



# CROP PROSPECTS and FOOD SITUATION

Quarterly Global Report

Countries in need of  
external assistance  
for food

40

## COUNTRIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD

FAO assesses that globally 40 countries, of which 31 in Africa, continue to be in need of external assistance for food. The impact of conflicts continues to be the main cause of the high level of severe food insecurity. Weather-induced production declines have also negatively impacted food availability.

Asia	-0.1
Africa	-2.5
Central America and the Caribbean	-1.9
South America	-9.9
North America	+1.5
Europe	-7.1
Oceania	-14.5
World	-2.4

## WORLD Cereal production 2018 over 2017 (rice in milled terms)

-2.4%

## REGIONAL HIGHLIGHTS

**AFRICA** Beneficial weather conditions triggered production gains in East Africa and output rebounds in North Africa. By contrast, dry conditions curbed harvests in Southern Africa, while in West Africa, production is expected to revert to average levels. Conflicts in several countries of the region, notably in Central Africa, continue to acutely impact the agriculture sector.

**ASIA** Cereal harvests in 2018 declined to below-average levels in the Near East and CIS Asia, on account of rainfall deficits, while also ongoing conflicts in parts of the Near East continue to impede agricultural activities. Aggregate cereal production in the Far East is foreseen to rise, driven by an enlarged paddy output.

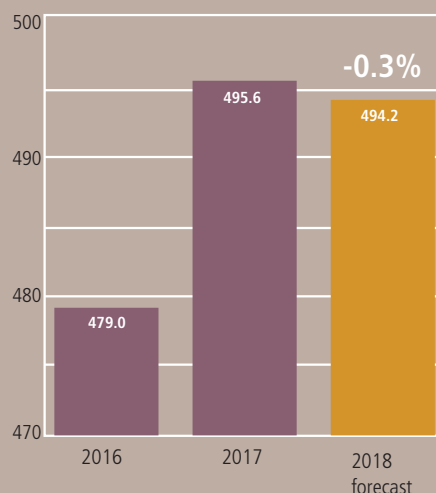
**LATIN AMERICA AND THE CARIBBEAN** Cereal production is estimated to decline from last year's record high in South America. In Central America and the Caribbean, extended dry weather conditions have adversely affected the 2018 output, except in Mexico.

Low-Income Food-Deficit  
Countries' (LIFDCs)

Cereal production 2018 over 2017

-0.3%

(million tonnes)



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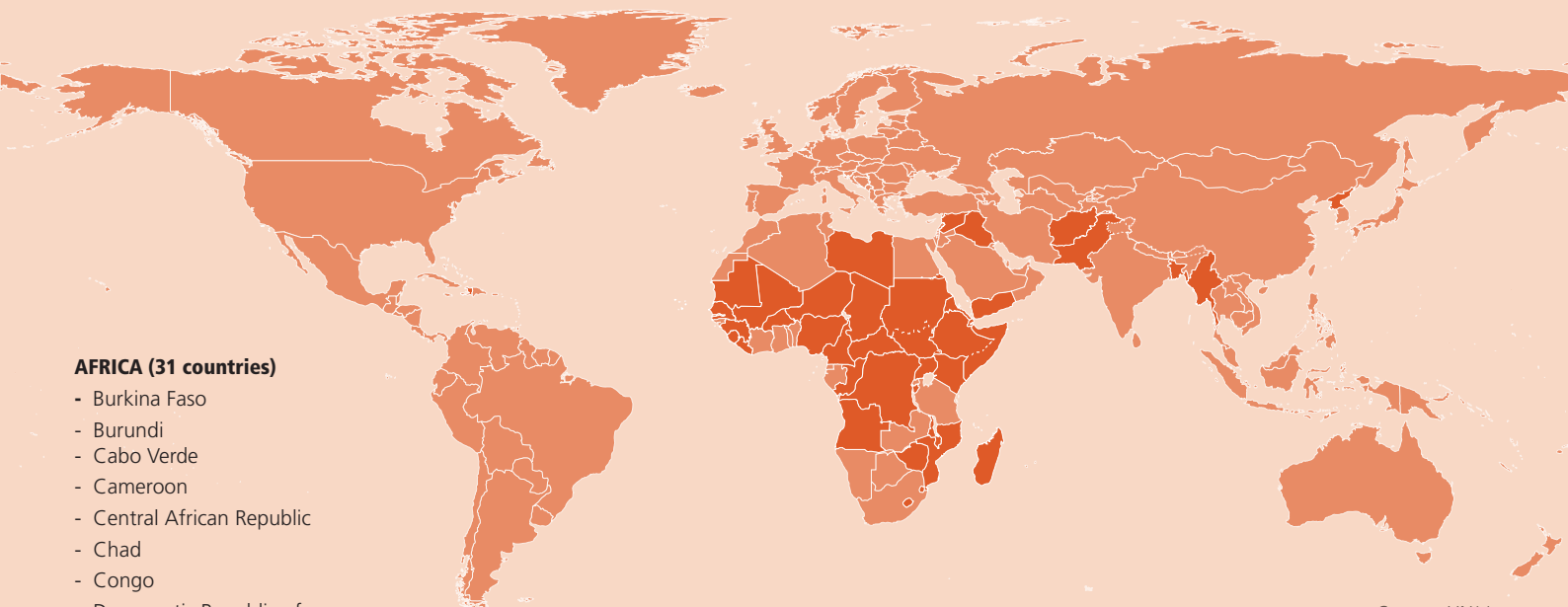
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# COUNTRIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD



## AFRICA (31 countries)

- Burkina Faso
- Burundi
- Cabo Verde
- Cameroon
- Central African Republic
- Chad
- Congo
- Democratic Republic of Congo
- Djibouti
- Eritrea
- Eswatini
- Ethiopia
- Guinea
- Kenya
- Lesotho
- Liberia
- Libya
- Madagascar
- Malawi
- Mali
- Mauritania
- Mozambique
- Niger
- Nigeria
- Senegal
- Sierra Leone
- Somalia
- South Sudan
- Sudan
- Uganda
- Zimbabwe

## ASIA (8 countries)

- Afghanistan
- Bangladesh 
- Democratic People's Republic of Korea
- Iraq
- Myanmar
- Pakistan
- Syrian Arab Republic
- Yemen

## LATIN AMERICA AND THE CARIBBEAN (1 country)

- Haiti

 New Entry

## AFRICA (31 COUNTRIES)

### EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/ SUPPLIES

#### Central African Republic

*Conflict, displacements and food supply constraints*

- The Internally Displaced People (IDP) caseload in October 2018 was estimated at about 643 000, a 5 percent increase since July 2018. About 1.9 million people (31 percent of the total population) are estimated to be in need of urgent assistance for food due to the widespread insecurity, several consecutive years of reduced agricultural production and poorly functioning markets, especially for displaced persons, host families and returnees.
- Violent clashes and inter-communal tensions persist, fueling the massive displacements, with severe negative impacts on food security.

### WIDESPREAD LACK OF ACCESS

#### Burundi

*Civil insecurity, economic downturn and localized crop production shortfalls*

- Disruptions to markets, farming activities and livelihoods, coupled with limited humanitarian assistance and declining food import capacity, continue to seriously affect food security conditions. The area most affected by food insecurity is the Ruyigi Province in the west.
- About 1.67 million people are estimated to be severely food insecure.

Source: UN\*\*

\*\* See Terminology ([page 5](#))

#### Chad

*Civil insecurity, internal displacements and dry spells in localized areas*

- According to the "Cadre Harmonisé", about 189 000 were projected to be food insecure in the October-to-December period.
- Nearly 449 195 people remained internally displaced, almost entirely on account of the insurgency in the northeast, in addition the country hosts about 450 000 refugees.

#### Democratic Republic of the Congo

*Conflict and displacements in eastern and southern areas as well as an influx of refugees straining resources of host communities*

- The country hosts 176 000 refugees from the Central African Republic, 94 000 from South Sudan and 47 000 from Burundi. The total IDP caseload is estimated at 4.5 million.
- An outbreak of the EVD has been reported and as of 26 August, 111 cases were confirmed, more than double the level since May.

#### Djibouti

*Impact of consecutive unfavourable rainy seasons on pastoral livelihoods*

- About 197 000 people are severely food insecure, mainly concentrated in pastoral areas north of Obock City and in southeastern areas, which were affected by consecutive unfavourable rainy seasons.

#### Eritrea

*Economic constraints have increased the population's vulnerability to food insecurity*

**Ethiopia***Impact of drought on local livelihood systems*

- An estimated 7.95 million people were affected by food insecurity, mainly in southeastern agro-pastoral areas, due to the lingering effects of severe drought conditions between mid-2016 and late 2017.
- About 1.44 million people have been displaced so far in 2018 in Somali, Oromia, SNNP and Benishangul Gumuz regions, as result of inter-communal conflict.

**Malawi***Below average cereal harvest in 2018*

- The number of people assessed to be food insecure in the period from October 2018 to March 2019 is estimated at 3.3 million, double the level compared to the corresponding period in 2017/18.
- The sharp increase mostly results from a decline in cereal production, with the 2018 output estimated to be below average.

**Niger***Civil conflict and production shortfalls*

- According to the last "Cadre Harmonisé" analysis, about 600 000 people in the October-December period were assessed to be in need of immediate assistance.
- Due to the civil conflict in neighbouring countries, more than 104 288 people are internally displaced, more than 176 000 reside as refugees, of which 119 000 are from Nigeria and 57 000 are from Mali.

**Nigeria***Persisting conflict in northern areas*

- According to the "Cadre Harmonisé" analysis, about 2.4 million people were assessed to be in need of assistance between October and December
- Market functionality and livelihood activities remain disturbed by the ongoing civil insecurity, limiting food access to vulnerable households. The areas inaccessible to humanitarian interventions are facing the worse food security conditions.

**South Sudan***Conflict, civil insecurity and severe economic downturn*

- Despite sustained humanitarian assistance, food insecurity still affects large segments of the population. The

number of severely food insecure people for the October-December period is estimated at 4.4 million. The significantly high number is a result of persisting insecurity, economic constraints, trade disruptions and high food prices.

**Zimbabwe***Food access constraints*

- An estimated 2.4 million people re assessed to be food insecure in 2018, mostly due to a reduced cereal output in 2018 and food access constraints, on account of low incomes and liquidity challenges.

**SEVERE LOCALIZED FOOD INSECURITY****Burkina Faso***Tight cereal supplies and high prices*

- According to the last "Cadre Harmonisé" analysis, the number of people in need of food assistance was projected to be 950 000 for the June-August period, mainly due to localized production shortfalls.
- An estimated 25 000 refugees, most of them from Mali, are living in the country.

**Cabo Verde***Poor performance of the 2018 agro-pastoral cropping season*

- According to the last "Cadre Harmonisé" analysis, about 10 500 people (approximately 2 percent of the total population) were estimated to be in CH Phase 3: "Crisis" and above.

**Cameroon***Influx of refugees putting strain on host communities and displacements*

- The number of refugees from the Central African Republic was estimated at 268 000 at the end of October 2018. Insecurity along the borders with Nigeria also led to the internal displacement of 228 000 individuals.
- Persisting civil strife since October 2016, has led to the displacement of about 450 000 people in the Northwest and Southwest regions.

**Congo***Influx of refugees straining the already limited resources of host communities*

- An estimated 32 000 refugees from the Central African Republic are sheltering in the country.

**Eswatini***Localized production shortfalls*

- An estimated 247 000 people are in need of humanitarian assistance until March 2019, mostly located in Lubombo and Shiselweni, on account of production shortfalls.

**Guinea***Localized production shortfalls*

- About 90 000 people are estimated to be in need of food assistance.

**Kenya***Consecutive unfavourable rainy seasons affect crop and livestock production*

- About 0.7 million people are severely food insecure, mainly located in northern and eastern areas as a result of the lingering effects of severe drought conditions between mid-2016 and late 2017.

**Lesotho***Decreased in cereal production*

- Approximately 257 000 people are estimated to be affected by food insecurity until February 2019.
- This year's estimate is slightly higher than in 2017, reflecting a drop in the 2018 cereal output.

**Liberia***Localized production shortfalls and influx of refugees*

- About 17 000 people are estimated to be in need of food assistance.

**Libya***Civil insecurity*

- The number of people in need of food assistance is estimated at 0.4 million, with refugees, asylum seekers and internally displaced among the most vulnerable.
- Food shortages are reported mostly in the south and east. Access to subsidized food among the affected population is limited.

**Madagascar***Dry spells and impact of cyclones*

- The number of people affected by food insecurity increased to 1.3 million in southern regions, due to unfavourable weather conditions that kept cereal production in 2018 at below-average levels, while record high prices earlier in the year negatively impinged on food access.

- At the national level, paddy production is estimated to have increased in 2018, mostly reflecting larger harvests in central and northern regions, improving food availability.

### Mali

*Persistent insecurity in the centre and north of the country*

- The country is hosting approximately 25 000 refugees, while 77 000 internally displaced people and 69 000 returnees, also mainly depend on humanitarian assistance.
- About 185 000 people were estimated to be in need of food assistance between October and December, according to the last “Cadre Harmonisé” analysis, as a result of the persisting civil conflict.

### Mauritania

*Reduced cereal production*

- According to the November 2018 “Cadre Harmonisé” analysis, about 227 000 people were assessed to be in need of assistance from October to December.
- About 59 000 refugees, mostly from Mali, reside in the country.

### Mozambique

*Weather shocks and localized production shortfalls*

- Dry conditions and pest infestations caused production shortfalls in southern provinces and some areas of the centre. As a result, an estimated 1.8 million people are food insecure.
- At the national level, cereal production is estimated to have increased in 2018.

### Senegal

*Rainfall deficits in some localized areas*

- According to the last “Cadre Harmonisé” analysis, about 95 000 people are estimated to be in need of assistance between October and December.
- An estimated 15 000 refugees, mostly from Mauritania, are residing in the country.

### Sierra Leone

*Food access constraints*

- About 107 000 people are estimated to be severely food insecure.

### Somalia

*Conflict, civil insecurity and widespread drought conditions*

- About 1.56 million people are estimated to be in need of emergency assistance, mainly IDPs and agro-pastoral communities affected by the lingering effects of the severe drought conditions between mid-2016 and late 2017.

### Sudan

*Conflict, civil insecurity and soaring food prices*

- The number of severely food insecure people for the period May-July was estimated at 6.2 million, mainly IDPs and host communities in conflict-affected areas. Vulnerable households affected by soaring food prices and production shortfalls during the 2017 season are also of concern.

### Uganda

*Localized crop production shortfalls and refugee influx*

- In the northeastern Karamoja Region, 2018 crop production is estimated at well below-average levels and households are expected to have depleted their food stocks from own production by late 2018, thus facing an early start of the next lean season.
- About 785 000 refugees from South Sudan and about 284 000 refugees from the Democratic Republic of the Congo are hosted in camps and depend on humanitarian assistance.

## ASIA (8 COUNTRIES)

### EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/SUPPLIES

#### Syrian Arab Republic

*Civil conflict and decreased crop production*

- About 5.5 million Syrians are food insecure and require some form of food assistance. In addition, between 500 000 and 800 000 may be food insecure in Idlib Governorate.
- Domestic cereal production in 2018 is the lowest since 1989, as a result of conflict related constraints and unfavourably distributed rains.
- Although some international food assistance is being provided, Syrian refugees are also straining host communities' resources in neighbouring countries.

## WIDESPREAD LACK OF ACCESS

### Democratic People's Republic of Korea

*Localized production shortfalls for 2018 main crop and economic downturn*

- Reflecting expectations of a reduced 2018 main season cereal output, most households are anticipated to continue to experience borderline or poor food consumption rates.

### Yemen

*Conflict, poverty and high food and fuel prices*

- An estimated 17.8 million people are food insecure and require urgent humanitarian assistance, a 5 percent increase over 2017 estimates.

## SEVERE LOCALIZED FOOD INSECURITY

### Afghanistan

*Conflict, population displacement and drought-induced decline in production*

- As of September 2018, some 9.8 million people (almost 44 percent of the rural population) were estimated to be in the IPC Phases 3: “Crisis” and 4: “Emergency”. Continuing conflict, natural hazards and limited economic opportunities have increased the vulnerability of the poorest households, including subsistence farmers.

### Bangladesh

*Influx of refugees putting strain on host communities*

- According to the latest figures from the International Organization for Migration (IOM), as of October 2018, about 923 000 Rohingya refugees from Myanmar were sheltering in Bangladesh, mainly in the Cox's Bazar District. Most refugees fled to Bangladesh following the resurgence of violence in Rakhine State in Myanmar in late August 2017.

### Iraq

*Civil conflict*

- An estimated 2.6 million people remained internally displaced.
- About 800 000 people were in need of food security assistance in 2017.

### Myanmar

*Conflict in parts of Kachin, Shan and resurgence of violence in Rakhine State*



- According to the latest data from the International Organization for Migration (October 2018) more than 700 000 Rohingya refugees fled to Bangladesh, following the resurgence of violence in Rakhine State in late August 2017. In addition, 241 000 people were internally displaced in Kachin, Kayin, Shan and Rakhine states due to ongoing conflict. These IDPs reside in temporary settlements, where they suffer from high levels of food insecurity and require humanitarian assistance to cover their basic needs.

### Pakistan

*Population displacement and localized cereal production shortfalls*

- In Tharparkar District and the surrounding areas of Sindh Province, the drought-affected cereal production in 2018 and significant losses of livestock have aggravated food insecurity and caused acute malnutrition.

- The country hosts close to 1.4 million registered and unregistered Afghan refugees. Most of these people are in need of humanitarian assistance and put strain on the already limited resources of the host communities.

## LATIN AMERICA AND THE CARIBBEAN (1 COUNTRY)

### SEVERE LOCALIZED FOOD INSECURITY

#### Haiti

*Impact of prolonged dry spells*

- About 774 000 people are estimated to be in need of assistance between October 2018 and February 2019, due to the adverse impact of dry spells on cereal production (especially maize), coupled with high prices of imported food as a result of a weaker local currency.

## Terminology

**Countries requiring external assistance for food** are expected to lack the resources to deal with reported critical problems of food insecurity. Food crises are nearly always due to a combination of factors but for the purpose of response planning, it is important to establish whether the nature of food crises is **predominantly** related to lack of food availability, limited access to food, or severe but localized problems. Accordingly, the list of countries requiring external assistance is organized into three broad, not mutually exclusive, categories:

- Countries facing an **exceptional shortfall in aggregate food production/supplies** as a result of crop failure, natural disasters, interruption of imports, disruption of distribution, excessive post-harvest losses, or other supply bottlenecks.
- Countries with **widespread lack of access**, where a majority of the population is considered to be unable to procure food from local markets, due to very low incomes, exceptionally high food prices, or the inability to circulate within the country.
- Countries with **severe localized food insecurity** due to the influx of refugees, a concentration of internally displaced persons, or areas with combinations of crop failure and deep poverty.

#### \* Unfavourable Production Prospects

Countries facing unfavourable crop production prospects are countries where forecasts point to a decrease in the cereal output compared to the five-year average, as a result of a reduction of the area planted and/or yields due to adverse weather conditions, plant pests and diseases, conflicts and other negative factors. This list does not include countries where production declines are mainly driven by deliberate/ predetermined economic and/or policy decisions (see Regional Reviews pages):

[page 11 \(Africa\)](#)

[page 20 \(Asia\)](#)

[page 30 \(North America, Europe and Oceania\)](#)

**\*\*** The boundaries shown and the designations used on the **maps** do not imply the expression of any opinion whatsoever on the part of FAO concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers and boundaries. Dashed lines on the maps represent approximate border lines for which there may not yet be full agreement.

