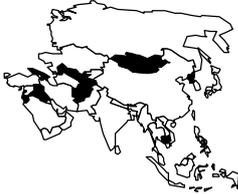


FOODCROPS AND SHORTAGES

No.1

March 2001

	<p>AFRICA: Despite improved harvests in parts, the food supply situation in eastern Africa remains precarious, with about 18 million people still in need of food assistance. The number of refugees and internally displaced people due to civil strife continues to increase, particularly in Central and Western Africa. The situation of Sierra Leone and refugees in Guinea gives cause for serious concern. Localized food shortages have emerged in Chad, Burkina Faso and Niger, while a prolonged dry spell and floods in several locations in southern Africa could adversely affect the current season's food production.</p>
	<p>ASIA: A grave food crisis has emerged in Afghanistan, the result of successive droughts, harsh winters and incessant civil strife. Substantial food and other humanitarian assistance is urgently needed. In Mongolia, another extremely cold winter has killed large numbers of livestock, aggravating the food insecurity of nomadic herders who lost millions of their livestock last year. Elsewhere, the food supply situation remains tight in DPR Korea due to drought, economic difficulties and the coldest winter in decades and in Armenia, Georgia and Tajikistan due to drought last year.</p>
	<p>LATIN AMERICA AND CARIBBEAN: In El Salvador, a succession of earthquakes in January and February caused many deaths and extensive damage to housing and infrastructure. Although major food crops had already been harvested, the damage to the infrastructure will affect agricultural activities in 2001. Emergency food and other assistance is being provided to the affected population. In South America, wheat harvest is completed, while prospects for the coarse grain crops in the field are favourable.</p>
	<p>EUROPE: Winter grain area in the EC is likely to decline from last year due to somewhat unfavourable weather last autumn. Persistent drought and high temperatures in central and eastern Europe, particularly in Hungary and the Balkan Peninsula in the south, will negatively affect the 2001 cereal harvests. In the Russian Federation, displaced people in Chechnya and surrounding republics continue to need food assistance. In the Baltic countries, the early outlook for 2001 winter cereals is satisfactory.</p>
	<p>NORTH AMERICA: Although weather conditions in the United States remain generally satisfactory, an extremely cold winter, one of the coldest on record, may have caused higher than normal winterkill, negatively affecting wheat yields. Also, official estimates indicate that the winter wheat area has declined by 5 percent to the lowest level since 1971. Dry conditions at sowing time in the main growing areas are reportedly the major reason. In Canada, early planting intentions for wheat and coarse grains point to similar areas as in the previous year.</p>
	<p>OCEANIA: Wheat output in Australia is estimated to be some 4 million tonnes below last year's bumper crop. Early prospects for the summer 2001 coarse grain crops, recently planted, are somewhat unfavourable due to dry weather and the final area sown is likely to be reduced. A series of earthquakes hit Papua New Guinea last December, but damage is reported to be limited. Despite the peace agreement last October, the security situation remains volatile in the Solomon Islands.</p>



AFFECTED COUNTRIES ^{1/}

COUNTRIES FACING EXCEPTIONAL FOOD EMERGENCIES (Total: 33 countries)

<u>Country/Region</u>	<u>Reason for Emergency</u>	<u>Country/Region</u>	<u>Reason for Emergency</u>
<u>AFRICA (16 countries)</u>		<u>LATIN AMERICA (4 countries)</u>	
Angola*	Civil strife, population displacement	Haiti*	Structural economic problems
Burundi*	Civil strife and insecurity	Honduras	Past adverse weather
Congo, Dem. Rep.*	Civil strife, IDPs and refugees	Nicaragua	Past adverse weather
Congo, Rep. of*	Past civil strife	El Salvador	Earthquakes
Eritrea*	IDPs, returnees and drought		
Ethiopia** ^{2/}	Drought, IDPs		
Guinea	Civil strife, population displacement	<u>EUROPE (2 countries)</u>	
Kenya	Drought	Russian Fed.	Civil strife in Chechyna, vulnerable groups
Liberia*	Past civil strife, shortage of inputs	F.Rep. Yugoslavia*	Vulnerable groups and refugees
Madagascar	Drought/cyclones		
Rwanda*	Drought in parts		
Sierra Leone*	Civil strife, population displacement		
Somalia*	Drought, civil strife		
Sudan*	Civil strife in the south, drought		
Tanzania	Food deficits in several regions		
Uganda	Civil strife in parts, drought		
<u>ASIA (11 countries)</u>			
Afghanistan*	Drought, civil strife		
Armenia*	Drought, economic constraints		
Azerbaijan	Drought, economic constraints		
Cambodia	Floods		
Georgia*	Drought, economic constraints		
Iraq*	Sanctions, drought		
Jordan	Drought		
Korea, DPR*	Adverse weather, economic problems		
Mongolia*	Economic problems, harsh winter		
Tajikistan*	Drought		
Uzbekistan	Drought in Karakalpakstan		

COUNTRIES WITH UNFAVOURABLE PROSPECTS FOR CURRENT CROPS

<u>Country</u>	<u>Harvest date</u>	<u>Main contributory factors</u>
Afghanistan*	May/June	Adverse weather, civil strife
Armenia*	Aug./Sept.	Shortage of seed, economic constraints
Georgia*	July/Sept.	Shortage of seed, economic constraints
Jordan	March/Apr.	Erratic rainfall
Tajikistan*	Jun./Sept.	Shortage of seed, economic constraints

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

^{2/} Country requiring external assistance for purchase and distribution of localized surpluses to deficit areas.

CROP AND FOOD SUPPLY SITUATION

OVERVIEW

Food shortages caused by recent or ongoing natural and/or man-made disasters continue to affect many countries in all regions of the world. There are currently 33 countries with over 60 million people facing food emergencies of varying intensity. In sub-Saharan Africa, despite improved weather conditions recently, the effects of the recent devastating drought in eastern Africa are still being felt in Ethiopia, Eritrea, Kenya, Sudan and Tanzania, where emergency food assistance continues to be provided by international humanitarian agencies and donors. In addition, populations displaced by the war between Eritrea and Ethiopia and civil strife in Angola, Burundi, Democratic Republic of Congo, Guinea, Sierra Leone and Sudan are entirely dependent on emergency food aid. In southern Africa, prospects for the current crops are somewhat unfavourable in parts, reflecting the effects of a prolonged dry spell in January and floods in Mozambique.

In Asia, the food supply situation remains very difficult in several countries, largely on account of natural disasters. In Afghanistan, a grave food crisis has emerged, the result of successive droughts, harsh winters and incessant civil strife. Substantial humanitarian assistance is urgently needed to avert further human suffering and loss of life. In Mongolia, a succession of droughts and extremely cold winters have killed large numbers of livestock on which over a third of the population, mainly nomadic herders, depends entirely for their livelihood and income. The UN has appealed for international assistance for the country. In DPR Korea, the coldest winter in decades and a reduced harvest in 2000 have exacerbated the already precarious food situation which has affected the country for the last six years. In India, a devastating earthquake left tens of thousands of people dead and destroyed homes and infrastructure that will take years to rebuild at an enormous cost. In the CIS countries in central Asia, the effects of the recent severe drought are still being felt, particularly in Armenia, Georgia and Tajikistan where food assistance continues to be needed.

In Latin America, a series of earthquakes hit El Salvador in early January mid-February, causing loss of life and extensively damaging homes and infrastructure. Food production and marketing in 2001 will be constrained by the damaged infrastructure.

In Europe, following somewhat unfavourable weather conditions last autumn, winter grain area in the EC is likely to be down from the previous year. Among the central and eastern European countries, prospects for the winter cereal crops are somewhat unfavourable, reflecting persisting drought in Hungary and most of the Balkan Peninsula to the south. Elsewhere, growing conditions are reported to be close to normal.

In North America, one of the coldest winters on record in the United States may have raised winterkill to above normal levels in parts, reducing yields. Official estimates indicate that the winter wheat area has declined further, by 5 percent since last year, to the lowest level since 1971.

SITUATION BY REGION

Africa

In **eastern Africa**, the 2000/2001 secondary cereal crops are being harvested in most countries. Following sufficient rainfall during the season, the outlook in Kenya, Somalia, Tanzania and Uganda has somewhat improved. However, the overall food supply situation in the region remains precarious due to the lingering effects of drought and conflicts in parts. In addition, pastoralists in the region have been seriously affected by the ban imposed by the major importing countries of the Arabian Peninsula on imports of livestock from these countries due to Rift valley fever. A similar ban in 1998 adversely affected the economies of the livestock exporting countries in the Horn of Africa.

In Ethiopia, a good meher (main) season crop has been gathered due to favourable weather conditions in main growing areas. While this implies an improvement in the overall food availability, the food security situation in the country remains precarious for some 6.2 million people, particularly in pastoral areas. In Kenya, despite improved rains, nearly 4.4 million people are estimated to be in urgent need of food assistance. The severe scarcity of water and pasture in northern and eastern parts resulted in large livestock losses. In Eritrea, mass displacement of farmers from the agriculturally rich regions of Gash Barka and Debub, accounting for more than 70 percent of cereal production, jeopardised the 2000 cropping season. The food supply situation of the more than 1.5 million war-displaced people and 300 000 drought-affected

people gives cause for serious concern. In Somalia, a satisfactory secondary (“Deyr”) season preceded by a favourable main (“Gu”) harvest has improved overall food prospects. However, large numbers of people are estimated to rely on food assistance due to succession of droughts and persistent insecurity. In Sudan, serious food shortages have emerged in western parts of the country due to late rains and prolonged dry spells, whilst food stocks have dwindled. The food situation in some parts of the south gives cause for concern due to drought and civil strife. An estimated 2.9 million people are in need of food assistance. In Tanzania, despite recent beneficial rains, successive years of drought have seriously undermined food supply in the northern and central regions of the country, resulting in some 800 000 people in need of food assistance. In Uganda, the food supply situation remains precarious in Gulu, Kitgum, Bundibugyo, and parts of Kasese and Kabarole, mainly due to last year’s poor harvest and/or insecurity.

A UN Inter-Agency appeal was launched on 30 January 2001 for US\$ 353 million to assist some 12.2 million drought affected people in the Horn of Africa.

Abundant rains from mid-October in Rwanda and Burundi resulted in satisfactory food production during the 2001 A season. However, dry weather resulted in reduced harvests in parts, where emergency food assistance is required for the affected population.

In **southern Africa**, prospects for the 2001 coarse grain crops have deteriorated in southern countries following a prolonged dry spell in January. Namibia, southern Angola, Botswana, Lesotho, southern Zimbabwe, southern Mozambique, South Africa, Swaziland and southern Madagascar received well below average precipitation in January, which could cause yield reductions. By contrast, in northern parts, abundant rains have resulted in localized floods in central and southern Mozambique and parts of Malawi and Zambia. The aggregate area planted to coarse grain crops is estimated to be lower than last year, mainly reflecting reductions in South Africa, in response to low prices, and in Zimbabwe, following events related to land reform issues. Preliminary forecasts point to a decline in this year’s maize output compared to last year’s good level. FAO’s latest estimates of the sub-region’s aggregate 2001 wheat crop has been revised to 2.4 million tonnes, which is 11 percent higher than last year but average.

Following the 2000 good cereal harvest, the overall food supply situation remains satisfactory. However, the food and nutritional situation remains serious for increasing numbers of displaced people in war-torn Angola. With food aid pledges falling seriously short of the requirement, additional pledges are urgently requested. Food situation in Zimbabwe is also difficult for urban households and those in communal areas that rely on purchased maize. Prices of maize and other staple foods have increased sharply in recent months due to high inflation, fuel shortages and continued depreciation of national currency. Food difficulties are also experienced by some 240 000 people in southern Madagascar, where last year’s harvest was reduced by drought, as well as by flood-affected people in Mozambique and Swaziland.

In **northern Africa**, planting is complete for most of the 2000/01 winter cereals, to be harvested from around April. Despite some delay in planting reported in Algeria and Tunisia, conditions are generally favourable so far. However, more rains are needed in these countries as well as in Morocco during the next two to three months for crops to reach maturity and to ensure a good harvest. In Egypt, area planted to wheat and barley is expected to increase further this year due to government incentives to increase production.

In **western Africa**, seasonably dry conditions prevail in the Sahel. Recession or off-season crops are now being cultivated. Prospects are less favourable than last year in Mauritania and Senegal due to a lower water level of the Senegal river. A series of joint FAO/CILSS Crop Assessment Missions in the 9 CILSS member countries of the Sahel estimated aggregate 2000 cereal production at 9.5 million tonnes, some 15 percent below the record production in 1999. Below-average harvests have been gathered in Burkina Faso and Chad, while production was close to average in Mali, Mauritania and Niger, and above average in Cape Verde, Guinea Bissau and Senegal. A record crop was harvested in The Gambia.

Reflecting favourable growing conditions, harvest prospects are generally favourable in the coastal countries along the Gulf of Guinea. However, in Guinea and Sierra Leone, fighting affected agricultural and marketing activities and caused new population displacements. Relief programmes are also being hampered. In Liberia, the 2000 paddy production is estimated at 144 000 tonnes, compared to a pre-war (1988) output of 259 000 tonnes. These three countries remain heavily dependent on international food assistance.

In **central Africa**, crop prospects are generally favourable in Central African Republic and Cameroon. In the Republic of Congo, the security situation has improved following a peace agreement, but food production has not yet recovered; food assistance is being provided to refugees and internally displaced persons. The food situation remains critical in the Democratic Republic of Congo due to persistent civil war. The number of internally displaced people is currently estimated at 2 million.

Asia

Mongolia again faces a devastating winter this year, following last year's which killed an estimated 3 million animals, affecting the livelihood and income of one-third of the population, mostly nomadic herders. Temperatures have fallen to as low as -50 degrees Celsius, and heavy snowfall has blanketed the pastures on which animals usually feed in winter. Already, large numbers of animals have been lost. The harsh winter also poses considerable problems for transporting food and medical supplies to areas where the worst affected populations are located. The UN has appealed for emergency relief for the country. In the Democratic People's Republic of Korea, there are serious concerns regarding the food supply situation in the country following the widespread effects of the coldest winter in decades. In mid-January, temperatures were reported to have fallen to the lowest levels in 50 years. The situation is becoming increasingly precarious for large segments of the population who have already been weakened by years of food shortages, limited access to health services, electricity and fuel for heating. In India, the worst earthquake in 50 years measuring almost 8 on the Richter scale devastated the western state of Gujarat, causing a death toll estimated to be in tens of thousands and an enormous economic cost. In Cambodia, paddy losses caused by floods late last year resulted in a cereal deficit of some 45 000 tonnes which is expected to be wholly met by food aid already in the pipeline. A similar mission is currently in Laos to assess crop losses due to floods at the same time last year.

In several countries of the **Near East**, severe drought, harsh winter and conflict continue to affect the livelihood of millions of people. In Afghanistan, freezing temperatures have killed many people, exacerbating the very serious food crisis that has emerged following two consecutive years of drought and continuing civil conflict. The 2000 drought has seriously affected crops and livestock across the country, with more than 3 million people in need of urgent assistance. In addition, intensified civil conflict, particularly in northern parts, has resulted in renewed population displacement, aggravating the precarious food situation. In Iraq, two years of drought has seriously reduced food output and exacerbated an already tight food supply situation. Similarly, the 2000 drought has severely affected crops and pastures in Jordan, leaving thousands of herders in need of assistance.

In the CIS countries in Asia, the outlook for winter grains for harvest in 2001 is uncertain. Following the drought reduced crops of 2000, seed shortages have limited the areas that could be sown with winter wheat in several countries, notably in Armenia, Georgia and Tajikistan. In Armenia and Georgia, indications are that the area sown to winter wheat has fallen to about two thirds of normal. By contrast, in Azerbaijan, where winter wheat largely escaped the effects of the summer drought, the area sown to wheat is expected to increase further. In many drought-affected countries, soil moisture deficits after last year's mild winter and hot dry spring and summer have not yet been fully replenished.

The aggregate 2000 cereal harvest in the eight CIS countries in Asia fell to 21 million tonnes from 24 million tonnes in 1999. The bulk of the decline was in wheat production, which is estimated at nearly 17 million tonnes compared to 19 million tonnes in 1999. Severe drought reduced production in many smaller countries with the exception of Azerbaijan and Turkmenistan, and average yields in Kazakhstan were also less than last year's levels. In Kazakhstan, the 2000 grain harvest is officially forecast at 11.6 (1999: 14.3) million tonnes, including 9.1 million tonnes of wheat (1999:11.2). Aggregate coarse grain output was also reduced (2.3 million tonnes compared to 2.8 million tonnes in 1999) mainly due to inadequate moisture (irrigation and rainfall) for spring crops. The paddy harvest was also affected, notably in Uzbekistan where the irrigated crop in the northern areas was affected by inadequate irrigation water supplies. By contrast, total cereal, - and wheat production in particular - increased sharply in Azerbaijan and Turkmenistan, reflecting the effects of land privatization and a sharp increase in the areas sown.

In the drought affected low-income food deficit countries of the CIS - notably Armenia, Georgia and Tajikistan - some 4 million people continue to require international relief assistance. Moreover, a significant recovery in food production this year will require further assistance with the provision of inputs. In Azerbaijan,

despite an improved harvest, access to adequate food remains a problem for the poorest segments of the population. In northern Uzbekistan vulnerable populations in Karakalpakstan have suffered heavy crop and income losses and need relief.

Latin America

In **Central America and the Caribbean**, land is being prepared for the 2001 first season coarse grain crops. Cereal plantings and aggregate cereal output during 2000 remained at the previous year's level. However, the situation varied from country to country. Mexico's coarse grains production is estimated to have increased slightly in 2000, and the current cool weather conditions are favouring the growth of winter wheat. By contrast, cereal output declined in 2000 in El Salvador, Guatemala, Haiti, Nicaragua and Honduras due to a dry summer spell and Hurricane "Keith". An earthquake hit El Salvador in early January and mid-February, killing many people and destroying housing and communications infrastructure. The event happened after the second season cereal crops were harvested, but there are concerns that the first season crops to be planted from April/May may be affected by disruptions in the supply of production inputs.

