No. 4 ■ December 2014

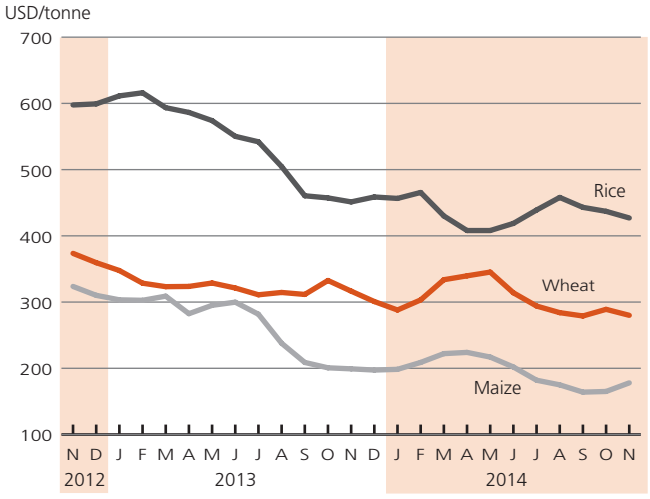
Crop Prospects and Food Situation

HIGHLIGHTS

- **World cereal production in 2014 is forecast to surpass last year's record, boosting stocks to a 15-year high.**
- **Maize export prices increased significantly in November supported by lower than previously expected yields of the 2014 crop in the United States of America. Wheat export prices strengthened in general, while rice quotations declined. Overall, however, cereal export prices persisted at levels below those of a year earlier, reflecting ample global supplies.**
- **In Western Africa, the outbreak of the Ebola virus disease in Guinea, Liberia and Sierra Leone continues to affect the food security situation of large numbers of people through the disruption of livelihoods, farming activities and markets.** Moreover, adverse weather conditions in 2014 caused a sharp drop in cereal and pasture production in large parts of the Sahel, notably in Cabo Verde, the Gambia, Guinea-Bissau and Senegal.
- **In Central Africa, the food security situation remains grave** in the Central African Republic with one-third of the population in need of urgent assistance. In eastern Democratic Republic of the Congo, continued population displacements together with recent damaging floods aggravated food insecurity.
- **In Eastern Africa, the food security situation improved in most countries following recent harvests.** However, in Somalia and the Sudan food prices remained at very high levels negatively impacting on food access.
- **In Southern Africa, prevailing stable maize prices reflect ample supplies from 2014's bumper output, contributing to an improved food security situation.**
- **In North Africa, a slightly below-average cereal crop was gathered in 2014.** However, sharp reductions were recorded in Morocco due to erratic rains, while in Tunisia production recovered from the previous year's poor harvest.
- **In the Near East, persistent conflicts continued to exacerbate food insecurity in the Syrian Arab Republic and in Iraq with the outflow of refugees affecting neighbouring countries.** Urgent response to appeals for assistance is required. In addition, drought conditions resulted in poor harvests in the main producing countries.
- **In the Far East, the 2014 aggregate cereal harvest is estimated to remain high, despite a small decrease in the rice output.**
- **In CIS Europe, the record 2014 cereal harvest was followed by concerns about the impact of the early onset of winter conditions on 2015 crops.**
- **In Central America, excluding the main producer Mexico, the 2014 cereal production is forecast at a sharply reduced level.** Crop losses reflect drought conditions during the main first season.
- **In South America, cereal production is estimated at an above-average level.** The wheat output recovered strongly from the previous year's low level, while maize production remained close to last year's record.
- **FAO estimates that globally 39 countries, including 29 countries in Africa, are in need of external assistance for food due to conflict, crop failures and the impact of localized high food prices on vulnerable groups.**

CONTENTS

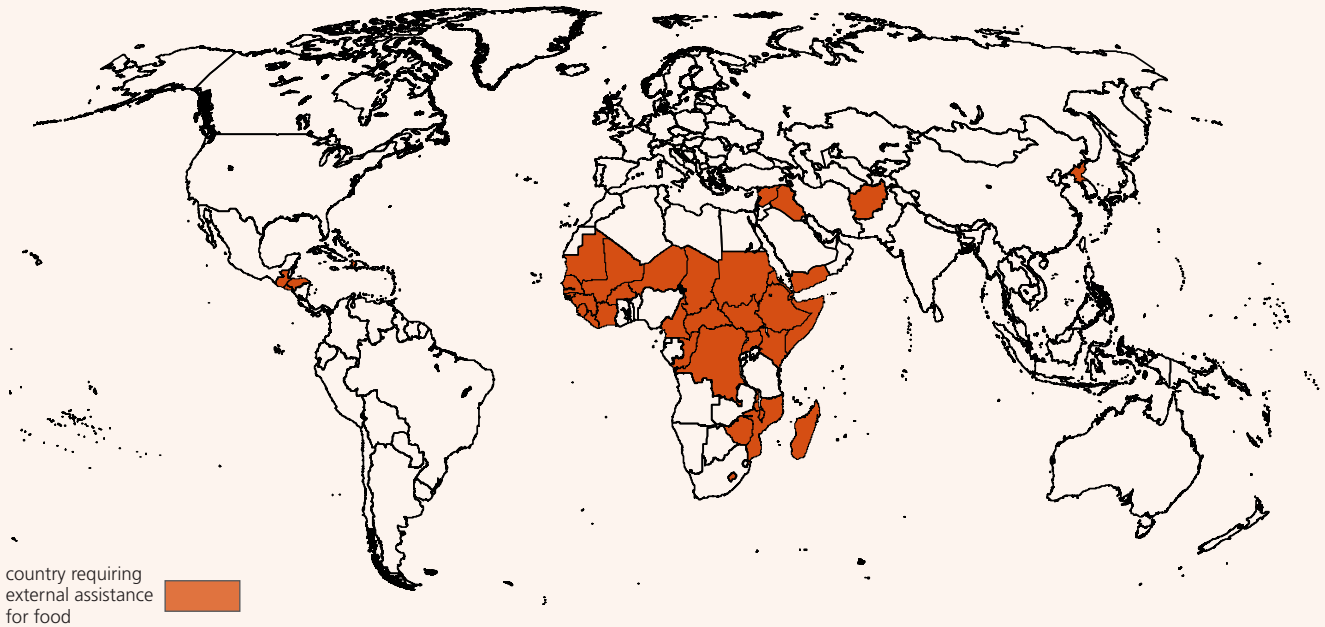
Cereal export prices remained lower than a year earlier, despite increases of wheat from most origins and maize



Note: Selected international cereal prices refer to monthly averages. See Table 3 for details

Countries requiring external assistance for food[1]

World: 39 countries



AFRICA (29 countries)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/SUPPLIES

Central African Republic
Conflict, displacements and below-average crop production
- The IDP caseload, as of early December, was estimated at 430 000 persons.
- In October 2014 about 1.5 million people, out of a total population of 4.6 million were estimated to be in need of food assistance.
- Food crop production in 2014 is estimated to be 58 percent below average, despite an 11 percent increase from the sharply reduced 2013 output.

Gambia
Below-average crop production
- Over 261 000 people are estimated to be in Phase 3: "Crisis" and above according to the last "Cadre Harmonisé" analysis. An additional 634 000 people are estimated to be at risk of food insecurity (Phase 2).

Guinea-Bissau
Below-average crop production
- Cereal production is estimated to decrease by 34 percent in 2014 compared to the average.
- Over 190 000 are estimated to be in Phase 3: "Crisis" and above according to the last "Cadre Harmonisé" analysis.

Senegal
Below-average crop production
- Cereal production in 2014 is estimated to be 41 percent below the average.
- Over 477 000 people are estimated to be in Phase 3: "Crisis" and above according to the last "Cadre Harmonisé" analysis. An additional 2.16 million people are estimated to be at risk of food insecurity (Phase 2).

WIDESPREAD LACK OF ACCESS

Burkina Faso
Massive influx of refugees from Mali put additional pressure on local food supplies
- Over 33 000 Malian refugees are estimated to be living in the country as of September 2014.

Chad
Large influx of refugees put additional pressure on local food supplies
- Over 461 000 people from the Sudan's Darfur region, the Central African Republic and northern Nigeria, as well as the return of an estimated 340 000 Chadians, have put added pressure on local food supply negatively affecting food security.
- Over 550 000 people are estimated to be in need of food assistance according to the last "Cadre Harmonisé" analysis.

Djibouti
Inadequate pasture availability and reduced access to humanitarian assistance
- About 160 000 people are severely food insecure, mainly in pastoral southeastern areas and in the Obock region.

Eritrea
Vulnerability to food insecurity due to economic constraints

Guinea
Impact of the Ebola virus disease (EVD) outbreak
- Disruption to markets, farming activities and livelihoods, seriously affecting the food security situation of large numbers of people.

Liberia
Impact of the EVD outbreak
- Disruption to markets, farming activities and livelihoods, seriously affecting the food security situation of large numbers of people.

Mali ■
Droughts, floods, population displacements and insecurity in northern areas
- Over 263 000 people are estimated to be in Phase 3: "Crisis" and above according to the last "Cadre Harmonisé" analysis.
- An additional 1.7 million people are estimated to be at risk of food insecurity (Phase 2).

Mauritania ■
Influx of refugees put additional pressure on local food supplies and high food prices constrain access
- More than 54 700 Malian refugees remain in southeastern Mauritania as of September 2014.
- Over 367 000 people are estimated to be in Phase 3: "Crisis" and above according to the last "Cadre Harmonisé" analysis.

Niger ■
Recurrent severe food crisis
- About 2.2 million people are estimated to be in Phase 3: "Crisis" and above according to the last "Cadre Harmonisé" analysis conducted in March 2014.
- Over 51 000 Malian refugees are estimated to be living in the country as of September 2014.
- Severe depletion of household assets and high levels of indebtedness.

Sierra Leone ▼
Impact of the EVD outbreak
- Disruption to markets, farming activities and livelihoods, seriously affecting the food security situation of large numbers of people.

Zimbabwe ■
Reduced localized crop production in southern and western regions
- An estimated 331 000 people require food assistance.
- The overall food security situation improved in 2014, with a 78 percent decrease in the number of food insecure persons compared to 2013, mainly attributed to more stable maize supplies.

SEVERE LOCALIZED FOOD INSECURITY

Cameroon ▼
Influx of refugees exacerbating food insecurity of the host communities already affected by recurrent droughts and floods
- The number of refugees from the CAR that entered mainly East, Adamaoua and North regions was estimated at 241 000 in late November 2014. About 44 000 refugees from Nigeria entered mainly the Far North region since May 2013.

Congo ▼
Influx of refugees straining the already limited resources of host communities
- As of late November 2014, about 20 000 refugees from the CAR are sheltering in the country.

Côte d'Ivoire ■
Conflict-related damage to agriculture sector in recent years and lack of support services, mainly in the northern regions

Democratic Republic of the Congo ▼
Conflict and displacements in eastern provinces
- As of late November 2014, the total number of IDPs was estimated at more than 2.7 million.
- An estimated 4.1 million people in need of urgent humanitarian assistance (June 2014).

Floods and landslides in eastern provinces
- At least 16 000 individuals in eastern parts were affected, raising serious food security and health concerns.

Influx of refugees straining on already limited resources of host communities
- As of late November, refugees from the CAR, mainly hosted in the northern Equateur province, were estimated at 68 000.

Ethiopia ▼
Reduced localized crop production
- The number of people in need of humanitarian assistance increased to 3.2 million, mainly in pastoral areas.

Kenya ▼
Successive seasons of below-average rains
- About 1.5 million people are severely food insecure, mainly located in northeastern pastoral areas.

Lesotho ■
Reduced localized crop production
- Food security conditions remain strained, with an estimated 447 760 people requiring assistance.

Madagascar ■
Reduced crop production in southern regions
- Food insecurity remains severe in southern regions, due to limited cereal availability.
- Although production improved somewhat in 2014, the output is still well below-average. Continued support for the locust control programme is urgently requested to prevent another outbreak of the locust plague.
- Lower rice prices have improved food access.

Malawi ■
Reduced localized crop production
- An estimated 640 000 people require assistance (a sharp decline compared to the 1.5 million estimated in 2013).

Mozambique ■
Reduced localized crop production
- An estimated 150 000 people require assistance, mainly due to a reduced cereal availability. This figure is approximately 60 000 below the level estimated last year.

Somalia ■
Conflict and civil insecurity
- Over 1 million people are estimated to be in need of emergency assistance, mainly IDPs and poor households in southern and central areas.

South Sudan ▲
Conflict and civil insecurity
- The number of severely food insecure people has decreased from 2.2 to 1.5 million, due to the availability of newly-harvested crops and the delivery of humanitarian aid.
- However, production short-falls in some areas and an escalation in the conflict is expected to result in increased numbers of people requiring assistance in 2015.

Sudan ▲
Conflict and civil insecurity
- The number of people estimated to be in need of humanitarian assistance, mainly IDPs in conflict-affected areas, has decreased from 5.3 to 3.5 million.

Uganda ▼
Below-average crop production
- About 180 000 people in Karamoja region are estimated to be severely food insecure following two years of below-average crop production.

ASIA (5 countries)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/SUPPLIES

Iraq ▼

Escalation of the conflict and large internal displacement

- Over 2 million people have been displaced since January 2014.
- 1.2 million beneficiaries (IDPs, non-displaced food insecure in conflict areas and food insecure host families) receiving food assistance.
- Internal trade restrictions and reduced access to stocks held in the areas under ISIL control.

Syrian Arab Republic ▼

Worsening civil conflict and below-average harvest

- Wheat harvest significantly affected by conflict and drought.
- An estimated 6.8 million people are facing severe food insecurity.
- Although some international food assistance is being provided, Syrian refugees are also putting strain on other host communities in neighbouring countries.
- 2.7 million receiving food assistance in neighbouring countries and 4.2 million within the country.

WIDESPREAD LACK OF ACCESS

Democratic People's Republic of Korea ■

Economic constraints and lack of agricultural inputs

- An estimated 16 million people remain at risk of food insecurity.
- Despite a generally good aggregate cereal harvest in 2014/15, the food system in the DPRK remains highly vulnerable to shocks and serious shortages exist particularly in the production of protein-rich crops and aggravated food insecurity.

Yemen ■

Conflict, poverty and high food and fuel prices

- About 40 percent of the population is considered food insecure.
- Recovery and resilience operation replaced emergency relief assistance.

SEVERE LOCALIZED FOOD INSECURITY

Afghanistan ■

Continuing conflict and population displacement

- Over 700 000 internally displaced, mostly in Helmand province.
- 1.7 million targeted with food assistance.

LATIN AMERICA AND THE CARIBBEAN (4 countries)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/SUPPLIES

El Salvador ■

Drought-reduced maize production

- Significantly reduced maize supplies due to drought conditions negatively impacting the 2014 main first season, accounting for more than half of annual production.
- Around 96 000 families have been severely affected and are in need of assistance.

Guatemala ■

Drought-reduced maize production

- Significantly reduced maize supplies due to drought conditions negatively impacting the 2014 main first season, accounting for more than half of annual production.
- Official estimates point to 268 000 families being affected and the Government has appealed for international assistance.

Haiti ✚

Drought-reduced maize production

- Drought conditions during the 2014 main first season, accounting for more than half of annual cereal production, have significantly reduced supplies of maize and rice.

Honduras ■

Drought-reduced maize production

- Significantly reduced maize supplies due to drought conditions negatively impacting the 2014 main first season, accounting for more than half of annual production.
- The affected population in need of food assistance is estimated at 76 712 small-farming families.

Countries with unfavourable prospects for current crops[2] (total: 1 country)

AFRICA (1 country)

Kenya ✚

Below-average cereal production

- ***Expected in western key cropping areas due to a series of dry spells and high incidence of pests and diseases, including some outbreaks of the Maize Lethal Necrosis Disease (MLND).***

Key - Changes since last report (October 2014)

No change ■ Improving ▲ Deteriorating ▼ New Entry ✚

Terminology

[1] **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.

[2] **Countries facing unfavourable prospects for current crops** are countries where prospects point to a shortfall in production of current crops as a result of a reduction of the area planted and/or yields due to adverse weather conditions, plant pests, diseases and other calamities.