# GLOBAL CEREAL OVERVIEW

## Cereal Supply and Demand Overview<sup>1</sup>

### Global cereal production in 2018 forecast to fall below the record high of 2017

FAO's latest forecast for 2018 world cereal production stands at 2 595 million tonnes, down marginally from November and 2.4 percent (62.5 million tonnes) below last year's record high.

FAO's forecast of world rice production in 2018 has remained broadly stable since November, pointing to the global output expanding by 1.3 percent year-on-year to a new high of 513 million tonnes. At the country level, production estimates were downscaled for Madagascar, as field assessments indicated that uneven rains and storm damages resulted in a more restrained output recovery than previously envisaged. By contrast, prospects have improved for a few Latin American and Caribbean

producing countries, in particular Peru, mainly reflecting better-than-expected yields.

Global wheat production is forecast at 725.1 million tonnes, 2.8 million tonnes lower than the November figure, reflecting reduced estimates for this year's harvests in Turkey and the Russian Federation. The forecast for world production of coarse grains has also been lowered by 3.1 million tonnes to 1 357 million tonnes, following some downward adjustments to barley and sorghum outputs. However, the forecast of global maize production remains unchanged, with an upward adjustment in Ukraine, driven by better-than-expected yields, largely offsetting lower prospects in the United States of America.

Looking ahead, planting of the 2019 winter wheat crop is progressing in the Northern Hemisphere. In the United States of America, higher producer

**Table 1. World cereal production<sup>1</sup>**  
(million tonnes)

	2016	2017 estimate	2018 forecast	Change: 2018 over 2017 (%)
<b>Asia</b>	<b>1 132.4</b>	<b>1 157.1</b>	<b>1 156.1</b>	<b>-0.1</b>
Far East	1 028.8	1 053.3	1 056.0	0.3
Near East	66.6	68.3	64.9	-4.9
CIS in Asia	37.0	35.5	35.2	-0.9
<b>Africa</b>	<b>170.3</b>	<b>188.4</b>	<b>183.7</b>	<b>-2.5</b>
North Africa	30.8	36.3	38.6	6.5
West Africa	57.2	59.2	56.8	-4.0
Central Africa	5.0	4.5	4.5	-0.5
East Africa	52.7	50.1	51.9	3.7
Southern Africa	24.7	38.4	31.8	-17.1
<b>Central America and the Caribbean</b>	<b>45.1</b>	<b>44.0</b>	<b>43.1</b>	<b>-1.9</b>
<b>South America</b>	<b>174.4</b>	<b>215.9</b>	<b>194.5</b>	<b>-9.9</b>
<b>North America</b>	<b>531.8</b>	<b>493.9</b>	<b>501.2</b>	<b>1.5</b>
<b>Europe</b>	<b>508.1</b>	<b>524.0</b>	<b>487.1</b>	<b>-7.1</b>
European Union	299.4	310.1	287.8	-7.2
CIS in Europe	192.9	202.4	184.0	-9.1
<b>Oceania</b>	<b>51.4</b>	<b>34.5</b>	<b>29.5</b>	<b>-14.5</b>
<b>World</b>	<b>2 613.4</b>	<b>2 657.9</b>	<b>2 595.2</b>	<b>-2.4</b>
Developing countries	1 465.5	1 541.5	1 517.5	-1.6
Developed countries	1 147.9	1 116.4	1 077.8	-3.5
- wheat	756.7	760.3	725.1	-4.6
- coarse grains	1 355.5	1 391.3	1 357.2	-2.5
- rice (milled)	501.2	506.3	512.9	1.3

Note: Totals and percentage change computed from unrounded data.

<sup>1</sup> Includes rice in milled terms.

<sup>1</sup> Based on the [FAO Cereal Supply and Demand Brief](#) released on 6 December 2018.



prices are expected to instigate enlarged plantings, although the expansion could be curbed by excessive wet conditions that has slowed seeding progress. A rebound in winter-wheat sowings is forecast in the European Union although dry weather is affecting some countries, while expansions are also foreseen in the Russian Federation and Ukraine, where generally beneficial weather prevails. Similarly, in Asia, favourable weather is benefiting crop establishment in China (Mainland) and India; however, reduced water availability in Pakistan has somewhat affected early crop prospects.

In the Southern Hemisphere, the 2019 summer cereal crop is currently being sown. Conducive weather and higher prices have boosted production prospects for maize in Argentina and Brazil, with outputs expected to rebound from the declines in 2017. In South Africa, maize sowings are anticipated to expand, and while early weather conditions were mostly favourable, increased prospects of anomalous dry conditions associated with a possible El Niño event, impairs the outlook for the country and the subregion.

### Cereal utilization in 2018/19 set to expand on growing food and feed demand

World cereal utilization in 2018/19 is pegged at 2 649 million tonnes, slightly below the November forecast but still up 1.3 percent from 2017/18. Total utilization of coarse grains is expected to reach a new high of 1 401 million tonnes, supported by a sharp (3.3 percent) anticipated increase in maize utilization, to 1 108 million tonnes, largely on strong demand for feed and industrial use, especially in China (Mainland) and the United States of America. However, unchanged from November, global wheat utilization is heading to only a marginal rise in 2018/19 to 740 million tonnes. While food consumption of wheat is foreseen to keep pace with population growth and reach 510 million tonnes, wheat feed utilization is expected to stagnate at around 141 million tonnes, constrained by lower production and higher prices. FAO's forecast of global rice utilization in 2018/19 is forecast at 509 million tonnes, down slightly from November, but still pointing to a 1 percent annual rise owing to a population-driven expansion in food intake.

**Table 2. Basic facts of world cereal situation**  
(million tonnes)

	2016/17	2017/18 estimate	2018/19 forecast	Change: 2018/19 over 2017/18 (%)
<b>Production <sup>1</sup></b>	<b>2 613.4</b>	<b>2 657.9</b>	<b>2 595.2</b>	<b>-2.4</b>
Developing countries	1 465.5	1 541.5	1 517.5	-1.6
Developed countries	1 147.9	1 116.4	1 077.8	-3.5
<b>Trade <sup>2</sup></b>	<b>405.3</b>	<b>420.2</b>	<b>416.6</b>	<b>-0.9</b>
Developing countries	116.6	139.1	133.2	-4.2
Developed countries	288.8	281.0	283.3	0.8
<b>Utilization</b>	<b>2 571.9</b>	<b>2 615.0</b>	<b>2 649.3</b>	<b>1.3</b>
Developing countries	1 662.9	1 706.5	1 737.8	1.8
Developed countries	908.9	908.5	911.5	0.3
Per caput cereal food use (kg per year)	147.8	148.4	148.6	0.1
<b>Stocks <sup>3</sup></b>	<b>779.3</b>	<b>815.0</b>	<b>762.1</b>	<b>-6.5</b>
Developing countries	575.7	606.5	584.7	-3.6
Developed countries	203.6	208.5	177.4	-14.9
<b>World stock-to-use ratio (%)</b>	<b>29.8</b>	<b>30.8</b>	<b>28.1</b>	<b>-8.6</b>

Note: Totals and percentage change computed from unrounded data.

<sup>1</sup> Data refer to calendar year of the first year shown and includes rice in milled terms.

<sup>2</sup> For wheat and coarse grains, trade refers to exports based on July/June marketing season. For rice, trade refers to exports based on the calendar year of the second year shown.

<sup>3</sup> Data are based on an aggregate of carryovers level at the end of national crop years and, therefore, do not represent world stock levels at any point in time.

### Trade in cereals foreseen to contract slightly in 2018/19

International trade in cereals is seen heading to a small decline in 2018/19, contracting by 0.9 percent from the previous season's record level to 416.6 million tonnes. World wheat trade is pegged at 172.5 million tonnes, down 2.1 percent from 2017/18 and only marginally below the November projection. Aided by higher domestic production this year, wheat purchases by Algeria, Morocco and India are expected to decline the most in 2018/19. Regarding exporters, wheat shipments from the Russian Federation, the world's largest wheat exporter, are now forecast at 34.5 million tonnes, down 15 percent from 2017/18, reflecting this year's sharp decline in domestic production. The decline in exports from the Russian Federation is expected to be largely compensated by a significant rebound in sales from the United States of America, up almost 28 percent from 2017/18, to 29.5 million tonnes. Higher exports are also forecast for Argentina and Canada, offsetting likely reduced shipments from Australia, the European Union and Ukraine.

The forecast for 2018/19 global trade in coarse grains is raised by 1.5 million tonnes, to almost 197 million tonnes, just slightly above the 2017/18 estimated level and marking a new record level. Upward revisions to maize imports by the European Union, followed by China (Mainland), Mexico and Canada, account for most of the month-to-month increase. World maize trade in 2018/19 is expected to reach 157.2 million tonnes, up 1.4 percent from 2017/18, mostly due to an anticipation of stronger import demand by the European Union. By contrast, trade in sorghum is likely to fall significantly in 2018/19 and drop by 21 percent from 2017/18 to just over 6 million tonnes, with nearly all the expected decrease in China (Mainland). Trade in barley is expected to drop marginally, to just under 30 million tonnes, on reduced purchases by several countries in Africa and Asia. Regarding exports of coarse grains, Ukraine is

set to boost its maize shipments in 2018/19 following this year's record production, while larger exports are also forecast for Argentina and the United States of America, more than offsetting anticipated sharp declines in sales from Brazil (maize) and the Russian Federation (maize and barley).

International trade in rice in 2019 (calendar year) is expected to subside by 1.4 percent year-on-year to 47 million tonnes, unchanged from November. Among exporters, Thailand is anticipated to see the largest contraction in shipments, followed by Pakistan and Brazil, while China (Mainland), India, the United States of America and Viet Nam are all seen exporting more.

### Cereal stocks falling sharply, largely on reduced wheat and maize inventories in major exporting countries

The forecast for world cereal stocks by the close of seasons in 2019 stands at 762 million tonnes, unchanged from November and down nearly 53 million tonnes (6.5 percent) from their all-time high opening levels. Among the major cereals, the largest year-on-year contraction is forecast for maize inventories, which are expected to decline by 14 percent (44 million tonnes) to 157 million tonnes, mostly due to large drawdowns in China (Mainland) followed by the United States of America, Argentina and Brazil. Wheat inventories are also forecast to decrease in 2018/19, down at least 12 percent (4.4 million tonnes) from their record opening levels and with most of the drawdown concentrated among the major exporters. World rice stocks are anticipated to reach a historical high of 177 million tonnes, up 2.7 percent from their opening levels and sufficient to cover 34.3 percent of projected uses in 2019/20. Overall, at the current forecast levels, the ratio of global cereal carryovers to utilization would be 28.1 percent, down from a 17-year high of 30.8 percent registered in the previous season and the smallest since 2013/14.

# LOW-INCOME FOOD-DEFICIT COUNTRIES' FOOD SITUATION OVERVIEW<sup>2</sup>

**Table 3. Basic facts of Low-Income Food-Deficit Countries (LIFDCs) cereal situation**

(million tonnes, rice in milled basis)

	2016/17	2017/18 estimate	2018/19 forecast	Change: 2018/19 over 2017/18 (%)
<b>Cereal production<sup>1</sup></b>	<b>479.0</b>	<b>495.6</b>	<b>494.2</b>	<b>-0.3</b>
excluding India	235.1	237.6	232.4	-2.2
<b>Utilization</b>	<b>528.7</b>	<b>530.2</b>	<b>536.6</b>	<b>1.2</b>
Food use	411.2	419.4	427.3	1.9
excluding India	216.2	222.0	226.8	2.2
Per caput cereal food use (kg per year)	146.7	147.0	147.2	0.1
excluding India	146.1	146.7	146.5	-0.1
Feed	44.1	46.8	46.1	-1.7
excluding India	28.0	29.1	27.3	-6.1
<b>End of season stocks<sup>2</sup></b>	<b>90.1</b>	<b>99.1</b>	<b>97.3</b>	<b>-1.8</b>
excluding India	55.5	57.4	52.0	-9.4

<sup>1</sup> Data refer to calendar year of the first year shown.

<sup>2</sup> May not equal the difference between supply and utilization because of differences in individual country marketing years.

**Table 4. Cereal production<sup>1</sup> of LIFDCs**

(million tonnes)

	5-year average	2017 estimate	2018 forecast	Change: 2018 over 2017 (%)
<b>Africa (37 countries)</b>	<b>118.6</b>	<b>125.4</b>	<b>123.8</b>	<b>-1.3</b>
East Africa	49.8	50.1	51.9	3.7
Southern Africa	9.9	11.7	10.6	-9.6
West Africa	54.2	59.2	56.8	-4.0
Central Africa	4.6	4.4	4.4	-0.5
<b>Asia (11 countries)</b>	<b>353.4</b>	<b>369.0</b>	<b>369.3</b>	<b>0.1</b>
CIS in Asia	10.9	11.2	9.5	-14.6
Far East	332.6	349.4	352.9	1.0
- India	244.1	258.0	261.8	1.5
Near East	9.9	8.5	6.9	-19.2
<b>Central America and the Caribbean (2 countries)</b>	<b>1.1</b>	<b>1.2</b>	<b>1.1</b>	<b>-2.5</b>
<b>Oceania (2 countries)</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>
<b>LIFDC (52 countries)</b>	<b>473.1</b>	<b>495.6</b>	<b>494.2</b>	<b>-0.3</b>

Note: Totals and percentage change computed from unrounded data.

The five-year average refers to the 2013-2017 period.

<sup>1</sup> Includes rice in milled terms.

## Unfavourable weather diminishes aggregate Low-Income Food-Deficit Countries (LIFDCs) cereal production in 2018

The aggregate cereal production of LIFDCs in 2018 is forecast at 494.2 million tonnes. At this level, the aggregate output is marginally lower on a yearly basis, but remains well above the previous five-year average.

The year-on-year decline in 2018 mainly reflects reduced outputs in *Asian* LIFDCs, notably **Pakistan**, **Uzbekistan**, **the Syrian Arab Republic** and **Afghanistan** (by order of magnitude). The yearly decreases are mostly associated with dry weather conditions that curbed yields and resulted in below-average cereal harvests, except in **Pakistan** where a near-average output was estimated. Moreover, the acute and negative impact of the conflict in **the Syrian Arab Republic**, despite some recent improvements in security conditions that facilitated increased access to agricultural land, contributed to a sharp drop in cereal production to its lowest level since 1989. Notable production declines were also recorded in *Southern Africa* on account of rainfall deficits at key cropping stages, with the largest yearly decreases estimated in **Malawi** and **Zimbabwe**.

<sup>2</sup> The inclusion of a country in the Low-Income Food-Deficit Countries (LIFDCs) group is based on three criteria: 1) the level of the annual per capita Gross National Income (GNI); 2) the net food trade position; and 3) self exclusion (when countries that meet the first two criteria request to be excluded from the category). The current (2016) list of the LIFDCs includes 52 countries, two less than in the 2015 list but with some changes. For full details see: [www.fao.org/countryprofiles/lifdc](http://www.fao.org/countryprofiles/lifdc)

Averting a larger decline at the aggregate level, cereal production upturns were estimated in **Bangladesh** and **India**, mainly resting on record paddy harvests driven by price-induced expansions in plantings. Additionally, beneficial weather in *East African* countries, with the main season harvest underway, with most countries foreseen to gather above-average harvests. While in **Madagascar**, by contrast to production outcomes in other *Southern African* countries, the 2018 harvest was estimated to have increased, although flood damages curbed larger gains.

### Import requirements forecast to fall driven by lower needs in Far East Asia

FAO's forecast for cereal import requirements by LIFDCs in the 2018/19 marketing year stands at 65 million tonnes, about 4 percent less than the previous year. Most of the decrease is related to lower import needs in **Bangladesh** and **India**. Similarly, the import forecast was cut for **Madagascar**, on the back of a rebound in paddy production. In *East Africa*, reflecting expectations of larger domestic outputs, maize imports are expected to decline.

**Table 5. Cereal imports of LIFDCs**  
(thousand tonnes)

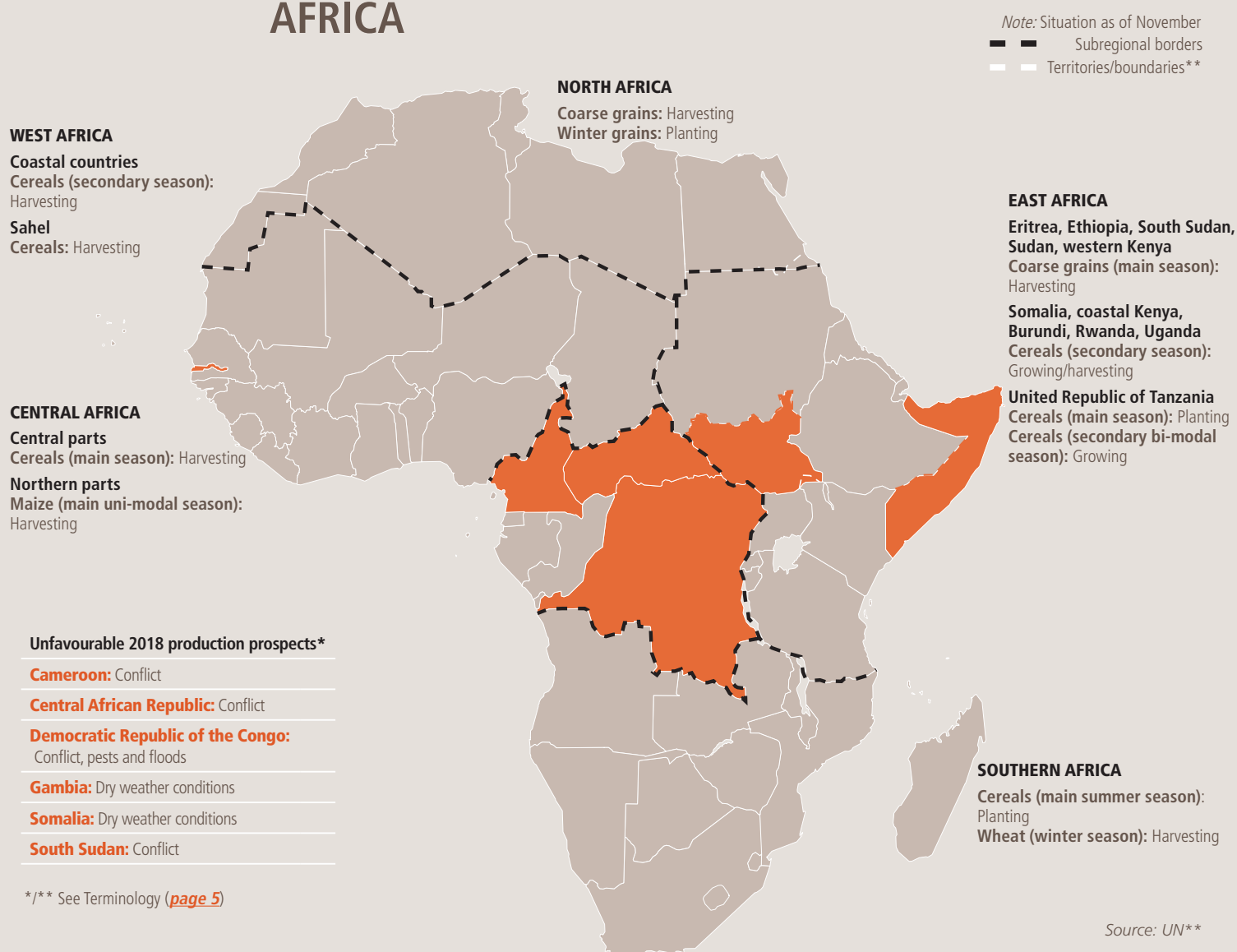
	2016/17 or 2017	2017/18 or 2018		2018/19 or 2019	
	Actual imports	Import forecast	of which food aid	Import requirement <sup>1</sup>	of which food aid
<b>Africa</b> (37 countries)	<b>35 832</b>	<b>35 659</b>	<b>1 043</b>	<b>35 451</b>	<b>1 019</b>
East Africa	11 211	11 934	733	11 290	718
Southern Africa	3 870	2 909	15	2 863	13
West Africa	18 435	18 557	134	18 982	134
Central Africa	2 317	2 259	161	2 316	154
<b>Asia</b> (11 countries)	<b>29 280</b>	<b>30 197</b>	<b>826</b>	<b>27 543</b>	<b>824</b>
CIS in Asia	4 579	4 634	0	5 098	0
Far East	14 549	14 821	199	10 944	197
Near East	10 152	10 742	627	11 502	627
<b>Central America and the Caribbean</b> (2 countries)	<b>1 486</b>	<b>1 402</b>	<b>10</b>	<b>1 477</b>	<b>10</b>
<b>Oceania</b> (2 countries)	<b>483</b>	<b>504</b>	<b>0</b>	<b>534</b>	<b>0</b>
<b>LIFDC</b> (52 countries)	<b>67 082</b>	<b>67 762</b>	<b>1 878</b>	<b>65 006</b>	<b>1 853</b>

Note: Totals computed from unrounded data.