Wheat harvest is completed in **South America**, and coarse grain crops are growing satisfactorily under favourable weather conditions. Early official forecasts from Brazil point to an increase in maize production. Harvesting of paddy crops has started in Corrientes and northern Rio Grande do Sul. The area under paddy in the region decreased from last year due to credit constraints and low market prices. In Bolivia, torrential rains and drought have caused localised damage, and the government declared a state of emergency in some of the affected departments. Normal weather conditions are reported for the remaining Andean countries.

Europe

Following somewhat unfavourable weather conditions last autumn, winter grain area in the EC is likely to be down from the previous year. The bulk of the decline is expected in wheat as, in addition to weather problems, a switch of land to feed cereals and oilseed crops is expected this year. Among the central and eastern European countries, prospects for the winter cereal crops are somewhat unfavourable, reflecting persisting drought in Hungary and most of the Balkan Peninsula to the south. Dry conditions hampered crop emergence in these countries while unusually warm temperatures have encouraged premature crop development, rendering them susceptible to any sudden drops in temperature. Winter weather conditions in Poland, the Czech Republic and the Slovak Republic are reported to be closer to normal.

In the CIS countries west of the Ural Mountains, (Belarus, Moldova, Russian Federation and Ukraine) the early outlook for 2001 crops is satisfactory. The aggregate area sown to winter cereals for harvest in the spring/summer of 2001 increased, notably in the Ukraine and Russia. Overall growing conditions have been satisfactory to date despite spells of extremely cold weather. In the Russian Federation, the area sown to winter crops increased by 0.5 million hectares to 14.6 million hectares, mainly due to larger plantings in the North Caucasus and over 90 percent of the crop is reported to be in good condition. In Ukraine, the area sown increased by an estimated 0.6 million hectares to 8.4 million hectares. Growing conditions have been mostly good in the 2000/2001 season to date.

The aggregate 2000 cereal harvest (excluding pulses) in the four CIS countries in Europe is estimated by FAO at 99 million tonnes, some 9 million tonnes more than the preceding year's low level, mainly due to better harvests in Belarus and the Russian Federation. Increased output in the Russian Federation more than offset lower harvests in the Ukraine. Aggregate wheat production has risen to an estimated 52 million tonnes, with better harvests in the Russian Federation offsetting a poor harvest in Ukraine. Aggregate output of coarse grains in 2000, estimated at 46 million tonnes, is 6 million tonnes higher than last year. In the Russian Federation, FAO's estimate of cereal production in 2000 is 70 million tonnes, some 11 million tonnes higher than the estimate for 1999. FAO's estimates in both years are about 10 percent higher than the official estimates, (2000: 65.4; 1999: 54.7 million tonnes) in view of systematic underestimation. Output of paddy has remained stable at 0.6 million tonnes. In Belarus, the 2000 cereal harvest is estimated at 4.5 (1999: 3.6 mt). By contrast, in Moldova and Ukraine, the 2000 cereal harvest was again affected by drought. Output in Moldova is officially (reportedly) over-estimated at 2.0 million tonnes marginally less than last year's poor 2.1 million tonnes. In Ukraine FAO now estimates the 2000 cereal harvest at only 22.9 million tonnes, less than the poor output of 1999 (26.4 m.t) and less than the official forecast of 24.4 in view of traders and expert reports of overestimation, notably of the spring coarse grain crop.

In Chechnya and surrounding republics, persons displaced and/or left homeless as a result of conflict, continue to need assistance. Conditions in the winter months are particularly difficult. In the Balkans also, vulnerable populations in Yugoslavia Fed. Rep. and surrounding countries continue to need assistance.

In the Baltic countries (Estonia, Latvia and Lithuania), the early outlook for 2001 winter cereals is satisfactory although crop development is somewhat less than at the corresponding time last year. The 2000 cereal output recovered to about 3.8 million tonnes (1999: 3.3) million tonnes, with wheat output increasing somewhat to 1.4 million tonnes and coarse grain production rising by 23 percent to 2.4 million tonnes.

In the Federal Republic of Yugoslavia, (Serbia and Montenegro), the outlook for the 2001 winter grain harvest is uncertain. Reports indicate that the area sown to wheat may have recovered to about normal levels, but much of the planting was late due to dry conditions in October/November and the availability of inputs remains problematic. Rain and mild temperatures as of late December have favoured crop establishment. The 2000 cereal harvest fell by 40 percent to an estimated 5.2 million tonnes. Unremunerative prices for wheat, critical shortages of inputs, flooding and water logging reduced the 2000 wheat harvest to an estimated 1.7 million tonnes while persistent drought virtually halved the spring maize crop (3.1 million tonnes) and also affected most other foodcrops. In Croatia, also, the outlook for the 2001 wheat crop is uncertain. Official plans, and support for the 2000/2001 winter crops sowing campaign, call for an 18 percent reduction in the sown area to wheat and moisture reserves remain low. The 2000 cereal harvest fell to 2.8 million tonnes, as drought reduced the spring coarse grain yields. In Bosnia Herzegovina, the declining trend in wheat plantings is likely to continue.

North America

Weather conditions remain satisfactory for winter wheat crops in the United States. However, after one of the coldest winters on record so far, winterkill may be above normal in parts and the state of crop development is generally behind normal throughout the Great Plains. Official estimates indicate that the winter wheat area has declined further, by 5 percent since last year, to the lowest level since 1971. In Canada, wheat and coarse grains crops are mostly sown in May/June. Early indications of planting intentions point to similar areas as in the previous year.

Oceania

The 2000 winter grain harvest in Australia has recently been completed and latest estimates put the wheat output at some 21 million tonnes, slightly up from the previous forecast but about 4 million tonnes below last year's bumper crop. Early prospects for the summer 2001 coarse grain crops (mostly sorghum), which have recently been planted are somewhat unfavourable because of dry conditions and the final area sown is likely to be reduced. A series of earthquakes hit Papua New Guinea in December but damage was limited. In the Solomon Islands, despite a peace agreement signed last October, the security situation remains volatile. In Fiji, the food supply situation is generally satisfactory, but serious nutritional problems are reported in several areas. In Samoa, more rains are needed in the next few months for normal crop development.

COUNTRY REPORTS ^{1/}

AFRICA

NORTHERN AFRICA

ALGERIA (20 February)

Planting of the 2000/01 season crop is almost completed. Despite initial concerns over delays in rainfall at the beginning of the season, conditions improved in January with beneficial rains over growing areas. However, more timely rains are needed during the next two to three months for crops to reach maturity and to ensure a good harvest. The 2000 cereal harvest is estimated at about 1.1 million tonnes, 35 percent below the 1999 below average output, as a result of inadequate rainfall during the growing season.

Imports of cereals for the 2000/01 marketing year (July/June) are expected to reach 7.3 million tonnes, including 5.5 million tonnes of wheat.

EGYPT (5 February)

Area planted to wheat and barley in 2001 is expected to be comparable to the previous year's good level of about one million hectares, thanks to government incentives to increase production. Early prospects are generally favourable for the mainly irrigated crop, harvesting of which normally starts in April.

The 2000 cereal production (milled equivalent) stands at about 18 million tonnes, some 3 percent over the previous year's above average crop. This includes some 6.6 million tonnes of wheat, 7.3 million tonnes of coarse grains and about 4.2 million tonnes of rice (milled).

Imports of wheat in 2000/01 (July/June) are forecast at 6.8 million tonnes and coarse grains, mostly maize, at 4.2 million tonnes.

MOROCCO (5 February)

Growing conditions have been generally favourable so far for the 2000/01 crops with normal to above normal rains received over most growing areas, with the exception of the south and parts of the centre. However, the area planted to cereals, reported at 3.4 million hectares at the beginning of the year, including 270 000 hectares of irrigated areas, is so far below the five year average, largely as a result of inadequate rainfall in the southern areas. More timely rains will be needed in the coming months for crops to reach maturity. Cereal production in 2000 is estimated at about 2 million tonnes, 53 percent of last year's below average crop, as a result of adverse weather conditions during the second half of the growing season. Consequently, imports of wheat in 2000/01 (July/June) are forecast to increase to about 3.2 million tonnes, some 14 percent above last year's level.

TUNISIA (5 February)

Conditions are generally favourable so far for the 2000/01 winter crops to be harvested from May. Farming activities at the beginning of the season were somewhat delayed by below-normal rainfall but conditions improved in December/January with widespread rains over most growing areas. However, more timely rains will be needed during the next few months to ensure a good harvest. It is anticipated that some 1.4 million hectares will be sown to cereals, mainly wheat, in the 2000/01 season, about the same as the previous year's level.

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

Cereal production in 2000 is estimated at about one million tonnes, some 40 percent below the previous year and much below average. Imports of cereals in 2000/01 (July/June), mostly wheat and maize, are forecast at about 1.8 million tonnes.

WESTERN AFRICA

BENIN (5 February)

Seasonably dry conditions prevail. Land preparation for the first maize crop is underway in the south. Plantings will start with the arrival of the rains, usually in March. Reflecting generally adequate growing conditions, the aggregate 2000 cereal production is estimated at 905 000 tonnes, which is slightly below last year's record but remains well above average.

The overall food supply situation is satisfactory. Markets are well supplied and prices of cereals remain generally stable. Cereal imports, for domestic use and re-exports during the 2001 marketing year are estimated at 150 000 tonnes and food aid requirements at 10 000 tonnes.

BURKINA FASO (5 February)

Seasonably dry conditions prevail. Off-season crops are generally developing satisfactorily. Final 2000 production figures have been released by the government and are significantly lower than the estimates of the FAO/CILSS Crop Assessment Mission in October 2000 which was pointing already to a below-average harvest.

Following this reduced crop, the overall food supply situation will tighten in several areas, notably in the north, the centre and the east where cereal production decreased significantly. The return of Burkinabé from Côte d'Ivoire to their villages is also putting additional pressure on food supply. However, some household stocks are still available following 1999 record crop and transfers from surplus to deficit areas are possible. During recent cereal exchange markets ("bourses de céréales"), the offer remained well above demand. Prices of cereals remained generally stable in January and below the 1995-99 average. A food supply assessment mission is scheduled to identify most vulnerable zones and assistance needs. In the north, the Government has recently launched a livestock relief programme based on drilling supplementary wells and making adequate feed available to ensure the survival of the animals.

CAPE VERDE (5 February)

Seasonably dry conditions prevail. A joint FAO/CILSS Crop Assessment Mission estimated the 2000 maize production at 18 500 tonnes, which is significantly below the 1999 record crop but is well above average.

Following two successive good harvests, the overall food supply situation is satisfactory. However, local production covers only about a quarter of consumption requirement and the country relies on imports and food aid to cover its needs. With available stocks and planned commercial imports and food aid for the coming months, markets should remain well supplied with stable prices. The cereal import requirement for the 2000/01 marketing year (November/October) is estimated at 88 000 tonnes and the food aid requirement at 53 000 tonnes.

CHAD (5 February)

Seasonably dry conditions prevail. Harvesting of berbéré (recessional sorghum) is underway. Yields are lower than last year due to lack of water and grain-eating birds attacks. A joint FAO/CILSS Crop Assessment Mission estimated the 2000 cereal production at 890 000 tonnes, which is 28 percent below the 1999 record level and 16 percent below the last five years average.

Following this reduced harvest, the food supply situation will tighten in the structurally deficit zones of the Sahelian Zone, notably in the Guéra and Lac departments. Unusual population movements were reported from the cantons of Baderi, N'Gouri and Yalita in Lac Department to major urban centres, southern Chad or the Lake Chad area. In the Sudanian Zone, the food situation is also worsening in the rice producing areas, notably in Mayo-Kebbi department. The cotton harvest in the south is also anticipated to be reduced, but groundnut production is good. Prices of millet remain close to those of January last year in the five major markets of the country, except in Abéché, where they registered an increase of 24 percent. By contrast, prices of rice increased sharply in the major producing areas. The migration of livestock from the Sahelian zone could trigger overgrazing and a shortage of pasture in the Sudanian zone. An assessment of the food supply situation in the at-risk zones conducted in early January estimated the at-risk population at 800 000 persons for whom about 40 000 tonnes of cereals are needed. About 700 000 people are also considered moderately vulnerable. The sale of 20 000 tonnes of cereals at subsidised prices is recommended.

COTE D'IVOIRE (5 February)

Land preparation for the first maize crop is underway in the south. Plantings will start with the arrival of the rains, usually in March.

Following an above-average cereal harvest in 2000, the overall food supply situation is satisfactory. However, recent civil disturbances may have affected marketing activities, exacerbating an already deteriorating economic situation. The external debt has reached about US\$1.5 billion, while GDP declined by about 2 percent in 2000. The fall in prices of cocoa, of which Côte d'Ivoire is the leading producer in the world, has been a major contributing factor. Substantial quantities of rice, exceeding average annual imports, have been received in 2000. Some 86 000 Liberian refugees and 1 500 Sierra Leoneans remain in the west.

THE GAMBIA (5 February)

Seasonably dry conditions prevail. A joint FAO/CILSS Crop Assessment Mission estimated the 2000 cereal production at a record 174 000 tonnes, representing an increase of about 12 percent compared to 1999 and 49 percent compared to the previous five years average.

Following two successive bumper crops in 1999 and 2000, the overall food supply situation is satisfactory. However, despite the increase in food production, two at-risk zones have been identified: Lower River Division (LRD) (Jarra East and Jarra Central) and Central River Division (CRD) North (all the five districts) which will gather poor crops due to blister beetles and striga infestations in the fields. Poor germination of groundnut seed due to high pest infestations at storage level also resulted in reduced groundnut production.

GHANA (5 February)

Land preparation for the first maize crop is underway in the south. Plantings will start with the arrival of the rains, usually in March.

Reflecting poor growing conditions in 2000, the food supply situation is tight in some areas. About 10 000 Liberian and up to 2 500 Sierra Leoneans refugees remain in the country.

GUINEA (5 February)

Seasonably dry conditions prevail. Reflecting a good harvest in 2000 and a record crop in 1999, the overall food supply situation is satisfactory and markets are generally well supplied, except in the south-east where rebel incursions from Sierra Leone have severely affected agriculture and marketing activities. Recent clashes forced humanitarian agencies to temporarily suspend their operations in Gueckédou and surrounding areas, pulling back staff to Kissidougou, only a week after returning to the area. Consequently, more than 200 000 refugees are once again out of reach. All public institutions such as dispensaries, hospitals, schools and police stations have been closed.

More than 400 000 refugees from Liberia and Sierra Leone remain in the country, located mainly in Gueckédou, Forécariah and N'Zérékore areas. Access is very difficult to the Parrot's Beak, a strip of Guinean territory that juts into Sierra Leone near the Liberian border, where around 250 000 people are located (about 180 000 refugees living in scores of camps and some 70 000 internally displaced persons). UNHCR is building camps in Borea and Kuntaya, respectively 60 km and 82 km north of Kissidougou, to relocate refugees from Guekedou and the Parrot's Beak. Other camps are also planned in Dabola prefecture. A transit camp has been established in Conakry for the repatriation of refugees to Sierra Leone by boat.

GUINEA-BISSAU (5 February)

Seasonably dry conditions prevail. A joint FAO/CILSS Crop Assessment Mission in mid-October estimated 2000 cereal production at 168 000 tonnes which is 22 percent above the previous year's level and close to the pre-crisis level of 1997.

The overall food supply situation is satisfactory. Markets remain well supplied and prices are stable. However, some population groups with low purchase power are facing food difficulties, notably in urban areas.

LIBERIA* (5 February)

An FAO/WFP Crop and Food Supply Assessment Mission visited Liberia in late November/early December and estimated the 2000 rice paddy production at 144 000 tonnes, compared with a pre-war (1988) figure of 259 000 tonnes. The area planted to rice in the year 2000 is estimated at 135 000 hectares, suggesting an average yield of 1.1 tonnes/hectare. Small plots and poor yields would appear to be the main cause of low production per household. The lack of employment opportunities during and after the war has compelled many families to grow some rice for the first time, in order to survive. It has also caused cultivation of land which had never previously been considered for rice production, such as the coastal mangrove swamps. As a result, there are many more families in rice production than in pre-war times, albeit with smaller plots. The main constraints faced by farmers include labour shortages, shortage of rice seed, lack of any marketing organization, high levels of post-harvest losses and poor road conditions. Large scale distribution of seeds and tools has stopped and agricultural extension activities by NGOs are focusing on rice seed multiplication, post-harvest loss reduction and coffee and cocoa rehabilitation.

Eating habits have changed dramatically since the war in favour of cassava, whose area and production have increased substantially. The Mission estimated that, taking into account possible losses, some 480 000 tonnes of cassava will be available for consumption in 2001, compared with 308 000 tonnes in 1988. Plantains are also said to be more important than before.

The Mission estimated the cereal import requirement in 2001 at 200 000 tonnes. Commercial imports are estimated at 160 000 tonnes, leaving an uncovered deficit of 40 000 tonnes to be met by food aid. WFP is seeking a total of 21 000 tonnes of cereals and pulses and 3 800

tonnes of other commodities to meet the food aid needs of about 145 000 refugees and other war affected people, as well as 140 000 children attending primary schools during the year 2001.

In Lofa county, one of Liberia's main rice producing areas, periodic rebel incursions since August 1999 intensified in October and have disrupted farming and displaced thousands of people, notably in the towns of Gorlu, Ganglota and Selayae. Security remains precarious. Thousands of Guineans fleeing hostilities in their country have sought refuge in border towns in Liberia. More than 15 000 have arrived in Bong county and northern Lofa county. WFP is distributing food aid to about 420 000 Liberian returnees. UNHCR is also assisting Sierra Leonean refugees in camps in Montserrado and Sinje areas in Grand Cape Mount County.