Global overview

GLOBAL CEREAL SUPPLY AND DEMAND ROUNDUP

World cereal **production** in 2014 is forecast at a new record of 2 532 million tonnes (including rice in milled terms), 10 million tonnes higher than November's forecast and 7 million tonnes (0.3 percent) above last year's peak. This month's largest upward adjustment corresponded to coarse grains, the global production of which is set to reach 1 312 million tonnes, just above last year's record and 8.5 million tonnes higher than anticipated earlier. The forecast for maize production has been raised by over 5 million tonnes since last month, driven primarily by upward adjustments to production levels in **China**, the **European Union (EU)** and **Mexico**. Global wheat production is currently forecast at 725 million tonnes, up 7.6 million tonnes (1.1 percent) from the 2013 record level and 2.3 million tonnes more than reported in November. The upward adjustment in December reflects an upgrading of crops in the **EU** and **the Russian Federation** more than offsetting a reduced forecast for wheat production in **Australia** and **Turkey**. Unlike for the other cereals, rice production may undergo a slight contraction in 2014, in the order of 2 million tonnes, or 0.4 percent. The forecast is somewhat lower than portended last month, reflecting poorer crop prospects especially for **India**, **Thailand** and **Guinea**.

Wheat plantings for harvest in 2015 are virtually complete in the Northern Hemisphere. In **the United States of America**, favourable weather aided crop establishment, but plantings are expected to fall marginally reflecting lower prices. In the **EU**, plantings are anticipated to remain more or less on par with the record level of last year, with favourable weather facilitating sowings and initial crop development. Small increases are estimated in **the Russian Federation** and **Ukraine**, however, soil moisture deficits and cold temperatures have delayed early crop growth. Satisfactory sowing conditions were observed in *North Africa*, with plantings expected to be completed by the end of the year. Similarly, in **Turkey**, favourable soil moisture levels facilitated crop development, and contributed to an expected expansion in plantings. Preliminary estimates in *Asia* point to larger plantings in **Pakistan**, while the area sown in **India** is foreseen to remain close to the record level of 2014 and a small increase is expected in **China**.

The FAO estimate for global wheat production in 2014 stands at 725 million tonnes, up 7.6 million tonnes from the

Figure 1. World cereal production and utilization

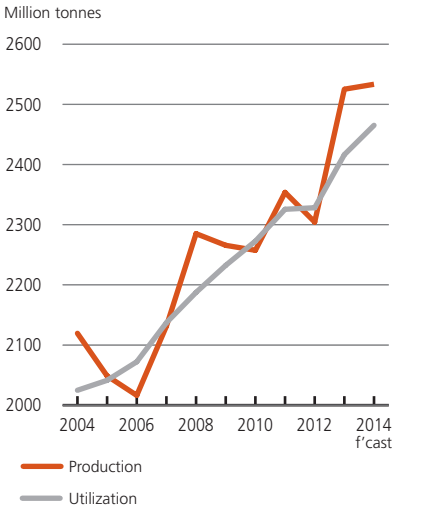


Table 1. World cereal production[1]
(million tonnes)

	2012	2013 estimate	2014 forecast	Change: 2014 over 2013 (%)
Asia	**1 091.7**	**1 124.7**	**1 112.1**	**-1.1**
Far East	995.4	1 017.3	1 013.5	-0.4
Near East	69.3	74.3	67.3	-9.3
CIS in Asia	27.0	33.1	31.2	-5.8
Africa	**162.3**	**162.8**	**164.1**	**0.8**
North Africa	33.9	36.0	32.7	-9.2
Western Africa	50.7	50.1	49.3	-1.5
Central Africa	4.7	4.7	4.7	-1.5
Eastern Africa	43.3	43.1	43.4	0.6
Southern Africa	29.7	28.9	34.1	17.9
Central America and Caribbean	**40.0**	**41.0**	**41.9**	**2.4**
South America	**153.2**	**173.1**	**173.2**	**0.1**
North America	**406.1**	**500.4**	**493.0**	**-1.5**
Europe	**415.2**	**480.7**	**512.7**	**6.7**
EU	278.3	304.1	321.4	5.7
CIS in Europe	124.1	162.6	177.4	9.1
Oceania	**35.9**	**42.6**	**35.0**	**-17.9**
World	**2 304.4**	**2 525.2**	**2 532.1**	**0.3**
Developing countries	1 396.1	1 444.6	1 433.9	-0.7
Developed countries	908.3	1 080.6	1 098.2	1.6
- wheat	660.6	717.2	724.9	1.1
- coarse grains	1 153.4	1 310.4	1 311.6	0.1
- rice (milled)	490.5	497.5	495.6	-0.4

Note: Totals and percentage change computed from unrounded data.

[1] Includes rice in milled terms.

estimate in the October issue of this report, mainly reflecting a 2 percent upward revision for *Europe*. At the current level, 2014 production is estimated to be 1.1 percent higher than the previous year.

The 2014 production estimate for *Europe* stands at 247.8 million tonnes, about 22.4 million tonnes, or 10 percent, higher than 2013. Larger crops in **the Russian Federation** and **Ukraine** account for the bulk of the increase, with both countries recording bumper yields following generally favourable weather conditions. Elsewhere in *Europe*, the **EU** is estimated to have harvested a crop of 155 million tonnes, approximately 8 percent, or 11.3 million tonnes, up on 2013's output, due to larger plantings and higher yields. In *North America*, production is estimated to have declined by 14 percent. Lower estimated yields more than offset larger plantings in **the United States of America**, resulting in a 5 percent decrease to 55 million tonnes. Similarly, reduced yields in **Canada**, in combination with lower plantings, caused a sharp 27 percent production decline.

The aggregate output for *Asia* is estimated at 319 million tonnes, virtually unchanged from the previous year. Record crops were harvested in **India** and **China**, about 3 percent up on 2013's outputs, mainly on account of large plantings and record yields. In **Pakistan**, a record output of 25.3 million tonnes was also estimated due to a combination of higher plantings and improved yields. However, these production gains were largely offset by lower aggregate outputs in the *Near East* and *CIS in Asia*. In **Turkey**, which accounts for nearly half of the *Near East's* output, drought conditions caused a 3 million tonne (10 percent) decline. Smaller crops were also harvested in **Iraq**, **the Syrian Arab Republic**, and **the Islamic Republic of Iran**, on account of unfavourable weather, while conflict negatively impacted on agricultural activities in the former countries, further contributing to the smaller harvests. In *CIS in Asia*, production is estimated to be down by 6 percent from last year and the average, largely on account of a weather depressed output in **Kazakhstan**, the subregion's dominant producer. There was a 12 percent reduction in the 2014 wheat output in *North Africa* compared to last year's record level. The decrease reflects smaller harvests in **Algeria** and **Morocco**, due to unfavourable weather conditions, which outweighed increases in **Tunisia** and a good, but unchanged, crop in **Egypt**.

Harvesting of the wheat crop in Southern Hemisphere countries is underway and expected to be completed by early next year. In *South America*, the production outlook still remains positive, with an expected 22 percent increase to 23.5 million tonnes. This mainly reflects larger plantings in the main producers, **Argentina** and **Brazil**, in response to high prices at the beginning of the season.

Persistent dry conditions in **Australia** resulted in a further downward revision. Despite an increase in the area planted, production is put 23.2 million tonnes, 14 percent lower than 2013. In *Southern Africa*, aggregate production is estimated to decline by 7 percent to just over 2 million tonnes, with reductions expected in the two main producing countries, **South Africa** and **Zambia**, on account of reduced plantings.

Global world coarse grains production in 2014 is estimated at 1 312 million tonnes, virtually unchanged from the 2013 record. The global maize output is put at 1 020 million tonnes, marginally higher than the previous estimate in October's issue of this report, reflecting upward revisions in the **EU**, **China** and **Mexico**. Compared to the record level in 2013, world production is about 1 percent higher, on account of a record harvest in **the United States of America**, as well as larger outputs in the **EU** and *Southern Africa*.

In the Northern Hemisphere, harvesting of the 2014 maize crop is nearing completion. Maize production in **the United States of America** is estimated at 366 million tonnes, 3.5 percent higher than the record crop of 2013, with an estimated increase in yields more than offsetting the expected reduction in the area harvested. In **Canada**, wet weather caused some delays to the harvest, but production is still estimated to be 20 percent below last year. In *Europe*, aggregate production stands at 120.4 million tonnes, 3 percent above 2013, mainly on account of a larger crop in the **EU** due to higher yields and in **the Russian Federation**, where increased plantings and good weather resulted in an estimated 3 percent production increase. These gains helped to offset a sharp 15 percent decrease in **Ukraine's** output, as yields returned to average levels.

Production in *Asia* is estimated at 300.4 million tonnes, down about 1 percent from last year. The decline mainly reflects lower 2014 outputs in **India** (-10 percent) and **China** (-1 percent), due to reduced yields following dry weather. In *Western Africa*, with the main harvest underway, production is estimated to contract by 5 percent from 2013's record, mainly due to dry weather, particularly in western parts of the Sahel, while the impact of the Ebola outbreak further contributed to production declines in affected countries. Similarly, production is expected to fall by 7 percent in *Eastern Africa* following persistent rainfall deficits.

In Southern Hemisphere countries harvesting of the main maize crop was completed earlier in the year. The 2014 output in *South America* was estimated at 119.8 million tonnes, about 3 percent down from the 2013 record, mainly on account of a smaller output in **Brazil**. Reduced harvests were also estimated in other *South American* countries, with the exception of **Argentina**. Aggregate

maize production in *Southern Africa* increased sharply (by 21 percent) to 27.4 million tonnes. Significant gains were registered in **South Africa**, the subregion's main producer, where white maize production recovered from the drought-affected 2013 harvest. Planting of the 2015 maize crop is underway in **Argentina**, **Brazil** and **South Africa**, the major producers in the Southern Hemisphere. Early planting estimates indicate a decrease in plantings, largely reflecting lower prices, as farmers opt to switch to crops with higher returns.

World barley production in 2014 is estimated at 143 million tonnes, a marginally improved figure compared to the October forecast, but still 2 percent below the record in 2013. The decrease mainly reflects smaller outputs in **Canada**, **Australia** and **Turkey**, which are estimated to outweigh an increase in *Europe*. The forecast for global sorghum production stands at 59.4 million tonnes, marginally lower than 2013, largely due to a decrease in *Asia*.

The 2014 rice season has reached an advanced stage, as most countries in the Northern Hemisphere have already reaped their main 2014 crops, with some also engaged in the sowing of the secondary crops. At the same time, along and south of the equator, planting of the first 2015 crops is already underway. FAO's forecast for global rice production in 2014 has been trimmed by about 0.7 million tonnes since November to 495.6 million tonnes (milled basis). The revision reflects a worsening of prospects especially in *Asia* and *Africa*. In the first region, this mainly concerned **India**, where large losses were reported in Andhra Pradesh from the passage in October of Cyclone Hudhud, and **Thailand**, where the drought that has gripped the country since the beginning of the year, is now hindering planting of the secondary crop. In *Africa*, difficulties associated with the Ebola infection have marred prospects for crops in **Guinea**, **Liberia** and **Sierra Leone**.

At the current forecast of 495.6 million tonnes, world production in 2014 would be 0.4 percent, or 1.9 million tonnes, short of the level in 2013, with much of the decline concentrated in *Asia*. In the region, the season is expected to close with a 0.6 percent contraction, equivalent to 3 million tonnes, reflecting the negative outturns expected in a number of countries, especially **India**, where erratic monsoon rains are now expected to curb production by close to 3 percent. **Sri Lanka** and **Thailand** are also likely to experience dips, following lingering drought problems and, in the case of **Thailand**, falling prices. Unfavourable weather conditions are behind expectations of reduced outputs in **Indonesia**, **the Democratic Republic of Korea**, **Nepal** and **Pakistan**. Only part of these decreases are anticipated to be compensated by gains in **China**, **Myanmar** and **Viet Nam**. In *Africa*, the situation is mixed, with overall production expected to remain stable around last year's level. Indeed, a recovery in **Madagascar** and growth in **the United Republic of Tanzania** could help to offset output declines in **Chad**, following scant rainfall, and in **Guinea**, **Liberia** and **Sierra Leone**, where limits of transit to contain the Ebola disease have hindered production operations and marketing. In *Latin America and the Caribbean*, good crops in **Brazil**, **Guyana** and **Paraguay** were largely behind an expected 1 percent increase in the region's output this year. However, below normal precipitation hampered growth in the central parts of the region, as well as in **Colombia**, **Ecuador** and **Peru**, while excessive rains and rising costs depressed output in **Uruguay**. In the other regions, production in **the**

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

	2012/13	2013/14 estimate	2014/15 forecast	Change: 2014/15 over 2013/14 (%)
PRODUCTION [1]				
World	**2 304.4**	**2 525.2**	**2 532.1**	**0.3**
Developing countries	1 396.1	1 444.6	1 433.9	-0.7
Developed countries	908.3	1 080.6	1 098.2	1.6
TRADE [2]				
World	**314.3**	**356.2**	**338.5**	**-5.0**
Developing countries	130.9	108.0	105.8	-2.1
Developed countries	183.4	248.2	232.7	-6.2
UTILIZATION				
World	**2 328.2**	**2 416.4**	**2 464.6**	**2.0**
Developing countries	1 495.1	1 545.2	1 572.2	1.7
Developed countries	833.1	871.2	892.4	2.4
Per caput cereal food use (kg per year)	152.4	152.9	152.6	-0.2
STOCKS [3]				
World	**506.1**	**578.6**	**628.4**	**8.6**
Developing countries	388.3	436.7	450.9	3.2
Developed countries	117.8	141.9	177.5	25.1
WORLD STOCK-TO-USE RATIO (%)	20.9	23.5	25.2	7.5

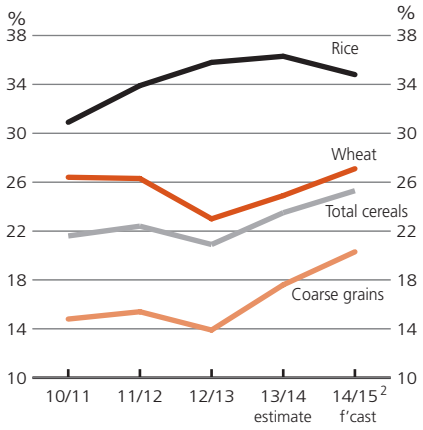
Note: Totals and percentage change computed from unrounded data.

[1] Data refer to calendar year of the first year shown and include rice in milled terms.

[2] 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.

[3] 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.

Figure 2. Ratio of world cereal stocks to utilization[1]



1 Compares closing stocks with utilization in following season.
2 Utilization in 2014/15 is a trend value based on extrapolation from the 2003/04-2013/14 period.

United States of America rose sharply, reaching its highest level since 2010. In **Australia**, tight water availabilities resulted in falling rice coverage and output. In the **EU**, production dropped for the third consecutive year, reaching its lowest level since 2008, reflecting excessive rains in Italy, the leading **EU** producer. By contrast, in **the Russian Federation**,increased plantings and favourable yields are estimated to have bolstered output to record levels.

While several *Asian* countries growing more than one paddy crop will only close their 2014 season in the first half of next year, a number of Southern Hemisphere countries are already busy sowing their first 2015 crops. Based on early information, reduced water allocations to farmers may again result in a declining area under rice in **Australia**. In *South America*, delays in plantings due to excessive precipitation have been reported in **Brazil**, which may negatively impact yields, while in **Argentina**, the area intended for rice planting was set somewhat lower than in 2014. In *Asia*, **Indonesia's** Government recently announced a paddy production target of 73.4 million tonnes (46.2 million tonnes, milled basis), implying a 4 percent increase from 2014. In **Sri Lanka**, production is set to recover next year, following a return of the rains, which ended the 11-month long drought that constrained output in 2014. In *Africa*, abundant precipitation in October have helped replenish soil water reserves in **Madagascar**, which may foster some recovery of plantings, even though early predictions for the coming months portends below average rains in central and northern parts of the country. Meanwhile, the second phase of a locust control programme was launched in the country in September 2014, which is to last until August 2015. Finally, in **the United Republic of Tanzania**, the government announced a production objective of a 19 percent increase next year.

The forecast for world cereal **utilization** in 2014/15 is put at 2 465 million tonnes, up 48.2 million tonnes (2 percent) from 2013/14. The anticipated year-to-year increase mainly reflects greater cereal usage by the livestock sectors, supported by falling prices. Total feed use could reach 876 million tonnes, 25 million tonnes (3 percent) more than in 2013/14 and 3 million tonnes higher than anticipated in November. Larger feed use of maize in the **EU** and **Mexico** is mainly behind this month's upward revision. The volume of cereals destined for food is expected to increase to 1 104 million tonnes, up 10 million tonnes (1 percent) from 2013/14, implying a stable average global per capita consumption of 152.8 kg.