<sup>1</sup> The import requirement is the difference between utilization (food, feed, other uses, exports plus closing stocks) and domestic availability (production plus opening stocks).

## REGIONAL REVIEWS

## AFRICA

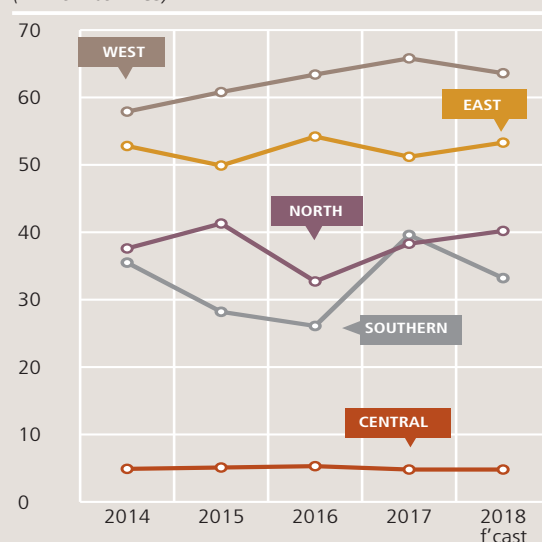


Source: UN\*\*

## Africa Production Overview

In 2018, aggregate cereal production in Africa is forecast at 183.8 million tonnes, 4.4 million tonnes below the previous year's bumper high, but still well above the five-year average.

The bulk of this year's decline is related to reduced harvests in Southern Africa, due to unseasonably dry weather. Outputs in several West African countries are forecast to return to near-average levels, following the previous year's bumper harvests. Elsewhere, production increases were estimated in North Africa, while beneficial weather in East Africa is expected to trigger production upturns in 2018. In Central Africa, persisting civil insecurity in some areas continue to impede agricultural activities, stagnating cereal outputs.

Cereal production  
(million tonnes)

## NORTH AFRICA



## Favourable planting conditions for 2019 winter crops

Planting of the 2019 winter wheat and coarse grains crops started in late October and will continue until the end of the year. Unlike the previous year, when rainfall deficits delayed plantings until December, above-average precipitation across the main growing areas of the subregion between September and the first decade of November replenished soil moisture reserves. Mostly sunny conditions during the second decade of November facilitated land preparation and planting activities.

## Above-average cereal output in 2018

The 2018 wheat and barley harvests across the subregion was completed by mid-August, while harvests of maize and rice crops in **Egypt** were concluded in November.

Aggregate cereal production in 2018 is estimated at 40.2 million tonnes, about 5 percent above both the previous year's harvest and the average. Production gains in **Morocco** and **Algeria**, on account of higher yields due to favourable weather, exceeded localized crop losses in **Egypt** and **Tunisia**. In **Morocco**, at 10.5 million tonnes, the 2018 cereal production exceeded last year's harvest by about 7 percent and the five-year average by 25 percent. In **Algeria**, total cereal production was estimated at 6 million tonnes, over 75 percent above last year's weather stricken-harvest and 60 percent above the five-year average. In **Tunisia**, the 2018 national cereal output was estimated at 1.45 million tonnes, about 10 percent below average due to rainfall deficits in central parts of the country. In **Egypt**, the 2018 cereal harvest is estimated at 22 million tonnes, about 5 percent below the 2017 level and 8 percent below average, mainly due to a decline in area planted under paddy crops. The cereal harvest in **Libya** is expected at a below-average level of 219 000 tonnes, reflecting limited availability of inputs.

The aggregate cereal import requirement for the subregion (of which wheat accounts for about 60 percent) for the 2018/19

marketing year (July/June) is estimated at approximately 48 million tonnes, 0.5 million tonnes more than the previous five-year average, but almost 2 million tonnes below the previous year reflecting increased domestic availabilities.

## High food inflation rates persist in Egypt and Libya

The highest food inflation rates prevail in **Egypt** and **Libya**. After three months of respite between April and July 2018 when the annual food and beverage inflation rate in **Egypt** declined to about 10 percent from record levels of over 40 percent in spring 2017. However, increased prices of energy and transportation pushed food inflation up to 20 percent in October 2018. In **Libya**, although the food inflation rate eased from a record level of 50 percent in December 2017, it remained elevated at 18 percent in April 2018 (latest available estimate), supported by insecurity-induced supply chain disruptions and shortages of foreign currencies.

Low or relatively stable food inflation rates prevail in **Algeria** (0.3 percent in September, down from 2.8 percent in August), **Morocco** (1.8 percent in October, up from negative 1 percent in August) and **Tunisia** (6.3 percent in October, up from 5.8 percent in September).

**Table 6. North Africa cereal production**  
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2017 estim.	2018 f'cast	5-yr Avg.	2017 estim.	2018 f'cast	5-yr Avg.	2017 estim.	2018 f'cast	5-yr Avg.	2017 estim.	2018 f'cast	Change: 2018/2017 (%)
<b>North Africa</b>	<b>19.1</b>	<b>19.5</b>	<b>21.3</b>	<b>12.8</b>	<b>12.3</b>	<b>13.9</b>	<b>6.2</b>	<b>6.4</b>	<b>5.0</b>	<b>38.1</b>	<b>38.3</b>	<b>40.2</b>	<b>5.0</b>
Algeria	2.6	2.4	3.9	1.1	1.0	2.1	0.0	0.0	0.0	3.8	3.4	6.1	78.2
Egypt	9.2	8.8	8.8	8.7	8.1	8.3	6.2	6.4	4.9	24.1	23.2	22.0	-5.5
Morocco	6.0	7.1	7.3	2.3	2.7	3.1	0.0	0.1	0.1	8.4	9.8	10.5	6.9
Tunisia	1.1	1.1	1.1	0.5	0.5	0.4	0.0	0.0	0.0	1.6	1.6	1.4	-10.1

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2013-2017 period.



## WEST AFRICA



## Above-average cereal harvest is expected in 2018 in Sahel and West Africa

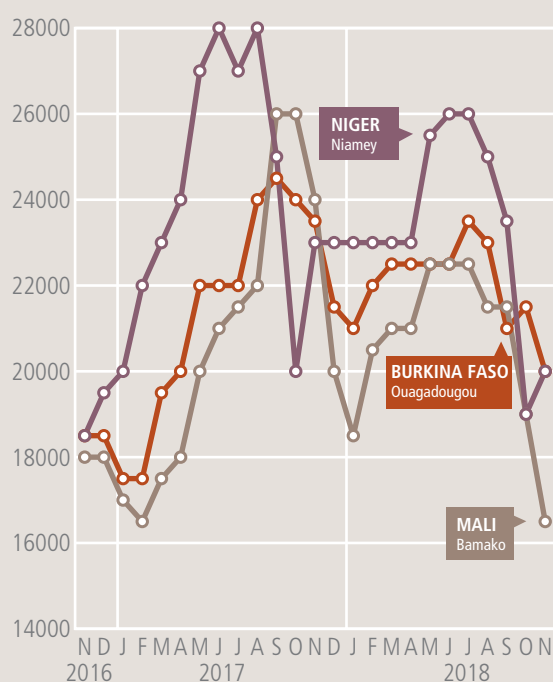
Harvesting of the 2018 second season cereal crops in coastal countries along the Gulf of Guinea is ongoing, while in the Sahel, harvesting of main season coarse grains crops is nearly complete in November. At the subregional level, the 2018 cereal production is expected to decline slightly from the 2017 record but still remain above average, sustained by favourable weather conditions and widespread support by national governments and partners for agricultural inputs and equipment. Cereal production is estimated at 63.6 million tonnes in *West Africa*, about 6 percent above the previous five-year average. Disaggregated, aggregate cereal production of the eight coastal countries is estimated at about 39 million tonnes in 2018, 6 percent more than the five-year average but slightly below the 2017 level. For the nine Sahel countries, the 2018 aggregate cereal production is estimated at approximately 24.6 million tonnes, 3 percent below 2017 record level and 6 percent above average. Record cereal outputs are forecast in **Chad**, **Guinea** and **Sierra Leone**, while above average harvests are anticipated in **Liberia**, **Mali**, **Ghana**, **Senegal** and **Côte d'Ivoire**. However, a significant year-on-year decrease relative to the average is forecast in

**Gambia** (11 percent). In **Nigeria**, the Boko Haram conflict continues to affect agricultural production and other livelihoods in the northeast. However, the delivery of external food assistance by humanitarian organizations and internal flows of coarse grains from areas not affected by the conflict are contributing to offset the production decline

## Newly harvested crops helped stabilized prices

Increased market supplies, due to the arrival of newly harvested crops have exerted downward pressure on prices in recent months. As a result, prices of major grains are generally lower than last year, but in some countries still remained at elevated levels, including in **Nigeria** and **Ghana** where inflation rates are very high. In **Burkina Faso**, improved market availabilities from the new harvest and subsidized sales by the government contributed to maintaining prices of coarse grains below or around their levels in October 2017. In **Niger**, prices of millet and maize declined further in October as a result of the ongoing harvests, while prices of sorghum remained mostly stable. In general, prices of coarse grains were lower than a year earlier. In **Mali**, prices of coarse grains began to decline in October and were generally lower than a year earlier as a result of improved supplies due to the commercialization of newly harvested crops, the implementation of food distribution programmes and government sales at subsidized prices. In **Chad**, improved market availabilities from the recently-started harvest put downward pressure on prices of coarse grains, which

Millet prices in selected West African markets (CFA Franc BCEAO (XOF)/100kg)



Source: Afrique Verte.

declined in most markets in September and contributed to an improvement in the food security situation in conflict-affected areas of Lake Chad. In **Senegal**, prices of rice, the main staple crop, remained mostly stable in September due to adequate market supplies and for millet following the start of the new harvest in some areas. In coastal countries along the Gulf of Guinea, prices of maize in **Ghana** showed mixed trends in October, declining further in Accra, with the new harvest, while remaining stable or increasing in the other markets, mainly due to transport disruptions caused by heavy rains. Prices of rice remained mostly stable. In **Togo**, prices of maize, the country's main staple food, dropped in September in line with seasonal trends and were below or around their year-earlier levels.

Table 7. West Africa cereal production (million tonnes)

	Coarse grains			Rice (paddy)			Total cereals <sup>1</sup>			
	5-yr Avg.	2017 estim.	2018 f'cast	5-yr Avg.	2017 estim.	2018 f'cast	5-yr Avg.	2017 estim.	2018 f'cast	Change: 2018/2017 (%)
<b>West Africa</b>	<b>44.1</b>	<b>47.8</b>	<b>45.2</b>	<b>15.9</b>	<b>17.8</b>	<b>18.3</b>	<b>60.1</b>	<b>65.8</b>	<b>63.6</b>	<b>-3.3</b>
Burkina Faso	4.2	4.2	4.2	0.3	0.3	0.3	4.6	4.5	4.6	1.1
Chad	2.4	2.5	2.8	0.3	0.3	0.3	2.7	2.7	3.1	12.8
Ghana	2.2	2.4	2.1	0.6	0.7	0.8	2.8	3.1	2.9	-7.2
Mali	5.6	6.5	6.3	2.4	2.7	2.6	8.1	9.3	8.9	-3.9
Niger	5.2	5.7	5.1	0.1	0.1	0.1	5.3	5.9	5.2	-11.0
Nigeria	18.0	19.0	18.0	6.1	7.0	7.2	24.2	26.1	25.3	-3.0

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2013-2017 period.

<sup>1</sup> Total cereals includes wheat, coarse grains and rice (paddy).

In **Benin**, prices continued to weaken in the main market of Cotonou and as of September were about 10 percent lower than a year earlier. In **Nigeria**, prices of cereals generally declined between July and September, reflecting the start of the new harvest. Prices, however, remain at relatively high levels, although lower than a year earlier.

### Food security continues to be affected by civil insecurity

Despite the record production in *West Africa*, the food situation remains a serious concern in several countries due to civil insecurity and armed conflict, which have disrupted production systems and marketing activities as well as caused large-scale population displacements. The most affected areas are in northeastern **Nigeria**, central and northern **Mali**, eastern **Niger**, northern **Burkina Faso**, Liptako Gourma region crossing **Mali**, **Niger** and **Burkina Faso**, and in the Lac Chad Region and Tibesti Region in **Chad**. According to the United Nations Office for the Coordination of Humanitarian Affairs (OCHA), the number of internally displaced people in the Lake Chad Basin Region is estimated at over 2.4 million as of October 2018, of which about 2 million Internally Displaced People (IDPs) in **Nigeria**, with the rest in **Cameroon**, **Chad** and **Niger**. In aggregate, based on the results of the "Cadre Harmonisé" analysis in November 2018, the number of severely food insecure people (CH Phase 3: "Crisis" and above) is estimated at about 4.5 million people, including about 182 000 people in CH Phase 4: "Emergency" in **Nigeria**, **Mali**, **Niger**, **the Gambia**, **Mauritania** and **Chad**. In addition, as a result of the ongoing civil insecurity in **the Sudan**, **the Central African Republic** and **Libya**, about 500 000 people remained displaced, mainly refugees and returnees, in **Chad**.

## CENTRAL AFRICA



### Cereal production in 2018 continues to be affected by widespread conflict

Harvesting of the main season's 2018 cereal crops in **the Central African Republic** and **Cameroon** concluded in October, while harvesting of the secondary season crops started at the beginning of December in some southern bi-modal rainfall areas. In **Gabon**, **the Congo** and in northern bi-modal rainfall areas of **the Democratic Republic of the Congo**, harvesting of the 2018 main maize crop is well underway. In the southernmost uni-modal rainfall areas of the Democratic Republic of the Congo, planting of the secondary season maize crop is currently underway, to be harvested from March 2019.

In **the Central African Republic**, **Cameroon** and **the Democratic Republic of Congo**, production continues to be negatively affected by persisting civil insecurity. The ongoing conflict has caused many households to abandon farms, resulting in an overall reduction in the planted area.

In **the Central African Republic**, five consecutive years of reduced cereal production has led to the depletion of households' productive assets, particularly seeds. Consequently, despite favourable weather conditions across the country

since the beginning of the season, the 2018 cereal production is foreseen at a below-average level and significantly below the pre-crisis levels. Similarly, in **Cameroon**, weather conditions were also favourable since the beginning of the season, benefitting crop development and yields. However, agricultural production is still expected to be below average as agricultural operations have been severely hampered by conflicts in the Far North as well as in Northwest and Southwest Anglophone regions. In both areas, the conflict has caused large population displacements, shortages of inputs and depletion of households' assets. In **the Democratic Republic of Congo**, the overall seasonal cumulative rainfall amounts were above average, but aggregate production of the 2018 season crops is expected to be slightly below average due to ongoing conflicts in the Kasai, North Kivu, South Kivu, Ituri and Tanganyika regions. The conflict continued to disrupt agricultural activities and limited the available crop-growing areas. Moreover, infestations of Fall Armyworm (FAW) throughout the country have caused significant maize crop damage and losses particularly in southern and eastern regions. In **the Congo** and **Gabon**, crops benefitted from a timely onset of seasonal rains in September followed by favourable weather conditions. Overall, the aggregate subregional cereal output in 2018 is estimated at 4.8 million tonnes, slightly below the five-year average.

### Food prices remain well above average

In parts of **the Democratic Republic of the Congo** and **the Central African Republic**, tighter market supplies, due to multiple years of reduced harvests and insecurity, have resulted in high prices of food. Prices are expected to decline

**Table 8. Central Africa cereal production**  
(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals <sup>1</sup>			
	5-yr Avg.	2017 estim.	2018 f'cast	5-yr Avg.	2017 estim.	2018 f'cast	5-yr Avg.	2017 estim.	2018 f'cast	Change: 2018/2017 (%)
<b>Central Africa</b>	<b>4.3</b>	<b>4.1</b>	<b>4.0</b>	<b>0.6</b>	<b>0.7</b>	<b>0.7</b>	<b>4.9</b>	<b>4.8</b>	<b>4.8</b>	<b>-0.4</b>
Cameroon	2.9	2.7	2.6	0.3	0.4	0.4	3.1	3.0	3.0	-0.7
Central African Republic	0.1	0.1	0.1	0.0	0.0	0.0	0.1	0.1	0.1	-3.4
Democratic Republic of the Congo	1.2	1.2	1.2	0.3	0.3	0.3	1.6	1.5	1.6	0.5

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2013-2017 period.

<sup>1</sup> Total cereals includes wheat, coarse grains and rice (paddy).

seasonally or remain stable in the coming months as a result of downward pressure from the newly-harvested crops.

In **the Democratic Republic of the Congo**, the annual inflation rate in 2018 is estimated at a high of, but still well below the 42 percent registered in 2017. The elevated level is mostly a result of a weaker currency that has driven up import costs. In **the Central African Republic**, cereal prices fell but the declines are expected to be short-lived as the ongoing conflict is expected to continue to disrupt food and livestock markets, especially in northwest, southeast and central areas. In **Cameroon**, supplies from the recent harvests, significant inflows of imports and the ongoing delivery of food assistance have put downward pressure on maize prices in recent months. In **the Congo** and **Gabon**, inflation rates were low and mostly stable in 2018. In both countries, the low rates reflect relatively strong local currencies that have exerted downward pressure on prices. Moreover, in **Gabon**, government subsidies on several basic goods, including food products, have contributed to maintaining prices at low levels.

### Conflicts continue to severely aggravate food security conditions

In **the Central African Republic**, armed conflict remains the major driver of food insecurity affecting households' livelihoods and access to food. The most affected people are located in areas with high concentration of IDPs, namely Batangafo, Kaga Bandoro, Rafai and in the prefectures of Ouham Pendé, Nana Gribizi, Ouaka and Haut-Mbomou, where both host communities and displaced people have lost access to their livelihoods. Based on the latest IPC analysis, conducted in September 2018, about 1.9 million people (31 percent

of the total population) were estimated to be severely food insecure (IPC Phases 3: "Crisis" and 4: "Emergency") of which more than 550 000 faced IPC Phase 4: "Emergency" conditions. Since late 2017, the quantity of food consumed by a large segment of the food insecure population has reportedly decreased and the dietary diversity has also drastically worsened, raising serious concerns in terms of nutrition and health conditions.