MALI (5 February)

Seasonably dry conditions prevail. Off season crops are now being cultivated. A joint FAO/CILSS Crop Assessment Mission estimated the 2000 cereal production at 2 386 300 tonnes. This is 17.5 percent below last year's record (2 893 600 tonnes) but is very close to the average of the last five years. Desert Locusts were reported in December in the northern Adrar des Iforas near Tadjilit, Amsir, and In-Tillit. Low numbers of adults are likely to persist in a few wadis of the Adrar des Iforas and perhaps in the Timetrine area. Some of these could move northwards during periods of warm southerly winds.

Following two successive bumper crops in 1998 and 1999, farmers stocks have been replenished. They were estimated by the national statistical service at 520 000 tonnes in late October 2000. The national security stock is also at its recommended level of 35 000 tonnes (plus 25 000 tonnes in the form of "financial" security stock). With stocks held by traders and other organisations, there was a stock of more than 3 months consumption before the 2000 harvest. Therefore, the overall food situation is satisfactory. However, some areas may be at risk of food shortages following poor harvests, notably in Mopti, Gao, Kidal, Tombouctou and northern Ségou regions. Prices of cereals are likely to increase in these areas due to lower production and stronger demand from neighbouring Burkina Faso and Niger which had reduced harvests compared to 1999. Livestock herds migrated earlier than usual to the delta of the Niger River.

MAURITANIA (5 February)

Seasonably dry conditions prevail. Production of rainfed (dieri) crops was well above average. Planted irrigated areas decreased in Trarza and Brakna and yields are anticipated to be reduced due to late plantings and lack of production credit. Prospects for recession (walo) crops are also less favourable than in the previous year as planted areas decreased due to reduced water levels in the Senegal River. Attacks by caterpillars are reported in several areas. A joint FAO/CILSS Crop Assessment Mission estimated the 2000 cereal production at 170 000 tonnes, which is 12 percent below the previous year's level and 3 percent below the average of the last five years.

The food situation improved in rural areas following good rainfed crops. Markets are well supplied and prices remain generally stable. However, some populations remain vulnerable, notably in various areas of the two Hodhs, Aftout and Affolé.

NIGER (5 February)

Seasonably dry conditions prevail. A joint FAO/CILSS Crop Assessment Mission estimated the 2000 cereal production at 2 319 000 tonnes, which is 19 percent below the 1999 level and about 3 percent below the average of the last five years. A few isolated Desert Locusts may be present in parts of the Air. No significant developments are expected.

Following this near-average harvest, the food supply situation will tighten in the traditionally food deficit areas. Markets are generally well supplied but prices of millet increased significantly in

January except in the west where substantial imports of millet from Mali limited price increases. Farmers stocks are still available following 1998 and 1999 good harvests but food shortages may appear during the lean season. The at-risk zones are notably in Diffa, Tahoua, Tillabery and Agadez departments. The government and donors are selling millet and sorghum at a subsidized price (about 15-35 percent lower than the prevailing market price) in the areas that experienced production shortfalls. As of 20 January, the National Security Stock (SNS) held approximately 12 500 tonnes of millet.

NIGERIA (5 February)

Land preparation for the first maize crop is underway in the south. Plantings will start with the arrival of the rains, usually in March. Reflecting generally favourable growing conditions during the 2000 rainy season, an average to above-average harvest is anticipated.

The overall food supply situation is satisfactory. Some population groups, however, remain vulnerable following flooding in Sokoto in the north-west.

SENEGAL (5 February)

Seasonably dry conditions prevail. A joint FAO/CILSS Crop Assessment Mission in October estimated the 2000 cereal production at 1 041 000 tonnes which is about 10 percent above average.

Following two successive good harvests, the overall food situation is satisfactory. Markets are well supplied. The price of millet and sorghum decreased following harvest while the price of rice remains stable.

SIERRA LEONE* (5 February)

A reduced rice crop has been harvested in 2000 as planted areas were significantly below the previous year's level due to a resurgence of civil strife in early May, the critical planting period. Due to insecurity, input distribution and relief operations were suspended or seriously disrupted, notably in the north. Agencies could provide only 46% of the targeted number of beneficiaries with agricultural inputs. Fighting along the border with Guinea and Liberia intensified in late 2000, resulting in new waves of population displacement.

Reflecting a reduced crop and transport problems, the food supply situation will remain tight in 2001. In addition to the Internally Displaced Persons (IDPs) already registered, new IDPs have been registered in the south and west following the upsurge of fighting in May and October. About half a million people have been displaced and are being hosted by local communities in government controlled areas, while it is estimated that 1 million people have been affected by the war in rebel controlled areas. More than 400 000 Sierra Leonean refugees remain in neighbouring West African countries, mostly in Guinea and Liberia.

Military activities between the Revolutionary United Front (RUF) and the Guinean army has displaced up to 15 000 persons from the border areas. Despite the hostilities, WFP and NGOs continue food distributions. A resettlement plan has been launched in Freetown, Port Loko, Kenema and Pejehun districts which have been declared safe for people to return to. IDPs originating from the above locations will receive WFP assistance for the next four months. It is estimated that approximately 50 percent of the 57 000 IDPs in camps located in the western areas are from districts now declared safe.

TOGO (5 February)

Land preparation for the first maize crop is underway in the south. Plantings will start following the arrival of the rains, usually in March.

The overall food supply situation is satisfactory. However, people affected by floods in various areas remain vulnerable.

**CENTRAL
AFRICA**

CAMEROON (5 February)

Seasonably dry conditions prevail. The overall food supply situation is satisfactory. Cereal imports for domestic use and re-export during the 2001 marketing year are estimated at 300 000 tonnes, mostly wheat and rice.

CENTRAL AFRICAN REPUBLIC (5 February)

Seasonably dry conditions prevail. Following successive good harvests, the food supply situation remains satisfactory. The cereal import requirement for the 2001 marketing year is estimated at 30 000 tonnes, mainly wheat.

CONGO, DEMOCRATIC REPUBLIC OF* (8 February)

The food supply situation continues to deteriorate due to persistent insecurity. Intensified fighting, particularly in eastern parts, has further disrupted all economic and agricultural activities and resulted in fresh waves of population displacements. The number of IDPs is currently estimated at 2 million, whose food and nutritional situation is critical. Recent surveys conducted by non-governmental organisations indicated that up to 21 percent of the population is suffering from severe malnutrition in the eastern province of North-Kivu. The situation could deteriorate with an expected cassava crop failure in eastern parts due to pests and diseases. The food situation is also difficult in the main cities of the country, mainly Kinshasa with a population of 6-7 million. An FAO Mission last October estimated Kinshasa's food deficit in 2 000 at 1 million tonnes. In general, factors constraining food supply to Kinshasa and other cities include the extreme state of disrepair of the road infrastructure; police/military harassment of shippers, traders and farmers; the cut-off of food supply from Equateur and Eastern Provinces; and the scarcity of fuel due to a shortage of foreign exchange.

Distribution of humanitarian assistance remains constrained by persistent insecurity and very poor road conditions. WFP plans to increase its distributions of food aid to cover 1.2 million people, including some 70 000 Angolan refugees, and has recently appealed for US\$112 million for the relief operations.

CONGO, REP OF* (5 February)

Precipitation was below average in January. Following the December 1999 ceasefire between the government and opposition parties, the security and the overall food supply situation improved in 2000. All areas are now accessible to humanitarian agencies. The bulk of the estimated 810 000 people displaced by the civil war have returned to their homes.

There are about 100 000 refugees from the Equateur province of DRC in northern areas, notably in Betou, near the border with the Central African Republic. There are also 5 000 Rwandan refugees and 8 000 Angolan refugees. WFP recently launched a new Emergency Operation to assist 50 000 refugees from the DRC over a period of 6 months. It is also providing food to some 120 000 persons in Brazzaville, Pointe Noire and other main towns.

EQUATORIAL GUINEA (5 February)

Limited rains were registered in December and January. The staple crops are sweet potatoes, cassava and plantains. The cereal import requirement for the 2001 marketing year is estimated at 10 000 tonnes of rice and wheat.

GABON (5 February)

Rains decreased in December and early January. They increased from mid-January, notably in the south but remained below average. The main foodcrops are cassava and plantains but some maize is also produced (around 25 000 tonnes). The country commercially imports the bulk of its cereal requirement, estimated at around 85 000 tonnes in 2001.

EASTERN AFRICA

BURUNDI* (12 February)

After a succession of reduced crops, the output of the recently harvested 2001 A season crops is estimated to be satisfactory. A recent locally-organized FAO/WFP/UNICEF Assessment Mission estimated food production at 85 000 tonnes of cereals, 68 000 tonnes of pulses, 483 000 tonnes of roots and tubers and 465 000 tonnes of bananas and plantains, which is 15 percent, 10 percent, 4 percent and 1 percent respectively higher than in the 2000 A season. However, outputs remain below the pre-crisis (1988-1993) average levels, due to insecurity and disruption of agricultural production since 1994.

The area planted increased significantly this season reflecting relatively a better security situation in western parts, in particular in the provinces of Bubanza and Cibitoke, and the closure of regroupment camps in Bujumbura Rural Province, which allowed farmers to return to their fields. The other factor which contributed to higher plantings this season was the timely seed distributions by the Government and international agencies, mainly in the Kirundo and Muyinga provinces, the worst affected by drought during the 2000 A season.

Despite a late start of the rainy season, precipitation was abundant and well distributed from October to November benefiting crop development. However, excessive rains in parts resulted in floods and crop losses and, in general, reduced yields, particularly for beans. Yields of bananas and plantains are expected to increase only from March/April as trees were seriously affected by previous prolonged dry weather.

The small 2000 C season in the marshlands, from mid-June to September, was poor reflecting the dry weather in previous months. The food output was estimated 4 percent below the level of the 1999 C season.

The tight food situation has eased with the arrival of the new harvest. Nevertheless, following several consecutive below average harvests, persistent insecurity and population displacements, as well as a recent malaria epidemic, the food and nutrition situation of vulnerable groups remains precarious. In particular, the situation is difficult for 324 000 internally displaced people and for drought affected persons in the provinces of Karuzi, Gitega, Kayanza and Muyinga. A recent nutritional survey in 7 provinces of the country indicated a 10 percent rate of acute global malnutrition. Similarly, a recent report by MSF indicated that the number of malnourished children admitted to its therapeutic feeding centres in Karuzi province had doubled in January 2001. Emergency food aid continues to be necessary for the vulnerable sections of the population.

ERITREA* (14 February)

Below-normal rains in December over winter rain receiving coastal areas have dampened prospects for the sorghum and maize crops, about to be harvested. Furthermore, despite favourable rains in September and October in some regions of the country, a well below average 2000 main season cereal crop is forecast as a result of displacement of a large number of farmers by war with neighbouring Ethiopia. Gash Barka and Debub administrative zones (Zobas), which have been severely affected by the displacement, are major grain producing areas supplying more than 75 percent of the country's cereal production.

The Desert Locust situation remains calm but with recent winter rains along coastal areas, conditions are likely to be favourable in parts of the Red Sea coastal plains.

Cereal prices, which normally decline at harvest time were generally increasing or remained unchanged in most market centres between November and December reflecting the anticipated poor harvest. The food situation continues to be tight for nearly 1.8 million people affected by the war with Ethiopia and last year's drought along the coastal areas.

ETHIOPIA* (14 February)

Planting of the 2001 secondary "belg" season crops is about to start. The "belg" crop accounts for around 8 to 10 percent of annual cereal and pulses production but in some areas it is the main harvest.

Harvesting of the main 2000 "meher" season crops was completed late last year. An FAO/WFP Crop and Food Supply Assessment Mission in November/December found that the meher crop had recovered strongly from earlier expectations due to abundant rainfall which continued through October, benefiting late sown crops. The Mission forecast a meher harvest of 11.61 million tonnes of cereals, about 7.3 percent higher than the 1999 post-harvest estimate, mainly due to an increase in area planted.

Livestock, particularly in the pastoralist areas, was devastated last year by a prolonged drought, which caused acute water and fodder shortages, exacerbated later by infectious diseases and parasites. The southern pastoralist areas of Somali, Borena, Bale and South Omo were worst hit and cattle losses at levels of up to 50 percent have been noted. Consequently, animal production among pastoralists and agro-pastoralists has been severely reduced and will take several years to recover. The late meher rains in 2000 have helped considerably in regenerating pasture and browse and recharging water points. Animals in belg-dependant zones and woredas in the settled farming areas also suffered and draught animal numbers are reported to be lower than needed, affecting area planted and quality of land preparation.

The improved availability of cereals has resulted in falling grain prices in most markets. However, despite the good harvest, some 6.5 million people will require food assistance. On the basis of the 2000 meher production estimate and a forecast belg harvest in 2001 of 170 000 tonnes of cereals and pulses, the Mission estimated a total grain import requirement of 970 000 tonnes in 2001, a large part to be covered by food aid. In addition, donors are urged to support local purchases to provide some strength in the market. In February, total pledges amounted to 450 000 tonnes of which 45 000 tonnes has been delivered.

The UN country team has recently launched an appeal for US\$203 million to assist 6.5 million people affected by drought and war.

KENYA (14 February)

Prospects for the 2000/01 secondary "short rains" cereal crop, accounting for some 20 percent of annual production, has improved with the unseasonal continuation of the rains well into January. However, recent reports of armyworm infestations in parts of Coast Province are a cause for concern. This crop provides the main source of food in parts of Central and Eastern provinces.

The main "long rains" cereal crop, harvested until last October, was significantly reduced due to a severe drought. Official estimates indicate maize output of about 1.7 million tonnes compared to 2.4 million tonnes average over the previous five years.

The severe drought in 1999/2000 seriously undermined the food security of nearly 4.4 million people and resulted in a massive relief operation. Despite some improvement, the food supply situation is still fragile, particularly in the northern, eastern and north-eastern pastoral districts. The severe scarcity of water and pasture has resulted in loss of large numbers of livestock and the process of recovery is rather slow.

An revised Emergency Operation was jointly approved in January 2001 by FAO and WFP for food assistance to 4.4 million drought affected people, worth US\$148.9 million for a period of six months.

RWANDA* (9 February)

Preliminary indications point to a food output of the recently harvested 2001 A season crop at around or slightly lower than the good level of last year. Despite a delay to the start of the rainy season, precipitation was abundant and well distributed from mid-October to December. Although excessive rains in November resulted in floods and crop losses in parts, mainly in Gisenyi and Butare Prefectures, they generally benefited plantings and yields, particularly of cereals and pulses. Production of roots and tubers and banana and plantains was less satisfactory reflecting shortages of planting material and prolonged dry weather. Also despite the overall positive picture, a poor harvest was gathered in the Bugesera region of Kigali Rural Province, due to seed shortages following successive reduced crops. A locally-organized Government/FAO/WFP/EU Mission has assessed this season's food production but its findings are not yet available.

The tight food supply situation has eased with the new harvest. Prices of maize, beans and Irish potatoes have decreased from their levels of a year ago. However, despite the overall improvement in the food situation, emergency food assistance is anticipated to be needed until the next harvest for people in the Bugesera region, particularly in Kanzenze and Gashora districts. WFP plans to distribute 13 000 tonnes of emergency food assistance for three months to 267 000 drought-affected people in southeast Rwanda.

SOMALIA* (14 February)

Harvesting of the 2000/01 secondary "Deyr" cereal crop, normally accounting for some 25-30 percent of annual cereal production, is underway. Preliminary estimates of the area planted indicate an increase of about 51 percent, compared to the previous Deyr season for the sorghum crop, to about 207 000 hectares, and a decrease of 21 percent for the maize crop to nearly 71 000 hectares. The total cereal production for the 2000/01 Deyr season is forecast at about 110 000 tonnes, close to last year's good Deyr harvest.

The main 2000 "Gu" season, harvested until last September, was estimated at 212 000 tonnes of cereals, about 22 percent above the post-war (1993-1999) average due to widespread rains and improved security in parts.

The overall food supply situation in parts of southern Somalia has improved in the last 6 months with better Gu and Deyr harvests. However, recent nutrition surveys indicate continued high malnutrition rates, reflecting slow household recovery from the succession of droughts and long-term effects of years of insecurity. Moreover, the recent injection of new currency into the market with the attendant depreciation of the Somali Shilling have caused a sharp increase in prices of food items and essential goods.

Elsewhere, in north-western Somalia (Somaliland) and north-eastern Somalia (Puntland), favourable rainfall in recent months has improved pasture and livestock conditions. However, the ban of livestock imports from eastern Africa by countries along the Arabian Peninsula due to a Rift Valley fever has caused substantial loss of income and has threatened the livelihoods of a large number of pastoral households, particularly in the Haud region of Togdeer.

Food aid distributed by WFP was close to 1 100 tonnes during the month of December, both in southern and northern Somalia bringing the total distributed from January to December 2000 to 16 845 tonnes.

SUDAN* (14 February)

An FAO/WFP Crop and Food Supply Assessment Mission, which visited southern Sudan from 4 to 27 October 2000 and northern Sudan from 19 November to 6 December 2000, found that serious food shortages were emerging in several parts of the country due to late rains and prolonged dry spells, whilst food stocks had dwindled. The Mission forecast 2000/01 total cereal production in Sudan at about 3.6 million tonnes, comprising 2.7 million tonnes of sorghum, 496 000 tonnes of millet and 334 000 tonnes of wheat (to be harvested in mid-2001) and 95 000 tonnes of other cereals. At this level, cereal production is about 14 percent above last year's below average crop but about 18 percent below the previous five years' average.

As a result, the cereal import requirement in the 2000/01 marketing year (November/October) is estimated at 1.2 million tonnes, about 16 percent above last year's actual imports. Commercial imports in 1999/2000 are estimated at nearly 1 million tonnes, some 13 percent higher than the previous year. Emergency food aid, in pipeline and under mobilisation, stood at 34 000 tonnes, leaving an uncovered gap of about 140 000 tonnes.

Lower harvests coupled with virtual depletion of stocks have led to a sharp rise in cereal prices. Sorghum retail prices, for instance, leapt from an average of SP 15 000 per 90kg bag in January to April 2000 to an average of SP 35 000 in May and June. In November and December 2000 sorghum prices averaged SP 40 000 compared to SP 20 000 for the same period in 1999. Such an increase will reduce access to food for the poorer segments of the population.