The FAO's forecast for world cereal **stocks** at the close of the 2015 marketing seasons has been raised by 4 million tonnes since last month and now stands at 628 million tonnes, 50 million tonnes (8.6 percent) above their opening levels and the highest since 2000. As a result, the global cereal stocks-to-use ratio would hit a 13-year high of 25.2 percent in 2014/15 (up from 23.5 percent in 2013/14), suggesting a generally comfortable supply situation for the 2014/15 marketing season. This month's upward revision mostly concerns coarse grains. World coarse grains stocks are currently forecast at 258 million tonnes, 3.5 million tonnes more than anticipated earlier and now up 36 million tonnes (16 percent) from the previous season. Record maize production is seen to boost inventories in the **EU** and **the United States of America**. Much higher maize carryovers are also anticipated in **China**. World wheat stocks are expected to reach 193 million tonnes in 2015, nearly unchanged from the previous forecast but as much as 17 million tonnes (10 percent) higher than their opening levels, reflecting further stocks accumulations in the **EU**, **China**, **India** and **the Russian Federation**. With global production in 2014 anticipated to fall short of consumption, rice global stocks are predicted to decline by 2 percent in 2015, with the largest offloads in absolute terms expected in **India**, **Indonesia** and **Thailand**.

World cereal **trade** is forecast to contract by about 17.7 million tonnes (5 percent) in 2014/15, mainly because of wheat and coarse grains and reach 339 million tonnes. World trade in coarse grains could fall to 148 million tonnes in 2014/15 (July/June), down 10.7 million tonnes (6.8 percent) from the previous season with lower maize imports by the **EU**, and to a lesser extent **Egypt**, accounting for nearly all of this decrease. World wheat trade in 2014/15 (July/June) is forecast at 150 million tonnes, down 7.3 million tonnes (4.6 percent) from the previous season with again lower imports by **China**, **Brazil**, **Mexico** and several countries in *North Africa*. On the other hand, rice trade is currently foreseen to rise slightly above the 2014 record estimate, sustained mainly by rising demand by countries in *Africa* and abundant supplies in exporting countries.

INTERNATIONAL PRICE ROUNDUP

While wheat export quotations from most origins averaged slightly higher than in October, the benchmark US wheat (No.2 Hard Red Winter) declined 3 percent to USD 280 per tonne, down 12 percent from November 2013. Slow export demand and expectations of record global supplies in 2014/15 weighed on US wheat export prices. However, concerns about yield and quality reductions of the Southern Hemisphere crops, being harvested, limited further declines in prices. Support was also provided by worries about the impact of unseasonal cold and dry weather in **the United States of America** and **the Russian Federation** on the recently sown 2015 winter crops.

Export prices of maize increased significantly in November, with the benchmark US maize (No.2, Yellow) averaging USD 178 per tonne, 8 percent higher than in October although still 11 percent below the corresponding period last year. Maize prices were influenced by outside market developments, in particular the recent strength in soybean markets, while lower than earlier expected yields of the 2014 maize crop in **the United States of America** also contributed to the increase.

For the third consecutive month, international rice prices fell in November, one of the busiest rice harvesting months in the year. With the arrival of the new crops, aromatic rice prices, in particular, tumbled. Export prices of Indica, the most traded rice, also edged lower. For instance, the benchmark Thai rice (Thai white rice 100%B) retreated by 2.3 percent to USD 427 per tonne, reflecting strong competition with other major exporters and subdued import demand.

Please see the Global Food Price Monitor for the latest monthly analysis on domestic food prices.

Table 3. Cereal export prices*

(USD/tonne)

	2013	2014					
	Nov.	June	July	Aug.	Sept.	Oct.	Nov.
United States							
Wheat[1]	316	314	294	284	279	289	280
Maize[2]	199	202	182	175	164	165	178
Sorghum[2]	196	220	203	183	174	189	197
Argentina[3]							
Wheat	352	365	287	270	248	242	252
Maize	207	204	192	181	166	171	179
Thailand[4]							
Rice, white[5]	451	419	439	458	444	437	427
Rice, broken[6]	375	313	325	343	336	345	338

*Prices refer to the monthly average.

[1] No.2 Hard Red Winter (Ordinary Protein) f.o.b. Gulf.

[2] No.2 Yellow, Gulf.

[3] Up river, f.o.b.

[4] Indicative traded prices.

[5] 100% second grade, f.o.b. Bangkok.

[6] A1 super, f.o.b. Bangkok.

Low-Income Food-Deficit Countries food situation overview[1]

Aggregate 2014 cereal production of LIFDCs revised slightly downwards

The latest FAO 2014 aggregate cereal production estimate for the 55 Low-Income Food-Deficit Countries (LIFDCs) stands at 438.5 million tonnes, marginally below the previous October figure published in this report, reflecting a downward revision in *Asia* that outweighed an improvement in *Africa*. Overall, total cereal production of LIFDCs remains just over 1 percent below the good output of 2013.

In *Africa*, the 2014 aggregate cereal production is estimated at 108.7 million tonnes, about 1 percent higher than the reduced 2013 regional output. This year's larger outturn is mainly the result of a strong production gain in *Southern Africa* due to favourable weather. Notably, **Zimbabwe** registered a well above-average cereal output compared to the sharply reduced 2013 harvest. In *Eastern Africa*, a small increase is estimated mainly on account of a sharp recovery in **the Sudan** from last year's drought-depressed output, but several countries are expected to register reduced outputs. Unfavourable rains in **Kenya** affected crop germination and development in major producing areas, which is expected to result in a below-average harvest. Similarly, **Rwanda** is also anticipating a cereal output about one quarter below the above-average production of 2013, due to unfavourable weather conditions. The aggregate 2014 cereal output for *West Africa* is estimated to have decreased by about 2 percent, largely reflecting lower outputs in **Senegal**, **Guinea-Bissau**, **the Gambia** and **Mauritania** on account of persistent rainfall deficits. Reduced harvests, mainly rice, are also estimated in **Sierra Leone** and **Liberia**, as labour shortages, resulting from the Ebola outbreak, curtailed harvesting activities. In **Guinea**, which has also been affected by the Ebola outbreak, cereal production is estimated slightly below 2013. In the countries of eastern *Sahel* and along the *Gulf of Guinea,* production gains are estimated, which helped to partly offset the declines elsewhere and limit the overall subregional decline. Inconsistent rains in *Central Africa* resulted in a small production decrease, while the continuing socio-political crisis and widespread insecurity in **the Central African Republic** (**CAR**) further contributed to the reduced cereal output. However, **the CAR** registered a strong rebound in cassava production, helping partly to stabilize overall food production.

In *Asia,* aggregate production is estimated to contract by 2 percent, mainly reflecting a reduced output in **India** (the largest producer amongst LIFDCs) from last year's record level. Late and inconsistent monsoon rains in June and July, coupled with flooding later in the season, depressed yields of the main "kharif" rice crop and led to an estimated 2 percent drop in total cereal production. However, the output is still estimated to remain above average. In **Sri Lanka**, despite a larger 2014 maize harvest, dry weather caused a contraction in the area planted for rice, resulting in an overall smaller cereal output. Good weather in **Bangladesh** helped push cereal production to a record level. In *CIS in Asia*, production estimates for **Tajikistan** and **Uzbekistan** remain similar to the previous

Table 4. Basic facts of the Low-Income Food-Deficit Countries (LIFDCs) cereal situation *(million tonnes, rice in milled basis)*

	2012/13	2013/14 estimate	2014/15 forecast	Change: 2014/15 over 2013/14 *(%)*
Cereal production[1]	**441.3**	**444.3**	**438.5**	**-1.3**
excluding India	199.4	200.9	201.6	0.3
Utilization	**456.2**	**468.0**	**470.9**	**0.6**
Food use	374.9	382.5	387.0	1.2
excluding India	183.2	186.9	190.2	1.8
Per caput cereal food use *(kg per year)*	0.2	0.2	0.1	-0.6
excluding India	0.1	0.1	0.1	-0.5
Feed	29.3	30.7	30.8	0.3
excluding India	21.5	22.6	22.7	0.1
End of season stocks[2]	**89.2**	**91.0**	**92.0**	**1.1**
excluding India	39.7	38.8	38.2	-1.7

[1] Data refer to calendar year of the first year shown.

[2] May not equal the difference between supply and utilization because of differences in individual country marketing years.

[1] **The Low-Income Food-Deficit Countries (LIFDCs)** group includes net food deficit countries with annual per caput income below the level used by World Bank to determine eligibility for IDA assistance (i.e. USD 1 945 in 2011). The current 2014 FAO list has been recently revised, with seven countries graduating, these are: **Cambodia**, **Egypt**, **Indonesia**, **Iraq**, **Kiribati**, **Lao People's Democratic Republic** and **Zambia**. Of these, Cambodia, Lao PDR and Zambia graduated from the list on the basis of net food-exporter criterion, while the other four (Egypt, Indonesia, Iraq and Kiribati) graduated based on income criterion. For full details see: http://www.fao.org/countryprofiles/lifdc/en/

Table 5. Cereal production[1] of LIFDCs
(million tonnes)

	2012	2013 estimate	2014 forecast	Change: 2014 over 2013 (%)
Africa *(37 countries)*	**109.1**	**107.7**	**108.7**	**0.9**
Eastern Africa	43.3	43.1	43.3	0.6
Southern Africa	10.6	9.8	11.4	16.2
Western Africa	50.7	50.1	49.3	-1.5
Central Africa	4.6	4.7	4.6	-1.5
Asia *(13 countries)*	**330.3**	**334.5**	**328.2**	**-1.9**
CIS in Asia	9.6	10.1	10.2	0.2
Far East	313.4	317.1	310.9	-1.9
- India	241.9	243.4	236.9	-2.6
Near East	7.3	7.3	7.2	-1.0
Central America *(3 countries)*	**1.9**	**2.1**	**1.5**	**-25.9**
Oceania *(2 countries)*	**0.0**	**0.0**	**0.0**	**8.8**
LIFDC *(55 countries)*	**441.3**	**444.3**	**438.5**	**-1.3**

Note: Totals and percentage change computed from unrounded data.

[1] Includes rice in milled terms.

year. However, reflecting adverse weather conditions and shortages of irrigation water, the 2014 output in **Kyrgyzstan** is estimated to contract by about 18 percent compared to the average harvest of 2013.

Maize production in *Central America* is forecast to decline sharply, following an unusually early and extended dry period. Outputs from the main first season harvests in **Honduras** and **Nicaragua** are estimated to have decreased to below-average levels, and the secondary season production is not expected to offset these declines. In **Haiti**, the 2014 main coarse grains season is concluded and a sharp decrease is estimated, on account of unfavourable weather.

Cereal imports in 2014/15 forecast to increase slightly to a new record

Total cereal import requirements for LIFDCs in the 2014/15 marketing year was marginally upgraded since the previous figure of October, to 53.4 million tonnes (rice in milled terms). At this level, import requirements are slightly above last year's record. The revision mainly reflects expectations of increased imports in the *Far East*, particularly from **the Philippines**, as result of increased wheat needs, and in **Sri Lanka** on account of a reduced 2014 rice output. In *Central America*, the anticipated smaller harvests in all LIFDCs, namely **Haiti**, **Honduras** and **Nicaragua**, are forecast to result in a 12 percent increase in imports to 2.1 million tonnes. In *Central* and *Western Africa*, the anticipated lower supplies from the 2014 harvest in some countries resulted in marginally higher import requirements. By contrast, significantly lower imports are expected in *Southern Africa*, reflecting the larger cereal outputs in all LIFDCs, namely **Malawi**, **Mozambique** and **Zimbabwe**, except **Lesotho**, where cereal production is expected to decline slightly. Similarly, relatively good levels of carryover stocks limited higher import requirements in *CIS Asia*. In *Eastern Africa*, *Oceania* and *Near East*, imports are estimated to remain close to the above-average level of 2013.

With regard to the individual commodities, aggregate wheat imports, the main imported cereal, is estimated at 31 million tonnes, slightly above last year's above-average level. Imports of rice and maize are forecast at 17.1 and 4.6 million tonnes, 4 and 5 percent, respectively, higher than the corresponding levels in the previous year.

The cereal import requirement of the LIFDCs as a group for the previous 2013/14 marketing year has been revised slightly downwards to 52.5 million tonnes from 53.1 million tonnes. At this level, imports would stand 14 percent, or 6.5 million tonnes, above the previous year's actual imported volume.

Table 6. Cereal import position of LIFDCs

(thousand tonnes)

	2012/13 or 2013	2013/14 or 2014				2014/15 or 2015	
		Requirements[1]		Import position[2]		Requirements[1]	
	Actual imports	Total imports:	*of which food aid*	Total imports:	*of which food aid pledges*	Total imports:	*of which food aid*
Africa *(37 countries)*	**26 059**	**29 251**	**1 628**	**19 714**	**966**	**29 142**	**1 351**
Eastern Africa	7 308	8 665	1 063	7 135	658	8 740	792
Southern Africa	2 015	3 029	154	3 029	154	2 479	141
Western Africa	14 657	15 436	263	8 497	113	15 744	268
Central Africa	2 079	2 121	149	1 053	41	2 179	151
Asia *(13 countries)*	**17 689**	**20 874**	**436**	**17 801**	**268**	**21 627**	**527**
CIS in Asia	3 661	3 978	1	3 978	1	3 853	1
Far East	8 376	10 734	284	10 176	183	11 606	375
Near East	5 652	6 162	151	3 647	84	6 167	151
Central America *(3 countries)*	**1 794**	**1 907**	**88**	**1 907**	**88**	**2 133**	**92**
Oceania *(2 countries)*	**471**	**450**	**0**	**182**	**0**	**458**	**0**
Total *(55 countries)*	**46 013**	**52 482**	**2 152**	**39 604**	**1 322**	**53 360**	**1 971**

Note: Totals computed from unrounded data.

[1] The import requirement is the difference between utilization (food, feed, other uses, export plus closing stocks) and domestic availability (production plus opening stocks).

[2] Estimates based on information available as of early November 2014.

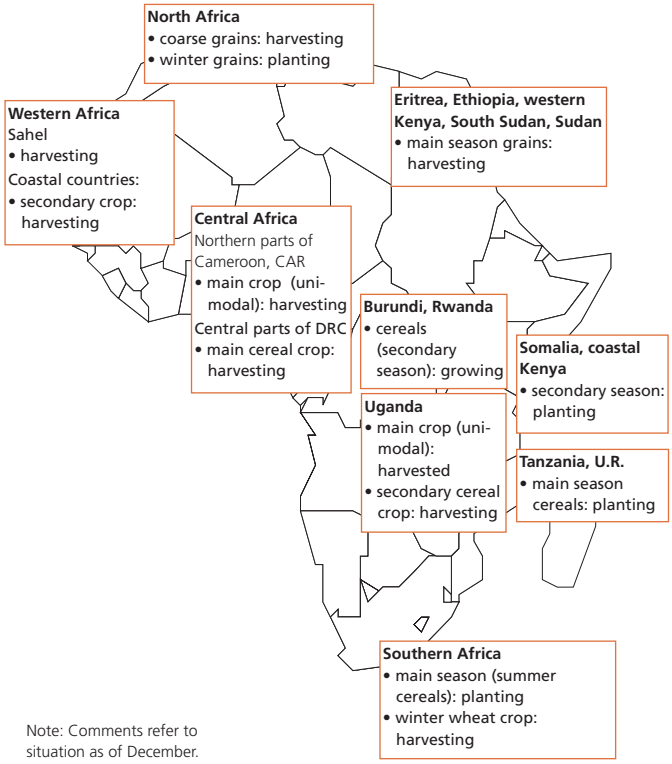
Regional reviews

Africa

North Africa

Favourable planting conditions for 2015 winter crops

Planting of the 2015 winter wheat and coarse grains crops is underway throughout the subregion under favourable weather conditions. Most planting activities are usually carried out in November to benefit from seasonal rainfall. Seasonally dry conditions in September and October, with some showers, facilitated land preparation. Abundant showers in early November replenished soil moisture for winter grain establishment, which relies mostly on rainfed grain production.



Note: Comments refer to situation as of December.