In **the Democratic Republic of the Congo**, new inter-ethnic clashes resulted in additional pockets of insecurity since June 2018 in South Kivu, which caused the displacement of about 76 000 people. Furthermore, the escalation of conflicts in eastern and southern areas as well as the ongoing humanitarian crisis in the Kasai Region continue to negatively affect food insecurity. The conflict has led to the displacement of about 4.5 million people, mostly located in central, eastern and southeastern provinces, and they face extremely limited access to livelihoods as they have lost their productive assets. The lean season set in earlier than normal in August, as stocks were quickly depleted due to reduced harvests during the previous agricultural seasons. According to preliminary results of the latest IPC, valid for the period from August 2018 to June 2019, about 13.1 million people are in need of urgent humanitarian assistance (IPC Phases 3: "Crisis" and 4: "Emergency").

In **Cameroon**, the escalation of conflicts in the North and Southwest regions are expected to aggravate an already alarming food security situation. The ongoing crisis started in October 2016 as a result of perceived marginalization and resistance to the assimilation of the Anglophone minority to the Francophone majority.

## EAST AFRICA



### Above-average 2018 subregional cereal output expected due to abundant March-May rains

In central and northern parts of the subregion, harvesting of the 2018 main season cereal crops is well underway. In **Ethiopia**, production prospects for the main "meher" season crops are generally favourable in key growing areas of western Oromia, Amhara and Benishangul Gumuz regions. Lower yields are expected in central parts of Oromia Region, where abundant early-seasoned rains in June and July were followed by below-average precipitation in August and September, and in SNNPR lowlands, where crops have been affected by a prolonged dry spell in July. In **Eritrea**, the June-September "kiremti" rains were abundant and well-distributed over most key cropping areas in central and western Anseba, Debub, Maekel and Gash Barka regions, auguring well for yield prospects. In **the Sudan**, the rainy season has been characterized by above-average precipitation over most cropped areas, which benefited crops but triggered floods in West Kordofan, Kassala, Gezira, Sennar and Northern states. The area planted with sorghum, the main cereal grown and consumed in the country, is reported to

**Table 9. East Africa cereal production**  
(million tonnes)

	Wheat			Coarse grains			Total cereals <sup>1</sup>			
	5-yr Avg.	2017 estim.	2018 f'cast	5-yr Avg.	2017 estim.	2018 f'cast	5-yr Avg.	2017 estim.	2018 f'cast	Change: 2018/2017 (%)
<b>East Africa</b>	<b>5.4</b>	<b>5.6</b>	<b>5.6</b>	<b>42.1</b>	<b>42.4</b>	<b>43.8</b>	<b>51.0</b>	<b>51.2</b>	<b>53.3</b>	<b>4.0</b>
Ethiopia	4.4	4.6	4.6	20.0	22.0	21.9	24.6	26.8	26.7	-0.4
Kenya	0.3	0.3	0.3	3.8	3.3	4.1	4.2	3.7	4.5	22.6
Sudan	0.5	0.5	0.5	5.8	4.7	5.1	6.4	5.2	5.6	8.2
Uganda	0.0	0.0	0.0	3.3	3.4	3.4	3.5	3.6	3.6	0.4
United Republic of Tanzania	0.1	0.1	0.1	7.1	7.1	7.3	10.0	9.7	10.4	7.8

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2013-2017 period.

<sup>1</sup> Total cereals includes wheat, coarse grains and rice (paddy).

have decreased in key semi-mechanized cropping areas in southern states as fuel shortages disrupted planting operations. In addition, low supplies and high prices of agricultural inputs are also expected to negatively impact yields. An ongoing nationwide government-led crop assessment, supported by FAO, will provide detailed production estimates in early 2019. In several northern and central uni-modal rainfall areas of **South Sudan**, seasonal rains were below average and unevenly distributed temporally, which forced farmers to replant multiple times and adversely impacted yields. Outbreaks of FAW are also likely to constrain cereal yields. Additionally, insecurity still prevails in most areas and continues to impede access to fields, however, it was reported that some refugees were able to return home and engage in farming activities. National 2018 crop production estimates will be provided by a joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM), currently deployed in the country. In key growing areas of the Rift Valley and Western provinces of **Kenya**, “long-rains” crops, currently being harvested, benefitted from abundant seasonal rains and, despite some localized floods, production is expected to be about 15 percent above average.

In southern parts of the subregion, harvesting of the 2018 second season cereal crops has recently started in **South Sudan** and **Uganda**, while in **the United Republic of Tanzania**, **Somalia** and **Kenya**, crops will be gathered in early 2019. The October-December rainy season has been erratic in several cropping areas of the subregion, negatively impacting crop establishment and development. In central and southern **Somalia**, as well as in coastal and marginal agricultural areas of southeastern **Kenya**, the rainy season has been largely characterized by dry conditions, with some scattered below-average rains received only in late October and mid-November. Similarly, in northern, northeastern and coastal bi-modal rainfall areas of **the United Republic of Tanzania**, “vuli” rains have been well below average, with the most severe rainfall deficits reported in coastal regions. In southern bi-modal rainfall areas of **South Sudan**, second season crops have been affected by delayed, erratic and below-average rains, which have adversely impacted vegetation conditions and consequently lowered yield expectations. Despite some localized

improvements in security conditions, which allowed farmers to expand plantings in some areas, agricultural activities are still severely affected by the conflict, which is constraining access to fields, continuing to cause displacement of people and damaging households’ productive assets. In bi-modal rainfall areas of **Uganda**, below-average seasonal rains in the Eastern Region negatively impacted on vegetation conditions and are expected to result in localized crop losses. In **Rwanda** and **Burundi**, harvesting of the “2018A” season crops, which normally starts in early December, will begin towards the end of the month in central and eastern Burundi, and in eastern and southern Rwanda, where below-average early-seasoned rains delayed planting operations by about three weeks. Improved rainfall since October benefited crop establishment and development in most areas, except in eastern Rwanda, where rainfall deficits were more severe and consequently vegetation conditions are below average as of mid-November.

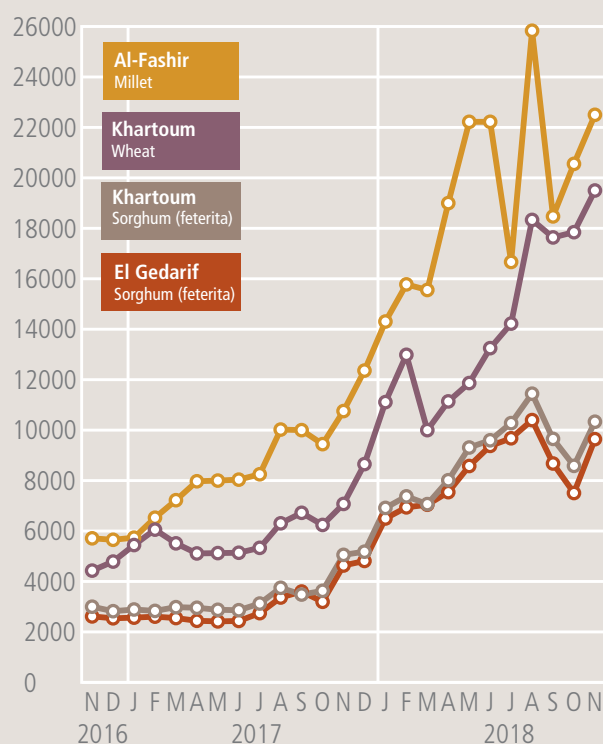
FAO’s preliminary estimate of the subregion’s 2018 aggregate cereal output, including a forecast for the second season harvests to be gathered early next year, stands at about 53 million tonnes, 4 percent above last year’s average output.

The October-December rainy season in pastoral and agro-pastoral areas has also been characterized by erratic and below-average precipitations. However, as of late November, vegetation conditions were still generally favourable as the abundant rains during the last March-May season led to a substantial regeneration of rangeland resources and resulted in a slower-than-normal depletion in recent months. Notably, in northern and eastern **Kenya**, southeastern **Ethiopia** and central and northern **Somalia**, which were affected by a severe drought between mid-2016 and late 2017, heavy March-May rains resulted in marked improvements in vegetation and livestock body conditions.

## Food prices at high levels in the Sudan and South Sudan

In **the Sudan**, prices of locally-grown sorghum and millet in September/October had declined by 10–40 percent since their peaks in August, as traders released stocks in anticipation of the 2018 harvest. Prices however increased in November, following a sharp devaluation of the Sudanese pound in October. Prices of coarse grains in November were two to three times higher than their year-earlier levels, mainly reflecting the strong depreciation of the local currency since late 2017 that triggered a significant rise in the general inflation rate. High fuel prices, which increased transportation costs, provided further support. In **South Sudan**, prices of maize, sorghum, wheat, cassava and groundnuts, after sustained increases in the first semester of 2018, decreased by 20 to 35 percent between June and October in the capital, Juba. The recent price declines were mainly driven by a substantial appreciation of the local currency on the parallel market, in part reflecting renewed confidence of investors, the resumption of oil production and increased domestic availabilities as well as reduced prices of imports from Uganda following the first season harvests. As a result, prices of sorghum and maize were lower on a yearly basis as of October, however, they remained

Wholesale prices of selected cereals in the Sudan  
(Sudanese pound (SDG) /tonne)



Source: Food Security information for Action (SIFISA).



twice as high as their levels two years ago, mainly on account of the widespread insecurity. In **Ethiopia**, prices of maize increased seasonally in recent months, subsequently levelling off or declining slightly in October with the start of the “meher” harvest and were 10-20 percent lower than one year earlier. In most markets of **Somalia**, prices of maize and sorghum have continued the declining trend that started in May, but in October they began to increase seasonally in the capital Mogadishu. Overall, prices in October were up to 50 percent below the levels of one year earlier, due to the above-average 2018 “gu” production and sustained food assistance operations. Similarly, in **Kenya** and **Rwanda**, prices of maize continued the downward trend that started in early 2018 and in October were up to 50 percent below their year-earlier levels as a result of large domestic availabilities from the 2018 harvests and sustained imports. In **the United Republic of Tanzania, Uganda** and **Burundi**, prices of maize increased

by up to 50 percent in September and October conforming to seasonal patterns, but remained 15-55 percent below their year-earlier levels due to adequate domestic availabilities.

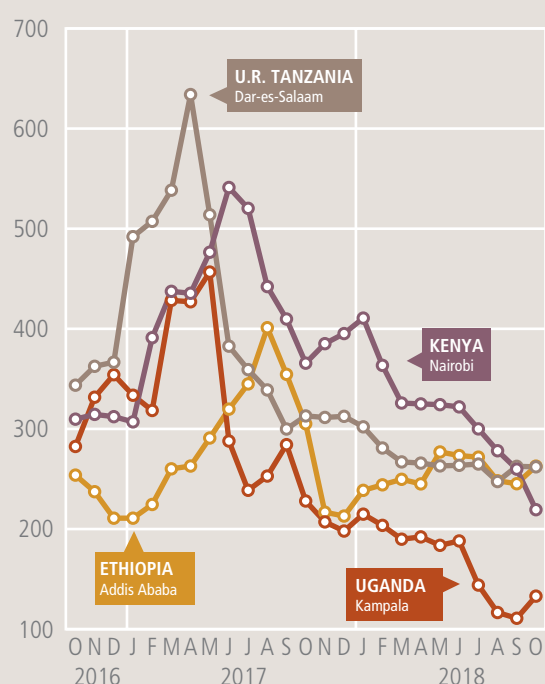
### Substantial food security improvements reported in Kenya and Somalia

The lean season is over in most crop-producing areas and food security conditions are gradually improving as newly-harvested crops from the main 2018 season become available for consumption. However, improvements are expected to be limited and short-lived in **South Sudan**, as reduced harvests will result in an early depletion of households stocks and a premature onset of the lean season is therefore anticipated. Currently, the number of people in need of humanitarian assistance in the subregion is estimated at 22.5 million, with the largest caseloads in Ethiopia, the Sudan and South Sudan.

The total number of severely food insecure people in the subregion is about 3.3 million less than one year earlier, mainly on account of the recovery in **Kenya**, where the food insecure caseload declined from 3.4 million in late 2017 to 0.7 million following the effect of abundant March-May “long-rains” on food availability and access for pastoralist households. Similarly, in **Somalia**, the food security situation has steadily improved since early 2018 and, according to the results from the latest multi-agency assessment, about 1.56 million people are estimated to be severely food insecure (IPC Phases 3: “Crisis”, 4: “Emergency” and 5: “Catastrophe”). This caseload is about half the estimate compared to 12 months earlier, mainly due to the improved crop and livestock production following the above-average

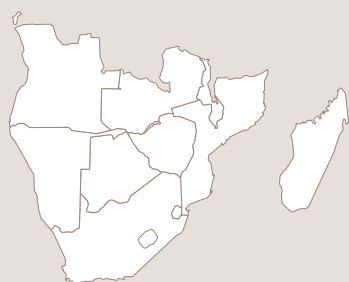
April-June “gu” rains and the sustained provision of large-scale humanitarian assistance. However, humanitarian needs still remain substantial, mostly reflecting the lingering effects of the 2016/17 drought and the critical situation of the population displaced by conflict and natural disasters, with about 217 000 IDPs estimated to face IPC Phase 5: “Catastrophe” levels of food insecurity. In **Ethiopia**, the food insecure caseload in mid-2018 was estimated at 7.95 million, slightly above the estimate in early 2018 and only 6 percent below the caseload one year earlier, at the height of the impact of the 2016/17 drought. The favourable impact of above-average March-May “gu/genna” rains on food availability and access in southeastern pastoralist areas was partly negated by livelihood losses caused by an upsurge in inter-communal conflicts, which resulted in the displacement of 1.44 million people during 2018. In **the Sudan**, 6.2 million people were estimated to be severely food insecure in mid-2018, about 60 percent more than in late 2017. The sharp deterioration of the food security situation is mainly due to the drought-reduced agricultural output, and to critical macro-economic challenges since late 2017, with high inflation rates resulting in soaring food prices and severe access constraints for vulnerable households. In **South Sudan**, the food insecure caseload is currently estimated at 4.4 million people, about 30 percent less than the record high reached last September following the 2018 harvest and 10 percent less on a yearly basis. However, 42 percent of the total population still faces severe food insecurity as food availability and access continues to be severely constrained by widespread violence, large scale displacements, high food prices, market disruptions and limited income-earning opportunities. The areas of major concern are former Jonglei, Lakes and Unity states, where about 60 percent of the population faces IPC Phases 3: “Crisis”, 4: “Emergency” and 5: “Catastrophe” levels of food insecurity.

Maize prices in selected East African markets (USD/tonne)



Source: Regional Agricultural Trade Intelligence Network; Ethiopian Grain Trade Enterprise.

## SOUTHERN AFRICA



## Forecasts of reduced rains dampen preliminary 2019 production outlook

Planting of the main 2018 cereal crops, to be harvested from next April, is underway. Early seasonal rains have been scattered and rainfall in October and early November was generally below average. The slow start of seasonal rains has impeded planting activities and in areas where crops had been planted hindered early crop establishment, which has resulted in below-normal vegetation conditions in southern parts of the subregion as of mid-November. The largest rainfall deficits were recorded in western **Madagascar**, central **Mozambique** and in large portions of **Zimbabwe**. For the December-to-March period, weather forecasts point to a higher likelihood of below-normal rainfall in **Namibia**, central and southern **Mozambique**, eastern **Zimbabwe** and the southern tips of **Malawi** and **Zambia**, while rains are expected to be near average in the remaining areas of the subregion. This period coincides with the critical reproductive phase of the maize crop, when the crop is most sensitive to water deficits. Although weather forecasts and current conditions have diminished yield prospects

in 2019, it is still early in the season and the situation could improve; it should also be noted that even if seasonal rainfall is reduced, precipitation levels could still be sufficient and favourably distributed to achieve normal yield levels

While official planting estimates are not yet available for most countries, in **South Africa**, the main cereal-producing country, preliminary indications point to a 6 percent year-on-year expansion in maize sowings, which would push plantings up to an average level (2014-2018). The expected increase is related to an initial favourable weather forecast for the first half of the season coupled with the application of crop rotation practices and higher grain prices.

## Reduced 2018 harvests raise import needs

Cereal production in 2018 is estimated at 33.2 million tonnes, 6.4 million tonnes lower than the 2017 record high but still 1.2 million tonnes above the previous five-year average. The year-on-year production decrease is predominantly on account of a reduced maize output, which on average accounts for about 76 percent of the total cereal production, with small production declines also estimated for millet and sorghum. These decreases more than offset production gains for paddy and wheat, mostly resting on output rebounds in **Madagascar** and **South Africa**, respectively.

In spite of the reduced outputs in 2018, aggregate domestic cereal supplies in the 2018/19 marketing year (mostly April/March) are estimated to still exceed the five-year average by a significant margin. This reflects the bumper cereal harvests in

2017 that resulted in a build-up of national inventories and enabled countries to shore up domestic supplies. Accordingly, despite a moderate yearly increase, aggregate maize import requirements for 2018/19 are estimated at a below-average level of 1.1 million tonnes. For all cereals, subregional import needs are estimated to remain virtually unchanged in 2018/19 compared to the preceding year, mainly reflecting lower requirements for rice in **Madagascar** and for wheat in **South Africa**, which offset the overall increase for maize.

Subregional cereal exports are almost entirely comprised of maize shipments from South Africa and, to a lesser extent, maize from Zambia. For the 2018/19 marketing year, **South Africa** is forecast to export about 2.4 million tonnes, similar to the previous year's quantity. Most of this volume is expected to be delivered to *Asian* countries as well as within the subregion. In October, temporary export restrictions were imposed in **Zambia** amidst a sharp year-on-year contraction in the 2018 output.

## Prices of maize climbed above year-earlier levels

Prices of maize, the main food staple, generally increased in the preceding months, conforming to seasonal trends. As of October/November, maize prices were above their year-earlier levels, except in the net-importing countries of **Eswatini** and **Namibia** where generally adequate supplies have tempered stronger price increases. In **South Africa**, prices of maize have steadily risen since July, mostly reflecting the weaker currency, spill-over effects from the international market and, more recently, concerns over the occurrence of an

Table 10. Southern Africa cereal production  
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2017 estim.	2018 f'cast	5-yr Avg.	2017 estim.	2018 f'cast	5-yr Avg.	2017 estim.	2018 f'cast	5-yr Avg.	2017 estim.	2018 f'cast	Change: 2018/2017 (%)
<b>Southern Africa</b>	<b>2.0</b>	<b>1.8</b>	<b>2.0</b>	<b>25.8</b>	<b>34.1</b>	<b>27.2</b>	<b>4.2</b>	<b>3.7</b>	<b>4.0</b>	<b>32.0</b>	<b>39.6</b>	<b>33.2</b>	<b>-16.3</b>
- excl. South Africa	0.3	0.3	0.2	12.5	16.0	13.1	4.2	3.7	4.0	17.0	20.0	17.3	-13.8
Madagascar	0.0	0.0	0.0	0.3	0.3	0.3	3.6	3.1	3.3	4.0	3.4	3.6	7.3
Malawi	0.0	0.0	0.0	3.4	3.6	2.9	0.1	0.1	0.1	3.5	3.7	3.0	-18.5
Mozambique	0.0	0.0	0.0	2.0	2.6	2.7	0.4	0.4	0.4	2.4	3.0	3.2	4.0
South Africa	1.7	1.5	1.8	13.3	18.0	14.1	0.0	0.0	0.0	15.0	19.6	15.9	-18.9
Zambia	0.2	0.2	0.1	3.1	3.7	2.4	0.0	0.0	0.0	3.3	3.9	2.6	-33.8
Zimbabwe	0.0	0.1	0.1	1.3	2.5	1.9	0.0	0.0	0.0	1.4	2.5	1.9	-23.6

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2013-2017 period.