The erratic rainfall also had a devastating effect on range vegetation, as well as on the availability of feed from grain and crop residues, especially in rainfed areas. The drastic fall in feed is expected to lead to widespread under-nutrition in livestock. Market supply of livestock has increased substantially, depressing prices and thus household incomes. The livestock/grain terms of trade for pastoralists have deteriorated sharply. Sheep/sorghum terms of trade (the quantity of sorghum bought with the local sale of a sheep) declined by about 400 percent in December 2000 compared to December 1999.

The population most affected by the current poor season is estimated at 900 000, mainly in Darfur, Kordofan, North Bahr el Ghazal, Bahr el Jebel, East Equatoria, Jonglei, Juba and Butana province in Gezira State. About 600 000 of these people will be in dire need of food assistance within four to five months time. In addition, some 2.4 million people affected by the ongoing civil strife in the south will need continued assistance. With few resources left and coping mechanisms stretched to the limit, farmers and other vulnerable groups have already started to migrate in search of work and food. Consumption of seed grains will

reduce their productive capacity and ability to sustain themselves in the coming agricultural season. A timely and targeted intervention is essential to prevent further human suffering.

An revised Emergency Operation was jointly approved in January 2001 by FAO and WFP for food assistance to 2.4 million people affected by war, drought and floods, worth an additional US\$50.2 million for a period of 4 months.

TANZANIA (14 February)

Harvesting of the 2000/01 short "Vuli" season crops is well advanced in the bi-modal rainfall areas of the northern coastal belt and north-east, where the crop accounts for some 30-40 percent of the annual food supplies. Despite good rains in parts, prospects are uncertain particularly with the recent armyworm infestations in Dodoma, Arusha, Mbeya, Iringa, Singida and parts of Mwanza.

The 2000 national cereal crop, mainly maize, is estimated at about 3.3 million tonnes, about 20 percent below the previous five years average. The decline is attributed to drought conditions in several parts of the country. However, the overall food supply situation has improved due to large maize imports, resulting in marked declines in food prices. Despite reduced pasture, livestock conditions are reported to be good.

Successive years of drought have seriously undermined food supply in the northern and central regions of the country. Food assistance will be required for about 800 000 people identified as food insecure, mainly in the regions of Dodoma, Mara, Shinyanga, Singida, Tabora, Tanga and southern Mwanza, who have suffered their third consecutive poor harvest.

UGANDA (14 February)

Harvesting of the 2000/01 second season cereal crops is well underway. The output is anticipated to be above average reflecting well distributed rains during the season.

The output of the main season crop, harvested from the middle of 2000, was below average due to drought and erratic rains in various parts of the country. Cereal production in 2000 is estimated to be about 12 percent below average at 1.6 million tonnes.

The overall food supply situation is satisfactory. However, the situation remains precarious in districts of Gulu, Kitgum, Bundibugyo, and parts of Kasese and Kabarole, mainly due to last year's poor harvest and/or insecurity. WFP's food assistance benefits an estimated 1.1 million IDPs, refugees, and drought-affected people in the country.

SOUTHERN AFRICA

ANGOLA* (5 February)

Prospects for the 2001 foodcrops, to be harvested from April, are uncertain reflecting erratic rains since the beginning of the season. Prolonged dry spells in parts have coincided with excessive precipitation in others. Dry weather during January in southern parts has stressed developing cereal crops and more rains are needed in these areas. By contrast, heavy rains in late January in the Northwestern province of Cabinda resulted in loss of life and damage to infrastructure and crops. The total area planted is estimated to have been reduced by the intensification of the civil conflict at sowing time, which could result in another below-average output. A reduced cereal crop for the third consecutive year would aggravate the precarious food supply situation of the country, reinforcing the heavy reliance on food assistance.

The food supply situation continues to deteriorate with the persistent civil conflict. The security situation in the interior of the country remained unstable with violent incidents reported in the northern province of Uije, the northwest province of Bengo and the central province of Bie. The number of internally displaced persons (IDPs), estimated at 2.5 million people last June has continued to increase, particularly in Bie. Fresh waves of displaced people were also recorded in Benguela in the west, Huila and Kuando Kubango in the south, Malange in the north and Moxico in the east. While the food and nutritional situation of the IDPs is extremely critical, food aid distributions continue to be problematic due to insecurity and food aid pledges falling below requirements. By the end of January, WFP had received pledges for only 60 percent of its current operation in Angola. This has led to a one-third reduction in the number of beneficiaries, from 1.5 million to 1 million and to cuts in the rations distributed. The current food pipeline is facing imminent shortfalls. Additional resources are urgently needed to avoid further cuts in distributions in March and April and consequent human suffering.

BOTSWANA (2 February)

Dry weather during most of January stressed the 2001 developing cereal crops, particularly the maize crop. More rains are urgently needed to avoid yield reductions, as well as the deterioration of pasture conditions.

Following two consecutive reduced cereal harvests, the country has an import requirement of 250 000 tonnes of cereals in marketing year 2000/01, all of which is expected to be imported commercially.

LESOTHO (2 February)

Rains from late January provided relief to the 2001 coarse grain crops, stressed by a dry spell since the beginning of the month. Yield reductions are likely in parts. Rains in the coming weeks will be critical for the recovery of the crop.

Following a reduced 2000 cereal crop, the import requirement in marketing year 2000/01 (April/March) is estimated at 248 000 tonnes, most of which is expected to be covered commercially.

MADAGASCAR (2 February)

Good rains in the second and third dekads of January benefited the 2001 rice crop, negatively affected by dry weather early in the month. The overall prospects for the paddy harvest starting from April are favourable; however more rains are needed in the extreme north and other localized areas where rains have been erratic. By contrast, in southern maize growing areas, dry weather in the last two dekads of January has stressed the developing maize crops. If more rains are not received soon, the harvest is likely to be reduced for the second consecutive year. The southern areas were affected by a severe drought that resulted in a one-quarter decline of the maize output last year.

The national food supply situation is tight following the poor 2000 rice crop and sharply increased import requirements. In southern parts, food assistance is required for 240 000 vulnerable people who gathered a poor harvest last season.

MALAWI (26 February)

Continuous heavy rains since late January have resulted in serious floods in 13 of the country's 27 districts, particularly in southern areas along the Shire River. Official reports indicate that 200 000 people are displaced due to the floods. Many areas are inaccessible as a result of damage to roads and bridges. It is estimated that 50 000 hectares of crops have been lost to the floods in the affected areas. The Government has appealed for international assistance to cope with the disaster.

Prospects for the 2001 cereal crops have deteriorated with the excessive rains in February that are likely to have resulted in yield reductions. A dry spell and high temperatures in January in some southern districts, mainly Balaka, Zomba and Mwanza, also negatively affected yields in these areas. Latest forecasts point to a maize crop below the 2.5 million tonnes of last year's bumper harvest, but still above average. The final outturn will depend on the rains in the remaining of the growing season.

The overall food supply situation is satisfactory reflecting last year's good harvest and adequate stocks. Also at household level the food security situation is reported to be generally satisfactory.

MOZAMBIQUE (26 February)

High water levels in the Zambezi River, due to torrential rains in neighbouring countries, as well as continuing heavy rains in central provinces since the last dekad of January, have resulted in floods in the central provinces of Zambezia, Sofala, Manica and Tete, particularly in late February. It is estimated that 41 persons have died, over 77 000 have lost their property and up to 400 000 are affected by the disaster. Severe damage to transport infrastructure is also reported. Access to the main port of Beira has been interrupted. Preliminary assessments of the agricultural damage carried out by the Government indicate that by late February, 27 000 hectares of cash and foodcrops had been lost to the floods, mostly in the Zambezia Province, affecting 44 000 farming families.

Following the opening of the Chaora Bassa dam, the country's largest along the Zambezi River, more floods are threatening central parts. About 80 000 people are being evacuated from the towns of Marromeu and Luabo and surrounding areas. Also along the Pungue River, in Manica and Sofala provinces, there is concern of more floods. Further south, 30 000 people are endangered by floods due to the high levels of the Save River. The Government has appealed for US\$30 million to cope with the emergency in central areas. Due to road closures, more aircraft for the evacuation operations are urgently needed. Emergency food assistance is currently being provided to 20 000 affected people. Agricultural tools and seeds required to allow affected farmers to plant a second season crop are valued at US\$2.3 million.

In southern provinces, the worst affected by the severe floods of last year, the outlook for this year's cereal harvest has deteriorated as a result of well below average precipitation in January. Rains in the second dekad of February may have arrived too late to prevent serious yield reductions. In the main cereal growing areas of the north, good rains since the beginning of the season have favoured crop development.

Overall, the outlook for this year's cereal crop is still satisfactory, as the crop losses to floods are not significant at national level. Reflecting generally abundant rains and an increase in the area planted from last year's level, early official forecast pointed to an increase of 6 percent in this year's cereal production. However, should the heavy rains continue in the remainder of the growing season, prospects could deteriorate rapidly.

The food supply situation remains satisfactory at national level. Maize prices are below their level of a year ago. Nevertheless, a total of 165 000 food insecure people in 37 districts are estimated to be in need of food assistance until the next harvest.

NAMIBIA (2 February)

The outlook for this year's cereal crop has deteriorated as a result of severe dry weather during January in the northern growing areas. The dry weather followed late and erratic rains since the beginning of the season. Precipitation in February and March will be critical for the recovery of maize and sorghum crops.

The food supply situation remains satisfactory as a result of the good cereal harvest of last season and the country's commercial import capacity.

SOUTH AFRICA (7 February)

Prospects for the 2001 maize crop have worsened. Well below average rains and high temperatures in January and early February have resulted in yield reductions particularly in the most affected western growing areas. Preliminary estimates indicate that up to 30 percent of the maize crop may have been damaged in the North West and Northern Cape provinces, that account for one third of maize production and 40 percent of the white maize. Rains in the coming weeks will be crucial for the recovery of part of the crop, which is entering the critical pollination phase, and to avoid further crop damage. Reflecting the deterioration of the harvest prospects, maize futures prices increased to over 900 rand per tonne by the first week of February from 700 rand per tonne in mid-December.

Latest official estimates of maize plantings indicate an area of 2.65 million hectares, higher than earlier anticipated, but still 17 percent below the level of last year. The decline reflects low domestic prices at planting time. The lower plantings, coupled with reduced yields could result in a sharp decrease in the 2001 maize production. More rains are urgently needed.

Production estimates of the 2000 wheat crop have been revised upward to 2.1 million tonnes, one-third above the poor harvest of the previous year and above average.

SWAZILAND (5 February)

The outlook for the 2001 cereal crop has deteriorated. Prolonged dry weather during most of January stressed the developing maize crop. Rains resumed in early February but may have arrived too late to prevent reductions in yields. An assessment of the crop damage caused by the dry spell is not yet available.

The overall food supply situation is tight reflecting the flood-reduced cereal harvest of last year and commercial imports during marketing year 2000/01 (April/March) well below requirements. In particular, serious food difficulties are being experienced by 14 000 people who experienced crop failure last season and are in need of food aid until the next harvest. The Government has appealed for international assistance to help the affected population.

ZAMBIA (2 February)

Heavy rains in January over most parts of the country, except in the extreme south, resulted in localized floods but, in general, benefited the developing 2001 cereal crops. Areas worst affected by crop losses to flashing floods are the Western (Kalabo, Kaoma Lukulu and Mongu), Luapula, Northern and Central Provinces. Other affected areas are the Luangwa Valley (including areas in Serenje, Mpika, Mambwe, Lundazi, Katete, Chipata, Nyimba and Luangwa districts). Excessive rains have also resulted in pests and diseases in some parts. By contrast, prolonged dry weather in Southern (Livingstone and the Gwembe Valley) and Western provinces (Sesheke, Shangombo and Senanga) is anticipated to result in sharply reduced yields in these areas.

Overall, despite the localized crop losses, prospects for the harvest are favourable following good rains since the beginning of the season. However, the 2001 maize production is forecast to decline from last year's bumper crop, reflecting a decline in the area planted because of low prices at planting time and large unsold surpluses from the previous season.

The food supply situation is satisfactory. Prices of maize, which declined following the last harvest, started to rise in January.

ZIMBABWE* (5 February)

Prospects for the 2001 foodcrops, to be harvested from April, have deteriorated following dry weather in the last two dekads of January and, in general, erratic rains since the beginning of the season. Rains in early February may have arrived too late to prevent reductions in yields of maize and other foodcrops. In the worst affected southern areas, below average precipitation since mid-November has resulted in significant reductions in plantings and yields. Plantings in most districts are estimated to be less than 50 percent of normal levels and a poor harvest is anticipated. Most affected districts are Beitbridge, Matobo and Umzingwane in Matebeleland South Province; Umuza in Matebeleland North Province; Guruve in Mashonaland Central Province; Chiredzi in Masvingo Province; and Shurugwi in Midlands Province. In the main maize growing areas of the north and centre, latest estimates point to a decline in the area planted to maize of 26 percent, with sowings in the large-scale commercial farming sector estimated to be 50 percent lower as a result of civil disturbances. Provisional forecasts point to a maize crop as low as 1.2 million tonnes, or 41 percent below last year's level, but the final outcome will depend on the rains in the main growing areas in the next two months. However, should this low maize production forecast materialize, import requirements in marketing year 2001/02 will increase sharply to around 500 000 tonnes, at a time when the country faces severe foreign exchange shortages.

The current overall food supply position remains satisfactory reflecting the good maize crop of last year and large carryover stocks. However, the situation is difficult for poor urban households and in some communal areas that rely on purchased maize. Prices of maize and other basic food have increased sharply in the past month due to high levels of inflation, fuel shortages and continued devaluation of the national currency.

ASIA

AFGHANISTAN* (14 February)

The country is gripped by a grave food crisis, following two consecutive years of drought, continuing civil conflict and a harsh winter. Recent reports indicate increasing number of deaths from freezing temperatures in western and northern parts.

The 2000 drought has devastated crops and livestock across the country, with more than 3 million people severely affected. In addition, intensified civil conflict, particularly in northern parts, has resulted in fresh waves of population displacement, aggravating the already precarious food situation. Large-scale movement of people, particularly from remote districts in Ghor, Badghis and Faryab Provinces has already begun with destitute households now being accommodated in camps at the edge of Herat, the main urban centre in the west. Furthermore, in the past five months alone, an estimated 150 000 people have crossed into northern Pakistan and are living in grim and freezing conditions in camps around Peshawar.

Prospects for the 2001 cereal crops, for harvest from May/June, remain uncertain mainly due to persistent insecurity in the provinces of the north, which contain some 40 percent of the country's irrigated area.

An FAO/WFP Crop and Food Supply Assessment Mission which visited the country in the middle of last year warned of the emerging serious food crisis in the country. The Mission estimated total cereal production in 2000 at 1.82 million tonnes, about 44 percent below 1999 and 53 percent compared to 1998. Cereal import requirements in the 2000/01 (July/June) marketing year, estimated at a record 2.3 million tonnes, are nearly double the 1999/2000 estimated volume of 1.3 million tonnes. Low precipitation last winter and insufficient

vegetation growth in most highland pastures in the western and southern regions during the spring have resulted in extremely high losses of livestock for the nomadic population.

In 2000, WFP distributed some 161 000 tonnes of food to 3.3 million worst affected people, compared to 82 631 tonnes for the same period last year. The UN has renewed a US\$220 million appeal launched last November where less than US\$14 million has been pledged by the end of January 2001.

ARMENIA* (1 February)

The outlook for the 2001 grain harvest is uncertain. Persistent drought in 2000 reduced grain production by 27 percent to 219 000 tonnes and has resulted in a shortage of seed. As a result early indications are that the area sown to winter grains (mainly wheat) for harvest in 2001 has fallen by a third to 65 000 hectares. Good rains late in 2000 helped to redress moisture shortages but precipitation has eased off since then and much more is needed. Satellite imagery clearly shows that crop development in the north,(parts of Shirak, Lori, Tavouch and adjoining areas of Kotaik and Geharkunik, in a belt stretching from Lake Sevan to the border) is markedly less than last year. However, the reduction in the areas sown to winter crops in these areas also contributes to this finding. Crop condition is markedly better than last year only in Siunik marz. The food supply outlook in 2001 will depend crucially on increasing the areas sown to lower yielding spring grains, and the mobilization of seed potato to enable farmers to plant this staple crop. Animal feed and pastures were also affected.

An FAO crop and food supply assessment mission in August estimated the cereal import requirement in 2000/01 (July/June) at 515 000 tonnes including 458 000 tonnes of wheat, and 44 000 tonnes of feedgrains to provide survival rations for livestock, a major source of protein and income for rural households. The import requirement is well above average and includes 146 000 tonnes of food aid. Against the import requirement, some 200 000 tonnes of cereals had been imported up to the end of 2000, including 68 000 tonnes of food aid.

Debilitating economic, social and political problems over the past decade have resulted in massive unemployment and food insecurity, with some 15 percent of rural children facing chronic malnutrition even under normal circumstances. WFP plans to provide targeted emergency food assistance to an estimated 297 000 subsistence farmers and other vulnerable households with 22 480 tonnes of iron-fortified wheat, vegetable oil and pulses from 1 November 2000 until 1 July 2001. The proposed Emergency Operation (EMOP) will be fully integrated with the ongoing Protracted Relief and Rehabilitation Operation (PRRO), also effective until June 2001, which targets another 170 000 beneficiaries. The combined outstanding tonnage of the planned EMOP and the ongoing PRRO amounts to more than 28 000 tonnes up to mid-2001.

AZERBAIJAN (1 February)

Early indications are that the area sown to winter wheat and barley has continued to increase. In the wake of two years of below average precipitation and difficulties in marketing cash crops such as grapes and cotton, farmers are switching to winter grains which mature in June, before the onset of summer heat and peak water needs. Water supplies for irrigation in the reservoirs are low after last year's drought in their catchment areas in neighbouring countries and harvest prospects will depend crucially on precipitation in February- March and snowmelt in May-June. Emergency works carried out this winter (deepening irrigation canals etc.) could help to maintain production levels of remunerative crops.