Slightly below-average outturn of the 2014 cereal harvest

The aggregate output of the 2014 cereal crops, harvested between July and October 2014, was estimated at 34.6 million tonnes, about 9 percent down on 2013 and 7 percent below the previous five-year average. Wheat production in the subregion, which accounts for just over half of the aggregate cereal output, is estimated at 17.8 million tonnes, 12 and 5 percent lower than 2013 and the five-year average, respectively.

In **Tunisia**, timely rains provided sufficient moisture for the development of the wheat and barley crops. Accordingly, total cereal production is estimated at 2.5 million tonnes, about 90 percent higher than the drought-affected crop in 2013 crop and 25 percent up on the five-year average. By contrast, in **Morocco**, dry conditions in the autumn of 2013 slowed down wheat planting with about 15 percent less land planted to cereals compared to the previous year. Despite improved weather conditions later in the season, yield gains were not sufficient to offset the area reduction, resulting in a 30 percent drop in cereal production in 2014 compared to the exceptionally high harvest of almost 10 million tonnes in 2013. In **Algeria**, although weather conditions were beneficial for crop establishment, rainfall deficits in eastern Algeria, which produces most of the domestic supply, negatively impacted crop development and lowered yields. At 3.3 million tonnes, the cereal crop in 2014 is some 30 percent lower than the average crop in 2013. **Egypt's** cereal harvest, estimated at 21.4 million tonnes, is on par with the previous year's near-average crop.

Cereal imports remain high

Even in good harvest years, *North African* countries rely heavily on cereal imports from the international market to cover their consumption needs, with **Egypt** being the world's largest wheat importer. On average, in the last five years, 45 percent of the total domestic cereal utilization (including food and feed) in **Egypt** and **Morocco** was met through imports. The share of imports

Table 7. North Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	Change: 2014/2013 (%)
North Africa	**18.0**	**20.3**	**17.8**	**11.7**	**11.5**	**10.7**	**6.0**	**6.1**	**6.0**	**35.8**	**37.9**	**34.6**	**-8.8**
Algeria	3.4	3.3	2.0	1.6	1.6	1.3	0.0	0.0	0.0	5.0	4.9	3.3	-32.4
Egypt	8.8	8.8	8.8	7.8	6.5	6.6	5.9	6.1	6.0	22.5	21.4	21.4	0.0
Morocco	3.9	7.0	5.1	1.4	2.9	1.9	0.1	0.0	0.0	5.3	9.9	7.1	-29.0
Tunisia	1.8	1.0	1.7	0.8	0.3	0.8	0.0	0.0	0.0	2.6	1.3	2.5	89.1

Note: Totals and percentage change computed from unrounded data.

is even higher in **Tunisia** (an average of 65 percent), **Algeria** (68 percent) and **Libya** (90 percent). The subregion's aggregate cereal import requirement for the 2014/15 marketing year (July/June) is estimated at 41 million tonnes, 9 percent above the average of the previous five years but 6 percent below last year's levels. Wheat imports account for almost 60 percent of the total. In **Egypt** and **Morocco**, cereal import requirements in 2014/15 are estimated at 17.1 million and 6.2 million tonnes, some 8 and 6 percent, respectively, lower than in 2013/14. **Algeria's** cereal imports are forecast at 11.4 million tonnes, similar to the previous year, while in **Tunisia**, at 3 million tonnes, a decrease of 17 percent is forecast, owing to the above-average wheat harvest.

Uneven developments in food inflation across the subregion

Food inflation rates assumed diverging trends in the countries of the subregion. In **Algeria**, the annual food inflation rate increased from below zero in October 2013 to over 5 percent in September 2014. On the other hand, in **Morocco**, the annual food inflation has been negative between May and September 2014 (latest available data). In **Tunisia**, annual food inflation has declined in recent months, from around 8 percent in the second quarter of 2014 to 6 percent in October 2014. Inflation rates of bread and cereals are at low levels across the subregion, partly due to the generous food subsidies. **Egypt** made progress in phasing out energy subsidies and rolling out of the ration card system for food subsidies. Consequently, the largest monthly increase of 3.5 percent in the general inflation rate since 2008 was recorded in July 2014 following the energy fiscal consolidation programme. The annual food and beverage inflation rate was 11.8 percent in September 2014 compared to 15.6 percent in April 2013. Subsidized bread continues to be sold at the unchanged subsidized price of EGP 0.05 per loaf (free market price of EGP 0.35 per loaf) with a maximum allocation of five loaves per person per day. Bakers are no longer allowed to buy wheat flour at subsidized prices but will be reimbursed by the Government based on sales data gathered from the smart cards. The new ration card system, currently in use in cities in the Suez Canal, Alexandria, and more recently introduced in Cairo, provides citizens with 20 privately and Government procured products, including meat. It aims to provide more balanced diets to the poor by extending choice of commodities and contribute to the fiscal consolidation.

Western Africa

The Ebola virus disease outbreak in Guinea, Liberia and Sierra Leone severely affected agricultural production

The 2014 coarse grains harvest is nearly complete in the Sahel, while in the coastal countries along the Gulf of Guinea, harvesting of the second season cereal crops has just started.

One of the most significant shocks to the agriculture and food sectors in 2014 has been the Ebola virus disease (EVD) outbreak, which has severely affected **Guinea**, **Liberia** and **Sierra Leone**. According to the latest figures from the World Health Organization (WHO), as of 8 December 2014, the number of cumulative cases of disease transmission has reached 16 903 with 6 374 reported deaths. The epidemic started to spread when crops were being planted and grew during the crop maintenance period, and then expanded rapidly during the critical harvesting period for the staple rice, maize and cassava crops. In the affected countries, various farming activities including land preparation/planting, crop maintenance (such as weeding, fencing and application of chemicals) and harvesting, have been disrupted mostly through labour shortages. Production of rice, the main staple crop in the Mano River Region, has been most affected. Based on the GIEWS Disease Impact on Agriculture – Simulation (DIAS) Model and the findings of Rapid Assessments carried out in the three countries, rice production in 2014 is estimated to decline by 4, 8 and 12 percent in Guinea, Sierra Leone and Liberia, respectively. However, the relatively low level of impact at the national level masks the sub-national production and food security impacts. For example, in the severely affected counties of Liberia, such as Lofa and Margibi, losses of paddy crop are estimated in the order of 20 percent. Cassava being a much less labour and input intensive crop compared to rice, the impact on its harvest is estimated to be lower. Cash crop production was also affected. In Guinea for instance, cocoa production is estimated to have fallen by one-third (from 3 511 tonnes to 2 296 tonnes), while

Table 8. Western Africa cereal production
(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals [1]			
	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	Change: 2014/2013 (%)
Western Africa	**42.5**	**41.2**	**40.6**	**12.7**	**13.8**	**13.6**	**55.3**	**55.2**	**54.3**	**-1.5**
Burkina Faso	4.6	4.6	4.3	0.3	0.3	0.3	4.9	4.9	4.6	-4.8
Chad	3.0	2.2	2.5	0.2	0.4	0.2	3.2	2.6	2.7	2.0
Ghana	2.4	2.2	2.3	0.5	0.6	0.6	2.9	2.7	2.9	5.7
Mali	4.7	3.5	4.3	1.9	2.2	2.3	6.7	5.7	6.6	15.6
Niger	5.3	4.3	4.0	0.1	0.1	0.1	5.3	4.3	4.1	-5.3
Nigeria	16.5	18.5	17.4	4.4	4.7	4.9	20.9	23.3	22.4	-3.9

Note: Totals and percentage change computed from unrounded data.
[1] Total cereals includes wheat, coarse grains and rice (paddy).

coffee production has dropped by half, according to a World Bank report. Similarly, rubber exports are estimated to have contracted significantly in Liberia.The 2015 cereal crop could be at risk if the outbreak continues.

Most countries of the Sahel expect reduced 2014 cereal harvests following adverse weather anomalies

Another reduced cereal harvest is anticipated in the Sahel in 2014 due to delayed rains and prolonged dry spells in several parts of the Sahel belt. Compared to 2013, cereal output is expected to decline significantly in most Sahelian countries, notably in countries located in the western parts of the subregion. Cereal production is estimated to drop by 81 percent in **Cabo Verde**, 52 percent in **the Gambia**, 38 percent in **Guinea-Bissau** and 27 percent in **Senegal**. In addition to the decline in cereal production, pasture conditions were affected in these countries.

Overall, harvest prospects are better in coastal countries along the Gulf of Guinea, notably in **Nigeria**, the largest producer of the subregion, where an above-average crop is forecast, but remains slightly below the record of 2013. Above-average cereal outputs are also anticipated in **Benin**, **Côte d'Ivoire**, **Ghana** and **Togo**. The aggregate subregional cereal output is expected to be about 3 percent above the average of the previous five years, as decreases in the affected Sahelian countries will be somewhat offset by the above-average crop harvests estimated in coastal countries.

Coarse grain prices are on the decline or stable, reflecting increased supplies from ongoing harvests

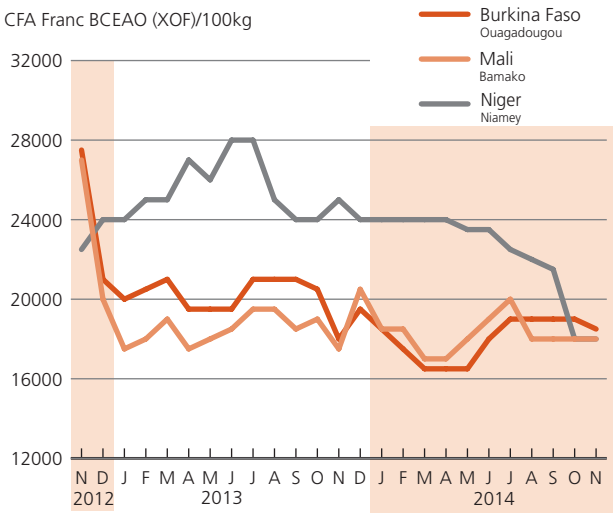
In coastal countries along the Gulf of Guinea, increased supplies from the 2014 first season harvests have put downward pressure on prices in several markets. Similarly, in the Sahel, in spite of the mixed crop prospects, prices of locally-produced sorghum, millet and maize remained relatively unchanged or declined in recent months and were generally lower than last year's levels. Overall, favourable prospects for the 2014 crop in major producing countries contributed to these downward movements.

Reflecting the increased supplies from ongoing harvests, millet prices in **Burkina Faso**, **Mali** and **Niger** remained generally stable in November, but declined significantly in several markets. Stable millet prices were also reported in October in most markets in **Chad**. Overall, coarse grain prices were below or similar to their levels in October/November 2013.

In coastal areas, good supplies from the new 2014 harvest in the southern parts of **Nigeria** have resulted in price declines for coarse grains, while generally favourable prospects in the key-producing regions of the north have kept cereal prices stable in recent months. In the main northern Kano market, maize prices remained virtually unchanged from June to October, after high volatility in the first quarter of the year. Substantial declines in maize prices were recorded recently in other coastal countries, including **Benin** and **Togo**. Although maize prices recovered somewhat in October in these countries, they were still between 20 and 43 percent below last year's level in most markets.

In countries affected by the outbreak of Ebola, despite reports of reduced container traffic, major seaports continued to function and rice imports have not been affected. Prices of imported rice in November remained overall unchanged compared to their levels in October, while those of domestically-produced rice showed some declines with the ongoing 2014 paddy harvests. In **Liberia**, prices of mostly imported rice stabilized in November, after the sustained increases of the previous months, but remained higher than a year earlier in most markets. The high level of prices is mainly the result of the depreciation of the national currency in June and July and increased transport costs. In **Guinea**, prices of local rice fell in several markets in November with increased supplies from the new harvest and were below their levels a year earlier, reflecting three consecutive years of good harvests and reduced cross-border exports to neighbouring countries due to closure of borders. Prices of imported rice, which normally covers 24 percent of the country's consumption requirements, remained stable and around their levels a year earlier. In **Sierra Leone**, which imports about one-quarter of its rice consumption needs, prices of imported rice remained stable in November. Prices of domestically produced rice declined with the ongoing

Figure 3. Millet prices in selected Western African markets



Source: Afrique Verte.

2014 harvest, despite an anticipated decrease in production this season due to reduced farming activities. However, in some areas prices persisted at relatively high levels reflecting reduced trading activity and increased transport costs.

Food security affected by the EVD outbreak and civil insecurity

Beyond its impact on the agriculture and food sector, the EVD is seriously affecting all other sectors of the economies in **Guinea**, **Liberia** and **Sierra Leone**. The mining, manufacturing and service sectors have been the hardest hit. According to the World Bank's revised estimates, the short-term impact of the epidemic on national outputs could amount to a decrease of 4 percentage points of GDP in Guinea, 3.7 percentage points in Liberia and 7.3 percentage points in Sierra Leone. About half of those working at the start of the Ebola crisis were unemployed as of early November 2014. In particular, the ban on bush meat is depriving many households of an important source of nutrition and income. Access to food for many households is being constrained by disruption of livelihoods and loss of income combined with increasing food prices.

The continuing civil conflict in **the CAR**, **Mali** and northern **Nigeria** has resulted in large population displacement in the subregion. For example, in **Nigeria**, there are over 1.5 million Internally Displaced Persons (IDPs) in the six states of the Northeast, while several other thousands have sought refuge in neighbouring countries (Cameroon, Chad and Niger). As of early November, more than 105 000 people have fled to Diffa region in Niger (since May 2013), and the rate is increasing according to OCHA. Similarly, in **Chad**, civil conflict in **the Sudan**, **the CAR**, **Nigeria** and **Libya**, has increased the number of refugees and returnees. More than 461 000 refugees are estimated to be living in Chad, while about 340 000 Chadians have returned to their country. Moreover, most Sahelian countries have been struck by successive severe food crises in recent years that have had very adverse, longer-term impacts on households' assets and savings. Rising food insecurity is likely in 2015 in **Cabo Verde**, **the Gambia**, **Guinea-Bissau** and **Senegal** due to the recent steep decline in cereal production. Over 3.6 million people are estimated to be in Phase 3: "Crisis" and above in the Sahel region and need urgent assistance according to the last "Cadre Harmonisé" analysis. An additional 11.8 million people are estimated to be at risk of food insecurity (Phase 2).

Central Africa

Conflict continues to seriously impact on food security in Central African Republic and eastern Democratic Republic of the Congo

Continued civil insecurity in **the Central African Republic (CAR)** and in eastern **Democratic Republic of the Congo (DRC)** has resulted in massive population displacements and hindered access to food for the affected population. Large numbers of refugees from the CAR sought refuge in neighbouring **Cameroon** and the DRC, straining on the already limited resources of the hosting communities. In addition, since early October, heavy rains in eastern **DRC** caused floods which affected thousands of people, exacerbating the already precarious food security situation.

In **the CAR**, the socio-political crisis, which is affecting the entire population, territory and economy, has resulted in widespread disruption of agricultural and marketing activities, and caused massive displacements. In early December 2014, the IDP caseload, estimated at 430 000, was about half the number at the peak of the crisis in early 2014, but increased by 5 percent since early October due to a recent upsurge in violence. As a result of the severe constraints on food availability and access, the food security situation, which has been sharply deteriorating since the start of the crisis, is serious. According to the latest Integrated Food Security Phase Classification (IPC), in October 2014, about 1.5 million people (out of a total population of 4.6 million), are in need of urgent assistance. The areas most affected by food insecurity are Ouham, Nana Grebizi and Kemo prefectures in the northwest. Several food security indicators showed a deterioration of the situation compared to a year earlier: the percentage of households with inadequate food consumption increased from 15 to 26 percent, and the recourse to negative coping strategies, such as domestic and productive asset sales, school dropout and illegal activities, intensified.

In **the DRC**, according to the latest available IPC food security analysis, conducted in June 2014 in the conflict-affected eastern provinces (Orientale, Maniema, North And South Kivu, Katanga), the number of people in acute food insecurity and livelihood crisis

Table 9. Central Africa cereal production
(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals [1]			
	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	Change: 2014/2013 (%)
Central Africa	**4.3**	**4.4**	**4.3**	**0.5**	**0.5**	**0.6**	**4.9**	**4.9**	**4.9**	**-1.4**
Cameroon	2.8	2.9	2.9	0.2	0.2	0.2	3.0	3.1	3.1	-0.9
Central African Rep.	0.1	0.1	0.0	0.0	0.0	0.0	0.2	0.1	0.0	-54.4
Dem.Rep.of the Congo	1.2	1.3	1.2	0.3	0.3	0.3	1.6	1.6	1.5	-2.3

Note: Totals and percentage change computed from unrounded data.
[1] Total cereals includes wheat, coarse grains and rice (paddy).

