0	404.8	26.5	378.3
Belarus	July/June	579.0	0.0	579.0	675.0	675.0	0.0	675.0
Bosnia-Herzegovina	July/June	315.6	84.4	400.0	460.0	460.0	0.0	460.0
Macedonia, FYR	July/June	100.0	0.0	100.0	145.0	140.0	0.0	140.0
TOTAL		77 231.8	8 169.5	85 401.3	80 510.1	71 984.3	5 935.3	66 049.0

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.

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

COUNTRY	Marketing year	2003/04			2004/05			
		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		19 110.8	1 262.1	20 372.9	20 971.0	2 720.5	232.7	2 487.8
Northern Africa		14 147.9	20.1	14 168.0	14 267.0	1 421.9	1.8	1 420.1
Egypt	July/June	10 879.9	20.1	10 900.0	11 300.0	1 265.9	1.8	1 264.1
Morocco	July/June	3 268.0	0.0	3 268.0	2 967.0	156.0	0.0	156.0
Eastern Africa		2 270.7	213.8	2 484.5	2 451.0	79.3	58.5	20.8
Kenya	Oct./Sept.	1 542.1	57.9	1 600.0	1 630.0	28.7	28.7	0.0
Somalia	Aug./July	245.4	21.6	267.0	369.0	23.6	22.6	1.0
Tanzania	June/May	483.2	134.3	617.5	452.0	27.0	7.2	19.8
Southern Africa		2 692.2	1 028.2	3 720.4	4 253.0	1 219.3	172.4	1 046.9
Angola	April/March	613.2	218.8	832.0	820.0	245.9	12.3	233.6
Lesotho	April/March	222.0	19.0	241.0	352.0	93.4	4.1	89.3
Madagascar	April/March	323.1	43.5	366.6	412.0	109.4	8.1	101.3
Malawi	April/March	83.9	15.2	99.1	408.0	89.2	14.2	75.0
Mozambique	April/March	596.4	274.8	871.2	785.0	277.1	12.6	264.5
Swaziland	May/April	111.5	15.5	127.0	132.0	27.5	0.8	26.7
Zambia	May/April	232.0	65.2	297.2	54.0	37.9	7.0	30.9
Zimbabwe 2/	April/March	510.1	376.2	886.3	1 290.0	338.9	113.3	225.6
ASIA/NEAR EAST		33 587.9	2 200.1	35 788.0	42 910.0	8 630.0	1 294.7	7 335.3
Afghanistan	July/June	346.9	159.1	506.0	1 733.0	47.0	47.0	0.0
Armenia	July/June	123.0	42.0	165.0	144.0	5.1	0.1	5.0
Azerbaijan	July/June	715.0	6.0	721.0	536.0	226.6	62.3	164.3
Bangladesh	July/June	2 674.7	256.9	2 931.6	3 758.0	711.5	21.5	690.0
Bhutan	July/June	56.7	3.5	60.2	66.0	0.3	0.3	0.0
China 2/	July/June	11 478.2	21.8	11 500.0	17 600.0	1 787.1	23.4	1 763.7
Georgia	July/June	445.0	67.0	512.0	479.0	194.7	72.7	122.0
India	April/March	218.1	36.8	254.9	170.0	26.3	25.3	1.0
Indonesia	April/March	7 871.0	219.9	8 090.9	6 340.0	2 454.0	44.0	2 410.0
Iraq	July/June	2 439.9	1 070.1	3 510.0	3 730.0	1 725.8	889.2	836.6
Kyrgyz Republic	July/June	33.0	1.0	34.0	122.0	0.0	0.0	0.0
Mongolia	Oct./Sept.	199.3	48.7	248.0	283.0	25.0	25.0	0.0
Nepal	July/June	92.5	8.8	101.3	180.0	0.8	0.8	0.0
Pakistan	May/April	386.9	14.0	400.9	1 200.0	720.5	7.4	713.1
Philippines	July/June	4 212.1	106.1	4 318.2	4 226.0	511.8	48.2	463.6
Syria	July/June	1 757.7	7.3	1 765.0	1 605.0	160.2	0.0	160.2
Tajikistan	July/June	207.0	49.0	256.0	296.0	27.5	27.5	0.0
Turkmenistan	July/June	34.0	0.0	34.0	24.0	0.0	0.0	0.0
Uzbekistan	July/June	296.9	82.1	379.0	418.0	5.8	0.0	5.8
CENTRAL AMERICA		3 448.6	155.8	3 604.4	3 515.0	289.4	84.6	204.8
Cuba	July/June	2 084.0	0.0	2 084.0	1 880.0	96.9	0.0	96.9
Haiti	July/June	563.1	56.9	620.0	625.0	90.1	54.0	36.1
Honduras	July/June	524.6	64.4	589.0	695.0	58.2	15.2	43.0
Nicaragua	July/June	276.9	34.5	311.4	315.0	44.2	15.4	28.8
SOUTH AMERICA		883.7	5.3	889.0	856.0	94.0	51.0	43.0
Ecuador	July/June	883.7	5.3	889.0	856.0	94.0	51.0	43.0
EUROPE		1 653.3	26.5	1 679.8	1 306.0	76.2	2.7	73.5
Albania	July/June	378.3	26.5	404.8	380.0	35.6	2.7	32.9
Belarus	July/June	675.0	0.0	675.0	406.0	40.6	0.0	40.6
Bosnia-Herzegovina	July/June	460.0	0.0	460.0	400.0	0.0	0.0	0.0
Macedonia, FYR	July/June	140.0	0.0	140.0	120.0	0.0	0.0	0.0
TOTAL		58 684.3	3 649.8	62 334.1	69 558.0	11 810.1	1 665.7	10 144.4

SOURCE: FAO

for footnotes, see previous page.

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DEFINITIONS

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

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

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

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

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