An FAO drought assessment mission fielded in January 2001 confirmed that the 2000 wheat crop had by and large escaped the effects of the drought, which affected mostly spring planted crops (potatoes, vegetables, cotton, fodder) and in particular on cropping areas at the end of the canal systems, in higher areas or where pumps could not lift water due to high suction associated with very low water levels. The areas sown to cereals had increased

markedly. The 2000 grain harvest is officially estimated at 1.5 million tonnes of grain, some 400 000 tonnes above the 5 year average reflecting a sharp increase in the area and yield of wheat, as the drought and shortages of irrigation water mainly affected spring sown crops (including potatoes, vegetables), fodder and the fishing industry.

Following the better than average harvest, the cereal import requirement is expected to decline somewhat. However, grainfeed for animals is likely to rise, as fodder supplies are low and domestic farmers face import competition. The bulk of the cereal import requirements will be covered commercially, though vulnerable groups, including the internally displaced, still need targeted food assistance. WFP continues to support 485 000 beneficiaries through a 3-year Protracted Relief and Recovery Operation which started in July 1999. Total food commodities committed for the life of the project amount to 47 880 tonnes of food aid.

BANGLADESH (5 February)

Currently the country is in its winter season, the main crops in the ground being wheat and irrigated Boro rice. Wheat is planted in November/December for harvest from late March, whilst the boro crop is planted from November through January for harvesting from April. Boro rice accounts for approximately 45 percent of aggregate rice production annually, the monsoon (Aman) a further 45 percent, whilst roughly 10 percent comes from the third Aus crop. In 1999/2000, a combination of an increase in area planted, favourable weather and adequate input supplies, resulted in bumper rice (milled) production of 22.78 million tonnes, some 14 percent above the previous year. The forecast for the current 2000/01 marketing year is slightly higher at 23.4 million tonnes of paddy, with the 2001 boro crop anticipated at around 11.1 million tonnes.

The overall food situation remains satisfactory with adequate government food grain reserves. At the end of January there was a total of 1.1 million tonnes of grain in stocks including some 800 000 tonnes of rice and 332 000 tonnes of wheat in the Public Food Grain Distribution System.

CAMBODIA (5 February)

In September 2000 the country was affected by one of the worst floods in recent history. This resulted in several hundred deaths and large scale destruction of crops, principally rice, infrastructure, property and lines of communication. An estimated 3 million people were affected, half a million displaced from homes and almost four hundred died. The September floods exacerbated existing problems following earlier floods last July.

Following the floods, an FAO/WFP Crop and Food Supply Assessment mission was fielded to the country between 6 and 15 December, to assess the overall food supply situation and the need for possible food aid intervention for the 2001 marketing year (January/December). The mission found that the cumulative effects of the floods this year reduced overall wet season rice production on some 400 000 hectares, though recovery was possible on around 60 000 hectares of the area lost. Notwithstanding the loss due to floods, rainfall this year was generally above average, as a result of which the overall season was favourable and yields were above 1999, which was a bumper year. Although harvesting is still underway, the mission estimates that the likely area harvested in the 2000 wet season will be around 1.64 million hectares in total, some 5 percent below average for the past four years and the lowest since 1996/97, which was also affected by serious floods. Based on average yields of around 1.85 tonnes/hectare, wet season paddy production is estimated at some 3.03 million tonnes. In addition some 20 percent of aggregate annual rice production comes from the recession and dry season crops. Overall prospects for the dry season are generally favourable, given the abundance of residual surface and soil moisture and silt deposits. Though tentative at this stage, as the crop will not be harvested till March/April, dry season production is forecast at 735 000 tonnes, similar to 2000. Overall 2000/01 paddy production, therefore, is estimated at 3.76 million tonnes or 2.33 million tonnes in rice equivalent. In addition to current year production, the mission assessed that there were reasonably large in-country stocks of rice due to a generally sluggish domestic and cross-border market. This is

reflected in prices which remain lower than last year. Taking into account these stocks, overall rice availability for the 2001 marketing year is estimated at 2.433 million tonnes. Against this total utilisation, food, seed, feed, other uses and stock draw-down, to cover the shortfall in wet season production, is estimated at 2.478 million tonnes leaving an uncovered deficit of around 45 000 tonnes. This deficit, however, will be covered entirely by pipeline food assistance, leaving an overall balance in rice supply and demand for 2001 with no import requirement.

Despite a relatively satisfactory rice supply/demand situation from a national perspective, this year's floods made a large number of people, who are normally on the borderline of subsistence and food insecurity, more vulnerable to food shortages. In general, there are three broad categories of "food insecure" people in the country. The largest group currently are the chronically food insecure, comprising approximately 2 million people. The second group are the "vulnerable groups" (handicapped, disease victims, orphans, etc.), which accounts for a further 500-600 000 people. The third group are the "transitory food insecure", due to factors such as fires, floods, and droughts, and would normally account for some 50 000 people. This year, however, due to the exceptional flooding, the number classified as transient food insecure is estimated at 3 million people. Of these, vulnerability analysis indicates that some 500 000 people would be classified as the most food insecure. Given the magnitude of the problem, this group could become chronically food insecure, if they have to resort to extreme coping strategies such as sale of land, incurring high interest debt, etc, to meet the household food deficit resulting from flood damage. However, if targeted food assistance is provided, almost all this group can be expected to recover by the next harvest. To cover the food needs of the half a million people who are most at risk, the mission advocates additional food assistance for four months. Part of the requirement (one and half months) will be met through a current Emergency Operation (EMOP 6296.00), whilst an additional 16 000 tonnes will be required to meet the remainder of food needs.

CHINA (5 February)

In the past few weeks the coldest winter in 50 years resulted in the death of some 30 people and several hundred thousand livestock in the northerly region of inner Mongolia. As the cold wave continues concerns are mounting for the welfare of the large number of nomadic families in the region who rely entirely on livestock and livestock products for their livelihood and income. More generally in the northern part of the country adequate snow cover protected dormant winter wheat, which was planted in October/November last year for harvest in May/June. Winter wheat accounts for most of the country's wheat produced annually. Due to declining support prices for staples, the area under wheat production declined further for the 2000/01 season as farmers continue to switch to other more lucrative crops. The area planted is estimated at around 23 million hectares, 1.17 million hectares or and almost 5 percent below 1999. In 1999/2000, due to a combination of severe drought and falling acreage, wheat production declined to around 101 million tonnes, some 94 million tonnes from winter wheat and 7 million tonnes from the spring crop. This was some 9 percent below normal for the preceding five years and the lowest level since 1995. Due to the drought, maize production also fell significantly to 105 million tonnes, some 18 percent below the previous year. Paddy production in 2000/01 is forecast at some 188.2 million tonnes around 5 percent lower than the previous year.

CYPRUS (14 February)

Sowing of the 2001 wheat and barley crops for harvest from May has been completed under generally normal weather. Aggregate wheat and barley output in 2000 is estimated at 101 000 tonnes, some 20 percent below the previous year's but about average.

Imports of wheat in 2000/01 (May/April) are forecast at 95 000 tonnes, while aggregate imports of barley and maize are forecast at some 540 000 tonnes, unchanged from last year.

EAST TIMOR (5 Feb)

The main rice and maize crops, planted in November/December are currently emerging and will be harvested from April/May. Despite disruption to the agriculture sector due to civil disturbances in 1999, agriculture recovery continues with improvements in access and marketing. Rice and maize production in 2000 was estimated by FAO at around 30 500 tonnes (milled) and 94 000 tonnes respectively.

GEORGIA* (1 February)

The outlook for the 2001 harvest is pessimistic. Crops are still developing satisfactorily but the area sown to winter cereals was reduced as a result of drought damage in 2000 and consequent seed shortages, particularly in the eastern and southern wheat growing areas. In addition, precipitation during the winter months has again been below average. Rodents are also proliferating. Despite emergency measures to mobilize winter wheat seed, it is estimated that between 62 percent of the area normally planted (some 110 000 hectares) has been sown. It is hoped to mobilize enough seed to increase the area sown in the spring to potatoes and maize, to offset the expected smaller wheat harvest.

Drought and the poor state of the irrigation system have resulted in a sharp fall in 2000 foodcrop production. The aggregate 2000 cereal harvest is less than 400 000 tonnes, nearly half that achieved in 1999 and 40 percent below average. Output of potatoes and other basic foodcrops is also down and livestock production is affected by reduced feed supplies.

With a minimum national cereal consumption requirement (including food, feed seed, losses) estimated at 1.1 million tonnes, Georgia's cereal import requirement in 2000/01 is estimated at 748 000 tonnes (620 000 tonnes of wheat, 88 000 tonnes of maize, 35 000 tonnes of barley and 5 000 tonnes of rice). Commercial imports are difficult to estimate. However, overseas food aid deliveries of wheat are proving difficult to market as cheaper supplies are being sourced in the CIS. Registered cereal imports between July and December 2000 have amounted to 104 000 tonnes, but substantial volumes enter informally. Against the estimated food aid requirement of 311 000 tonnes, confirmed pledges to date amount to 76 000 tonnes.

Emergency food aid is required for an estimated 696 000 worst affected drought victims and WFP has appealed for almost 66 000 tonnes for a period of 8 months (November to June), until the next main harvest.

INDIA (5 February)

The worst earthquake in fifty years measuring almost 8 on the Richter scale, ravaged the western state of Gujarat with an epicentre near the town of Bhuj. In addition to the economic cost of the devastation, current estimates indicate that the death toll could run in to tens of thousands. In view of the magnitude of the problem, many countries have offered various forms of humanitarian assistance, including urgent food, water and medical supplies.

The earthquake exacerbated existing food and water problems in the state which has been seriously affected by the second drought in succession, following a poor monsoon last year. Ground water tables had already fallen appreciably, whilst many people had started to migrate. Consequently even

before the earthquake, the Government had already made provisions for providing some 670 000 tonnes of food grains for relief operations in eight drought affected states, which included Gujarat, Himachal Pradesh, Maharashtra, Madhya Pradesh, Orissa, Rajasthan and Uttaranchal. Of these, Gujarat, Rajasthan. The country has had to endure a succession of natural disasters last year and this including earlier drought and severe flooding in a number of states, during the last monsoon season, which left many dead and thousands homeless.

Late winter rains and a cold spell in January, favoured winter wheat an improved prospects somewhat, following an earlier dry spell, which reduced the area under the wheat crop for the 2000/01 and season principally in states where the crop is rain fed, including Madhya Pradesh, Rajasthan and parts of Uttar Pradesh. Current forecasts suggest that there may be an extended winter this year, which could improve prospects. In 2000 the country produced a record wheat crop of around 76 million tonnes. The overall food grain production target for the 2000/01 marketing year is 212 million tonnes, compared to 209 million tonnes for 1999/2000.

Government wheat stocks at the beginning of December last year stood at a high 26.0 million tonnes, compared to 18.5 million tonnes in the previous year. In view of large wheat inventories, the Government had authorised exports of 2 million tonnes, though to off take has been generally slow. The Government has also authorised the export of 2 million tonnes of rice to reduce stocks. Rice stocks at the beginning of December last year stood at 19.5 million tonnes, compared to some 13.3 million tonnes the year before.

INDONESIA* (5 February)

Seasonal rain during the last dekad of January provided moisture for main season rice in the main producing province of Java. The crop is planted in the period November to January for harvest from April. At the end of January a mild earthquake, measuring 5.7 on the Richter, hit Irian Jaya though reports have been received of casualties or damage.

Paddy production for the 2000 calendar was around 51 million tonnes, some 2 percent above last year and some 4 percent above the five year average . Higher production is attributed to a long wet season and only minor incidences of pests and disease. The area harvested remained around an average 11.5 million hectares. Due to higher domestic production, the estimate for imports in 2000 may be revised down somewhat. Since late 1998 the Government has allowed private imports of rice.

The humanitarian and food security situation is precarious in central Kalimantan, following an eruption of civil unrest and violence, which has already claimed several hundred lives and displaced thousands of people.

The overall food situation in the country continues to stabilise, following the economic crisis in 1997/98, which was also compounded by a poor agricultural year due to El Niño. However, reports indicate that 11 of the 14 districts in the province of East Nusa Tenggara are suffering food shortages due to drought and crop failure.

IRAN, ISLAMIC REPUBLIC OF (5 February)

In the last dekad of January light rain was received in western parts of the country becoming generally heavier around the Caspian Coast. The country's main staple wheat is normally planted in September/October and harvested in April/May. Rain fed barley which is essential for livestock feed is also planted from September onward for harvest in March.

In 2000 the affect of two successive years of drought seriously affected agriculture and livestock production. The drought was the worst since 1964 and affected an estimated 37 million people or over 50 percent of the population. Consequently 2000 wheat production is estimated to have fallen to around 8 million tonnes, some 700 000 tonnes lower than the already drought reduced crop in 1999 and almost 2 million tonnes below the five year average.

IRAQ* (14 February)

Prospects for the 2001 cereal harvest in May/June remain uncertain. Production is also likely to be constrained by the lingering effects of two consecutive years of severe drought and inadequate availability of essential agricultural inputs. An FAO/WFP/WHO Food Supply and Nutrition Assessment Mission in May 2000 found that in the most affected centre/south areas, not only were the plantings reduced, but also some 75 percent of the cropped area under wheat and barley was heavily damaged and mostly used as grazing for livestock. Cereal yields were reduced to all time low levels. As a result, total cereal production in 2000, estimated at some 796 000 tonnes, is about 47 percent below 1999 and 64 percent below the average of the past 5 years.

Cereal imports under the SCR 986 oil-for-food deal have led to significant improvements in the food supply situation. However, long delays in the flow of food imports continue to be reported. Also, despite significant increases in the food ration since SCR 986, child malnutrition rates in the centre/south of the country do not appear to have improved significantly and nutritional problems remain serious and widespread. The existing food rations do not provide a nutritionally adequate and varied diet which is lacking in vegetables, fruit, and animal products and is therefore deficient in micronutrients.

ISRAEL (14 February)

Recent rains improved prospects for the 2001 wheat and barley crops, to be harvested from April. Domestic production of wheat in normal years covers less than one-fifth of total requirement, the rest being imported commercially. Wheat production in 2000 was estimated at 50 000 tonnes, about 58 percent below average, due to the severe drought that affected several countries in the Near East. Imports of cereals in 2000/01 (July/June) are forecast at some 2.9 million tonnes.

JAPAN (1 February)

The only crop currently is winter wheat in parts. Since 1995, as part of the country rice area adjustment programme, area has declined by some 16 percent. As a consequence domestic (milled) rice production has declined from some 11 million tonnes in 1994 to an average of around 9 million tonnes in the last five years.

In view of falling agricultural prices, and the disincentive this is providing farmers, a price policy review and plan is likely to be undertaken. An official panel has proposed aid to about 400 000 farmers, including agricultural corporations to offset the effect of falling farm revenues.

JORDAN (14 February)

The prospects for the 2001 wheat and barley crops, for harvest in May/June, remain uncertain due to the lingering effects of two consecutive years of severe drought and erratic rainfall during the current season. In 2000, aggregate output of wheat and barley, estimated at 42 000 tonnes, was more than double the previous year's output, but still about 54 percent below average. The livestock sector was also seriously affected, particularly small scale sheep herders.

However, despite the serious impact of the drought on rainfed crops and livestock, vegetable production from the irrigated Jordan Valley has increased substantially. As a result, vegetable prices plummeted affecting farmers incomes. Lack of adequate processing facilities and export markets are major constraints.

An FAO Mission which visited the country in September 2000 identified priority needs for assistance to mitigate the impact of drought on agricultural production. Accordingly, an appeal for US\$ 13.5 million was launched, on 21 December 2000, to provide seeds and other inputs for

the 2001 cropping season, to assist in the distribution of animal feed and health services, and to support in forest and range land reserves.

KAZAKHSTAN (12 February)

The bulk of cereals are sown in the spring. The planting target is 11.7 million hectares to be sown to cereals and output is targeted at 11.6 million tonnes.

The preliminary official estimate of the 2000 harvest is 11.6 million tonnes of cereals and pulses, including 9.1 million tonnes of wheat. This is less than the previous years bumper harvest of 14 million tonnes but will still allow the country to cover domestic requirements and export between 4-5 million tonnes of cereals.

The country exported nearly 7 million tonnes of cereals in 1999/2000 including 6 million tonnes of wheat, mainly to other CIS countries.

KOREA, DEMOCRATIC PEOPLE'S REPUBLIC OF* (8 February)

There are renewed concerns regarding the food supply situation in the county following the widespread effects of the coldest winter in decades. In mid-January temperatures are reported to have fallen to the lowest levels recorded in 50 years. In the northern province of Chagang the temperature fell to minus 37 degrees Celsius and in Pyongyang, the capital, minus 27. The situation is becoming increasingly precarious for large segments of the population who have already been weakened by years of food shortages, limited access to utilities, basic health services, and lack of electricity and fuel wood for heating.

Reports also indicate that due to the poor harvest in 2000, food provision through the public distribution system (PDS) may cease by the end of January in parts of the country. From February to late June, when potatoes and some of the double crop is harvested, the only source of food will be food aid, and alternative foods. In parts WFP food monitors report that food distributions via the PDS are at around 200 grams of cereals per person per day, which translates into some 720 k/cal. The minimum requirement for an adult to survive is 2 200 k/cal per day.

Last November an FAO/WFP Crop and Food Supply Assessment Mission, assessed domestic grain availability, in cereal equivalent, for the 2000/01 marketing year at 2.92 million tonnes compared to grain demand for food and other utilisation needs of 4.79 million tonnes. The import requirement, therefore, was estimated at 1.87 million tonnes, of which commercial imports were anticipated to cover 200 000 tonnes, whilst a further 600 000 tonnes of the import requirement was envisaged through pledged food assistance through WFP and 500 000 more through bilateral concessional imports. Taking these into account, the uncovered import requirement is estimated at 665 000 tonnes, with which the country still needed assistance to meet minimum food needs. To-date pledges stand at 651 000 tonnes, of which 140 000 tonnes have been delivered.