(IPC Phases 3 and 4) was estimated at about 4.1 million, 8 percent up from the December 2013 figure. As of late September 2014, the IDP caseload was estimated at more than 2.7 million, 4 percent up from the estimate in June 2013. The IDPs are mainly located in conflict-affected Oriental, Maniema, North Kivu, South Kivu and Katanga provinces. In addition, in parts of these provinces heavy rains during October and November caused floods and landslides which resulted in severe damage to infrastructure, houses and crops, and affected at least 16 000 individuals, raising serious food security and health concerns. As of 28 November, the DRC was hosting about 68 000 refugees from **the CAR**, mainly located in the northern Equateur and Oriental provinces.

In **Cameroon**, the arrival of large numbers of refugees fleeing from neighbouring **Nigeria** and **the CAR** has put local food supplies under increased strain. As of 28 November 2014, the number of refugees from the CAR which sought refuge mainly in East, Adamaoua and North regions was estimated at about 241 000. In addition, the Far North region hosts, as of mid-October, 44 000 refugees from Nigeria. Overall, the humanitarian situation of the refugees is precarious: an estimated 34.4 percent of the refugee households from the CAR are food insecure. In several locations the number of refugees exceeds the local population, and living conditions have become increasingly difficult, with host communities and refugees competing over already inadequate resources, especially in the North and Far North regions, where the food situation was already precarious due to recurrent climatic shocks that have depleted households' productive assets and eroded their resilience capacity.

In the CAR, production recovered slightly in 2014, but is still well below average largely due to continuing conflict

In **the CAR**, harvesting of the bulk of the cereal crops has been concluded in the last several weeks. In some areas of the south, the secondary season crops will be harvested from December. According to the findings of a joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM), the 2014 aggregate production of food crops increased by 11 percent from the sharply reduced 2013 output, but still remains 58 percent below the pre-crisis five-year average (2008-2012). This year's aggregate outcome is mainly driven by a significant increase in cassava production (+45 percent), while cereal output declined by about 54 percent from 2013. The ongoing socio-political crisis and widespread insecurity severely disrupted agricultural and marketing activities and caused the depletion of already inadequate households' productive assets. This, coupled with erratic rainfall in western parts as well as some pest attacks, led to a reduction in the planted area by 23 percent. FAO and NGO partners helped to avert a major food crisis, by providing crop production support to a total of 111 750 vulnerable households.

In **Cameroon**, harvesting of the 2014 main maize crop was completed in October in bi-modal southern areas, while in northern uni-modal areas harvesting of millet and sorghum crops was completed in November. The second season maize crop will be harvested in southern parts during December. A prolonged dry spell in July had a negative impact on vegetation conditions of the main season maize crops. Average to above-average rainfall in August and September reduced moisture deficits, but another dry spell in the first two dekads of October may have negatively impacted germination and establishment of second season crops. By contrast, in northern uni-modal areas, early season dryness in July may have delayed planting operations but subsequent adequate rainfall benefited sorghum and millet crops and a satisfactory output is expected.

In **the DRC**, harvesting of the main 2014 maize crop has recently been completed in northern areas and is currently underway in the centre, while crops in southern regions are still in vegetative stage and will be harvested early next year. According to remote sensing analysis, vegetation conditions are favourable in most cropping areas following adequate rainfall. In **the Congo** and **Gabon**, the harvesting of the main season maize crop normally starts in December, but some delays may occur in both countries due to a late onset of seasonal rains which may have affected planting operations. However, in both countries, the bulk of the national cereal requirement is met through imports.

The subregional production forecast for cereals indicates a 2014 cereal output slightly below the level of 2013.

Inflation surged in the CAR

In **the CAR**, the average inflation rate, estimated at a low 1.5 percent in 2013, surged to an estimated 9 percent in 2014, mainly as a result of increased food price inflation. For instance, prices of agricultural commodities, including maize, millet and groundnuts, increased by 30-70 percent between March-April and August 2014. The sharp rise is partly attributed to increased demand, as payments to civil servants resumed in March 2014, injecting more cash in the economy while large numbers of IDPs in the capital also returned to their homes. In **Gabon**, the average inflation rate, at a low 0.5 percent in 2013, increased to 4.7 percent in 2014, mainly due to increasing food prices. For instance, prices of imported wheat, the most important staple, increased in the capital, Libreville, by 36 percent between January and October 2014, mainly due to the removal of price control measures. In **the DRC**, rates of inflation, which declined sharply from 46 percent in 2009 to 1 percent in 2013 as a result of the implementation of economic reforms and tight fiscal and monetary policies, increased to 2.4 percent in 2014 due to a slight loosening of monetary policy

and sustained demand. In **Cameroon**, the average inflation rate, at 2 percent in 2013, increased slightly to 3.2 percent in 2014, mainly as a result of higher fuel prices, while in **the Congo**, inflation declined from 4.6 percent in 2013 to 2.2 percent in 2014, mainly due to a stronger currency and lower global food prices.

Eastern Africa

Overall favourable prospects for the ongoing 2014 harvests

Harvesting of the 2014 main season cereal crops is underway in **Ethiopia**, **the Sudan**, **South Sudan**, western **Kenya**, **Eritrea** and the Karamoja region in **Uganda**, and will continue until the beginning of next year. FAO's preliminary estimates of the subregion's 2014 aggregate cereal output, including the forecast for the secondary season harvest to be gathered early next year, stands at about 44 million tonnes, similar to last year's good harvest and 8.1 percent above the average of the previous five years. However, prospects are poor in parts of western Kenya, due to erratic rains; in conflict-affected areas of the Sudan and South Sudan, and in agro-pastoral areas of the Karamoja region in Uganda.

In **Ethiopia**, production prospects for "meher" crops are generally favourable, despite a prolonged dry spell from June to mid-July that affected long-cycle coarse grains in eastern Amhara and Tigray regions and the lowlands of East and West Hararghe, and West Arsi zones in central Oromia region. In **Eritrea,** according to satellite-based analysis, prospects appear to be favourable in main agricultural areas of Debub, Maekel, Gash Barka and Anseba Zobas. In **the Sudan**, cereal production is expected at above-average levels in eastern and central key-producing states, due to the combination of favourable rains and increased plantings following better access to credit and high crop prices. By contrast, despite favourable rains, an average to below-average output is expected in most the conflict-affected areas of Darfur, South Kordofan and Blue Nile states where insecurity has affected agricultural activities along the cropping season (June to November) and where localized floods in July affected standing crops. Similarly in **South Sudan**, production prospects are generally favourable except in the conflict-affected states of Upper Nile, Unity and Jonglei where the area planted was significantly reduced following displacements, insecurity and shortage of seeds. In particular, an estimated 40 percent reduction in planted area is reported in the important mechanized farming areas of Renk County in Upper Nile state.

In **Kenya**, the aggregate long-season maize production is estimated at below-average levels due to unfavourable rains that affected crop germination and development in major producing areas as well as the increased incidence of the viral Maize Lethal Necrosis Disease (MLND). In **Uganda,** aggregate 2014 cereal production is forecast at slightly above-average levels. However, prospects are poor in Karamoja region following reduced plantings and yields due to erratic rains. In bi-modal rainfall areas of Uganda harvesting of the 2014 second season crops has just started, while in **Burundi** and **Rwanda** harvesting of the 2015A "main" season crops is ongoing. In all three countries, the September-December rainy season started on time and the amount of rains received so far were abundant, especially in Uganda, with positive impacts on crop yields and pasture conditions.

The secondary season crops, for harvest from early next year, are progressing well in southern and central **Somalia**. In the bi-modal rainfall areas of **the United Republic of Tanzania** and in the southeastern and coastal areas of **Kenya,** some risk of flooding, especially in the lowlands of **Somalia** and **Kenya**, is forecast during the remainder of the season.

On another note, following several years of unfavourable "vuli" rainy seasons, reports indicate that a significant number farmers are switching from maize production to more drought-tolerant crops such as tubers and beans, and postponing all maize plantings during the "masika" season (February-August).

Poor pasture conditions in parts of eastern Kenya and southern Somalia

Pasture conditions are average to above average in most countries, with the exception of eastern and northeastern pastoral and agro-pastoral areas of **Kenya** (particularly Isiolo, Wajir and Garissa counties) and in southern and coastal areas of **Somalia**. Grazing resources in these areas are almost completely depleted as the late start of the current rainy season in November was preceded by below average March-May rains and exceptionally hot temperatures during the dry season. Trekking distances have increased, livestock body conditions range from fair to poor and

Table 10. Eastern Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Total cereals [1]			
	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	Change: 2014/2013 (%)
Eastern Africa	**4.5**	**5.0**	**4.8**	**37.2**	**36.3**	**36.7**	**44.1**	**44.1**	**44.3**	**0.6**
Ethiopia	3.5	4.0	3.8	17.4	18.7	18.3	21.1	22.9	22.3	-2.8
Kenya	0.4	0.5	0.5	3.9	3.7	2.9	4.5	4.3	3.5	-17.9
Sudan	0.3	0.2	0.3	4.9	2.6	4.8	5.2	2.9	5.2	78.2
Tanzania U.R.	0.1	0.1	0.1	6.2	6.5	6.1	8.1	8.7	8.3	-4.4
Uganda	0.0	0.0	0.0	3.3	3.3	3.3	3.5	3.5	3.5	0.6

Note: Totals and percentage change computed from unrounded data.
[1] Total cereals includes wheat, coarse grains and rice (paddy).

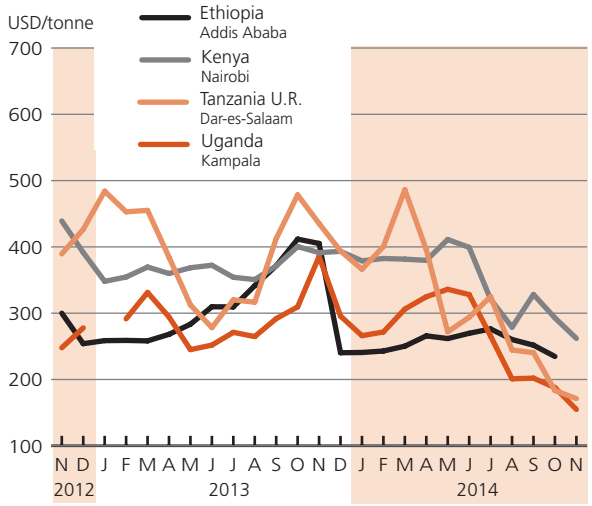
milk production is generally below average. In **Ethiopia**, pasture conditions are below average in northern Afar region and in parts of the Somali region.

Cereal prices declined

Prices of locally-produced cereals declined in recent months in most countries as ongoing and/or recently-harvested crops increased supplies. In **Uganda**, prices of maize declined by about 48-58 percent during the last six months. Favourable prospects for the second season harvest, to be gathered soon, are exerting additional downward pressure on prices. Similarly, in **the United Republic of Tanzania**, prices of maize declined by 36–63 percent between April and November as "msimu" and "masika" harvests increased supplies in markets located in both uni-modal and bi-modal rainfall areas. In **Kenya**, maize prices continued to decline in recent months, decreasing between July and November by 18–42 percent, due to substantial imports from **Uganda** and **the United Republic of Tanzania** together with new supplies of the "long rains" harvest. In the capital, Nairobi, prices of maize in November were 33 percent below their levels of last year. In **Ethiopia**, prices of maize declined in September and October by between 10 and 20 percent as crops from the secondary "belg" season and the start of the main 2014 "meher" season harvest increased supplies. In **Somalia**, prices of maize and sorghum were up to 90 percent higher in October 2014 compared to October 2013, due to a reduced 2014 main "gu" harvest, as well as persistent trade and marketing disruptions caused by conflict. However, prices had decreased between August and October by up to 25 percent in most markets following the harvests.

In **the Sudan**, prices of sorghum continued to increase despite the start of the main 2014 harvest. Overall, prices of coarse grains in October were up to more than twice their levels of October 2013, mainly due to the early depletion of stocks from the poor 2013 harvest, the impact of civil conflict in Darfur and South Kordofan and increased informal exports to **South Sudan**. In the capital, Khartoum, prices of wheat, mostly imported and consumed in urban areas, declined in October by 5 percent from the record levels reached in September, but were still about 50 percent higher than a year earlier due to strong demand and high prices of other cereals. In **South Sudan,** prices of sorghum declined in the capital, Juba, by up to 17 percent between August and September, due to increased domestic availabilities, imports from neighbouring countries and food aid distributions. In conflict-affected areas, price declines were observed in some markets in September due to the start of the green harvests and a partial resumption of imports from **the Sudan** and **Ethiopia**. However, staple food prices remained exceptionally high, due to civil insecurity, seasonal deterioration of road conditions and fuel scarcity. For instance, in Unity State sorghum prices were three to four times higher than in non-conflict-affected areas.

Figure 4. Maize prices in selected Eastern African markets



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

Food security improves with new harvests, but large number of people still depend on food assistance

The lean season is over in most crop producing areas of **Ethiopia**, **the Sudan**, **South Sudan**, **Kenya**, **Uganda**, **Rwanda** and **Burundi**. Food security conditions gradually improved as newly-harvested main season crops were made available for consumption. Further improvements are expected as the bulk of main season harvests reach markets and early maturing second season crops become available. Pastoralist areas are also expected to benefit from increased availability together with impact of the ongoing "short rains" season on grazing resources and livestock productivity.

Conflict and civil insecurity remain the main reasons for severe food insecurity in parts of southern **Somalia**, in Darfur, South Kordofan and Blue Nile states in **the Sudan** as well as in the Greater Upper Nile in **South Sudan**. In particular, the conflict in South Sudan is likely to escalate in the coming months as road conditions gradually improve during the dry season allowing better movements of people. Furthermore, serious concerns remain for the beginning of 2015 as households' food stocks are expected to be only partially replenished in most conflict-affected areas due to below-average production and coping mechanism may have been exhausted. Consequently, the number of people in need of humanitarian assistance is expected to increase.

In **Ethiopia**, pockets of high food insecurity are reported in pastoral areas of Afar region and in the "belg" season cropping areas in Amhara region that had a below-average harvest last

May. In **Kenya**, most of the food insecure people are in pastoral areas of Marsabit, Wajir and Isiolo counties in the northeast, as well as in pocket areas of Samburu and Turkana counties in the northwest. In **the United Republic of Tanzania**, areas of high food insecurity persist in uni-modal central Rift Valley regions of Dodoma and Singida which gathered reduced 2014 "msimu" crops last May/June and food stocks were depleted by August, some three months earlier than usual, with households forced to rely on market purchases during a longer-than-usual lean season. The lean season in the Karamoja region of **Uganda** is expected to start in January, about two months earlier than usual, as households' food stocks are expected to be depleted quickly following the estimated below-average harvest.

Currently, the number of people in need of humanitarian assistance in the subregion is estimated at 11 million (including 3.5 million in the Sudan, 3.2 million in Ethiopia, 1.5 million in Kenya, 1.5 million in South Sudan, 1 million in Somalia, 180 000 in Karamoja region of Uganda and 160 000 in Djibouti), down 12 percent compared to October's estimate of 12.6 million people.

Southern Africa

Planting of 2015 cereal crops underway with early season dryness in some eastern parts

Planting of the 2015 cereal crops, to be harvested from March 2015, is expected to be completed before the end of the year. Rains in October 2014, marking the start of the 2014/15 cropping season (October/June), were generally below normal, but precipitation improved in November in western parts, while early seasonal rainfall deficits continued to affect eastern areas of the subregion (including southern areas of **Malawi** and **Madagascar**, central and southern **Mozambique**, eastern parts of **Zimbabwe** and **Zambia**, as well as northeastern areas of **South Africa**). Although it is only at the beginning of the cropping season, if soil moisture levels are not replenished soon it could negatively impact on crop production. The subregional rainfall forecast between December 2014 and February 2015 indicates normal to above normal rains, which may help reverse the negative impact of early seasonal dryness.

Although official planting estimates for most countries will only be available early next year, current expectations indicate that the area planted to maize will be close, but slightly lower than the above-average level of the previous season. Given the lower maize prices in 2014, some commercial farmers are expected to switch away from maize to more profitable crops, including oilseeds in the case of **South Africa**. In South Africa, the largest maize producer in the subregion, planting intentions released in October showed a small contraction compared to the area planted in 2014.