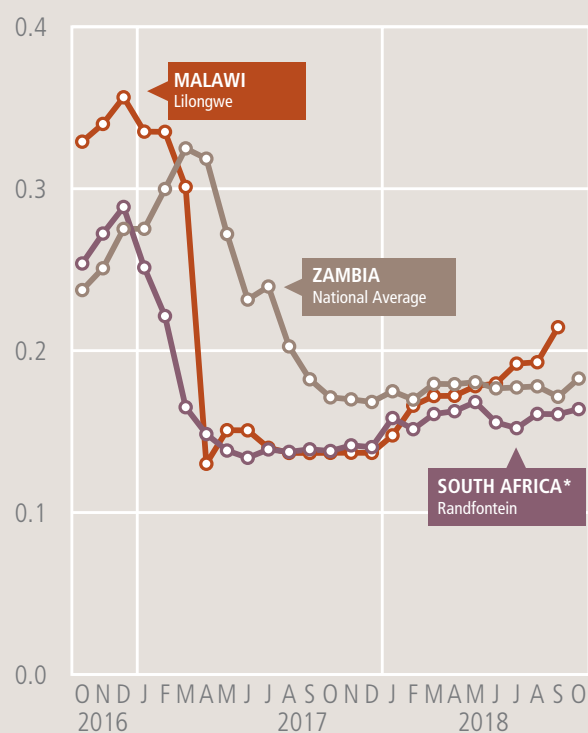
El Niño event and its impact on the 2019 harvest. However, larger price gains were capped by the good overall supply situation in the country. In **Zambia** and **Malawi**, seasonal increases in maize prices were amplified by the reduced 2018 outputs, with prices higher by around 20 percent or more on a yearly basis as of October. Also in **Mozambique**, prices of maize were reportedly above their year-earlier levels. In **Zimbabwe**, prices of maize meal continued their decreasing trend since 2017 and as of September 2018 were lower on a yearly basis reflecting generally adequate domestic supplies. However, prices of wheat flour spiked in September reflecting higher international quotations coupled with liquidity constraints that have disrupted access to external supplies. In **Madagascar**, despite a small increase in the 2018 paddy output, prices of local rice varieties were close to the high levels of the preceding year due to the generally tight domestic supply situation.

### Food insecure numbers second highest in the last ten years

According to estimates from the latest IPC analyses, the number of food insecure people is projected to peak at

10.4 million people<sup>3</sup> during the January-March 2019 lean season. At this level, the number of people in need of humanitarian assistance is the second highest estimate in the last ten years. The largest year-on-year increases are estimated for **Malawi**, **Mozambique** and **Zambia**, while the highest absolute numbers of food insecure people are estimated in **Malawi** and **Zimbabwe**, with approximately 3.3 million and 2.4 million people, respectively. The current poor conditions reflect the reduced 2018 harvests and higher prices of cereal staples that have also impinged on food access. The high number of food insecure persons is also underpinned by structural challenges, such as poor infrastructure and limited access to improved seed varieties, which continue to restrain agricultural productive capacities.

**White maize prices in selected Southern African markets**  
(USD/kg)



\* Wholesale prices, all others retail prices

Sources: Central Statistical Office, Zambia; Sistema De Informação De Mercados Agrícolas De Moçambique, Mozambique; SAFEX Agricultural Products Division, South Africa.

<sup>3</sup> Based on the 2017 Vulnerability Assessment Committees' evaluation. This figure excludes Angola (official estimates are not available) and South Africa (figures are not directly comparable with data from other countries) and Mauritius.

# REGIONAL REVIEWS

## ASIA

Note: Situation as of November

■ Subregional borders

□ Territories/boundaries\*\*

### CIS IN ASIA

Wheat (winter season): Planting

### FAR EAST ASIA

China (Mainland)

Rice (late double season): Harvesting

Wheat (winter season): Planting

Southeastern Far East Asia

Maize and rice (secondary season): Planting

Rice (main season): Harvesting

### NEAR EAST ASIA

Coarse grains (winter season): Planting to establishment

### FAR EAST ASIA

Southern Far East Asia

Coarse grains: Harvesting

Rice (main season): Harvesting

India

Coarse grains and rice (kharif season): Harvesting

Maize and wheat (rabi season): Planting

### Unfavourable 2018 production prospects\*

Yemen: Conflict

\*/\*\* See Terminology ([page 5](#))

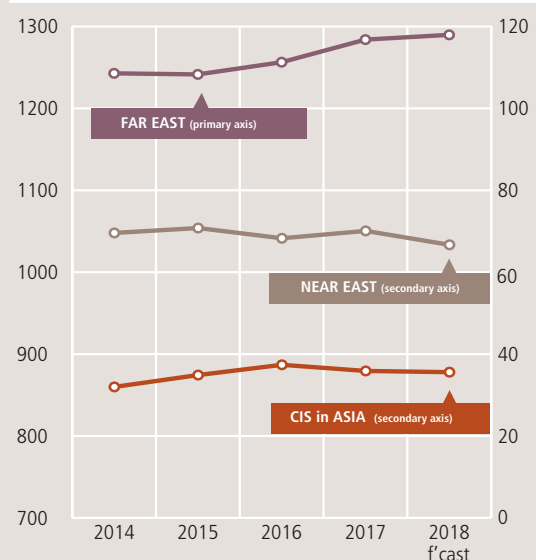
Source: UN\*\*

## Asia Production Overview

At the aggregate level, cereal production in Asia is estimated at 1 156 million tonnes, almost unchanged on a yearly basis and well above the five-year average.

In the Far East, notable production increases in India and Bangladesh helped to more than offset output declines in China (Mainland) and Pakistan, resulting in a small upturn in the subregional output. The aggregate cereal output in CIS Asia is estimated to have fallen, mostly resting on a large decrease in Uzbekistan. In the Near East, the continued impact of conflicts in some countries and erratic weather caused production declines, except in Iran (Islamic Republic of).

### Cereal production (million tonnes)



## FAR EAST



### Bumper aggregate cereal production expected in most countries for 2018 season

In Northern Hemisphere countries, harvesting of the 2018 main rice and maize crops is well advanced and is expected to be finalized in early 2019, following which the 2018 secondary rice and maize crops will be planted. In Southern Hemisphere countries and those along the Equator, harvesting of the 2018 secondary paddy and maize crops has almost concluded and planting operations for the 2019 main season are currently underway.

The subregional aggregate cereal production in 2018 is forecast at is forecast at record 1 290 million tonnes (rice in paddy

equivalent), close to the previous year's high level.

The 2018 production of paddy rice, the major staple in the subregion, is forecast at a record high of 694 million tonnes, 8.9 million tonnes above 2017's level, reflecting significant yearly increases in **Bangladesh, India, Indonesia** and **Cambodia**, where harvests reached record highs and bumper harvests in **Viet Nam, Thailand** and **Myanmar**, mostly resulting from price-induced area expansions. In addition, paddy production in

**Sri Lanka** rebounded by 1.4 million tonnes to a near-average level from the drought-reduced output in 2017, reflecting improved rains and water availability for irrigation. By contrast, paddy production in **China (Mainland)** is forecast to decrease by 2.3 million tonnes, about 1.1 percent below the 2017 output, due to a decline in plantings in response to lower minimum government procurement prices and reflecting the government's initiative to replace paddy cultivation with more profitable crops. Similarly, below-average outputs are expected in **the Democratic People's Republic of Korea** and **Timor Leste**, due to erratic rains and low irrigation supplies. A below-average output is also forecast in **the Republic of Korea**,

reflecting the government's directive to reduce paddy cultivation in response to a gradual decline in rice consumption.

The 2018 aggregate maize production is forecast at record 308 million tonnes, close to the previous year's high level on account of enlarged plantings, reflecting increased demand from the national feed sector and above-average yields on account of generally favourable weather conditions. Record maize harvests are forecast in **Bangladesh, Indonesia, the Philippines** and **Thailand**. By contrast, maize outputs are forecast at below-average levels in **Viet Nam**, where farmers preferred to cultivate more profitable cash crops and in **the Democratic People's Republic of Korea** due to unfavourable weather conditions that diminished yields.

The subregional 2018 wheat crop, which was harvested in the first half of the year, is estimated at 258 million tonnes, slightly below the record high achieved in 2017.

### Planting prospects for the 2019 wheat crop are favourable, except in Pakistan

Planting of the mostly irrigated 2019 winter wheat crop, for harvest next year, is nearing completion in most countries. In **China (Mainland)**, weather conditions and precipitation levels have been adequate since early September in most of the main producing areas, benefitting crop germination and early development. In **India**, planting operations are also

**Table 11. Far East cereal production**  
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2017 estim.	2018 f'cast	5-yr Avg.	2017 estim.	2018 f'cast	5-yr Avg.	2017 estim.	2018 f'cast	5-yr Avg.	2017 estim.	2018 f'cast	Change: 2018/2017 (%)
<b>Far East</b>	<b>251.5</b>	<b>262.7</b>	<b>257.9</b>	<b>328.4</b>	<b>336.3</b>	<b>338.0</b>	<b>672.7</b>	<b>685.0</b>	<b>693.9</b>	<b>1 252.6</b>	<b>1 284.0</b>	<b>1 289.8</b>	<b>0.5</b>
Bangladesh	1.3	1.3	1.3	2.3	3.0	3.2	51.8	51.4	53.6	55.4	55.7	58.1	4.3
Cambodia	0.0	0.0	0.0	0.8	1.2	1.2	9.7	10.5	10.7	10.5	11.7	11.9	1.3
China (Mainland)	128.0	133.0	128.0	228.4	225.9	226.2	206.8	208.6	206.3	563.2	567.5	560.5	-1.2
India	93.3	98.5	99.7	43.0	46.6	46.8	161.7	169.4	173.0	298.0	314.5	319.5	1.6
Japan	0.9	0.9	0.9	0.2	0.2	0.2	11.0	10.8	10.8	12.1	11.9	11.9	-0.4
Myanmar	0.1	0.1	0.1	2.3	2.7	2.8	28.5	29.5	30.4	30.9	32.3	33.3	3.2
Nepal	1.8	1.8	1.9	2.7	2.9	2.9	4.9	5.2	5.3	9.4	9.9	10.2	2.9
Pakistan	0.0	26.7	25.5	0.0	6.6	6.2	0.0	11.2	10.3	0.0	44.4	42.0	-5.5
Philippines	0.0	0.0	0.0	0.0	7.9	8.2	0.0	19.4	19.3	0.0	27.3	27.5	0.7
Republic of Korea	0.0	0.0	0.0	0.0	0.2	0.2	0.0	5.3	5.2	0.0	5.5	5.4	-1.7
Sri Lanka	0.0	0.0	0.0	0.0	0.2	0.2	0.0	2.4	3.8	0.0	2.6	4.1	57.7
Thailand	0.0	0.0	0.0	0.0	5.0	5.2	0.0	33.7	34.5	0.0	38.7	39.6	2.5
Viet Nam	0.0	0.0	0.0	0.0	5.1	4.8	0.0	42.8	44.6	0.0	47.9	49.4	3.2

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2013-2017 period.

progressing on schedule supported by ample water availability for irrigation. However, in **Pakistan**, reports indicate reduced water availability for irrigation in the main reservoirs curtailing production prospects for the 2019 wheat crop. Elsewhere in the subregion, plantings of the winter crops is ongoing under favourable weather conditions.

### Coarse grains import forecast at record high in 2018/19 reflecting increased demand for livestock feed

Aggregate cereal imports in the 2018/19 marketing year are forecast at 133.1 million tonnes, close to last year's above-average level. Wheat imports in 2018/19 are forecast at an above-average level of 50.7 million tonnes, on account of higher import requirements in **Bangladesh, Indonesia, the Philippines, Sri Lanka, the Republic of Korea** and **Viet Nam**, compared to the average of the preceding five years. Aggregate imports of coarse grains, mostly maize, are forecast at a record high of 67.3 million tonnes in 2018/19 reflecting growing demand for livestock feed. By contrast, in **China (Mainland)** imports of coarse grains are forecast below the five-year average as a result of a government directive that aims to reduce the large national maize stocks through increased sales from State reserves. Imports of rice in 2019 are forecast at 13.3 million tonnes, well below the five-year average on account of bumper outputs in most countries.

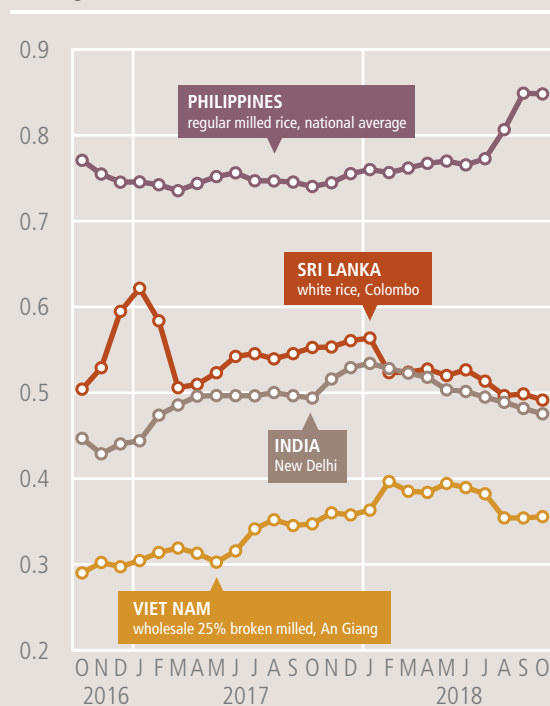
Exports of cereals consist mainly of rice, of which shipments in 2019 are forecast at 39.5 million tonnes, close to the previous year's high level.

### Domestic prices of rice showed mixed trends, those of wheat were generally stable

Domestic prices of rice showed mixed trends between August and October, but were generally higher than their year-earlier levels. In **Thailand**, prices were mostly stable in the August-September period, but increased slightly in October supported by anticipated purchases following an official announcement by the Philippines to procure a total of 750 000 tonnes of rice from several countries. Prices in **Viet Nam** also increased slightly in October, following declines in July and August, on expectations of the new sales to the Philippines. In **India**, prices were generally stable as downward pressure from the record 2018 harvest was negated by the impact of government purchases.

Among the importing countries, prices in **the Philippines** reached record highs in September, but levelled off in October with the start of the 2018 main harvest. Similarly, prices in **Sri Lanka** continued to increase in October, conforming to seasonal trends. By contrast, prices decreased in **Bangladesh** weighed by large market availabilities from the record 2018 "aus" and "boro" harvests. In **Indonesia**, prices of rice remained stable, mostly due to ample market availabilities from the above-average 2018 harvest. Prices of wheat grain and wheat flour

Rice retail prices in selected Far East countries (USD/kg)



Sources: Department of Census and Statistics, Sri Lanka; Ministry of Consumer Affairs, India; Bureau of Agriculture Statistics, the Philippines; Agrofinfo, Viet Nam.

remained generally stable between August and October and, in October, were higher than their earlier-year levels.

In the wheat importing countries of **Bangladesh, Indonesia** and **Sri Lanka**, prices remained virtually unchanged, reflecting adequate market supplies from imports. Similarly, in **India**, prices were stable as the ongoing government procurement programme offset the downward pressure from the record 2018 harvest, completed in May. According

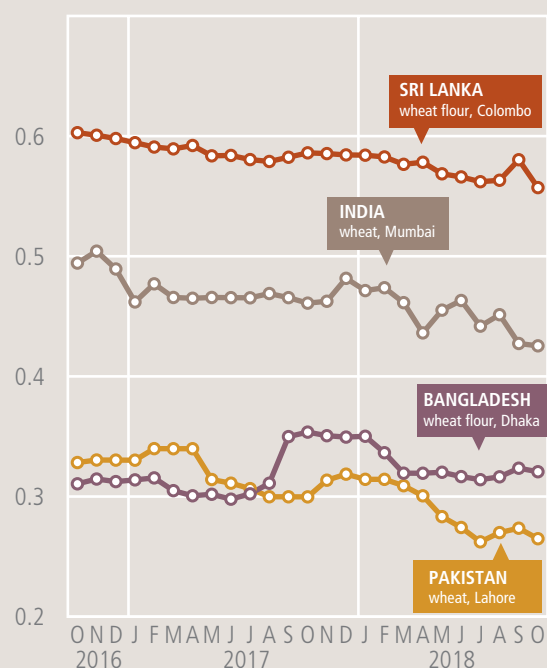
Table 12. Far East cereal production and anticipated trade in 2018/19 <sup>1</sup>  
(thousand tonnes)

	Avg 5-yr (2013/14 to 2017/18)	2017/18	2018/19	2018/19 over 2017/18 (%)	2018/19 over 5-yr avg (%)
<b>Coarse grains</b>					
Exports	4 124	3 677	3 580	-2.6	-13.2
Imports	64 905	66 735	67 257	0.8	3.6
Production	328 374	336 281	338 044	0.5	2.9
<b>Rice (milled)</b>					
Exports	37 650	39 998	39 477	-1.3	4.9
Imports	14 997	15 863	13 318	-16.0	-11.2
Production	446 394	454 381	460 095	1.3	3.1
<b>Wheat</b>					
Exports	4 059	2 319	2 769	19.4	-31.8
Imports	47 089	52 894	50 675	-4.2	7.6
Production	251 499	262 661	257 859	-1.8	2.5

<sup>1</sup> Marketing year July/June for most countries. Rice trade figures are for the second year shown.

### Wheat and wheat flour retail prices in selected Far East countries

(USD/kg)



Sources: Pakistan Bureau of Statistics; Ministry of Consumer Affairs, India; Management Information System and Monitoring, Bangladesh; National Bureau of Statistics of China.

to official estimates, as of October, the Government of India procured about 35.8 million tonnes of wheat, representing almost 40 percent of the total annual output in 2018. In **Pakistan**, prices increased in most monitored markets, with seasonal patterns exacerbated by a strong pace of exports. Between May (the start of the marketing year) and October, cumulative wheat exports from Pakistan were estimated at 850 000 tonnes, considerably higher than the previous five-year average.

### Overall stable food security, but concerns remain in some countries

Overall, food security conditions are stable although pockets of severe food insecurity persist in some countries. According to the latest figures from the International Organization for Migration (IOM), as of October 2018, about 923 000 Rohingya refugees from Myanmar were sheltering in Bangladesh, mainly in the Cox's Bazar District. Most refugees fled to Bangladesh following the resurgence of violence in Rakhine State, (Myanmar) in late August 2017. In addition, 241 000 people were internally displaced in the **Myanmar** states of Kachin, Kayin, Shan and Rakhine due to ongoing conflict. The IDPs reside in temporary settlements and are affected by high levels of food insecurity, requiring humanitarian assistance to cover their basic needs. In **Pakistan**,

there are concerns about food insecurity in Tharparkar District and the surrounding areas of Sindh Province due to reduced cereal harvest in 2018 and losses of livestock as a result of a prolonged drought. In addition, about 1.4 million Afghan refugees are sheltering in Pakistan, which are straining the already limited resources of the host communities. In **the Democratic People's Republic of Korea**, food insecurity continues to remain a key concern, with conditions aggravated by the below-average 2018 main season output.