KOREA, REPUBLIC OF (5 February)

Prospects of economic recovery and growth, in the aftermath of the financial crisis in Asia, continue to improve signalling stronger demand for grains for food and feed. Wheat and maize are almost entirely imported, whilst the country on average produces around 5 million tonnes of rice (milled) per annum, during the main season which extends from around May to October. In general, the number of productive farms and rice acreage is declining in the country as more land is made available to infrastructure and urban development. Any future expansion will come mainly from marginal and reclaimed land, including land subject to flooding.

KYRGYZ REPUBLIC (12 February)

Much of the country is now covered by snow, but crop development in the SyrDarya valley is satisfactory. A cold winter and heavy snows are helping to recharge irrigation water supplies. The 2000 grain harvest is now officially estimated at 1.57 million tonnes including 1.04 million tonnes of wheat. This is somewhat less than the previous year's harvest (1.63 million tonnes) reflecting crop losses due to dry weather and early snows. The 2000 harvest also fell short of the target of 1.704 million tonnes of grain.

The overall food supply situation remains satisfactory and indeed the country exports cereals to neighbouring Tajikistan and Afghanistan. However, a significant proportion of the population is poor, and access to adequate food is a problem for the poorest with high food prices in the hard winter months. The country also imports wheat in part due to the demand for quality wheat, to supplement the State Security Reserve (via food aid deliveries), and to poor internal communications.

LAOS* (5 February)

As part of a wider phenomenon, which affected neighbouring countries in the region, extensive floods damaged large areas of the country. Overall, seven central and southern provinces were flooded during the monsoon season resulting in serious damage to crops and, to a lesser extent, livestock and fisheries. Rice crops in some areas remained submerged for up to three weeks. The worst affected provinces were Khammouane, Savannakhet, Saravane and Champasack. The Ministry of Agriculture and Forestry described the floods as the worst to have hit the country since 1978. Some 450 000 people were affected, many of whom were made homeless. The floods are likely to lead to slower growth in agriculture and will have a severe impact on the food security of the most vulnerable and at risk population as rice prices are anticipated to rise and incomes and access to food fall. Rice is the country's principal crop accounting for 85 percent of total cropped area. Other crops grown include maize (second largest in acreage), sugarcane and groundnut. Most of the rice is produced in the wet season (June to November), largely under rain fed conditions and in the central and southern provinces along the Mekong River Valley, where annual rainfall ranges from 1500 mm to 2200 mm, 70 percent of which is received between May and October. Farmers do not generally apply any fertilizers to rice under rain fed conditions during the wet season. Serious floods in 1995 and 1996 resulted in substantial rice deficits, resulting in the country requiring external food assistance for vulnerable groups.

An FAO/WFP Crop and Food Supply Assessment Mission is currently assessing the food supply situation and the need for any food assistance. In addition, FAO will provide urgent rice and vegetable seeds to some 8 000 rural families affected by last year's floods.

LEBANON (14 February)

Prospects for the 2001 winter harvest in June/July are favourable so far. However, domestic cereal production usually covers only about 10 percent of consumption requirements. Aggregate production of wheat and barley in 2000 is estimated at 62 000 tonnes, similar to the previous year.

Imports of wheat in 2000/01 (July/June) are forecast at some 0.51 million tonnes, similar to last year.

MALAYSIA (5 February)

The country normally produces around 2 million tonnes of paddy annually, of which 60 percent is from the main and 40 percent from the off season crop. Normally a third of domestic consumption requirements of rice are imported into the country, whilst wheat and maize are almost entirely imported. To enhance production, the Government recently announced various strategies to enable sustainable food production to reduce dependency on imports. These include improving efficiency and productivity, introducing food production zones, strengthening marketing systems and food processing industries, developing infrastructure and human resources. The priority areas will be on rice, fruit, vegetables, fisheries and poultry farming.

MONGOLIA* (5 February)

Following the worst winter in decades last year, which seriously undermined the food security of large numbers of people especially nomadic herders, this year again the country faces a devastating winter which will greatly exacerbate food supply problems. Thick snow has blanketed pastures on which herds usually feed in winter and temperatures have fallen to as low as minus 50 Celsius. Already the conditions have killed eight herders and about 500 000 animals, on which a third of the population rely entirely for their livelihood and income. Due to the conditions, there are also considerable problems in transporting food and medical supplies to areas where the population is particularly vulnerable to food shortages. The cold winter also comes on top of a summer drought which reduced the fodder crop for animals. The conditions are expected to deteriorate further as the winter progresses. An urgent UN appeal was made in January for international assistance to the country.

The impact of another cold winter and reduced fodder supplies on livestock will be of immense importance. The sector plays an extremely important part in the economy providing the main source of household income and contributing a major source of foreign exchange. The heavy loss of livestock and the consequent reduction in meat supplies, have also meant that there has been a large increase (up to 40 percent) in livestock prices. This in turn has had a knock-on effect on inflation and the cost of living further exacerbating the food security of the poor and vulnerable groups. In addition to meat there is also serious shortage of milk, especially in rural areas, further restricting an important source of protein and nutrients in the diet. It has also been very difficult for nomadic herd families to find alternative sources of income, as most are poorly educated and trained for alternative employment. Nonetheless many have migrated to towns and urban centres compounding existing problems of unemployment and vulnerability to food shortages.

Current food shortages, follow several years in which nutritional standards in the country have been falling due to significant changes in economic circumstance of large sectors of the population as the economy has been reoriented from one which was centrally planned to one which is market driven. This in particular has left many groups who were formally dependent on state employment and welfare exposed to economic uncertainties due to limited alternative earning potential. Various reports in the mid 1990s indicated that those most affected by poverty and food insecurity, included the unemployed, the elderly, female headed households, children, pensioners and small herders. Recent studies by NGOs report high levels of chronic malnutrition persist in a number of nomadic areas, with many families living in extreme poverty with almost no resources.

A UN interagency Mission, including FAO, visited Mongolia in January to appraise the situation and has launched an appeal for emergency relief. The focus of the UN appeal would be on vulnerable populations in the most severely affected provinces and on building the disaster management and co-ordination capacity of the State Emergency Commission (SEC) and other relevant national partners to enhance preparedness and future response. The appeal covers a period of four months, from 1 February to 31 May 2001 and is for US\$7 million in cash and US\$4.7 million in kind to assist beneficiaries in 73 affected counties. The

appeal will focus assistance on the following sectors: livestock (US\$4 million in cash and US\$4.7 million kind, health, water and sanitation US\$2.3 million and nutrition US\$608 000.

MYANMAR (5 February)

Harvesting of the main (monsoon) rice crop is complete. Main season rice normally accounts for around 85 percent of aggregate production the remaining 15 percent coming from the second, or dry season crop, which is planted in October/November for harvest the following April/May. Current forecast is that paddy production in the 2000/01 marketing year will be similar to the 19.8 million tonnes produced in 1999.

NEPAL (5 February)

Main season rice harvesting is complete, with current estimates indicating paddy production around an average 3.7 million tonnes.

Reports indicate that the government may assist farmers affected by falling agricultural prices, by introducing fixed support prices. Last year, the price of paddy fell sharply compared, due to imports from India. The cost of production has also risen as various subsidies have been removed on inputs, like fertilizers and irrigation

PAKISTAN (5 February)

The main crop currently in the ground is winter wheat which is planted in October/November for harvest in April/May. Crop prospects improved somewhat recently due to late season rain in December and lower temperatures in January, following concerns that production would fall in 2001 due to high temperatures and dry conditions earlier. The country produced a record wheat crop of some 21 million tonnes last year and before the recent improvement in weather conditions forecasts indicated that there would be a 9 percent reduction in output.

In Baluchistan in the North West and Sind in the south, concerns are again mounting of food and water shortages due to successive drought which resulted in the loss of harvest and drop in ground water sources. The provinces were also seriously affected last year due to drought. Reports indicate that the situation for vulnerable groups is becoming critical.

PHILIPPINES (5 February)

Heavy rainfall in the latter part of January in eastern parts increased moisture levels and resulted in localised flooding in parts. The Institute of Vulcanology and Seismology warned recently of possible eruptions by Mayon volcano, from which ash was recently seen. The 8 000 foot volcano is in Albay province, 330 km south east of the capital Manila.

Harvesting of main season rice is complete, while planting of second season rice and maize, for harvest from around February/March should be well advanced.

Paddy production for the 2000 calendar year was put at a record 12.2 million tonnes, up 2 percent from the previous year's harvest, whilst maize output was 4.5 million tonnes, some 2 percent lower than 1999. The increased availability of water in traditional maize producing areas led farmers to switch from maize to rice, which accounted for the reduction in maize production.

SAUDI ARABIA (14 February)

Following recent good rainfall, prospects improved for the 2001 wheat crop, to be harvested in April/May. Production of wheat in 2000 is estimated at 1.5 million tonnes, similar to the previous year but about 9 percent below the previous five year average.

Import of cereals in 2000/01 (July/June) is currently forecast at about 7 million tonnes, slightly higher than last year.

SRI LANKA (5 February)

The main crop in the ground is currently the main Maha rice crop, which is planted in October to December for harvest from March. The crop is grown during the country's main rainy season; the north east monsoon. The main crop accounts for two thirds of annual production the rest coming from the dry season (Yala) crop. Paddy production has averaged around 2.5 million tonnes in the last five years from 1995 to 1999. In addition to rice, the country's main staple, some 850 - 900 000 tonnes of wheat are imported annually to meet demand for bread and other wheat based products.

SYRIA (14 February)

Prospects for winter grain crops, to be harvested from mid-May, are favourable due to good rains so far. Crop and livestock production in 2000 has recovered from the drought reduced harvest in 1999. The 2000 wheat production, estimated at 3.6 million tonnes, is about 31 percent above the previous year's crop and about average. Barley production, which is almost entirely rainfed, is estimated at 800 000 tonnes, double the 1999 crop, but still about 28 percent below the previous five-year average.

TAJIKISTAN* (12 February)

Cold weather and snowfall are needed to help to replenish irrigation water supplies for the coming spring/summer but the weather in January has been unusually mild. In addition, the outlook for the 2001 cereal harvest remains clouded by shortages of seed after last year's drought-reduced crop, the poor state of the irrigation/water management system and inadequate drainage which is causing salination. A severe drought has reduced the 2000 cereal harvest to 236 000 tonnes, down by 47 percent compared to 1999. Output of all other crops, including potatoes, vegetables and cotton have also been affected.

The severe drought last year has rendered almost half of the 6.2 million people in the country vulnerable to food shortages and donor response to the appeals for food aid have been slow. The cereal import requirement in the 2000/01 marketing year (July/June) is estimated at 791 000 tonnes. After taking into account a projected commercial import of some 400 000 tonnes and pledged food aid of 104 000 tonnes, the uncovered food aid requirements remains at 285 000 tonnes. A shortfall of this magnitude for this impoverished country, if not addressed by the international community, could have disastrous implications for the population. Many households are already in dire conditions and the situation will worsen for increasing numbers in the lean season (late winter - spring) when they exhaust whatever food stocks they have, as well as other means of coping. An estimated 3 million people fall in this category, with about 2 million facing a desperate situation. The evolving critical food supply, production and access situations need to be monitored carefully with a view to making adjustments to the ongoing assistance programmes and/or designing appropriate new ones.

WFP has launched an appeal for 126 000 tonnes of food aid worth \$62 million to implement an emergency operation to assist over one million people threatened by famine over the next nine months. Without assistance, about 1.2 million people will face a desperate situation with virtually no employment opportunities or other sources of income to purchase food from the market.

THAILAND (5 February)

Widespread rain during the last dekad of January increased soil moisture reserves. Harvesting of the main wet season rice crop should be complete while planting of the second dry season crop should be underway in parts. The latest forecasts from the Ministry of Agriculture indicate that the paddy production from the main 2000/01 crop would be around 19.04 million tonnes, whilst the current second crop, harvested in May/June next year, is expected to be yield around 4.95 million tonnes. Total production therefore will be around 24 million tonnes, or 16 million tonnes in rice equivalent.

Rice exports reached 6.6 million tonnes last year, down 100 000 tonnes from the previous year.

TURKEY (14 February)

Prospects for the 2001 winter crop are favourable so far reflecting good rains in the agriculturally important areas. The 2000 wheat production is estimated at 19 million tonnes, about 5 percent above the previous year's reduced crop but about average.

The government has significantly reduced its grain support prices in June 2000 with the objective of reducing inflationary pressures and lowering government outlays. For instance, support prices for Anatolian Hard Red Wheat, which is most commonly produced, has been reduced by about 14 percent to 166 US\$/tonne compared to 1999.

Turkey's state grain board (TMO) purchase from farmers in 2000 is estimated at about 4.5 million tonnes of cereals.

TURKMENISTAN (12 February)

Official reports indicate that the 2000 winter grain harvest reached 1.7 million tonnes, above target (1.645 million tonnes) and some 280 000 tonnes more than in 1999. The increase is mainly in response to private responsibility for production under leasehold and has been achieved despite shortages of irrigation water in some production areas and in most neighbouring countries. The bulk of cereals are sown in the winter and escaped damage as a result of hot weather and shortages of irrigation water. The outcome of the irrigated rice production is still uncertain, but is likely to be well short of target as was the 2000 cotton harvest, which fell by 20 percent to 1.03 million tonnes.

An earthquake damaged western parts of the country (Nebit Dag) and surrounding areas in December, causing loss of life and damages to housing and food stocks, not so much in the regional capital but in nearby villages.

UZBEKISTAN (12 February)

At this early stage of the season, crop development is less than at the corresponding time last year. However, this could be due to colder weather and/or later plantings. Overall the early outlook for winter grains is satisfactory. Early reports indicate that the area sown to winter cereals has increased slightly, despite late and reduced planting in the northern areas affected by severe water shortage in the summer and autumn of 2000. The final outcome will depend crucially on good snowfall in the glacier mountains in the neighbouring countries feeding the two major rivers on which the country depends for irrigation water supplies.

The 2000 grain harvest is officially estimated at 3.916 million tonnes, below target (5.8 million tonnes) and some 10 percent below the previous year. Output was reduced as a result of a below normal winter precipitation, a shortage of irrigation water following a mild winter and poor management of water resources, with catastrophic impacts on agriculture in the down river regions of the AmuDarya, the Autonomous Region of Karakalpakstan and Khorizem, but particularly the former. Output of cotton, a major export crop with which imports of wheat

and machinery are financed, has fallen to 3 million tonnes compared to 3.6 million tonnes last year. The rice harvest (irrigated) is also sharply down to 155 000 tonnes from 421 000 tonnes in 1999.

Imports of foodstuffs have declined in recent years in part due to a sharp increase in cereal production (notably wheat), and in part, because imports have been kept low to maximize funds available for the creation of import substituting industries. Nevertheless, the import requirement for wheat in 2000/01 is estimated at over 800 000 tonnes. The bulk of cereal imports will be mobilized commercially but the government has requested (and received) 38 200 tonnes of durum wheat for pasta production.

Larger volumes of cereals than normal will have to be transferred to drought affected populations. Budget constraints may reduce the capacity of the government to make adequate provision for the affected populations but the central government has not requested any additional emergency assistance. A rapid nutrition assessment in November-December in Karakalpakstan showed low levels of acute malnutrition (2.6 percent of children under 5 with MUAC<13.5cm), but quite a bit of chronic malnutrition compared to the NCHS/CDC reference (15.4 percent).

VIET NAM (5 February)

Seasonably dry weather favoured land preparation and planting of winter/spring rice through most of January. In the north the crop is planted in January to March for harvest in June/July, whilst in the south planting and harvesting are around a month earlier. In view of weaker prices, the Ministry of Agriculture and Rural Development reports that cropped area in the north declined sharply. The area under maize is reported to have been some 29 percent down on the previous year, whilst the area under sweet potato and soya beans decreased by 27 percent to 91 000 hectares and 19 000 hectares respectively. In some areas farmers are substituting these crops for sunflower and wheat.

Due to a slow down in rice trade in the world market, rice export revenues were lower in 2000 than anticipated. Compared to a revised target of 3.8 million tonnes some 3.7 million tonnes were exported.

YEMEN (14 February)

The output of the 2000 recently harvested sorghum crop is estimated at 380 000 tonnes, some 8 percent lower than the average for the previous five years, due to reduced yields.

The Desert Locust situation remains calm but with recent winter rains along the Red Sea coastal plains, conditions are likely to be favourable for breeding.

Imports of cereals in 2000, mainly wheat, are estimated at some 2.6 million tonnes.

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

COSTA RICA (1 February)

Harvesting of the 2000/01 second season cereal crop has been completed. Output of maize (white) is expected to be lower than last year's as a result of the lower area planted. Paddy production in the year 2000 (January/December) was a record 329 000 tonnes. For the 2001 agricultural campaign early forecasts indicate that the planting intentions may be slightly reduced.

Wheat imports in the current marketing year 2000/01 (July/June) will probably increase, in line with the observed expansion in domestic demand of recent years. Maize imports, mostly yellow, also expected to increased in the marketing year 2000/01 (July/June) relative to the previous period as a consequence of an increase in the demand for animal feed.

CUBA (1 February)

Abundant rains during December helped to partially replenish water reservoirs which were low from last year's dry spell. These reservoirs are important in view of the forthcoming first season crop due to start in March. However, the high humidity caused by the intensive rains affected the quality of paddy crops, and did not favour the concentration of nutrients in sugar cane. The sugar cane crop currently being harvested had earlier been affected by drought, and its output is likely to decrease compared to last year's 4.1 million tonnes. The rains receded in January, which helped to improve the quality of paddy and sugar cane crops.

Wheat imports in marketing year 2000/01 are forecast to remain at about the previous year's 900 000 tonnes. Yellow maize imports in the current marketing year (July/June) are also expected to be close to those of the previous year, which amounted to about 260 000 tonnes.