Above-average maize crop harvested in 2014

The 2014 aggregate maize output was estimated at 27.4 million tonnes, up 21 percent from the drought-affected 2013 output. The increase mainly reflects a strong rebound in **South Africa**, large crops in **Zambia** and **Malawi**, and a sharp recovery in **Zimbabwe** from the previous year's drought-depressed output. The improved maize outputs resulted from expansions in plantings and increase in yields, following favourable rains. Rice production in **Madagascar** (the subregion's main producer) also increased in 2014 on account of good rains. In addition, the joint Government-FAO anti-locust campaign that commenced in late 2013 prevented the further spread of the locust plague and consequently reduced the potential damage on rice crops. Production, however, still remained below the five-year average.

Harvesting of the winter wheat crop, mainly produced in **South Africa** and **Zambia**, is expected to be finalized by the end of the year and forecasts point to a 3 percent reduction to 2.1 million tonnes, as a result of reduced plantings.

Lower aggregate imports forecast in 2014/15 reflecting improved national harvests

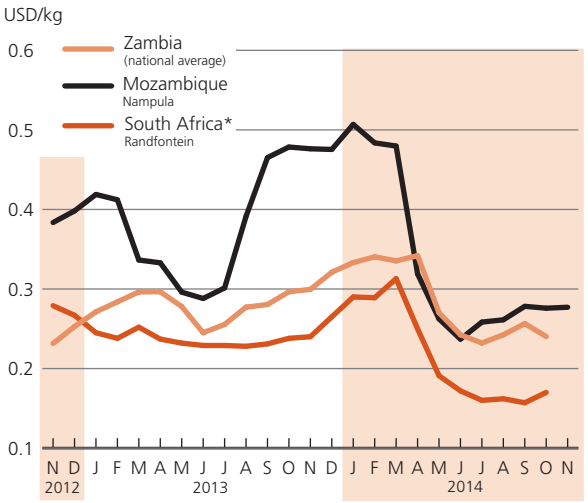
The aggregate subregional maize import requirement for the current 2014/15 marketing year (generally May/April) is

Table 11. Southern Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	Change: 2014/2013 (%)
Southern Africa	**2.2**	**2.2**	**2.1**	**24.1**	**23.8**	**28.9**	**5.1**	**4.2**	**4.5**	**31.4**	**30.3**	**35.6**	**17.5**
- excl. South Africa	**0.3**	**0.4**	**0.3**	**10.8**	**10.9**	**13.3**	**5.1**	**4.2**	**4.5**	**16.2**	**15.4**	**18.1**	**17.7**
Madagascar	0.0	0.0	0.0	0.4	0.4	0.4	4.6	3.6	4.0	5.0	4.0	4.3	8.8
Malawi	0.0	0.0	0.0	3.7	3.8	4.1	0.1	0.1	0.1	3.8	3.9	4.2	7.8
Mozambique	0.0	0.0	0.0	1.8	1.8	2.2	0.3	0.4	0.3	2.2	2.2	2.5	13.3
South Africa	1.9	1.9	1.8	13.3	13.0	15.6	0.0	0.0	0.0	15.2	14.9	17.4	17.3
Zambia	0.3	0.3	0.2	2.9	2.6	3.4	0.0	0.0	0.0	3.2	2.9	3.6	24.5
Zimbabwe	0.0	0.0	0.0	1.1	1.0	1.7	0.0	0.0	0.0	1.2	1.0	1.8	77.4

Note: Totals and percentage change computed from unrounded data.

Figure 5. White maize prices in selected Southern African markets



*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.

estimated at 0.9 million tonnes, well below the previous year's level of 1.4 million tonnes. The reduction follows increased domestic outputs.

South Africa is expected to remain the dominant exporter, given its abundant supplies in 2014/15 and further helped by its lower year-on-year maize prices. Currently, between May and mid-November maize exports from South Africa to the subregoin are about 60 000 tonnes below the level of the corresponding period last year, reflecting reduced subregional demand. However, for the import-dependent countries of **Botswana**, **Lesotho** and **Swaziland**, the monthly rates of imports are similar to the previous year, as these countries take advantage of the relatively low prices in South Africa. While white maize is normally exported to countries within the region, large volumes of yellow maize have been exported to *Asia*; about 1.33 million tonnes between May and mid-November 2014 compared to 1 million tonnes during the same period in 2013. **Zambia** is likely to retain its position as the second exporter, following the lifting of the export ban earlier this year, with an exportable surplus of about 1 million tonnes.

Imports of wheat and rice, of which the subregion is a deficit producer, are estimated to remain comparatively stable in 2014/15. Aggregate wheat and rice import requirements are forecast at 3.44 and 2.74 million tonnes, respectively.

Ample supplies result in stable and lower year-on-year maize prices

In general, prices of maize remained below their year-earlier levels, driven down by the larger 2014 harvests and consequently ample supplies in the subregion. Prices in **South Africa**, the subregion's dominant producer and exporter, declined sharply since their record levels of February 2014. However, in November prices increased slightly, coming under upward pressure from export demand and international prices, but still remain below their year-earlier levels. The lower year-on-year prices have lessened import inflationary pressure in **Lesotho**, **Swaziland**, **Botswana** and **Namibia**, which satisfy a large proportion of their cereal needs with South African grain.

Prices of maize in **Malawi**, **Mozambique** and **Zimbabwe**, have been generally stable or increased seasonally, but at a restrained rate compared to the previous year, reflecting the favourable supply situation in 2014. Rice prices in **Madagascar**, both imported and domestic varieties, are also below their year-earlier levels, pushed down by the adequate supplies following large imported volumes in 2013/14 and the moderate rebound in 2014 domestic rice production.

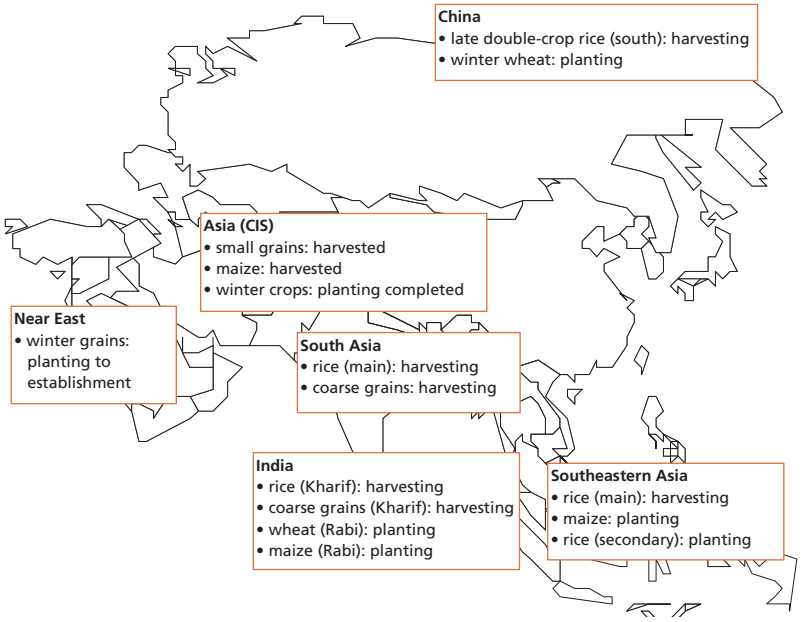
Food security conditions remained stable

Food security conditions are generally stable, reflecting adequate maize supplies and lower prices. However, in areas where the 2014 cereal crop performed poorly, including southern parts **Angola**, localized areas of southern **Malawi** and western **Zambia**, southern regions of **Madagascar**, and southern and western parts of **Zimbabwe**, conditions are expected to be stressed during the peak lean season from January to March 2015. According to the national vulnerability assessments conducted earlier in the year (June-July), there was a 56 percent decrease in the number of people requiring food assistance compared to the high level of 2013/14 (excluding **Angola**, **Madagascar** and **South Africa**). Substantial improvements were seen in Zimbabwe and Malawi, where the number of people in need of food assistance decreased to 565 000 (-74 percent) and 640 009 (-56 percent), respectively. Similarly, the larger 2014 cereal harvests in **Mozambique** and **Namibia** improved food supplies and contributed to reducing the number of food insecure, estimated at 150 000 (down from 212 000) and about 118 000 people (down from 778 504), respectively. In **Zambia**, despite the record maize output, localized production losses resulted in a rise in the number of food insecure, while an increase was also estimated in **Lesotho**. In **Madagascar**, food insecurity in southern regions still remains acute, following a second successive year of poor harvests in these areas despite an increase in the national rice output that improved conditions in central and northern areas (the main producing regions of the country). Lower prices of rice throughout the country have, however, helped to improve food access. In **Angola**, some improvements were observed, but food security in southern and coastal areas remains stressed, due to higher prices and dry weather that affected crop production and livestock conditions.

Asia

Far East

Cereal production to remain virtually unchanged from last year's record level



Note: Comments refer to situation as of December.

Harvesting of the 2014 main (wet) season rice and coarse grains crops are nearly complete. FAO's forecast for the subregional aggregate cereal harvest in 2014 has been downgraded somewhat since October, to 1 236 million tonnes (rice in paddy terms), which is still close to last year's record output. A higher wheat crop is expected this year to partially compensate for a decline in the maize output. Paddy production is forecast around its record level of 2013. Irregular monsoon rains and unfavourable weather conditions during the cropping season have resulted in estimated declines in **India**, **Nepal**, **Lao People's Democratic Republic**, **Thailand**, and particularly in **Sri Lanka**. By contrast, generally favourable weather conditions boosted cereal harvests in **Bangladesh**, **Myanmar**, **Pakistan**, **the Philippines** and **Viet Nam**. The remaining countries, namely, **the Republic of Korea**, **China** and **Indonesia**, are expecting a total cereal output more or less similar to that of the year before.

Production of paddy rice, the major staple crop in the subregion, is forecast at 667.3 million tonnes, slightly below last year's record. Most of the projected contraction, in absolute terms, is expected to come from **India**, where late and poor monsoon rains in June and early July, coupled with localized floods in late July and September depressed yields of the main ''kharif" season rice crop. As a result, FAO forcasts this season rice crop to decrease by 2 percent compared to the respective season of last year and reach 134 million tonnes. Assuming an average forthcoming 2014/15 ''rabi" secondary crop, the aggregate paddy production in India is tentatively forecast at about 156 million tonnes, 2 percent below the 2013

Table 12. Far East cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	Change: 2014/2013 (%)
Far East	**243.9**	**244.3**	**251.3**	**309.6**	**324.8**	**317.0**	**662.2**	**671.7**	**667.3**	**1 215.7**	**1 240.8**	**1 235.6**	**-0.4**
Bangladesh	1.3	1.3	1.3	2.3	2.3	2.3	50.8	51.5	52.4	54.3	55.1	56.0	1.6
Cambodia	0.0	0.0	0.0	1.0	0.9	0.9	9.3	9.4	9.3	10.2	10.3	10.2	-1.1
China	120.8	121.9	125.3	214.7	228.0	225.1	205.9	205.2	206.7	541.5	555.1	557.1	0.4
India	94.9	93.5	95.9	41.8	43.3	37.4	157.9	159.8	155.5	294.6	296.6	288.7	-2.7
Indonesia	0.0	0.0	0.0	19.4	18.5	18.5	69.1	71.3	70.6	88.4	89.8	89.2	-0.7
Japan	0.9	0.8	0.8	0.2	0.2	0.2	10.7	10.8	10.6	11.7	11.8	11.6	-1.6
Korea Rep. of	0.0	0.0	0.0	0.2	0.2	0.2	5.4	5.6	5.6	5.6	5.8	5.9	1.0
Myanmar	0.2	0.2	0.2	1.7	1.9	1.9	27.7	28.3	28.9	29.6	30.4	31.0	2.1
Nepal	1.8	1.9	1.9	2.3	2.6	2.8	4.5	5.0	4.6	8.7	9.6	9.3	-2.8
Pakistan	23.5	24.2	25.3	4.8	5.1	5.1	8.3	10.2	10.1	36.6	39.5	40.5	2.4
Philippines	0.0	0.0	0.0	7.4	7.3	7.8	18.1	18.8	18.8	25.5	26.2	26.6	1.5
Thailand	0.0	0.0	0.0	5.1	5.2	5.2	38.0	38.1	37.0	43.1	43.3	42.2	-2.7
Viet Nam	0.0	0.0	0.0	4.8	5.2	5.4	43.7	43.9	44.9	48.5	49.1	50.3	2.5

Note: Totals and percentage change computed from unrounded data.

record output but 4 percent above the five-year average. In **the Democratic People's Republic of Korea**, below-average precipitation at the critical crop growing stage between July and August resulted in a reduced rice output, officially estimated at 2.6 million tonnes, 10 percent down from last year's above-average level. A reduced 2014 aggregate rice production was also recorded in **Sri Lanka** and **Nepal** as a result of dry weather during the cropping season. In **Thailand**, this year's total rice production is forecast to decrease slightly to 37 million tonnes, given a small decrease in the area planted in response to low prices at planting time and the late arrival of monsoon rains. By contrast, generally favourable weather conditions and Government support are expected to result in record 2014 rice harvests in **Bangladesh**, **China** and **Viet Nam**. In the remaining countries of the subregion, rice harvests are forecast to be at generally stable levels.

Table 13. Far East cereal production and anticipated trade in 2014/15 [1]
(thousand tonnes)

	Avg 5-yrs (2009/10 to 2013/14)	2013/14	2014/15	2014/15 over 2013/14 (%)	2014/15 over 5-yr avg (%)
Cereals - Exports	39 252	47 309	41 990	-11.2	7.0
Cereals - Imports	90 745	103 615	101 699	-1.8	12.1
Cereals - Production	957 386	1 017 289	1 013 528	-0.4	5.9
Rice-millled - Exports	28 842	32 384	32 329	-0.2	12.1
Rice-millled - Imports	10 091	11 061	10 817	-2.2	7.2
Rice-millled - Production	431 636	448 158	445 262	-0.6	3.2
Wheat - Exports	4 660	7 766	4 430	-43.0	-4.9
Wheat - Imports	34 855	38 624	37 386	-3.2	7.3
Wheat - Production	233 679	244 296	251 290	2.9	7.5

[1] Marketing year July/June for most countries. Rice trade figures are for the second year shown.

The 2014 aggregate maize production is set at 290.6 million tonnes, slightly below last year's record output, mainly reflecting a 10 percent decline in **India** where below-average rains depressed yields considerably this year. In **China**, production declined marginally.

The subregional 2014 wheat crop, harvested in the first half of the year, is estimated at a record level of 251.3 million tonnes, 3 percent up from the bumper production in 2013. The major improvement, in absolute terms, in the subregion's growth is expected from **China** (+3.4 million tonnes), followed by **India** (+2.4 million tonnes) and **Pakistan** (+1.1 million tonnes).

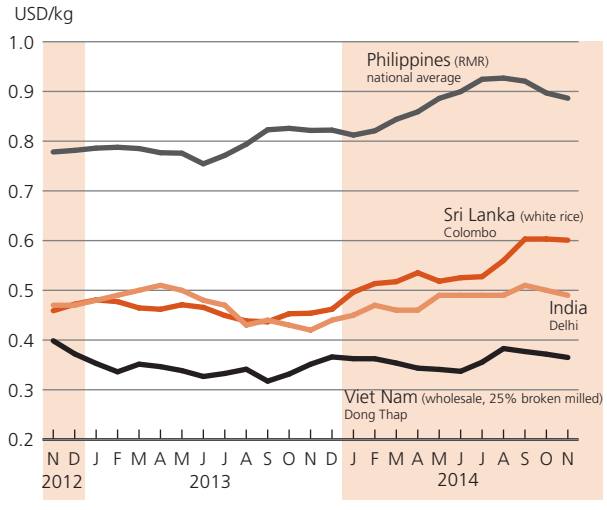
Planting prospects the 2015 wheat crop favourable

Planting of the 2014/15 winter crops (including mostly irrigated winter wheat, barley and secondary rice crops) is currently underway and will continue until mid-December. In **India**, early official forecasts for the 2015 wheat crop is set at 94 million tonnes, slightly below the 2014 record high, as yields are anticipated to return to average levels. In **Pakistan**, the abundant rains in September improved water availability for irrigation and are expected to benefit this season's crop. The official target for the 2015 wheat crop is set at 26 million tonnes, 3 percent up from the 2014 bumper level. Similarly, the outlook for wheat is also positive in **China** with early indications for this year's aggregate production pointing to 126 million tonnes.