### NEAR EAST



### Favourable planting conditions for 2019 winter crops

Planting of the 2019 winter wheat and coarse grains crops is currently underway and, depending on location, will continue until the end of the year or January next year. Unlike the previous year, when rainfall deficits delayed plantings and seriously impeded crop development, above-average precipitation in the main growing areas in autumn 2018 replenished soil moisture reserves. However, it is reported that abundant rainfall temporarily hindered fieldwork activities in some parts.

### Erratic rains and conflict-related constraints result in below-average cereal output in 2018

Subregional cereal production in 2018 is estimated at 66.6 million tonnes, out of which wheat constitutes 41.6 million tonnes. Total cereal production recorded a 5 percent decline compared to last year's output and the previous five-year average. The largest production decline, in relative terms, was registered in **the Syrian Arab Republic**, where the 2018 wheat production is estimated at 1.2 million

**Table 13. Near East cereal production**  
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2017 estim.	2018 f'cast	5-yr Avg.	2017 estim.	2018 f'cast	5-yr Avg.	2017 estim.	2018 f'cast	5-yr Avg.	2017 estim.	2018 f'cast	Change: 2018/2017 (%)
<b>Near East</b>	<b>43.9</b>	<b>44.0</b>	<b>41.6</b>	<b>22.1</b>	<b>21.3</b>	<b>20.4</b>	<b>4.4</b>	<b>4.7</b>	<b>4.5</b>	<b>70.5</b>	<b>70.0</b>	<b>66.6</b>	<b>-4.9</b>
Afghanistan	4.8	4.3	3.5	0.7	0.7	0.8	0.6	0.5	0.5	6.2	5.5	4.7	-14.2
Iran (Islamic Republic of)	11.0	12.5	13.4	4.3	4.0	3.7	2.6	3.1	3.0	17.9	19.6	20.1	2.9
Iraq	3.7	3.5	3.0	1.2	1.1	1.0	0.3	0.3	0.1	5.2	4.9	4.1	-14.7
Turkey	21.2	21.5	20.0	14.0	13.7	13.4	0.9	0.9	0.9	36.0	36.1	34.4	-4.9

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2013-2017 period.

tonnes, the lowest level since 1989 and about 30 percent of the pre-conflict average of 4.1 million tonnes (2002-2011). The biggest production decline in absolute terms was estimated in **Turkey**. Smaller harvests were also recorded in **Afghanistan** and **Iraq**, where cereal outputs, mostly comprising of wheat, declined by around 14 percent on a yearly basis to below-average levels.

The production decline was mainly associated with erratic rains, except in **Iran (Islamic Republic of)**, where abundant rains in spring boosted crop production.

At the subregional level, cereal import requirements in the 2018/19 marketing year (July/June) are estimated at 71 million tonnes, similar to the previous year's volume and 7 percent above the last five-year average. At 28 million tonnes, wheat imports are forecast to remain stable year-on-year, but the strong demand for animal feed in most Arab countries continues to support imports of coarse grains, now forecast to increase by 15 percent compared to the previous five-year average.

### Persisting conflicts continue to worsen food security

In **Yemen**, according to the 2018 Humanitarian Needs Overview, approximately 17.8 million people are estimated to be food insecure, a 5 percent

increase over the 2017 estimate. This figure includes 8.4 million people who are severely food insecure and at risk of starvation, about 24 percent more than in 2017. An IPC analysis is currently ongoing and the estimated number of severely food insecure people is expected to increase significantly. Any disruption of trade flows threatens the continuity of market supplies and, consequently, the food security of a large number of people. Food prices across the country are generally well above the pre-crisis levels (February 2015) and in some cases have doubled, while significant price differences also persist between markets.

In **the Syrian Arab Republic**, as of August 2018, about 5.5 million Syrians are estimated to be food insecure and require some form of food assistance. In addition, as many as 500 000 to 800 000 people are estimated to be food insecure in the Idleb Governorate.

In **Afghanistan**, as of September 2018, about 9.8 million people (almost 44 percent of the rural population) were estimated to be in the IPC Phases 3: "Crisis" and 4: "Emergency". Almost 2.2 million people were considered to be chronically food insecure, of which 1.4 million people are at risk of acute food insecurity due to last year's drought. Continuing conflict, natural hazards and limited economic opportunities have increased the vulnerability of the poorest households, including subsistence farmers.

## CIS IN ASIA<sup>4</sup>



### Plantings of 2019 winter cereals anticipated to fall slightly

Planting of the 2019 winter cereal crops, to be harvested from May 2019, is virtually concluded under generally favourable weather conditions. The early-planted winter-wheat crops have already entered into the germination phase. In **Kazakhstan**, the main cereal-producing country of the subregion, overall conditions of winter wheat crops are satisfactory, although above-normal precipitations, low temperatures and frosts in the south and southeast of the country were observed in October which delayed land preparation and planting operations.

Early indications point to a further reduction in the area planted to cereals compared to last year's below-average level, mainly associated with a contraction in wheat plantings in **Armenia, Azerbaijan**

**Table 14. CIS in Asia cereal production**

(million tonnes)

	Wheat			Coarse grains			Total cereals <sup>1</sup>			
	5-yr Avg.	2017 estim.	2018 f'cast	5-yr Avg.	2017 estim.	2018 f'cast	5-yr Avg.	2017 estim.	2018 f'cast	Change: 2018/2017 (%)
<b>CIS in Asia</b>	<b>26.1</b>	<b>26.4</b>	<b>25.5</b>	<b>7.8</b>	<b>8.5</b>	<b>9.0</b>	<b>34.8</b>	<b>35.8</b>	<b>35.5</b>	<b>-0.9</b>
Armenia	0.3	0.2	0.2	0.2	0.1	0.1	0.5	0.3	0.3	-7.4
Azerbaijan	1.7	1.8	2.0	1.1	1.1	1.1	2.9	2.9	3.2	8.1
Georgia	0.1	0.1	0.1	0.3	0.2	0.3	0.4	0.3	0.4	20.8
Kazakhstan	14.1	14.8	15.0	4.0	4.6	5.5	18.5	19.9	21.0	5.7
Kyrgyzstan	0.7	0.7	0.7	1.0	1.1	1.0	1.7	1.8	1.7	-1.2
Tajikistan	0.9	0.9	0.7	0.3	0.4	0.3	1.3	1.4	1.1	-19.6
Turkmenistan	1.4	1.0	0.9	0.1	0.1	0.1	1.6	1.2	1.1	-9.0
Uzbekistan	6.9	6.9	6.0	0.9	1.1	0.6	8.0	8.2	6.8	-16.4

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2013-2017 period.

<sup>1</sup> Total cereals includes wheat, coarse grains and rice (paddy).

<sup>4</sup> Georgia is no longer a member of CIS but its inclusion in this group is maintained for the time being.



and **Kazakhstan**. The area sown in **Kazakhstan**, in particular, has fallen over the last two years reflecting a government directive to progressively reduce the area planted under wheat from an estimated 12.4 million hectares in 2017 to 10.1 million hectares in 2021, in favour of more profitable oil crops.

### Cereal production slightly above average in 2018

With all cereal crops harvested, aggregate cereal production in 2018 is estimated at just over 35 million tonnes, slightly above the five-year average and similar to the 2017 level. Reduced outputs were obtained in **Armenia**, **Kyrgyzstan**, **Tajikistan**, **Turkmenistan** and, in particular, **Uzbekistan**, where dry weather conditions between March and May 2018 affected yields and reduced the output by almost 1.3 million tonnes year-on-year. However, these results were outweighed by larger outputs obtained in **Georgia**, **Azerbaijan** and **Kazakhstan**, where weather conditions were favourable.

### Increased trade forecast for 2018/19

Cereal import requirements for the subregion are estimated to have increased by 7 percent in the 2018/19 marketing year (July/June), to an above-average level of 7.8 million tonnes, which mostly consists of wheat. The projected year-on-year increase rests on higher requirements in **Armenia**, **Tajikistan**, **Turkmenistan** and **Uzbekistan** due to the weather-reduced wheat outputs in 2018.

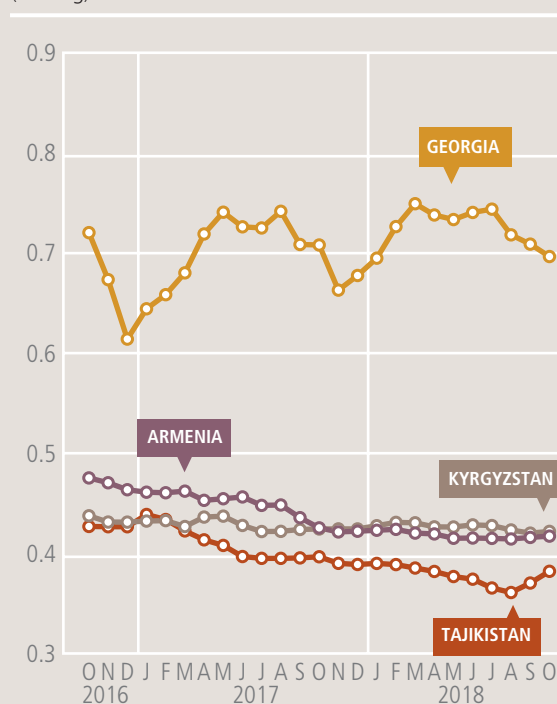
Total cereal exports are expected at an above-average level of 11.4 million tonnes in 2018/19, 5 percent above the previous year. Most of the yearly upturn is related to a forecast increase in shipments of barley from **Kazakhstan**, the main exporting country, which are expected to reach 2 million tonnes, 43 percent higher than in the 2017/18 marketing year, amid bumper production and strong demand on international markets. Wheat exports from Kazakhstan, on the other hand, are expected to remain unchanged from the previous year at 8.5 million tonnes, but still 13 percent above the five-year average level.

### Domestic prices of wheat flour remained virtually unchanged

In **Kazakhstan**, export prices of wheat increased moderately over the last three months and in November were higher than a year earlier, mainly due to reduced grain quality following excessive soil moisture. Domestic retail prices remained virtually unchanged over the last months and in October were slightly higher than in 2017, amid weakening of the national currency.

In the importing countries of the subregion, retail prices of wheat flour remained unchanged, despite slight increases in export prices from Kazakhstan. In **Armenia**,

**Retail wheat flour prices in selected CIS in Asia countries (national averages)**  
(USD/kg)



Source: National Statistical Service of Republic of Armenia; National Statistical Committee of the Kyrgyz Republic; State Committee on Statistics, Republic of Tajikistan; National Statistics Office of Georgia.

wheat flour prices did not decline seasonally at harvest time, but remained stable as the 2018 output is estimated to be below average. In **Kyrgyzstan**, prices of wheat flour in October were close to their values a year earlier on account of good supplies from imports, while in **Georgia**, prices were above their levels of the previous year, mainly reflecting a weaker national currency, given the country's heavy dependency on imports.

# REGIONAL REVIEWS

## LATIN AMERICA AND THE CARIBBEAN



\*\* See Terminology ([page 5](#))

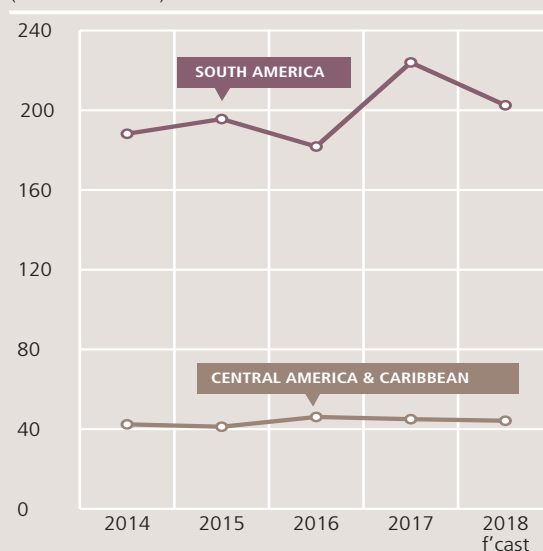
Source: UN\*\*

### Latin America and the Caribbean Production Overview

The 2018 aggregate cereal production in Latin America and the Caribbean is forecast at an above-average 247 million tonnes, but is 8 percent below the record output of 2017.

The bulk of the decline is based on drought-reduced maize harvests in the main producers in South America, Argentina and Brazil. In Central American and the Caribbean countries, dry conditions were less severe than previously expected, particularly in Guatemala and Nicaragua, and consequently the aggregate output contracted by only 2 percent.

**Cereal production**  
(million tonnes)



## CENTRAL AMERICA AND THE CARIBBEAN



### Wheat production in 2018 anticipated at low levels

In **Mexico**, virtually the only wheat producer in the subregion, harvesting of the 2018 main wheat crop concluded in August, while the 2018 minor wheat crop, which accounts for about 5 percent of the national production, is at the vegetative stage. Total national production is estimated at approximately 3 million tonnes, a below average level and about 15 percent below from the previous year's good output. This year's decrease mainly results from a contraction in plantings caused by reduced water availability in the main producing regions, which prompted farmers to switch to more drought-resistant crops.

### Maize production in 2018 anticipated an above-average level

The subregion's aggregate 2018 maize output is forecast at about 32 million tonnes, slightly higher than the five-year average. In **Mexico**, the main season harvest is underway under overall favourable weather conditions, although excessive rainfall in October caused some crop losses in the important maize-producing Tamaulipas Department.

The forecast for Mexico's 2018 maize production stands at an above-average level of 27.6 million tonnes as improved yields are expected to more than offset a slight contraction in the harvested area. In response to the reduced sown area, the government launched a support price programme for smallholder farmers in October, to try and promote an increase in plantings next year.

Elsewhere in *Central America*, prolonged dry spells from mid-June to early August, particularly in the Dry Corridor, caused crop losses during the main season. The harvest of minor season is underway in Guatemala, while the minor season maize crop is at the flowering and grain-filling stages elsewhere. In **Guatemala**, despite initial concerns over the main season output in areas affected by dry spells, the 2018 aggregate production is forecast at an average level of 1.9 million tonnes, as improved yields in the main cereal-producing region in the north more than offset crop losses in Chiquimula and Jutiapa departments. In **El Salvador**, prolonged dry spells and torrential rains in the first dekad of October caused maize crop losses that amounted to about 7 percent of the average output (2013-2017). As a result, the 2018 aggregate production is estimated at a below-average level of 830 000 tonnes. In **Honduras**, the drought-affected 2018 maize production is anticipated at a below-average level of 460 000 tonnes, while the production in **Nicaragua** is forecast at an average level of 420 000 tonnes. Although the impact of the drought in Nicaragua was not as severe as in neighbouring countries, social unrest caused uncertainties on access to finance and difficulties in transport to markets.

In **Haiti**, despite an enlarged area sown, limited rainfall between mid-June and early August reduced maize outputs in key-producing rain fed Artibonite and Centre departments. These decreases offset the good outputs in the irrigated areas and the highlands of Sud, Nippes and Grande-Anse departments, resulting in an overall below-average 2018 maize output of 185 000 tonnes.

### Cereal imports forecast at high levels in 2018/19

Cereal imports in the 2018/19 marketing year (September/August) are forecast at a well above-average level of 36.7 million tonnes. These high import requirements reflect the sustained demand for yellow maize for animal feed (import dependency for this crop is high) in the poultry and fishery industries. In **Mexico**, where the use of maize in the fishery sector is increasing, imports are expected to be 23 percent above the five-year average. In **Honduras**, in an effort to mitigate the impact of the expected reduced output, imports of maize, mostly from the United States of America, increased considerably in the third trimester.

### Prices of maize well above their year-earlier levels

In **El Salvador**, **Guatemala**, **Honduras** and **Nicaragua**, prices of white maize in the September-November period showed a general decreasing trend with improved domestic availabilities from the main season harvest. However, they were still well above their year-earlier levels due to increased input costs and initial concerns over the 2018 production. Prices declined in **Mexico** during this period but were 15 percent higher than their year-earlier levels, mainly reflecting a year-on-year

**Table 15. Latin America and the Caribbean cereal production**  
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2017 estim.	2018 f'cast	5-yr Avg.	2017 estim.	2018 f'cast	5-yr Avg.	2017 estim.	2018 f'cast	5-yr Avg.	2017 estim.	2018 f'cast	Change: 2018/2017 (%)
<b>Central America &amp; Caribbean</b>	<b>3.6</b>	<b>3.5</b>	<b>3.0</b>	<b>36.9</b>	<b>38.6</b>	<b>38.1</b>	<b>2.9</b>	<b>3.0</b>	<b>3.1</b>	<b>43.4</b>	<b>45.0</b>	<b>44.2</b>	<b>-1.7</b>
El Salvador	0.0	0.0	0.0	1.0	1.0	0.9	0.0	0.0	0.0	1.0	1.0	1.0	-7.4
Guatemala	0.0	0.0	0.0	1.9	2.0	1.9	0.0	0.0	0.0	1.9	2.0	2.0	-3.5
Honduras	0.0	0.0	0.0	0.5	0.6	0.5	0.1	0.1	0.1	0.6	0.6	0.6	-10.9
Mexico	3.6	3.5	3.0	32.1	33.6	33.4	0.2	0.3	0.3	35.9	37.3	36.7	-1.8
Nicaragua	0.0	0.0	0.0	0.5	0.5	0.5	0.3	0.4	0.4	0.8	0.9	0.9	2.3
<b>South America</b>	<b>24.1</b>	<b>25.8</b>	<b>28.3</b>	<b>146.3</b>	<b>173.1</b>	<b>149.3</b>	<b>24.6</b>	<b>25.1</b>	<b>25.0</b>	<b>195.0</b>	<b>224.0</b>	<b>202.5</b>	<b>-9.6</b>
Argentina	14.4	18.5	19.5	45.4	56.4	49.7	1.5	1.3	1.4	61.3	76.2	70.6	-7.4
Brazil	5.7	4.3	5.5	84.2	100.7	84.2	11.9	12.3	12.1	101.8	117.3	101.8	-13.2

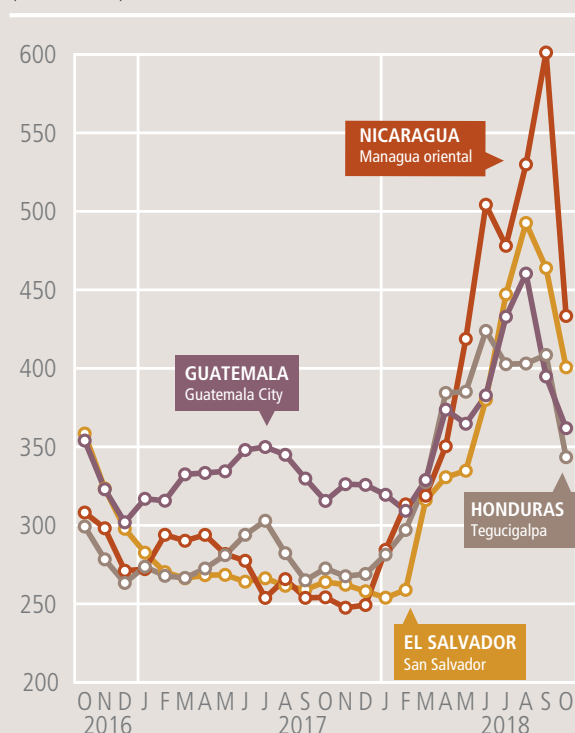
Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2013-2017 period.

decrease in production. Prices of maize in **the Dominican Republic**, a net importer of cereals, were significantly higher on a yearly basis, due to elevated maize prices in the United States of America, the country's main supplier of cereals.