DOMINICAN REPUBLIC (1 February)

Agricultural activities are progressing normally thanks to the favourable weather conditions that prevail in the main producing zones of the country. Land is being prepared for planting the forthcoming 2001 first season coarse grain crops in March, while planting of this year's paddy crop is underway. Weather conditions have also benefited the development of other minor food crops.

Wheat imports in marketing year 2000/01 (July/June) are expected to increase from last year's 277 000 tonnes to some 300 000 tonnes. Imports of maize are also expected to increase so as to satisfy the increasing demand for feed. Rice imports in marketing year 2001 (January – December) are expected to be about 70 000 tonnes.

EL SALVADOR (20 February)

The country has been hit by a series of earthquakes since January. On 13 January 2001 a severe earthquake killed over 800 people and totally or partially destroyed more than 140 000 homes, particularly in the vicinity of the capital city. Emergency food aid and other types of relief assistance are being provided by the international community to the affected families in urban and peri-urban areas. Official reports indicate that the worst hit agricultural sector was the important export-oriented coffee industry. Damage to cereal crops was minimum, as the event occurred at a time when the harvesting of the second season crop had already been completed. A second earthquake in mid-February killed over 270 people. As the first and second season maize crops had earlier been affected by adverse weather conditions, so total production for the 2000 campaign is expected to decline from the previous year's 650 000 tonnes to about 570 000 tonnes. Rice and beans outputs are expected to be average compared to the previous years. A major concern for the government is the 2000/01 first

season crop, due to be sown from April-May. It is feared that the total area cultivated may be reduced following the disruptions caused by the earthquake on infrastructure, labour and agricultural imports in general.

Wheat imports in marketing year 2000/01 (July/June) are expected to be 180 000 tonnes while maize imports should be between 260 000 and 280 000 tonnes. Rice imports in marketing year 2001 (January/December) are expected to remain at last year's 20 000 tonnes.

GUATEMALA (2 February)

Harvesting of the 2000/01 second season cereal crop is completed. Maize output is anticipated to decline slightly from last year's 1.1 million tonnes, mainly due to the damage caused by Hurricane "Keith" in October to second season crops, principally in the southern coast of the country. Paddy output in year 2000 was about 35 000 tonnes.

It is expected that wheat imports in marketing year 2000/01 (July/June) will slightly increase to some 400 000 tonnes (last year's total was 380 000 tonnes). Maize imports in the same period are also likely to increase to compensate for the damage caused by Hurricane "Keith". Rice imports in the marketing year 2000 (January/December) were some 35 000 tonnes. A similar amount is early forecast for marketing year 2001.

HAITI* (20 February)

Harvesting of the 2000/01 second season coarse grain crops is completed. A below-average 150 000 tonnes of maize and 65 000 tonnes of sorghum are provisionally estimated. The aggregate coarse grains production is thought to be about 20 percent lower than last year because of the dry spell that affected the early stages of growth of the first season crops. Planting of the irrigated 2001 first season paddy crop has just started. Food assistance continues to be provided by the international community.

Commercial maize imports in the marketing year 2000/01 (July/June) are forecast to increase to about 90 000 tonnes compared to last year's 66 000 tonnes. Rice imports for the marketing year 2000 (January/December) are provisionally forecast to remain close to the previous year's 170 000 tonnes. Food aid pledges amount to 72 000 tonnes, of which 20 000 have been delivered.

HONDURAS (2 February)

Harvesting of the 2000/01 second season coarse grain and bean crops is well advanced. The first season maize crop was adversely affected in early 2000 by a dry spell (*canícula*), whereas heavy rains and flooding caused by the passage of Hurricane "Keith" hampered the cultivation of the second season coarse grain crops. As a result, the aggregate coarse grain output (first and second season crops) is forecast to decrease from last year's weather affected crop. Maize production could be about 500 000 tonnes or even lower. Sorghum production is also expected to decline.

Wheat imports during marketing year 2000/01 (July/June) are estimated to increase to about 210 000 tonnes. Maize imports are also likely to increase to compensate for the decrease in production, to some 280 000 tonnes from 250 000 of the previous marketing year. Rice imports in marketing year 2000 (January/December) increased to 97 000 tonnes from some 82 000 tonnes in 1999.

MEXICO (2 February)

Wheat crops are developing normally, and a slight increase could be expected due partly to an expansion in the area cultivated and partly to the cool February weather conditions that are favouring the heading. The dry weather is also favouring land preparation for the forthcoming first

season coarse grain to be planted in April/May. Planting intentions of sorghum are expected to remain at last year's 1.15 million hectares.

Wheat imports for marketing year 2000/01 (July/June) are expected to increase slightly to some 2.7 million tonnes. Sorghum imports are forecast to increase in the same period by approximately 200 000 tonnes due of a strong demand from the feed industry. Rice imports in marketing year 2000 (January/December) were expected to decrease slightly.

NICARAGUA (2 February)

A prolonged summer dry spell (*canícula*) and heavy rains and flooding in October are affecting the 2000/01 coarse grains crops. While the overall sorghum and bean losses may not appear significant, these occurred in areas that had, in recent years, been hit by natural disasters (El Niño and Hurricane "Mitch"). However, harvesting of the 2000/01 third season "apante" maize and bean crops is progressing under normal weather conditions. Paddy crops were also affected by *canícula*, and year 2000 production is likely to decrease from last year's record level but would still remain above average.

Wheat imports for marketing year 2000/01 (July/June) are estimated at some 100 000 tonnes, similar to the previous year. Maize imports are expected to increase slightly, some 10 000 tonnes, mainly to compensate for the drought induced losses in production. Rice imports for marketing year 2000 (January/December) are estimated at 95 000 tonnes.

SOUTH AMERICA

ARGENTINA (20 February)

An estimated 6.3 to 6.4 million hectares of wheat were harvested in the 2000 campaign. Total output is estimated to be between 15.5 and 16.5 million tonnes, a volume higher than originally estimated despite the heavy January rains during harvest in the important producing province of Buenos Aires. The area planted with maize in 2000/01 is some 3.1 million hectares (according to official estimates of mid January). So far the rains have helped the development of maize. The harvest is due from March and the crop looks in good conditions. About 787 000 hectares of sorghum are also being planted, and early forecasts indicate an output of 3.5 million tonnes. The area planted with paddy is thought to be slightly lower than last year (175 000 hectares compared to 195 000 hectares in year 2000), and the early forecast stands at 846 000 tonnes.

BOLIVIA (20 February)

The government declared the state of emergency in the departments of La Paz, Cochabamba, Oruro and Beni after rains above the historic average during the rainy season caused localised floods and mud slides of various intensities. Food aid is being distributed to the affected population by the international community. No detailed assessment of the damages caused by the rains on the crops is yet available. Drought has also been reported in some areas, and the international community is also providing them with food assistance. Enlarged plantings were earlier reported for most cereals and the forecasts pointed to an increase in production. Maize production is provisionally estimated at some 700 000 tonnes in year 2000, and sorghum at about 135 000 tonnes. An estimated 135 000 hectares of paddy have been planted to be collected in April/May, and early forecast indicate an output of about 324 000 tonnes for year 2001.

BRAZIL (2 February)

Land is being prepared for wheat planting in April/May. Maize planting was delayed in east-central Brazil because of reduced soil moisture, but latest reports indicate that the total area cultivated increased by 10 per cent relative to last year's. The first season maize crop, which accounts for up to 90 percent of total maize production, is benefiting from good weather conditions in the largest

producing state of Paraná and elsewhere in central-south Brazil. No estimates are yet available for the area to be planted in the second season maize crop. The area currently planted with paddy is estimated at 3.55 million hectares, which is somewhat smaller than last year because of credit constraints and low international prices for rice and total production is currently forecast to remain at last year's level of some 11.4 million tonnes.

CHILE (2 February)

Harvesting of the 2000/01 wheat crop is on the way and, weather permitting, total production is expected to be about 1.5 million tonnes. The area cultivated with maize in the current campaign is slightly higher than last year's, and the crop is developing under normal weather conditions. Early forecasts indicate that production is likely to reach 700 000 tonnes (autumn 2000 plantings).

Wheat imports in marketing year 2000/01 (July/June) are likely to decline slightly and are expected to be some 550 000 tonnes. Maize imports are forecast to increase slightly.

COLOMBIA (2 February)

Normal weather conditions are allowing both the harvest of the second season maize crop of year 2000, and land preparation for the forthcoming 2001 April/May first season maize crop. Water availability in the country's northern Caribbean coastal areas is also helping the sowing of the 2001 February season paddy crops.

Wheat imports for marketing year 2000/01 (July/June) are estimated to be similar to last year's 1.15 million tonnes, and maize imports (mostly for feed) is also expected to be some 1.65 million tonnes.

ECUADOR (2 February)

Planting of the yellow (winter) maize crop will continue until April, but above-average rains in central and southern coastal areas have delayed some of the farming activities. Maize production for year 2000 is estimated to recover to about 570 000 tonnes. Planting of winter paddy crops (rain fed) is progressing, and water availability gives good prospects for year 2001.

Wheat imports for marketing year 2000/01 (July/June) stand at last year's level of 490 000 tonnes. Maize imports are forecast to decrease from last year's 170 000 to some 110 000 tonnes.

PERU (2 February)

Water reservoirs in the north and south coast are considered adequate for the requirements of the main cereal crops. Most of the 2001 wheat crop has been sown, and a reduction in the number of hectares planted has been observed compared to the previous campaign. Reduced plantings of white maize are also being noted, and the total area cultivated for the 2001 agricultural campaign is expected to be about 15 percent smaller than last year's. The area planted with yellow maize continues to increase, and early forecasts indicate that it could be even higher than 10 percent (last year, Peru planted some 268 000 hectares). Paddy planting is progressing, and the area is expected to be similar to last year's level.

Wheat imports in marketing year 2000/01 (July/June) are expected to be 1.2 million tonnes. Maize imports 2000/01 (July/June) are expected to decrease to some 900 000 tonnes.

URUGUAY (2 February)

Prolonged rains during the cultivation of the 2000 wheat campaign affected planting and did not allow a complete recovery from last year's drought affected crop. Wheat production was estimated to be some 400 000 tonnes. Wheat planting intentions in the year 2001 are estimated to decrease to about 150 000 hectares compared to last year's 196 000. The summer rains are favouring the normal growth of coarse grain crops, and outputs are expected to recover to 1999 levels. Normal

weather conditions are also favouring paddy crops, and total output is estimated to be similar to last year's some 1.1 million tonnes.

VENEZUELA (2 February)

Weather is back to normal after heavy rains during November forced the government to temporarily declare the state of emergency in states north and west of Caracas. The conditions are currently adequate for the preparation of soils for planting the 2000/02 cereal crops. The area planted with maize is expected to be similar to last year's level of some 373 000 hectares, but below the five year average (400 000 hectares). Paddy production is expected to remain at last year's level of 750 000 tonnes.

Cereal imports are expected to remain similar to last year's, with about 1.28 million tonnes of wheat and 1.3 million tonnes of yellow maize.

EUROPE

EC (13 February)

In the EC, the 2000 autumn conditions were generally unfavourable for winter grain planting and the area sown overall for the 2001 harvest is expected to have declined. The bulk of the decline is expected in wheat as, in addition to weather problems, a switch of land to feed cereals and oilseed crops is expected this year in anticipation of increased demand from the feed industry following the ban on the use of meat and bone meal. Significant reductions in winter wheat area are reported in France and the United Kingdom, which are likely to more than offset increases reported in some other countries, namely Austria, Germany and Sweden. One positive feature of the autumn period in 2000 was above-normal temperatures, which favoured good establishment of crops so yield prospects at this stage could be somewhat above average.

BELARUS (13 February)

Growing conditions for the 2000/01 winter cereal crop have been satisfactory to date. The 2000 cereal and grain harvest is officially reported at 4.7 million tonnes, a good recovery from the poor 3.6 million tonne harvest in 1999 but still below average.

In 2000/01, the country will need to import cereals for human consumption and has already contracted some 350 000 tonnes from Kazakhstan.

BOSNIA-HERZEGOVINA* (13 February)

The early outlook for winter grains is satisfactory. However, the downward trend in winter grain plantings is likely to persist, reflecting poor profitability of wheat. To meet consumption demand, wheat imports have increased steadily and in the 2000/01 marketing year are projected to increase beyond the 290 000 tonnes imported in 1999/2000.

BULGARIA (13 February)

In Bulgaria, the winter wheat area is officially estimated at some 1.2 million hectares, up about 10 percent from 1999. The barley area is also estimated up at about 230 000 hectares. Prospects for the crops improved in mid-January with the arrival of snow, which will provide much needed moisture for crop development this spring. Latest reports as of late January indicate the crop is generally in good condition and almost certainly better than last year's at the same time.

CROATIA (13 February)

The early outlook is uncertain. The 2000 drought persisted into the autumn delaying winter cereal plantings, which are planned to be less than last year. Precipitation has improved since December

but the intensity of crop development is less than last year, when the wheat harvest reached bumper 1.08 million tonnes. The area to be sown to spring crops overall is to be reduced somewhat, but that to be sown to maize is targeted to increase to 386 000 hectares, from 361 000 hectares in 2000 to help replenish maize supplies after the drought reduced harvest in 2000 of only 1.5 million tonnes, compared to 2.1 million tonnes in 1999. Despite the poor harvests, quantities of maize are being exported to neighbouring Bosnia Herzegovina. The country also plans to export about 200 000 tonnes of wheat in 2000/01.

CZECH REPUBLIC (13 February)

The winter cereal area is officially estimated at just over 1 million hectares, of which 865 000 hectares are wheat and 165 000 hectares are barley. Conditions for crops are reported to be somewhat more favourable than in the neighbouring countries to the south as rainfall has been closer to the norm.

ESTONIA (13 February)

The early outlook for winter grains is satisfactory. The 2000 grain harvest is estimated at a bumper 0.6 million tonnes cleaned weight from 330 000 hectares. Feed prices are expected to fall in response to the good harvest, some 25 percent more than last year, and reduced livestock production in the first half year of 2000. The first agricultural census since 1939 is to be carried out in mid 2001.

FORMER YUGOSLAV REPUBLIC OF MACEDONIA (13 February)

Conditions are reported to be generally satisfactory for the winter cereal crops and the area sown should be similar to last year's normal level

WFP continues to provide food assistance to about 7 500 refugees in collective centres or with host families. Repatriation packages are also being provided by WFP to refugees who voluntarily return to the Kosovo Province of the Federal Republic of Yugoslavia.

HUNGARY (13 February)

Winter wheat and barley plantings are estimated at 1.2 million hectares and 200 000 hectares respectively, somewhat up from the previous year's level, which could allow some recovery in production this year. However, soil moisture reserves are reported to be very low after a prolonged drought. Good precipitation is required soon to replenish reserves for spring growth.

LATVIA (13 February)

Satellite imagery indicates vegetative development of winter crops, which is less than at the corresponding time last year. The area sown has likely remained average.

The 2000 cereal output is tentatively forecast at nearly 0.9 million tonnes, about average and almost 0.1 million tonnes more than last year. With livestock production remaining depressed, imports of cereals in recent years are limited to about 50 000-70 000 tonnes per annum, mainly of bread quality wheat.

LITHUANIA (13 February)

The early outlook for the 2001 winter cereal harvest is satisfactory but crop development in the north-eastern corner of the country, bordering Latvia is markedly less than a year ago. The 2000 grain harvest is anticipated to recover to an about average 2.4 million tonnes from last year's poor level of 2.1 million tonnes, and to include nearly 0.9 million tonnes of wheat.

MOLDOVA (13 February)

After two poor years, normal precipitation and temperatures in the autumn favoured the planting of winter wheat and barley for harvest in 2001. Growing conditions have been good this season to date and crop development is markedly better than at the corresponding time last year.

The 2000 grain harvest is officially reported to have reached 2.1 million tonnes, significantly higher than earlier estimates and only marginally less than the equally drought affected harvest in 1999. However, farmers, traders and independent analysts question the official estimate while analysts evaluate the yield of wheat at 75-50 percent of the official estimate of over 2 tonnes/hectare. By November 2000, the domestic price of wheat had more than doubled, indicating a tighter grain market. Wheat production, initially targeted at 1 million tonnes, is officially reported to be 780 000 tonnes, but analysts put it as low as 500 000 tonnes. Equally, the 2000 maize harvest, officially forecast at 1.091 million tonnes could also be less.

The 2000 wheat harvest is adequate to meet food consumption needs, although in view of the poor quality of much of the wheat, imports of high gluten wheat are necessary to mix with local supplies for quality bread. Indications are that purchasing power could keep such imports low. Following the second poor harvest in succession the availability of feedgrains for livestock is very tight and high prices will necessitate substantial destocking to continue. The government has prohibited wheat exports this year and is trying to procure 60 000-80 000 tonnes for domestic reserves, with little success.

POLAND (13 February)

Autumn and winter rainfall has been closer to normal than in the countries further south, and some recovery in winter grain production is expected after last year's reduced output.

ROMANIA (13 February)

Early indications suggest that the winter wheat area is similar to that in the previous year at around 1.9 million hectares. After a long summer drought some scattered showers in the autumn allowed planting to progress satisfactorily in the main producing areas. However, conditions remained prevalently dry up until the end of January when finally some significant precipitation was recorded. Much more rain is needed in Romania to replenish soil moisture reserves for crop growth this spring.

RUSSIAN FEDERATION (13 February)

The early outlook for the 2001 winter cereals is good. The area sown to winter crops for harvest in the spring/summer of this year increased by 0.5 million hectares to 14.66 million hectares, mainly due to larger plantings in the North Caucasus. Growing conditions have been good overall. Satellite imagery shows better crop development in most areas, with the exception of Volgograd and Saratov oblasts. Mostly mild conditions this winter have benefited crops. Although, spells of extreme cold have caused human suffering, in general overall crops have had adequate protection.

FAO's estimate of the 2000 grain (cereal and pulse) harvest is 71 million tonnes, about average and some 11 million tonnes higher than FAO's estimate for production in 1999. FAO's estimates in both years are about 10 percent higher than the official estimates, (2000: 65.4; 1999: 54.7 million tonnes) in view of systematic underestimation Output of wheat is now estimated by FAO at 38 million tonnes (some 10 percent above the official forecast) and the proportion of quality wheat is higher than last year. Output of coarse grains is estimated by FAO at 31 million tonnes compared to 25 million tonnes last year.