Cereal imports and exports to decrease although remain well above average

In general, the *Far East* subregion is a net exporter of rice and net importer of wheat. Due to the anticipated good cereal harvest in 2014 in most countries, aggregate cereal imports in the 2014/15 marketing year are expected to decrease slightly compared to 2013/14, but remain 12 percent above the preceding five-year average. Total wheat imports are forecast at 37.4 million tonnes, down 3 percent from last year's record level. The decrease is mainly attributed to lower wheat imports from **China**, which are projected at 3.5 million tonnes, almost half the record level of the previous year, given this year's

Figure 6. Rice retail prices in selected Far East countries

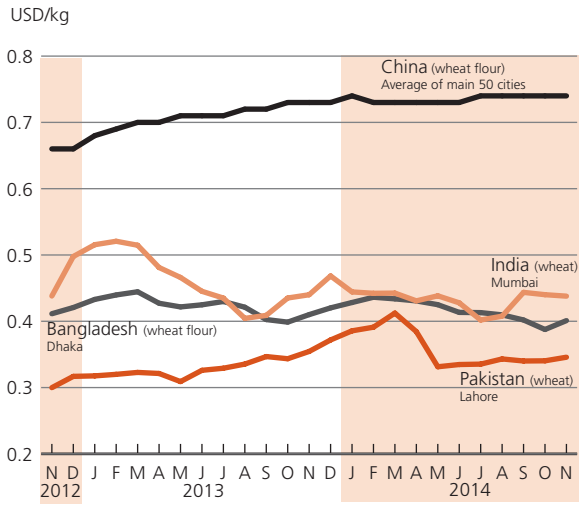


Sources: Department of Census and Statistics, Sri Lanka; Ministry of Consumer Affairs, India; Bureau of Agriculture Statistics, the Philippines; Agroinfo, Viet Nam.

record harvest and large carryover stocks. Similarly, total maize imports are expected to decrease by 2 percent to 42.2 million tonnes, driven by weaker import demand from **China** and **the Republic of Korea**. Likewise, aggregate rice imports are set at 10.8 million tonnes, some 2 percent below last year's above-average level. However, a considerable increase in rice imports is projected in **Indonesia** and **Sri Lanka**, due to lower production this year.

Aggregate cereal exports in 2014/15 are forecast to decrease by 11 percent from the previous year's record level following an anticipated contraction in the exportable surplus from **India**, where total cereal exports are forecast to decrease by 6.6 million tonnes, or 32 percent compared to last year's high level. Exports of rice (milled basis), are forecast at 32.3 million tonnes, virtually unchanged from the previous year's record level. Lower estimated rice exports from India, relative to last year, are expected to be compensated by an increase in exports from **Thailand** and **Viet Nam**, forecast at 11 and 6.9 million tonnes, 8 and 5 percent, respectively, higher than their levels of the previous year.

Figure 7. Wheat and wheat flour retail prices in selected Far East countries



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

Near East

Planting of the 2015 winter season crops is underway

Land preparation and planting of the 2015 winter cereal crops are underway. The main crop producing countries received heavy rains during late October that occasionally hampered fieldwork but benefited the establishment of winter cereal crops.

The subregion's aggregate cereal output in 2014, mainly harvested from May/June 2014, is estimated at 69 million tonnes (rice in paddy equivalent), some 10 percent lower than the record crop of the previous year and 5 percent below the average of the previous five years. The decrease is attributed to drought conditions affecting the main regional producers coupled with conflict escalation in parts. The largest production drop in absolute terms was reported in **Turkey** where total cereal production dropped from 37.5 million tonnes in 2013 to 32.9 million tonnes in 2014 due to erratic weather conditions (a decline of over 12 percent on 2013 but still about 5 percent above the five-year average). The largest relative drop is expected in **the Syrian Arab Republic** where reduced plantings and drought conditions in parts of the country have negatively impacted yields and overall production. Among the factors that contributed to the decline in production are: high crop costs; reduced input availability; prevailing violence, related damage to farm equipment and power stations; as well as dry conditions at the time of planting. FAO estimates that 1.9 million tonnes of wheat were harvested in 2014.

In **Iraq**, prior to the current escalation of the conflict, an above-average 2013/14 wheat harvest of 3 million tonnes, some 16 percent above the five-year average, was forecasted by FAO. The barley forecast, at 900 000 tonnes, was similar to the previous year but 15 percent above the five-year average. Although the final estimates of the 2014 harvest are not yet available, Government reports indicate that the Iraqi Grain Board managed to buy some 3.4 million tonnes of wheat from farmers (the Board buys wheat at about USD 480 per tonne). Such levels of purchases indicate that the production levels may have been higher than forecast. However, the delivery of the wheat crop to the silos coincided, from the second week of June, with the escalation of conflict and large areas falling under the control of the so-called "Islamic State in Iraq and the Levant (ISIL)" fighters, especially in the provinces of Ninevah and Salah-Aldeen. A number of Grain Board silos are located in these areas and were reported to have now come under the control of so-called ISIL fighters.

In **Saudi Arabia**, wheat production is estimated at 500 000 tonnes, some 17 percent lower than in 2013, following the 2008 decree that aims to phase out domestic wheat production by 2016 because of strong concerns over the depletion of local water reserves in irrigated wheat production. A similar decree is being considered to phase out forage production as some farmers shifted from wheat to even more water demanding forage crops.

The total subregional cereal import requirement in the 2014/15 marketing year (July/June) is forecast at some

64 million tonnes, 7 percent and 19 percent respectively up on the five-year average and the previous year. Wheat constitutes almost half of these imports and at about 30 million tonnes, accounts for an increase of about 10 percent on the previous year and about 25 percent compared to the five-year average. Coarse grains, mostly barley and maize, are imported mainly for animal feed.

Civil unrest affects food security of large number of people

In **the Syrian Arab Republic**, 9.8 million are considered to be food insecure, of which 6.8 million are severely food insecure and 3 million moderately. As of mid-November 2014, almost 3.3 million refugees are registered in the region covering **Egypt**, **Iraq**, **Jordan**, **Lebanon** and **Turkey**. Although WFP continues to provide food assistance to vulnerable Syrian populations in the region, resources in host communities remain under strain. The WFP assistance in neighbouring countries is scaled to reach more than 2.5 million beneficiaries by December 2014, up from 795 000 in June 2013.

In **Yemen**, the 2014 Comprehensive Food Security Survey confirmed that food insecurity decreased from 45 percent in 2011 to over 40 percent in 2014. However, nearly half of the rural population and over one-quarter of the urban population are food insecure, leaving the absolute number of food insecure unchanged. In **Iraq**, over 1.8 million have been displaced since January 2014. Many of these people have been repeatedly displaced. At the moment, there are reports of deteriorating access to drinking water as well as basic food commodities and other essential non-food items. Food security conditions are likely to deteriorate with large numbers of IDPs putting strain on hosting communities, particularly as a large share of IDPs have fled towards cities in the Kurdish region of Iraq. Reports indicate that in the most affected governorates of Ninevah and Salah-Aldeen, the Public Distribution System is compromised and food might not be available to the most vulnerable. Lack of resources limit the coping capacities available to households and limit access to food. Farmers and rural households have been heavily affected by the current conflict. Some farmers have been forced to sell their livestock at lower prices, either for generating fast cash or because of their inability to afford fodder and vaccination for their cattle.

In **Afghanistan**, the overall food security situation has generally been stable owing to the above-average harvests in the last three years (2012-2014). However, fighting between the Government and insurgent forces resulted in further displacement. The latest available information from the United Nations High Commissioner for Refugees (UNHCR) indicates that the total number of IDPs in the country is 702 000, with Helmand province being the most affected. The WFP emergency food assistance, which reached over 900 000 beneficiaries in 2013 was replaced by a Protracted Relief and Recovery Operation from 1 January 2014 to 31 December 2016. The operation is expected to reach 3.7 million beneficiaries.

Food price inflation resumed a decreasing trend in many countries of the region, although in some countries it remains at high levels. Decreases were reported in **Turkey** (12.6 percent in October 2014 compared to 14.4 percent in August 2014), **Iraq** (-2.6 percent on a yearly basis in October 2014 as opposed to 4.6 percent in June 2014) and **Afghanistan** (the food component of the CPI increased by 4.7 percent in October 2014 compared to 5.3 percent in August 2014). In **the Islamic Republic of Iran**, the latest official information indicates that the food and beverages price inflation index stood at 2.3 percent on a monthly, and 7.8 percent on a yearly, basis for the month of Mehr (23 September-22 October 2014). For comparison, a year earlier the food price inflation was above 45 percent on a year-on-year basis. Across the subregion, stable prices prevailed for subsidized food commodities, such as bread and cereals in **Iraq**, **Jordan** and **Saudi Arabia.**

Table 14. Near East cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	Change: 2014/2013 (%)
Near East	**45.6**	**48.0**	**43.0**	**20.8**	**23.1**	**21.2**	**4.7**	**4.9**	**4.9**	**71.1**	**76.1**	**69.1**	**-9.1**
Afghanistan	5.1	5.2	5.1	0.8	0.7	0.7	0.7	0.8	0.8	6.6	6.7	6.6	-1.0
Iran (Islamic Rep. of)	13.8	14.0	13.0	4.7	4.5	4.5	2.8	2.9	3.0	21.3	21.4	20.4	-4.4
Iraq	2.4	3.3	3.0	0.8	1.2	1.2	0.4	0.4	0.4	3.5	4.9	4.5	-7.1
Syrian Arab Republic	2.8	2.4	1.9	1.0	1.1	0.8	0.0	0.0	0.0	3.8	3.5	2.7	-23.2
Turkey	20.1	22.1	19.0	12.4	14.5	13.0	0.9	0.9	0.8	33.4	37.5	32.8	-12.4

Note: Totals and percentage change computed from unrounded data.

CIS in Asia[2]

Planting of 2015 winter crops completed under normal weather conditions

In the Asian CIS countries, planting of the winter cereal crops, to be harvested in 2015, is almost complete under normal weather conditions. Early estimates indicate that the total area planted is close to the level of the previous year. However, the 2015 cereals output of the subregion depends on the production of **Kazakhstan**, accounting for more than half of the subregion's aggregate cereal output, where the bulk of the crop is only planted in spring.

Table 15. CIS in Asia cereal production

(million tonnes)

	Wheat			Coarse grains			Total cereals [1]			
	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	Change: 2014/2013 (%)
CIS in Asia	**21.4**	**26.2**	**24.6**	**5.1**	**6.4**	**6.1**	**27.3**	**33.4**	**31.5**	**-5.7**
Armenia	0.2	0.3	0.3	0.2	0.2	0.2	0.4	0.5	0.5	1.4
Azerbaijan	2.0	2.1	1.9	0.8	0.9	0.9	2.8	3.0	2.8	-6.0
Georgia	0.1	0.1	0.1	0.4	0.4	0.4	0.5	0.5	0.4	-10.1
Kazakhstan	9.8	14.0	12.5	2.2	3.3	3.3	12.4	17.6	16.1	-8.4
Kyrgyzstan	0.6	0.8	0.7	0.7	0.8	0.6	1.4	1.6	1.3	-17.9
Tajikistan	0.8	0.8	0.8	0.2	0.3	0.3	1.1	1.1	1.1	0.1
Turkmenistan	1.2	1.4	1.2	0.1	0.1	0.1	1.4	1.6	1.3	-14.3
Uzbekistan	6.7	6.9	7.2	0.4	0.4	0.4	7.3	7.5	7.8	4.1

Note: Totals and percentage change computed from unrounded data.

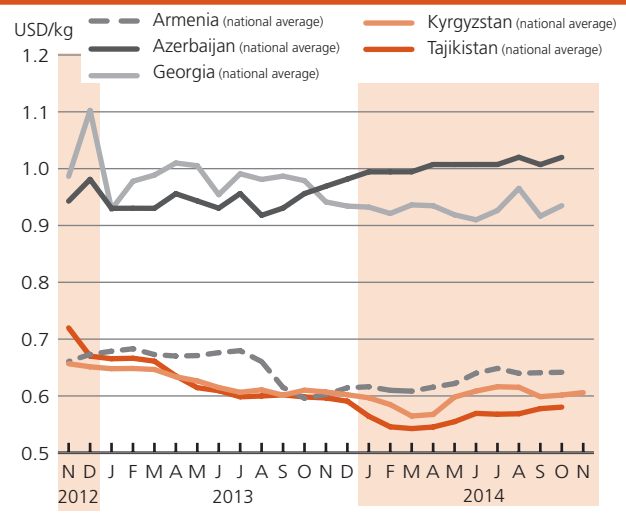
[1] Total cereals includes wheat, coarse grains and rice (paddy).

Slight decline in the 2014 cereal output compared to the previous year

The 2014 cereal harvest has been completed in all countries of the subregion and is estimated at 31.5 million tonnes, 3.4 percent below the five-year average and 6 percent down from last year's level. Wheat, the major staple in the subregion, is estimated at 24.6 million, representing approximately 80 percent of the aggregate cereal production.

Favourable rainfall and improved availability of agricultural inputs boosted the cereal harvest to record levels in **Armenia** and **Uzbekistan.** By contrast, in other countries, adverse weather conditions during the cropping season, coupled with shortages of irrigation water, dampened cereal production. The highest decline is reported in **Kyrgyzstan**, where the aggregate cereal production dropped by 18 percent to 1.3 million tonnes. In **Kazakhstan**, persistent rains, followed by abnormally cold weather and snow in mid-October, delayed spring wheat harvesting in northern parts and negatively affected both yields and the quality of the crop. Cereal production is anticipated at 16.1 million tonnes, 8 percent below last year's level and 10 percent under the five-year average. National wheat production is put at 12.5 million tonnes, down by 10 percent and 15 percent compared to last year's level and the five-year average respectively.

Figure 8. Retail wheat flour prices in selected CIS in Asia countries



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

Cereal imports to increase in the 2014/15 marketing year

The export forecast for **Kazakhstan**, the main wheat supplier in the subregion, has decreased by 31 percent, to 5.5 million tonnes, with supplies sufficient to cover the needs of the neighboring countries. The total cereal import requirement of the subregion in the 2014/15 marketing year is forecast to stay close to last year's level, in spite of the reduced domestic outputs, mainly on account of sufficient carryover stocks in importing countries.

Wheat flour prices remain generally stable in October though slightly above those of last year

In most countries of the subregion, prices of wheat flour in October remained generally stable and slightly above their year-earlier levels. However, in **Kyrgyzstan** flour prices strengthened in October following a reduction in the 2014 cereal production and depreciation of the local currency. In **Armenia**, prices of wheat flour in October were at the same levels of the previous months, reflecting adequate supplies from consecutive years of good harvests and imports, though they remain higher than a year earlier. In **Azerbaijan**, prices of wheat products remain unchanged during the last few months, although were at higher levels than a year-earlier. In **Georgia**, prices of wheat flour increased slightly in October but remained at the level of the previous year.

[2] Georgia is no longer a member of CIS but its inclusion in this group is maintained for the time being.

Latin America and the Caribbean

Central America and the Caribbean

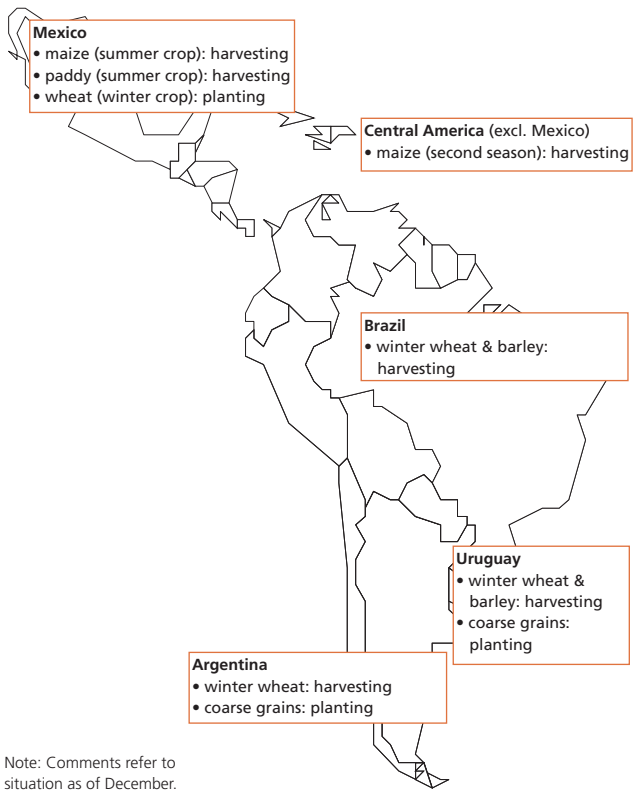
Wheat production in 2014 higher than last year

In **Mexico**, virtually the only wheat producer in the subregion, harvesting of the main irrigated winter wheat crop was completed in July. Reflecting an increase in the area planted, the 2014 aggregate (spring and winter seasons) production was estimated at almost 5 percent up from last year's below-average level.