In **Guatemala** and **Mexico**, prices of black beans declined seasonally during the September-November period and were below their levels of a year earlier, sustained by ample supplies. Conversely, prices of red beans were slightly higher on a yearly basis in **El Salvador** due to concerns over the main season output affected by torrential rainfall in October. In **Nicaragua**, prices of red beans were slightly lower than the same period last year as a result of the good first season harvest. In **the Dominican Republic**, retail prices of red and black beans declined slightly in line with seasonal trends, while prices of rice were above their levels a year earlier on account of reduced imports. In **Haiti**, prices of black beans and maize meal in the Port-au-Prince market declined with the summer season harvest in September and were lower than a year earlier, while prices of mostly imported rice were higher than a year earlier mainly due to a weaker local currency.

### Wholesale white maize prices in selected countries in Central America

(USD/tonne)



Sources: Secretaría de Agricultura y Ganadería, Honduras; Ministerio de Agricultura, Ganadería y Alimentación, Guatemala; Ministerio agropecuario y forestal, Nicaragua; Dirección General de Economía Agropecuaria, El Salvador.

## SOUTH AMERICA



### Higher prices expected to spur an expansion in 2019 maize plantings

In *South America*, planting of the first season maize crop is underway under overall favourable conditions in the major producing countries. In **Brazil**, the 2019 maize production is officially forecast to increase by over 10 percent from last year's reduced level, mainly reflecting an anticipated price-induced expansion in the sown area. In **Argentina**, the planted area is officially forecast to increase by about 3 percent. Furthermore, the abundant rains have improved soil moisture for planting of the second season crops, which will be finalized by the end of the year. As a result, the 2019 maize output in *South America* is expected at an above-average level.

### Maize production slightly above average in 2018

The 2018 subregional maize output is estimated at an above-average level of 137 million tonnes, mostly reflecting an increase in the area sown. However, the output is estimated to be 15 percent below the previous year's record high, due to dry weather conditions in early 2018 that affected several countries. Almost 90 percent of the aggregate subregional production pertains to **Argentina**, where the 2018 harvest increased by 15 percent compared to the five-year average, and **Brazil**, which produced an average maize output of about 81 million tonnes.

Dry weather conditions also affected **Bolivia (Plurinational State of)**, **Colombia**, **Ecuador** and **Uruguay**, where 2018 maize outputs are anticipated at well below-average levels. In **Chile**, the 2018 maize production is estimated at 1.1 million tonnes, 15 percent below the five-year average, due to a contraction in the area sown to a ten-year low level. In **Paraguay**, production is estimated at a well above-average level of 5.2 million tonnes, on account of strong domestic demand for maize in ethanol production that instigated an expansion in plantings. In **Peru**, maize production in 2018 is estimated at a slightly below-average level, but increased relative to 2017 reflecting favourable weather conditions that resulted in higher yields.

### Wheat production in forecast at a high level in 2018

The forecast for the 2018 subregional wheat output stands at 28.2 million tonnes, 18 percent above the five-year average. The increase is mostly on account of an anticipated record output in the main wheat-producing country of the subregion, **Argentina**, where the harvest is underway. Production in Argentina is foreseen at a record level of 19.5 million tonnes due primarily to a 27 percent increase in sowings compared to the five-year average. However, yield prospects have been somewhat diminished by dryness and a cold snap in October as well as excessive rainfall in the first half of November. In **Brazil**, harvesting of the 2018 wheat crop is underway. The area planted is estimated to have increased by 6 percent year-on-year, reflecting farmers' decision to plant wheat instead of a second season maize crop, as dry conditions prematurely closed the planting window for maize. Higher wheat prices prior to the planting period added further support to an expansion in the area planted. As a result, Brazil's 2018 wheat production is officially forecast at 5.5 million tonnes, 30 percent higher than last year's output.

Rice harvests have concluded in most countries and the aggregate paddy output is estimated at 25 million tonnes, slightly above the five-year average. In **Brazil**, the subregion's major rice-producing country, paddy production is officially estimated at an average level of 12 million tonnes in 2018. Similarly, average outputs were estimated in **Colombia** and **Uruguay**. However, a yearly production upturn

was registered in **Peru**, where the paddy output is estimated at 3.5 million tonnes, 13 percent higher than the five-year average, mostly on account of an expansion in the sown area.

### Cereal exports expected to remain high in 2018/19

Aggregate cereal exports in the 2018/19 marketing year are forecast at about 75 million tonnes. The bulk of this volume would comprise of maize exports, which are forecast at 55 million tonnes, 16 percent higher than average due to weaker local currencies in **Argentina** and **Brazil** that have increased their competitiveness. However, this quantity is lower than the record high registered in 2017/18. Reflecting an expected larger wheat output in 2018, coupled with the depreciation of the local currencies, subregional wheat exports, mainly originating from Argentina, are forecast at a well above-average level of about 14 million tonnes.

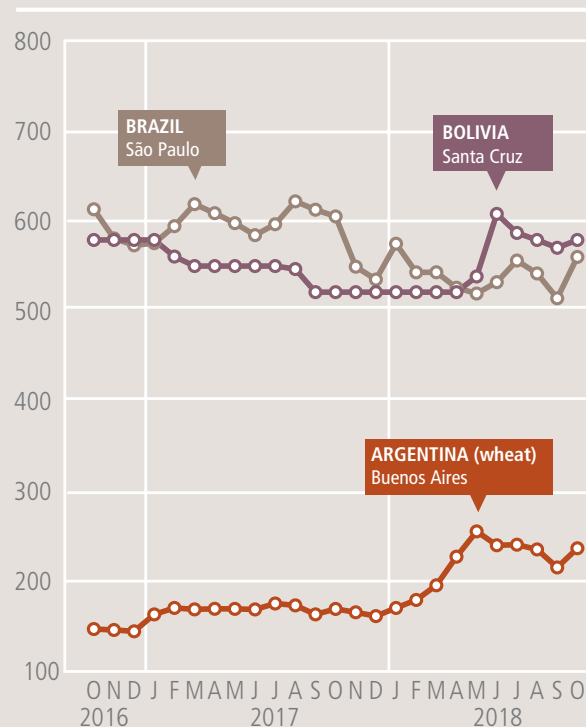
### Wheat and maize prices in Argentina and Brazil are higher than a year-earlier

In **Argentina** and **Brazil**, prices of yellow maize were well above their year-earlier values in the September-November period, sustained by reduced 2018 outputs and weak local currencies. However, prices started to decline in October mainly as a result of a slight month-on-month appreciation of the currencies and overall favourable production prospects for the 2019 crops. In **Bolivia (Plurinational State of)**, prices of yellow maize strengthened, mainly due to the estimated

below-average minor season output. However, they were below their levels of the previous year on account of good supplies from the 2018 main season harvest. In **Chile**, prices of maize increased seasonally and were above their year-earlier levels, partly reflecting imported inflation due to a weaker currency. In **Colombia** and **Ecuador**, prices of yellow maize were lower than the corresponding period last year reflecting adequate national supplies. In **Peru**, prices of yellow maize increased slightly despite a good 2018 harvest underpinned by high demand from the poultry industry and costlier imports compared to a year earlier. In **Paraguay**, prices of yellow maize weakened due to augmented market supplies following the 2018 main season harvest.

In **Argentina**, prices of wheat continued to increase and reached record highs mainly reflecting the weaker currency. Wheat prices in **Bolivia (Plurinational State of)** and **Chile** were higher than their levels a year earlier due to high export prices of Argentina, the countries' main supplier. In **Brazil**, prices of wheat grain remained well above their levels a year earlier. However, prices declined slightly in October with the progress of the 2018 harvest. In **Ecuador** and **Peru**, prices of wheat flour were near

Wholesale wheat flour prices in selected countries in South America  
(USD/tonne)



Sources: Servicio Informativo de Mercados Agropecuarios, Bolivia; Instituto de Economía Agrícola, Brazil; Bolsa de Cereales, Argentina.

their year-earlier values, as imports bolstered domestic supplies.

With regards to rice, prices of paddy in **Brazil** continued to increase seasonally in October. In **Uruguay**, where the 2019 season planting has recently completed, prices increased in line with seasonal trends and were well above those a year earlier, sustained by a reduced 2018 output, while prices remained mostly stable in **Colombia** and **Peru**.

# REGIONAL REVIEWS

## NORTH AMERICA, EUROPE AND OCEANIA

Note: Situation as of November

### NORTH AMERICA

Canada, United States of America  
Cereals (winter season): Dormant

### EUROPE

Northern Europe  
Cereals (winter season): Dormant  
Centre-southern Europe  
Cereals (winter season): Establishment  
CIS in Europe:  
Cereals (winter season): Establishment to dormant

### OCEANIA

Australia  
Cereals (winter season): Harvesting

### Unfavourable 2018 production prospects\*

**Australia (wheat):** Dry weather conditions

\*/\*\* See Terminology ([page 5](#))

Source: UN\*\*

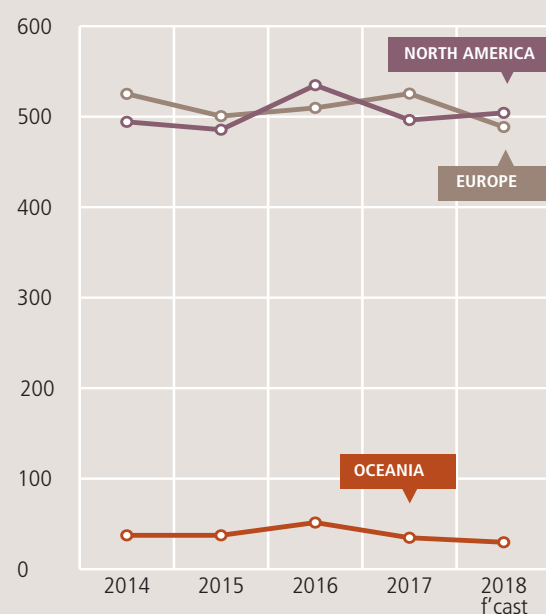
## North America, Europe and Oceania Production Overview

In North America, cereal production is forecast at 504.2 million tonnes, a notable rebound from the previous year's reduced level but still below the record high of 2016.

In Europe, significant cuts to outputs in the European Union and the Russian Federation resulted in a 37-million-tonne year-on-year decrease, resulting in an aggregate cereal output of 488.6 million tonnes.

In Oceania, a severe drought in Australia resulted in diminished wheat yields and, consequently, the cereal output is estimated at 29.7 million tonnes, 15 percent lower on a yearly basis.

Cereal production  
(million tonnes)





## NORTH AMERICA



## Higher producer prices expected to spur increase in 2019 wheat plantings

In the **United States of America**, planting of the 2019 winter wheat is underway and higher producer prices are expected to instigate an expansion in the planted area. However, the expected increase could be curbed by recent wet conditions, notably in the southern Plains, which slowed seeding progress. As of early November, an estimated 84 percent of the intended winter wheat area had been sown, down from last year's pace and the average. Overall, total wheat plantings, including the spring crop, are foreseen to rise in 2019.

Regarding maize production in 2018, with the harvest virtually complete, following the most recent survey-based crop assessment, yield forecasts were downgraded but are still foreseen at a bumper level. Despite this reduction, the 2018 output is forecast at 371.5 million tonnes, slightly above the previous year's good output and the second highest production on record. Overall, aggregate 2018 cereal production in the **United States of America** is estimated at

446.6 million tonnes, higher than the previous year and five-year average.

In **Canada**, wheat production in 2018 is estimated at an average level of 31 million tonnes, 3 percent higher on a yearly basis, as increased yields more than offset a contraction in plantings. Planting of the minor 2019 winter wheat crop is underway

negatively affected crop emergence and early development. For 2018, the *European Union's* aggregate cereal output is estimated at 288.9 million tonnes, below the five-year average and 7 percent down from last year's level, largely on account of a sharp reduction in wheat output, reflecting low yields caused by unseasonably hot and dry weather earlier in the year.

## EUROPE



## EUROPEAN UNION

## Early indications suggest a rebound in 2019 wheat plantings

In the *European Union*, as of late November, most of the winter grain crops for harvest in 2019 were planted. Early indications suggest that wheat sowings will rebound from the previous year's level by about 5 percent to a near-average 26.5 million hectares. Favourable weather conditions for planting and emergence of winter crops were observed in most parts of western and northern *Europe*. However, below-average rainfall between October and November in central countries of the *European Union*, notably in **Germany** and **Poland**,

## CIS IN EUROPE

## Area planted under 2019 winter cereals is estimated slightly above last year's level

Planting of the 2019 winter cereal crops is virtually complete and the area sown is estimated to be slightly above last year's average level.

Due to scarce precipitation between September and early November in parts of the **Russian Federation** and **Ukraine**, some localized crop stress was detected, but overall conditions of winter crops are reported to be satisfactory.

In the **Russian Federation**, as of early November, about 17.5 million hectares of winter cereal crops, mostly wheat, were planted, which is 5 percent more than the above-average level of 2017. Crop conditions were mainly favourable, with the exception of northwestern regions, where above-average precipitations in mid-October delayed crop development, and the Southern and North Caucasian districts where minimal precipitations

Table 16. North America, Europe and Oceania cereal production  
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2017 estim.	2018 f'cast	5-yr Avg.	2017 estim.	2018 f'cast	5-yr Avg.	2017 estim.	2018 f'cast	5-yr Avg.	2017 estim.	2018 f'cast	Change: 2018/2017 (%)
<b>North America</b>	<b>87.2</b>	<b>77.3</b>	<b>82.3</b>	<b>406.0</b>	<b>410.9</b>	<b>412.0</b>	<b>9.1</b>	<b>8.1</b>	<b>9.9</b>	<b>502.4</b>	<b>496.3</b>	<b>504.2</b>	<b>1.6</b>
Canada	31.3	30.0	31.0	25.9	26.4	26.5	0.0	0.0	0.0	57.3	56.3	57.6	2.2
United States of America	55.9	47.3	51.3	380.0	384.6	385.5	9.1	8.1	9.9	445.1	440.0	446.6	1.5
<b>Europe</b>	<b>251.0</b>	<b>271.9</b>	<b>240.5</b>	<b>254.0</b>	<b>249.7</b>	<b>244.1</b>	<b>4.1</b>	<b>3.9</b>	<b>3.9</b>	<b>509.0</b>	<b>525.5</b>	<b>488.6</b>	<b>-7.0</b>
Belarus	2.6	2.6	2.6	5.2	4.9	5.1	0.0	0.0	0.0	7.8	7.5	7.7	2.4
European Union	151.5	152.0	137.0	158.6	156.4	149.1	2.9	2.9	2.9	313.0	311.2	288.9	-7.2
Russian Federation	66.5	85.9	70.4	41.4	44.3	34.8	1.0	1.0	1.0	109.0	131.1	106.2	-19.0
Serbia	2.5	2.3	3.2	6.7	4.5	7.4	0.0	0.0	0.0	9.2	6.8	10.6	55.8
Ukraine	25.0	26.2	24.6	37.5	34.6	42.8	0.1	0.1	0.1	62.6	60.8	67.4	10.9
<b>Oceania</b>	<b>25.3</b>	<b>21.6</b>	<b>17.0</b>	<b>14.3</b>	<b>12.3</b>	<b>12.0</b>	<b>0.8</b>	<b>0.8</b>	<b>0.6</b>	<b>40.4</b>	<b>34.7</b>	<b>29.7</b>	<b>-14.5</b>
Australia	24.9	21.2	16.6	13.7	11.7	11.4	0.8	0.8	0.6	39.3	33.8	28.6	-15.3

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2013-2017 period.

were observed, resulting in soil moisture deficits. In **Ukraine**, planting of winter crops was complete as of late November, slightly earlier than usual, and the area sown, mostly wheat, is officially estimated at 7.2 million hectares. Overall crop conditions were reported to be satisfactory as, besides inadequate soil moisture observed in the southern regions, widespread rains over the rest of the country were beneficial for germination, development and rooting of winter crops. In **Belarus**, after early concerns due to dry weather conditions, well-distributed precipitation has restored soil moisture levels and crop conditions were reported to be satisfactory. The area planted for winter cereals is estimated to be close to last year's average level. Similarly, in **the Republic of Moldova**, crops are developing under favourable weather conditions and the sown area is estimated at near-average levels.

**Wheat export prices in Russian Federation and Ukraine**  
(USD/tonne)



Source: International Grains Council.

### Above-average cereal output in 2018

Harvesting of all cereals in the subregion started in June and was completed by mid-November. The aggregate subregional cereal production is set at 184 million tonnes, just above the five-year average, on account of slightly below-average output in **the Russian Federation** and **Belarus**, and above average production in **the Republic of Moldova** and **Ukraine**, where 2018 maize output is estimated at 34 million tonnes, about 25 percent above the five-year average and the highest production ever obtained, following abundant rainfall in July and increase in area planted.

### Expected record maize exports from Ukraine boost trade forecasts in 2018/19

Total subregional cereal exports in the 2018/19 marketing year (July/June) are forecast at about 88 million tonnes, 17 percent above the average. Exports of wheat, accounting for most of the total cereal shipments, are forecast at about 51 million tonnes, 21 percent above the average, while maize exports are expected at an above-average level of 28 million tonnes, mainly on account of record shipments forecast from **Ukraine**.

In **the Russian Federation**, wheat shipments (accounting for almost 70 percent of the subregional wheat exports) are expected to reach 34.5 million tonnes, 28.4 percent above the average, which would confirm the country as the world's top wheat exporter. In **Ukraine**, wheat exports are forecast to reach the above average level of 16 million tonnes, while maize shipments are expected at about

25 million tonnes, which is 31 percent higher than the average and an all-time high, amid bumper production, strong import demand and competitive prices on the international markets.

### Export prices of wheat strengthened

In **the Russian Federation** and **Ukraine**, export prices of milling quality wheat have generally increased and despite falling in November remained higher on a yearly basis. The overall increasing trend is mostly the result of strong import demand, driven in part by weaker currencies, and pressure from lower grain inventories.

Domestic prices of wheat flour in **the Russian Federation** and **Ukraine** were relatively stable and in October were higher than a year earlier, as a result of strong demand for exports and reduced outputs.

## OCEANIA



### Wheat production in Australia forecast at a ten-year low

In **Australia**, harvesting of the 2018 wheat crop is expected to be finalized in January 2019. Persistent dry weather conditions earlier in the season, the impact of which was partly reversed by improved rains from October, are expected to result in reduced yields and cause a 22 percent year-on-year decline in wheat production. The 2018 wheat output is forecast at 16.6 million tonnes, about 13 percent below the five-year average and a ten-year low.

# STATISTICAL APPENDIX

Table A1. Global cereal supply and demand indicators

	Average 2013/14 - 2017/18	2014/15	2015/16	2016/17	2017/18	2018/19
<b>Ratio of world stocks to utilization (%)</b>						
Wheat	32.5	30.6	32.1	34.6	37.4	35.0
Coarse grains	24.7	25.0	25.1	25.9	26.1	22.3
Rice	33.7	34.1	33.4	33.4	33.8	34.3
Total cereals	28.7	28.4	28.7	29.8	30.8	28.1
<b>Ratio of major grain exporters' supplies to market requirements (%) <sup>1</sup></b>	123.4	124.3	124.0	123.1	122.8	115.7
<b>Ratio of major exporters' stocks to their total disappearance (%) <sup>2</sup></b>						
Wheat	18.7	18.4	18.0	20.2	21.1	16.9
Coarse grains	13.4	14.3	12.5	14.1	15.0	12.5
Rice	22.0	24.6	19.7	18.8	18.0	19.3
Total cereals	18.0	19.1	16.7	17.7	18.0	16.3
	Annual trend growth rate 2008-2017	2014	Change from previous year			2018
			2015	2016	2017	
<b>Changes in world cereal production (%)</b>	1.7	1.8	-1.0	2.8	1.7	-2.4
<b>Changes in cereal production in the LIFDCs (%)</b>	2.1	3.2	-3.2	4.5	3.5	-0.3
<b>Changes in cereal production in the LIFDCs excluding India (%)</b>	2.3	6.0	-1.3	3.9	1.0	-2.2
		2015	2016	2017	2018*	Change 2018* over 2017*
<b>Selected cereal price indices<sup>3</sup></b>						
Wheat		143.9	125.2	133.4	147.9	10.8%
Maize		161.2	151.0	146.3	155.6	6.0%
Rice		210.5	193.5	206.4	225.0	9.7%

**Notes:**

Utilization is defined as the sum of food use, feed and other uses.