Indications are that the 2000 harvest is adequate to cover domestic food and feed needs and allow some small replenishment of stocks. In the 2000/01 marketing year cereal imports are

forecast to fall to half of last year's level (8.4 million tonnes) and to be partially offset by exports amounting to around 2 million tonnes.

Food insecurity is primarily a problem of access rather than availability as income distribution is very uneven. Some 50 percent of the population lives below the poverty line of US\$4.30/person/day. Specific causes of poverty include arrears in the payment of pensions, salaries and wages.

In Chechnya, the outlook for winter grain planting for harvest next year is also reported to be bleak due to lack of financial resources and fuel. The 2000 agricultural production was greatly compromised by the security situation as well as the shortages of machinery, fuel and inputs.

The conflict in Chechnya continues to cause severe hardship for the local and displaced population, particularly now in the harsh winter months. An estimated 170 000 persons remain displaced inside Chechnya. Relief operations are seriously hindered by problems of security and shortage of resources. WFP and the NGOs are providing basic and complementary food assistance to practically all internally displaced persons (IDPs) in Ingushetia, who number an additional 160 000, of whom some 30 000 are still living in tent camps.

SLOVAK REPUBLIC (13 February)

In the Slovak Republic, prospects for the winter grain crops are satisfactory and plantings have likely remained similar to last year's levels.

UKRAINE (13 February)

The early outlook for the 2001 winter cereals is good. The area sown increased by an estimated 0.8 million hectares to 8.4 million hectares. Growing conditions have been good in the 2000/01 season to date and some 88 percent of the crop are in good/satisfactory condition. Satellite imagery shows markedly better conditions than at the corresponding time last year, although crops in the south-east need rain.

The 2000 grain harvest was affected by drought. FAO now estimates the 2000 cereal harvest at only 22.9 million tonnes, less than the poor output of 1999 (26.4 million tonnes) and less than the official forecast of 24.4 million tonnes in view of traders and expert reports of overestimation, notably of the spring coarse grain crop (maize).

Despite another poor harvest, the country could remain a net exporter of cereals. In the first six months of the current marketing year, the country has exported in excess of 0.8 million tonnes (mainly barley) and imported roughly 0.4 million tonnes, (mainly wheat). In the 2000/01 marketing year, aggregate cereal exports are anticipated to halve to 1.4 million tonnes while imports increase to about 900 000 tonnes, from just over 600 000 tonnes in 1999/2000.

YUGOSLAVIA, FED. REP. OF (SERBIA AND MONTENEGRO)* (13 February)

The outlook for winter wheat, to be harvested later this year, has improved somewhat but remains uncertain. The drought, which sharply reduced the 2000 cereal harvest, continued into the autumn, delaying the planting of winter wheat and hindering crop establishment. The Farming Institute of Novi Sad, situated in the Vojvodina, the major producing area, indicates that despite the poor economic conditions of farmers, some 750 000 hectares were finally planted to winter wheat. This is less than planned – 800 000 hectares – but, if true, would be more than was actually sown and harvested last year (roughly 600 000 ha) and closer to average. Better rains and mild temperatures since late December have improved the outlook but subsoil moisture reserves remain precarious. Disruption in the administrative systems

governing agriculture and shortages of funds at all levels in the sector will keep input use, and likely yields, well below potential.

FAO estimates the aggregate 2000 cereal harvest at only 5.2 million tonnes compared to 8.6 million tonnes in 1999. An assessment mission in June/July put the 2000 wheat harvest at only 1.7 million tonnes, reflecting poor incentives to sow wheat, limited availability of inputs, crop damage by floods and later dry conditions. Severe drought in the spring and summer reduced spring coarse grain and other foodcrop harvests. The 2000 maize harvest is officially estimated at only 3.1 million tonnes, about half of the bumper 6.1 million tonne harvest in 1999.

The overall cereal supply situation is tight and there is little or no scope for exports of cereals, despite substantial carry-forward stocks, particularly of maize. Livestock production will be adversely affected by the rising prices of grain.

The population continues to suffer from shortages of energy and sharp price increases for basic foods, since the new government has started liberalizing the formerly controlled prices.

WFP is currently targeting about 700 000 refugees and socially vulnerable people. In addition the ICRC assists 200 000 IDPs with an individual food ration and 100 000 beneficiaries (social cases) through a hot meal under their soup kitchen programme.

NORTH AMERICA

CANADA (13 February)

Latest estimates put the 2000 wheat output at about 26.8 million tonnes, virtually unchanged from the previous year. However, the harvest was hampered by wet weather and the average quality crop is reported to be somewhat poorer than normal. Early indications for the 2001 wheat crop, the bulk of which will be sown in April/May, point to a similar overall area as in the previous year. The milling wheat area may increase at the expense of durum and oilcrops. Aggregate output of coarse grains in 2000 is estimated at 24.5 million tonnes, some 9 percent down from the previous year and the smallest crop since 1995. The decrease is largely due to wet and cold conditions throughout the season, which affected yields.

UNITED STATES (13 February)

As of mid-February, weather conditions in the Great Plains, the major winter wheat growing area in the United States, continued to remain at best satisfactory for the 2001 wheat crop. Conditions have generally been colder than normal throughout the plains, keeping crop development at a slow pace. Some crops in northern Texas and Kansas are reported to have suffered significant damage from wind and frost. According to the USDA Seedings Report of 11 January, the winter wheat area for the 2001 harvest has declined to 16.7 million hectares, some 800 000 hectares or 5 percent less than the previous year and the lowest level since 1971. Dry conditions, which hampered planting in the main growing areas, are cited as the major cause of the reduction.

OCEANIA

AUSTRALIA (13 February)

In Australia, the recently completed 2000 winter wheat harvest is now officially estimated at 21.2 million tonnes, slightly up from the previous forecast but nevertheless still considerably below the 1999 crop of 25 million tonnes. Reduced yields in Western Australia and Queensland, due to dry weather, more than offset bumper crops in some other regions. Output of winter coarse grains (mostly barley and oats), recovered from the reduced level in 1999 due to increased plantings but

remained below the average of the past five years. Aggregate coarse grains output in 2000 is estimated at 9.5 million tonnes, about 10 percent up from the previous year's reduced crop. Early prospects for the summer 2001 coarse grain crops (mostly sorghum), which have recently been planted are somewhat unfavourable because of dry conditions and the final area sown is likely to be reduced. Planting of the 2001 season rice is progressing and Government reports indicate that the planted area could expand by 19 percent.

FIJI (5 February)

Rainfall in December was abundant and widespread, with total levels ranging from 200 to 400 percent above average levels in some areas, particularly during the first two weeks. Near normal conditions prevailed in January, with some regions recording even below-average levels of rains. Overall, conditions have been favourable for the major crops produced in the country, including sugar cane, coconut, ginger and fruits such as mangoes and papaya. The food supply situation in the country is generally good, but serious nutritional problems are reported in several areas.

PAPUA NEW GUINEA (5 February)

A series of earthquakes hit the country in December 2000, affecting mostly northern areas. Although some of the earthquakes reached 6 and 8 degrees on the Richter scale, the reported injuries and damage were relatively limited, compared to previous years' similar disasters such as the one in 1998 which killed many people and destroyed crops and property.

SAMOA (15 February)

Dry conditions prevailed in both December and January, which is unusual for the season. More widespread rains are needed during the next four months for normal crop development.

SOLOMON ISLANDS (5 February)

The security situation remains volatile since the peace agreement was signed last October to end two years of civil strife in the Islands. In January 2001, the UN Security Council expressed its strong support for the agreement and various donors in Europe, Asia and the Pacific are now offering to assist and contribute to the process of rehabilitation, reconstruction and economic development.

**ESTIMATED CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/
a) 2000/01 or 2001 estimates (in thousand tonnes)**

	Marketing year	1999/2000 or 2000			2000/01 or 2001			
		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		26 809.3	2 451.6	29 260.9	31 047.0	11 040.8	1 770.4	9 270.4
Northern Africa		14 201.7	73.3	14 275.0	16 345.0	8 619.5	240.6	8 378.9
Egypt	July/June	9 755.9	64.1	9 820.0	11 030.0	6 444.7	20.7	6 424.0
Morocco	July/June	4 445.8	9.2	4 455.0	5 315.0	2 174.8	219.9	1 954.9
Eastern Africa		4 000.0	1 756.9	5 756.9	6 026.0	1 200.6	819.7	380.9
Burundi	Jan./Dec.	61.3	8.7	70.0	106.0	13.4	13.4	0.0
Comoros	Jan./Dec.	46.0	0.0	46.0	46.0	9.4	0.0	9.4
Djibouti	Jan./Dec.	98.5	9.5	108.0	103.0	22.8	4.2	18.6
Eritrea	Jan./Dec.	77.4	194.1	271.5	240.0	46.6	46.6	0.0
Ethiopia	Jan./Dec.	67.7	1 043.6	1 111.3	970.0	503.7	503.7	0.0
Kenya	Oct./Sept.	1 771.3	117.1	1 888.4	2 164.0	224.8	160.4	64.4
Rwanda	Jan./Dec.	50.0	167.0	217.0	175.0	18.1	18.1	0.0
Somalia	Aug./July	274.6	35.4	310.0	330.0	37.1	37.1	0.0
Sudan	Nov./Oct.	900.2	132.8	1 033.0	1 202.0	192.1	34.1	158.0
Tanzania	June/May	653.0	48.7	701.7	690.0	132.6	2.1	130.5
Southern Africa		1 628.9	308.4	1 937.3	2 144.0	831.0	512.7	318.3
Angola	April/March	389.6	140.9	530.5	753.0	318.8	240.4	78.4
Lesotho	April/March	235.0	3.0	238.0	248.0	3.1	3.1	0.0
Madagascar	April/March	214.1	16.0	230.1	518.0	190.0	12.0	178.0
Malawi	April/March	61.9	67.9	129.8	60.0	16.2	15.6	0.6
Mozambique	April/March	228.3	73.6	301.9	413.0	287.7	237.7	50.0
Swaziland	May/April	73.0	0.0	73.0	88.0	10.9	0.0	10.9
Zambia	May/April	427.0	7.0	434.0	64.0	4.3	3.9	0.4
Western Africa		6 274.8	262.1	6 536.9	5 809.0	348.4	172.0	176.4
Coastal countries		4 469.5	74.4	4 543.9	3 720.0	291.8	133.6	158.2
Benin	Jan./Dec.	118.8	4.6	123.4	110.0	1.4	1.4	0.0
Cote d'Ivoire	Jan./Dec.	1 145.4	11.3	1 156.7	775.0	14.9	7.0	7.9
Ghana	Jan./Dec.	469.4	16.1	485.5	385.0	93.9	83.7	10.2
Guinea	Jan./Dec.	348.7	1.3	350.0	390.0	4.0	4.0	0.0
Liberia	Jan./Dec.	99.9	18.4	118.3	200.0	5.2	3.8	1.4
Nigeria	Jan./Dec.	1 911.0	0.0	1 911.0	1 470.0	87.7	0.3	87.4
Sierra Leone	Jan./Dec.	310.3	18.7	329.0	310.0	32.0	29.4	2.6
Togo	Jan./Dec.	66.0	4.0	70.0	80.0	52.7	4.0	48.7
Sahelian countries		1 805.3	187.7	1 993.0	2 089.0	56.6	38.4	18.2
Burkina faso	Nov./Oct.	121.2	29.7	150.9	190.0	5.1	5.1	0.0
Cape Verde	Nov./Oct.	30.3	51.4	81.7	88.0	18.7	18.7	0.0
Chad	Nov./Oct.	38.0	14.7	52.7	85.0	0.3	0.3	0.0
Gambia	Nov./Oct.	115.3	4.6	119.9	120.0	6.9	1.9	5.0
Guinea Bissau	Nov./Oct.	50.2	10.4	60.6	72.0	1.1	1.1	0.0
Mali	Nov./Oct.	104.2	5.6	109.8	90.0	7.9	7.9	0.0
Mauritania	Nov./Oct.	269.7	23.2	292.9	300.0	13.9	0.7	13.2
Niger	Nov./Oct.	344.5	10.7	355.2	377.0	2.7	2.7	0.0
Senegal	Nov./Oct.	731.9	37.4	769.3	767.0	0.0	0.0	0.0
Central Africa		703.9	50.9	754.8	723.0	41.3	25.4	15.9
Cameroon	Jan./Dec.	288.0	2.8	290.8	290.0	5.0	5.0	0.0
Cent.Afr.Rep.	Jan./Dec.	27.0	2.6	29.6	30.0	8.3	0.6	7.7
Congo, Dem.Rep.	Jan./Dec.	217.9	32.1	250.0	250.0	2.8	2.8	0.0
Congo, Rep.	Jan./Dec.	156.4	8.3	164.7	133.0	13.0	13.0	0.0
Eq. Guinea	Jan./Dec.	8.4	0.9	9.3	10.0	5.8	0.0	5.8
Sao Tome	Jan./Dec.	6.2	4.2	10.4	10.0	6.4	4.0	2.4

**ESTIMATED CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/
a) 2000/01 or 2001 estimates (in thousand tonnes)**

	Marketing year	1999/2000 or 2000			2000/01 or 2001			
		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		36 166.8	3 580.4	39 747.2	35 359.0	14 161.7	2 727.9	11 433.8
Afghanistan	July/June	1 150.3	107.7	1 258.0	2 300.0	465.2	165.2	300.0
Armenia	July/June	353.0	19.0	372.0	515.0	184.0	97.0	87.0
Azerbaijan	July/June	744.0	33.0	777.0	685.0	201.7	8.7	193.0
Bangladesh	July/June	1 127.0	1 017.0	2 144.0	1 981.0	733.5	163.0	570.5
Bhutan	July/June	22.0	0.0	22.0	22.0	0.2	0.2	0.0
Cambodia	Jan./Dec.	32.7	33.4	66.1	75.0	51.7	32.8	18.9
China 2/	July/June	10 008.0	192.0	10 200.0	10 600.0	3 991.0	58.6	3 932.4
Georgia	July/June	498.0	70.0	568.0	748.0	92.2	76.2	16.0
India	April/March	1 834.0	259.1	2 093.1	309.0	354.6	256.5	98.1
Indonesia	April/March	8 009.7	508.3	8 518.0	6 493.0	3 841.4	403.6	3 437.8
Korea, D.P.R.	Nov./Oct.	1 030.5	824.5	1 855.0	1 865.0	990.8	650.9	339.9
Kyrgyz Republic	July/June	223.0	79.0	302.0	166.0	73.6	61.0	12.6
Laos	Jan./Dec.	53.1	3.9	57.0	47.0	0.0	0.0	0.0
Maldives	Jan./Dec.	34.3	2.7	37.0	37.0	0.0	0.0	0.0
Mongolia	Oct./Sept.	203.0	0.0	203.0	203.0	40.0	40.0	0.0
Nepal	July/June	107.7	6.3	114.0	79.0	0.5	0.5	0.0
Pakistan	May/April	1 754.0	267.2	2 021.2	290.0	105.4	105.4	0.0
Philippines	July/June	3 940.3	50.0	3 990.3	3 560.0	2 572.9	211.0	2 361.9
Sri Lanka	Jan./Dec.	1 211.0	13.5	1 224.5	1 210.0	42.3	42.3	0.0
Tajikistan	July/June	524.0	77.0	601.0	791.0	136.5	104.2	32.3
Turkmenistan	July/June	7.0	7.0	14.0	10.0	3.7	3.4	0.3
Uzbekistan	July/June	633.0	0.0	633.0	803.0	70.1	38.2	31.9
Yemen	Jan./Dec.	2 667.2	9.8	2 677.0	2 570.0	210.4	209.2	1.2
CENTRAL AMERICA		2 729.4	426.4	3 155.8	3 061.0	967.0	152.5	814.5
Cuba	July/June	1 662.3	50.6	1 712.9	1 567.0	314.1	1.9	312.2
Haiti	July/June	419.9	161.7	581.6	590.0	190.1	72.0	118.1
Honduras	July/June	476.4	110.3	586.7	622.0	299.6	46.6	253.0
Nicaragua	July/June	170.8	103.8	274.6	282.0	163.2	32.0	131.2
OCEANIA		381.0	0.0	381.0	381.0	0.6	0.6	0.0
Kiribati	Jan./Dec.	8.0	0.0	8.0	8.0	0.0	0.0	0.0
Papua New Guinea	Jan./Dec.	318.0	0.0	318.0	318.0	0.6	0.6	0.0
Samoa	Jan./Dec.	17.0	0.0	17.0	17.0	0.0	0.0	0.0
Solomon Isl.	Jan./Dec.	26.0	0.0	26.0	26.0	0.0	0.0	0.0
Tuvalu	Jan./Dec.	1.0	0.0	1.0	1.0	0.0	0.0	0.0
Vanuatu	Jan./Dec.	11.0	0.0	11.0	11.0	0.0	0.0	0.0
EUROPE		681.0	174.0	855.0	699.0	85.2	79.4	5.8
Albania	July/June	383.9	19.1	403.0	319.0	5.2	0.0	5.2
Bosnia&Herzegovina	July/June	228.5	61.5	290.0	300.0	77.4	77.4	0.0
Macedonia, FYR	July/June	68.6	93.4	162.0	80.0	2.6	2.0	0.6
TOTAL		66 767.5	6 632.4	73 399.9	70 547.0	26 255.3	4 730.8	21 524.5

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.\$ 1460 in 1996 which is in accordance with the guidelines and criteria agreed to by the CFA should be given priority in the allocation of food aid.

2/ Includes import requirements of Taiwan Province.

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DEFINITIONS:

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

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

"Distribution of Local and/or Exportable Surpluses Requiring External Assistance": Refers to a situation of an exceptional surplus existing in a particular area of a country which needs to be transported to deficit areas in the same country or the neighbouring countries for which purpose external assistance is required.

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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