Cereals refer to wheat, coarse grains and rice; grains refer to wheat and coarse grains (barley, maize, millet, sorghum and cereals NES).

<sup>1</sup> Major wheat exporters are: Argentina, Australia, Canada, the European Union, Kazakhstan, the Russian Federation, Ukraine and the United States of America; major coarse grains exporters are Argentina, Australia, Brazil, Canada, the European Union, the Russian Federation, Ukraine and the United States of America; major rice exporters are India, Pakistan, Thailand, the United States of America and Viet Nam.

<sup>2</sup> Disappearance is defined as domestic utilization plus exports for any given season.

<sup>3</sup> Price indices: The Wheat Price Index has been constructed based on the International Grains Council Wheat Price Index, rebased to 2002-2004=100; for maize, the U.S. maize No.2 Yellow (delivered U.S. Gulf ports) with base 2002-2004=100; for rice, the FAO Rice Price Index, 2002-2004=100, is based on 16 rice export quotations.

\* January-November average.

**Table A2. World cereal stocks<sup>1</sup>***(million tonnes)*

	2014	2015	2016	2017	2018 estimate	2019 forecast
<b>TOTAL CEREALS</b>	<b>637.0</b>	<b>713.1</b>	<b>738.9</b>	<b>779.3</b>	<b>815.0</b>	<b>762.1</b>
<b>Wheat</b>	<b>196.8</b>	<b>217.6</b>	<b>236.0</b>	<b>255.1</b>	<b>276.7</b>	<b>264.5</b>
held by:						
- main exporters <sup>2</sup>	57.4	69.0	70.2	81.2	85.1	66.7
- others	139.4	148.6	165.8	173.9	191.6	197.8
<b>Coarse grains</b>	<b>274.0</b>	<b>327.0</b>	<b>336.3</b>	<b>356.1</b>	<b>366.2</b>	<b>320.8</b>
held by:						
- main exporters <sup>2</sup>	84.6	111.2	99.4	113.8	124.7	104.1
- others	189.4	215.8	236.9	242.3	241.5	216.7
<b>Rice (milled basis)</b>	<b>166.1</b>	<b>168.6</b>	<b>166.5</b>	<b>168.1</b>	<b>172.1</b>	<b>176.7</b>
held by:						
- main exporters <sup>2</sup>	49.6	43.6	34.5	33.1	32.1	34.8
- others	116.5	125.0	132.0	135.0	140.0	141.9
<b>Developed countries</b>	<b>150.5</b>	<b>180.6</b>	<b>176.9</b>	<b>203.6</b>	<b>208.5</b>	<b>177.4</b>
Australia	7.7	7.8	6.6	9.2	8.7	6.8
Canada	15.2	10.5	10.0	12.4	10.8	9.2
European Union	32.7	40.0	36.4	33.2	40.9	31.7
Japan	7.1	7.1	7.3	6.6	6.7	6.8
Russian Federation	7.9	12.7	11.1	19.1	23.6	16.6
South Africa	1.7	3.4	3.8	1.8	4.9	4.6
Ukraine	11.0	13.0	9.5	7.3	6.2	7.1
United States of America	51.4	69.0	76.1	95.8	88.8	74.8
<b>Developing countries</b>	<b>486.4</b>	<b>532.5</b>	<b>562.0</b>	<b>575.7</b>	<b>606.5</b>	<b>584.7</b>
<b>Asia</b>	<b>403.0</b>	<b>430.3</b>	<b>459.6</b>	<b>469.6</b>	<b>482.7</b>	<b>468.5</b>
China (Mainland)	257.9	282.5	325.5	351.1	359.4	348.3
India	49.6	48.9	41.9	34.5	41.7	45.3
Indonesia	10.9	9.9	9.6	8.9	10.0	9.9
Iran (Islamic Republic of)	6.0	9.4	9.9	8.4	6.5	5.3
Korea, Republic of	3.7	3.9	4.3	3.7	3.1	3.1
Pakistan	5.2	6.2	5.2	5.1	4.2	2.2
Philippines	3.2	4.2	4.0	3.7	4.1	4.6
Syrian Arab Republic	3.2	2.0	1.5	2.0	2.0	1.4
Turkey	7.2	6.3	5.9	4.7	6.0	3.8
<b>Africa</b>	<b>42.8</b>	<b>49.0</b>	<b>52.7</b>	<b>51.7</b>	<b>54.1</b>	<b>52.0</b>
Algeria	4.2	5.0	5.7	5.6	5.4	6.0
Egypt	6.2	6.3	7.1	6.5	7.0	6.3
Ethiopia	1.8	3.1	4.2	4.8	5.6	5.8
Morocco	5.8	5.4	8.2	5.9	6.6	7.3
Nigeria	1.8	3.4	3.6	3.1	2.4	2.1
Tunisia	0.9	1.2	1.0	1.0	1.1	1.0
<b>Central America</b>	<b>7.5</b>	<b>8.2</b>	<b>9.7</b>	<b>12.3</b>	<b>13.4</b>	<b>13.1</b>
Mexico	3.3	3.6	4.6	6.5	7.6	7.5
<b>South America</b>	<b>32.8</b>	<b>44.6</b>	<b>39.6</b>	<b>41.6</b>	<b>55.9</b>	<b>50.8</b>
Argentina	6.5	11.6	7.7	8.5	13.4	10.3
Brazil	12.5	17.5	14.2	12.7	19.7	16.9

Note: Based on official and unofficial estimates. Totals computed from unrounded data.

<sup>1</sup> Stocks data are based on an aggregate of carryovers at the end of national crop years and do not represent world stock levels at any point in time.<sup>2</sup> Major wheat exporters are Argentina, Australia, Canada, the European Union, Kazakhstan, the Russian Federation, Ukraine and the United States of America; major coarse grains exporters are Argentina, Australia, Brazil, Canada, the European Union, the Russian Federation, Ukraine and the United States of America; major rice exporters are India, Pakistan, Thailand, the United States of America and Viet Nam.

**Table A3. Selected international prices of wheat and coarse grains**  
(USD/tonne)

	Wheat			Maize		Sorghum
	US No.2 Hard Red Winter Ord. Protein <sup>1</sup>	US Soft Red Winter No.2 <sup>2</sup>	Argentina Trigo Pan <sup>3</sup>	US No.2 Yellow <sup>2</sup>	Argentina <sup>3</sup>	US No.2 Yellow <sup>2</sup>
<b>Annual (July/June)</b>						
2005/06	175	138	138	104	101	108
2006/07	212	176	188	150	145	155
2007/08	361	311	318	200	192	206
2008/09	270	201	234	188	180	170
2009/10	209	185	224	160	168	165
2010/11	316	289	311	254	260	248
2011/12	300	256	264	281	269	264
2012/13	348	310	336	311	278	281
2013/14	318	265	335	217	219	218
2014/15	266	221	246	173	177	210
2015/16	211	194	208	166	170	174
2016/17	197	170	190	156	172	151
2017/18	230	188	203	159	165	174
<b>Monthly</b>						
2016 - November	191	167	176	152	178	143
2016 - December	187	162	168	154	181	154
2017 - January	201	173	177	159	183	155
2017 - February	210	180	186	163	179	157
2017 - March	198	176	191	159	163	150
2017 - April	191	173	189	157	164	150
2017 - May	200	175	189	158	161	158
2017 - June	226	182	190	158	155	164
2017 - July	240	206	193	159	150	173
2017 - August	201	173	190	148	149	170
2017 - September	215	176	181	147	149	169
2017 - October	214	177	182	148	149	171
2017 - November	220	176	179	148	150	167
2017 - December	219	171	178	149	158	174
2018 - January	229	178	178	156	164	178
2018 - February	240	191	189	164	177	188
2018 - March	245	198	211	171	188	181
2018 - April	240	198	229	175	189	180
2018 - May	250	211	261	179	192	165
2018 - June	241	205	268	166	170	167
2018 - July	235	207	245	157	165	147
2018 - August	250	215	242	162	168	165
2018 - September	242	203	235	156	160	165
2018 - October	240	210	233	160	162	159
2018 - November	232	210	220	160	161	157

Sources: International Grains Council and USDA.

<sup>1</sup> Delivered United States f.o.b. Gulf.<sup>2</sup> Delivered United States Gulf.<sup>3</sup> Up River f.o.b.

**Table A4a. Estimated cereal import requirements of Low-Income Food-Deficit Countries<sup>1</sup> in 2017/18 or 2018***(thousand tonnes)*

	Marketing year	2016/17 or 2017			2017/18 or 2018
		Commercial purchases	Food aid	Total imports (commercial and aid)	Total import requirements (excl. re-exports)
<b>AFRICA</b>		<b>34 838.1</b>	<b>994.3</b>	<b>35 832.4</b>	<b>35 659.0</b>
<b>East Africa</b>		<b>10 611.6</b>	<b>599.0</b>	<b>11 210.6</b>	<b>11 934.0</b>
Burundi	Jan/Dec	160.9	15.0	175.9	169.8
Comoros	Jan/Dec	41.0	0.0	41.0	61.0
Djibouti	Jan/Dec	81.0	4.0	85.0	85.0
Eritrea	Jan/Dec	447.3	0.0	447.3	447.7
Ethiopia	Jan/Dec	1 677.6	54.0	1 731.6	1 900.0
Kenya	Oct/Sept	3 220.0	80.0	3 300.0	3 580.0
Rwanda	Jan/Dec	195.0	0.0	195.0	200.0
Somalia	Aug/Jul	695.0	170.0	865.0	950.0
South Sudan	Nov/Oct	500.0	60.0	560.0	665.0
Sudan	Nov/Oct	2 100.0	182.0	2 282.0	2 360.0
Uganda	Jan/Dec	482.2	23.0	505.2	560.5
United Republic of Tanzania	Jun/May	1 011.6	11.0	1 022.6	955.0
<b>Southern Africa</b>		<b>3 776.3</b>	<b>93.2</b>	<b>3 869.5</b>	<b>2 908.8</b>
Lesotho	Apr/Mar	249.5	14.0	263.5	189.1
Madagascar	Apr/Mar	467.4	17.1	484.5	1 023.6
Malawi	Apr/Mar	540.0	6.0	546.0	167.0
Mozambique	Apr/Mar	1 295.0	1.0	1 296.0	1 116.0
Zimbabwe	Apr/Mar	1 224.4	55.1	1 279.5	413.1
<b>West Africa</b>		<b>18 291.9</b>	<b>143.1</b>	<b>18 435.0</b>	<b>18 556.9</b>
<b>Coastal Countries</b>		<b>13 190.1</b>	<b>44.5</b>	<b>13 234.6</b>	<b>13 663.5</b>
Benin	Jan/Dec	426.0	6.0	432.0	612.0
Côte d'Ivoire	Jan/Dec	2 065.0	5.5	2 070.5	1 980.5
Ghana	Jan/Dec	1 260.2	5.0	1 265.2	1 375.0
Guinea	Jan/Dec	897.0	5.5	902.5	847.5
Liberia	Jan/Dec	490.0	12.0	502.0	487.0
Nigeria	Jan/Dec	7 390.0	0.0	7 390.0	7 710.0
Sierra Leone	Jan/Dec	466.9	10.0	476.9	356.0
Togo	Jan/Dec	195.0	0.5	195.5	295.5
<b>Sahelian Countries</b>		<b>5 101.8</b>	<b>98.6</b>	<b>5 200.4</b>	<b>4 893.4</b>
Burkina Faso	Nov/Oct	683.0	10.0	693.0	678.0
Chad	Nov/Oct	121.0	38.6	159.6	169.6
Gambia	Nov/Oct	217.0	1.5	218.5	258.5
Guinea-Bissau	Nov/Oct	158.0	6.3	164.3	119.3
Mali	Nov/Oct	451.2	0.0	451.2	451.2
Mauritania	Nov/Oct	589.7	16.1	605.8	578.8
Niger	Nov/Oct	625.0	18.0	643.0	638.0
Senegal	Nov/Oct	2 256.9	8.1	2 265.0	2 000.0
<b>Central Africa</b>		<b>2 158.3</b>	<b>159.0</b>	<b>2 317.3</b>	<b>2 259.3</b>
Cameroon	Jan/Dec	1 335.0	10.0	1 345.0	1 270.0
Central African Republic	Jan/Dec	61.0	23.0	84.0	86.0
Democratic Republic of the Congo	Jan/Dec	745.0	125.0	870.0	885.0
Sao Tome and Principe	Jan/Dec	17.3	1.0	18.3	18.3

Source: FAO

<sup>1</sup> The Low-Income Food-Deficit Countries (LIFDCs) group includes net food deficit countries with annual per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. USD 1 985 in 2013); for full details see <http://www.fao.org/countryprofiles/lifdc>



**Table A4b. Estimated cereal import requirements of Low-Income Food-Deficit Countries<sup>1</sup> in 2017/18 or 2018***(thousand tonnes)*

	Marketing year	2016/17 or 2017			2017/18 or 2018
		Commercial purchases	Food aid	Total imports (commercial and aid)	Total import requirements (excl. re-exports)
<b>ASIA</b>		<b>28 507.1</b>	<b>773.1</b>	<b>29 280.2</b>	<b>30 196.9</b>
<b>Cis in Asia</b>		<b>4 579.1</b>	<b>0.1</b>	<b>4 579.2</b>	<b>4 633.7</b>
Kyrgyzstan	Jul/Jun	565.3	0.1	565.4	617.2
Tajikistan	Jul/Jun	1 147.5	0.0	1 147.5	1 032.5
Uzbekistan	Jul/Jun	2 866.3	0.0	2 866.3	2 984.0
<b>Far East</b>		<b>14 396.0</b>	<b>153.0</b>	<b>14 549.0</b>	<b>14 821.2</b>
Bangladesh	Jul/Jun	6 674.9	85.0	6 759.9	10 980.9
Democratic People's Republic of Korea	Nov/Oct	390.0	66.0	456.0	641.0
India	Apr/Mar	6 030.8	0.0	6 030.8	1 906.7
Nepal	Jul/Jun	1 144.2	2.0	1 146.2	1 140.8
Pakistan	May/Apr	156.1	0.0	156.1	151.8
<b>Near East</b>		<b>9 532.0</b>	<b>620.0</b>	<b>10 152.0</b>	<b>10 742.0</b>
Afghanistan	Jul/Jun	2 882.0	100.0	2 982.0	3 002.0
Syrian Arab Republic	Jul/Jun	2 650.0	290.0	2 940.0	3 430.0
Yemen	Jan/Dec	4 000.0	230.0	4 230.0	4 310.0
<b>CENTRAL AMERICA AND THE CARIBBEAN</b>		<b>1 476.2</b>	<b>10.0</b>	<b>1 486.2</b>	<b>1 402.1</b>
Haiti	Jul/Jun	866.6	10.0	876.6	810.1
Nicaragua	Jul/Jun	609.6	0.0	609.6	592.0
<b>OCEANIA</b>		<b>483.3</b>	<b>0.0</b>	<b>483.3</b>	<b>504.0</b>
Papua New Guinea	Jan/Dec	420.2	0.0	420.2	440.2
Solomon Islands	Jan/Dec	63.1	0.0	63.1	63.8
<b>TOTAL</b>		<b>65 304.7</b>	<b>1 777.4</b>	<b>67 082.1</b>	<b>67 762.0</b>

Source: FAO

<sup>1</sup> The Low-Income Food-Deficit Countries (LIFDCs) group includes net food deficit countries with annual per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. USD 1 985 in 2013); for full details see <http://www.fao.org/countryprofiles/lifdc>

**Table A5. Estimated cereal import requirements of Low-Income Food-Deficit Countries<sup>1</sup> in 2018/19\****(thousand tonnes)*

	Marketing year	2017/18			2018/19
		Commercial purchases	Food aid	Total imports (commercial and aid)	Total import requirements (excl. re-exports)
<b>AFRICA</b>		<b>8 093.0</b>	<b>215.8</b>	<b>4 813.8</b>	<b>4 618.0</b>
<b>Eastern Africa</b>		<b>5 199.0</b>	<b>201.0</b>	<b>1 905.0</b>	<b>1 755.0</b>
Kenya	Oct/Sep	3 495.0	85.0	3 580.0	3 155.0
Somalia	Aug/Jul	760.0	190.0	950.0	850.0
United Republic of Tanzania	Jun/May	944.0	11.0	955.0	905.0
<b>Southern Africa</b>		<b>2 894.0</b>	<b>14.8</b>	<b>2 908.8</b>	<b>2 863.0</b>
Lesotho	Apr/Mar	188.5	0.6	189.1	235.9
Madagascar	Apr/Mar	1 015.6	8.0	1 023.6	751.0
Malawi	Apr/Mar	165.0	2.0	167.0	277.0
Mozambique	Apr/Mar	1 115.0	1.0	1 116.0	1 246.0
Zimbabwe	Apr/Mar	409.9	3.2	413.1	353.1
<b>ASIA</b>		<b>24 752.6</b>	<b>493.6</b>	<b>25 246.2</b>	<b>22 573.1</b>
<b>CIS in Asia</b>		<b>4 633.9</b>	<b>0.1</b>	<b>4 634.0</b>	<b>5 097.5</b>
Kyrgyzstan	Jul/Jun	617.4	0.1	617.5	518.5
Tajikistan	Jul/Jun	1 032.5	0.0	1 032.5	1 232.0
Uzbekistan	Jul/Jun	2 984.0	0.0	2 984.0	3 347.0
<b>Far East</b>		<b>14 076.7</b>	<b>103.5</b>	<b>14 180.2</b>	<b>10 283.6</b>
Bangladesh	Jul/Jun	10 879.4	101.5	10 980.9	8 650.0
India	Apr/Mar	1 906.7	0.0	1 906.7	421.0
Nepal	Jul/Jun	1 138.8	2.0	1 140.8	1 040.8
Pakistan	May/April	151.8	0.0	151.8	171.8
<b>Near East</b>		<b>6 042.0</b>	<b>390.0</b>	<b>6 432.0</b>	<b>7 192.0</b>
Afghanistan	Jul/Jun	2 902.0	100.0	3 002.0	3 452.0
Syrian Arab Republic	Jul/Jun	3 140.0	290.0	3 430.0	3 740.0
<b>CENTRAL AMERICA AND THE CARIBBEAN</b>		<b>1 392.0</b>	<b>10.1</b>	<b>1 402.1</b>	<b>1 477.1</b>
Haiti	Jul/Jun	800.0	10.1	810.1	835.1
Nicaragua	Jul/Jun	592.0	0.0	592.0	642.0
<b>TOTAL</b>		<b>34 237.6</b>	<b>719.5</b>	<b>31 462.1</b>	<b>28 668.2</b>

Source: FAO

\* Countries included in this table are only those that have entered the new marketing year.

<sup>1</sup> The Low-Income Food-Deficit Countries (LIFDCs) group includes net food deficit countries with annual per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. USD 1 985 in 2013); for full details see <http://www.fao.org/countryprofiles/lifdc>



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