Maize production in 2014 forecast at a record level reflecting a bumper crop in Mexico

Harvesting of the 2014 secondary season has been recently concluded. FAO's latest forecast of the subregion's aggregate maize output has been revised upwards by 1.2 million tonnes to a record level of 28 million tonnes. This mainly reflects a second successive bumper crop in **Mexico**, which represents 85 percent of the subregion's maize output, where a reduction in area planted to white maize of the secondary crop season, driven by low prices, was offset by higher-than-expected yields. Production in Mexico is officially estimated at 24 million tonnes, 7 percent above the 2013 level and record.

However, excluding **Mexico**, the aggregate (first and second season) maize production of the rest of the subregion is forecast at a sharply reduced level. An unusually early and extended "canicula", a recurrent dry period of about ten days that occurs around July/August, sharply reduced the main first season harvest, which accounts for 60 percent of annual production. Most distressed is the area known as the "Dry Corridor", which covers most of **El Salvador** and parts of **Costa Rica**, **Guatemala**, **Honduras** and **Nicaragua**. Aggregate maize production for these countries is estimated at 3.5 million tonnes, 9 percent or 350 000 tonnes below last year's level.



Note: Comments refer to situation as of December.

Despite increased plantings of maize, the second season cereal harvest is not expected to compensate for crop losses of the main season as most of the area planted is dedicated to beans.

In **Haiti**, the 2014 cereal season is virtually concluded. The earlier favourable forecasts were sharply revised downward reflecting this year's reduced crop due to low precipitations during July and August in main producing regions of the country which significantly affected maize and rice yields. Total cereal production is estimated at almost 40 percent below last year's bumper crop reaching 367 000 tonnes (rice paddy) and well below the country's five-year average.

Table 16. Latin America and Caribbean cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	Change: 2014/2013 (%)
Central America & Caribbean	**3.3**	**3.5**	**3.7**	**34.9**	**35.5**	**36.4**	**2.8**	**3.0**	**2.9**	**41.0**	**42.0**	**42.9**	**2.3**
El Salvador	0.0	0.0	0.0	1.1	1.0	0.9	0.0	0.0	0.0	1.1	1.1	1.0	-9.3
Guatemala	0.0	0.0	0.0	1.8	1.9	1.9	0.0	0.0	0.0	1.8	1.9	1.9	2.6
Honduras	0.0	0.0	0.0	0.6	0.6	0.4	0.1	0.1	0.1	0.7	0.7	0.5	-28.4
Mexico	3.3	3.5	3.7	30.2	30.5	31.8	0.2	0.2	0.2	33.6	34.2	35.7	4.6
Nicaragua	0.0	0.0	0.0	0.5	0.6	0.5	0.4	0.4	0.4	0.9	1.0	0.9	-12.0
South America	**16.3**	**19.2**	**23.4**	**120.8**	**137.5**	**133.1**	**24.0**	**24.6**	**24.9**	**161.2**	**181.2**	**181.4**	**0.1**
Argentina	8.0	9.2	11.5	31.2	37.8	38.0	1.6	1.6	1.6	40.8	48.6	51.1	5.1
Brazil	4.4	5.7	7.5	74.1	83.5	81.2	11.6	11.8	12.2	90.1	101.1	100.9	-0.2

Note: Totals and percentage change computed from unrounded data.

Cereal imports forecast at high levels in 2014/15

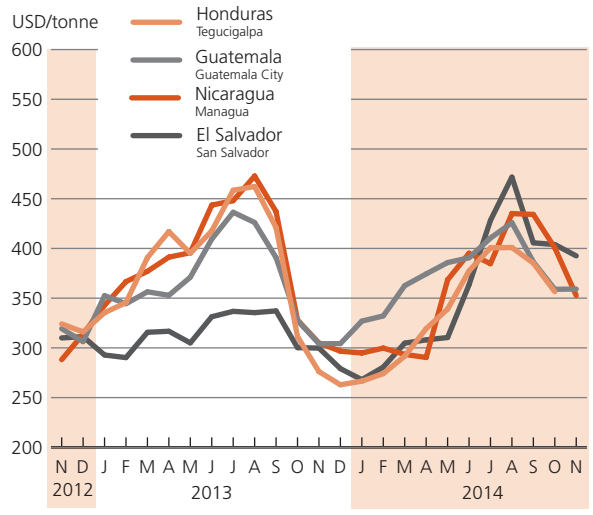
Cereal imports for the 2014/15 marketing year are forecast to remain close to last year's high level of 27 million tonnes and well above the subregion's five-year average. In the drought-affected countries, **El Salvador**, **Guatemala**, **Honduras** and **Nicaragua**, the aggregate cereal imports are expected to reach 3.7 million tonnes, a downward revision of 6 percent from the previous forecast reflecting reduced losses than had been anticipated earlier. But at this level, cereal imports are well above their five-year average for these countries.

Maize and red bean prices declined in November but remain high

In most countries of the subregion, white maize prices declined in November with the beginning of 2014 secondary "de postrera" season harvest. However, prices remained significantly higher than their year-earlier levels reflecting the drought-reduced main first season "de primera" harvest. Prices of red beans, the second most important staple food and the main crop of the "de postrera" season, declined from their record highs of the previous months but remained more than twice their levels of November 2013 in **El Salvador**, **Honduras** and **Nicaragua**. In **Guatemala**, where black beans are the most consumed variety, prices averaged slightly higher in November reflecting lower import flows from Mexico. However, prices declined sharply in the second half of the month with the entry into the markets of the second season harvest.

In **Haiti**, prices of imported rice, the main food staple which represents more than 80 percent of domestic consumption, remained stable in most markets and declined in the capital, Port-au-Prince (in US dollars), following trends in **the United States of America**, the country's main supplier. Compared to their year earlier levels, prices were lower or unchanged. Local maize meal prices, the second most important staple, remained stable in most markets and were below their levels compared to November 2013, in spite of a sharp reduction in 2014 maize production.

Figure 9. Wholesale white maize prices in selected countries in Central America



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

South America

The 2014 wheat output is forecast to recover from the low levels of previous years

Harvesting of the 2014 wheat crop is well advanced and prospects for this year's harvest are generally favourable. The subregion's aggregate output is forecast by FAO at a record level of 23 million tonnes or 22 percent above last year's reduced output. This mainly reflects an increase in the area planted in the main producers **Argentina** and **Brazil**, in response to high prices at the beginning of the season. However, in Brazil excessive rains in the main producing regions, might have significantly reduced the quality of the crop.

Coarse grain production in 2014 remains at a high level

The 2014 subregion's aggregate coarse grains production, harvested earlier in the year, has been revised upwards by FAO to 133 million tonnes, 3 percent below last year's record level but still above average. The upward revision reflects better-than-expected maize yields in **Brazil** and **Argentina** that offset area reductions, and a near-record production in **Ecuador**. Better-than-average 2014 maize production in **Bolivia** also increased regional availabilities. In **Peru**, while production decreased by almost 5 percent from last year's high level, estimates for the 2014 maize production point to an output close to the country's five-year average, better than initially anticipated. In **Chile**, by contrast, yellow maize production is estimated at a sharply reduced level, 22 percent lower than in 2013 and well below the average reflecting a contraction in the cultivated area, owing to the low market prices prevailing at planting time.

The subregion's 2014 rice (paddy) crop, harvested earlier in the year, has been estimated at almost 25 million tonnes, around last year's high level and above the five-year average. This mainly reflects good harvests in **Brazil**, **Guyana** and **Paraguay**, which made up for declines elsewhere in the subregion.

Wheat flour prices continued to decline in most countries in November, yellow maize prices increased seasonally

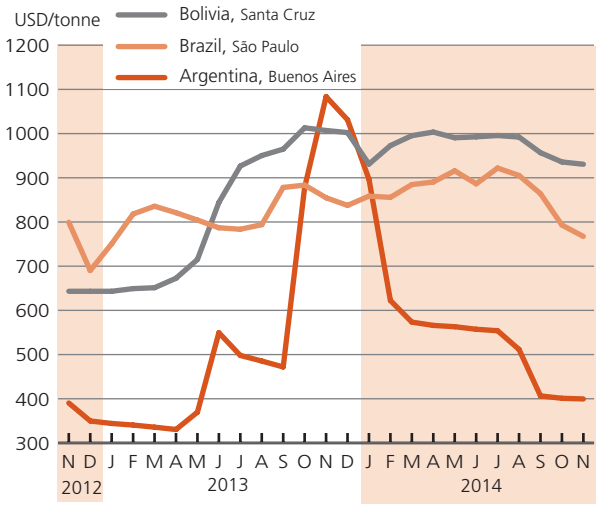
Wheat flour prices in the subregion continued their declining trend in **Argentina**, **Bolivia** and **Brazil** and were significantly below their levels from a year earlier. The decline in prices is being supported by the strong recovery in wheat production and

ample regional availabilities. By contrast, in **Paraguay,** prices strengthened in November supported by a reduced output for a second consecutive year and continued strong import demand in the subregion.

Yellow maize prices increased seasonally in the subregion in November. Despite the increased levels, in the main producers, **Argentina** and **Brazil** as well as in **Bolivia**, prices remained significantly below their levels from a year earlier, reflecting this year's high level of production. By contrast, in **Peru**, prices remained stable but above their levels of November 2013, as a result of this year's reduced crop.

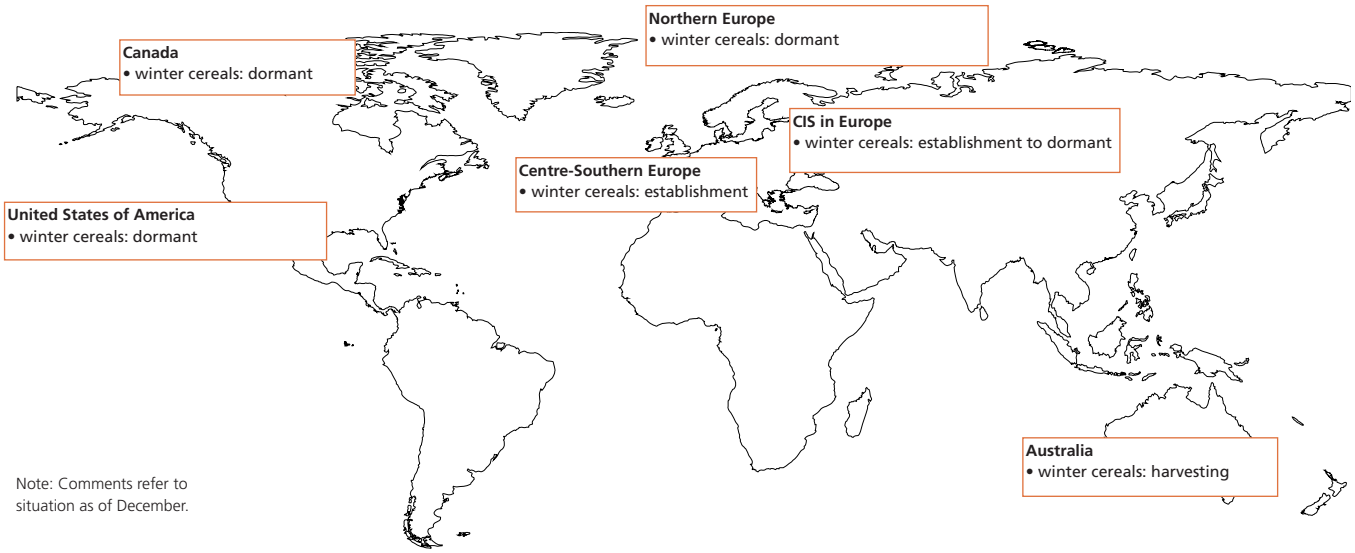
Prices of potatoes, another staple in Andean countries, increased for a third month in most markets of **Ecuador** in November, although at a slower rate, and were 60 to 75 percent higher than their levels in November 2013 due to a reduced crop in the previous months. In **Peru**, after increasing in the pasts two months, potato prices decreased slightly in November, with the beginning of the new harvest and were significantly lower than a year earlier.

Figure 10. Wholesale wheat flour prices in selected countries in South America



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

North America, Europe and Oceania



Note: Comments refer to situation as of December.

North America

Early estimates point to smaller winter wheat area in the United States of America harvest in 2015

In **the United States of America**, winter wheat planting for the 2015 harvest was reported to be mostly complete by late November and the rate of crop emergence was about normal. Soil moisture is reported to be mostly adequate for emergence and establishment, with the exception of some parts of the southern plains where more precipitation would be beneficial. Although final estimates are not available yet, early indications suggest that the area sown to winter wheat, which accounts for over 80 percent of the country's total wheat area, has likely decreased slightly because of planting delays and lower prices expected in 2015 compared to competing crops. The latest official estimate of the United States of America 2014 wheat crop remains at 55 million tonnes, some 5 percent down from the 2013 crop, with lower yields offsetting an increase in area. Regarding coarse grains, the latest official estimate puts the 2014 maize output at some 366 million tonnes, 3.5 percent up from last year's crop, and a new record high. Although the final harvested area is expected to be down by about 5 percent from the previous year, bumper to record yields were achieved in most states.

In **Canada**, the bulk of the wheat is planted in spring and the 2015 crop will not be sown until March-April next year. Latest information regarding the 2014 cereal harvest puts the total wheat output at 27.5 million tonnes, 27 percent down from last year's record due to reduced plantings, higher abandonment and a fall in average yields. The maize crop, mostly grown in Eastern Canada, is forecast down by 19 percent at 11.5 million tonnes, reflecting reduced plantings and lower yields.

Table 17. North America, Europe and Oceania cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	2012	2013 estim.	2014 f'cast.	Change: 2014/2013 (%)
North America	**88.9**	**95.6**	**82.6**	**310.9**	**398.6**	**403.4**	**9.1**	**8.6**	**10.0**	**408.8**	**502.9**	**496.0**	**-1.4**
Canada	27.2	37.5	27.5	24.5	28.8	21.7	0.0	0.0	0.0	51.7	66.4	49.1	-26.0
United States	61.7	58.1	55.1	286.3	369.8	381.7	9.1	8.6	10.0	357.1	436.5	446.8	2.4
Europe	**193.1**	**225.4**	**247.8**	**219.4**	**252.8**	**262.4**	**4.4**	**4.1**	**4.1**	**416.9**	**482.3**	**514.3**	**6.6**
Belarus	2.1	2.0	2.5	6.7	6.2	6.6	0.0	0.0	0.0	8.8	8.2	9.1	11.4
EU	132.6	143.7	155.0	143.8	158.7	164.7	3.1	2.9	2.8	279.6	305.3	322.5	5.6
Russian Federation	37.7	52.1	60.8	29.5	36.6	42.3	1.1	1.0	1.2	68.2	89.7	104.2	16.2
Serbia	1.9	2.7	2.4	3.9	6.6	7.2	0.0	0.0	0.0	5.8	9.3	9.6	3.0
Ukraine	15.8	22.0	24.3	29.9	40.3	37.4	0.2	0.1	0.1	45.9	62.4	61.8	-0.9
Oceania	**23.2**	**27.3**	**23.5**	**12.1**	**14.5**	**10.9**	**0.9**	**1.2**	**0.9**	**36.2**	**43.0**	**35.3**	**-18.0**
Australia	22.9	27.0	23.2	11.5	13.9	10.3	0.9	1.2	0.8	35.3	42.1	34.4	-18.3

Note: Totals and percentage change computed from unrounded data.

Europe

European Union

Wheat to remain virtually unchanged for harvest in 2015

The bulk of the winter grain crops for harvest in 2015 have now been sown throughout the **European Union (EU)** under predominantly favourable conditions, according to the latest EU Crop Monitoring (MARS) report. During October and the first part of November, western and central Europe generally experienced warmer than average conditions. Although, heavy rainfall in some areas, such as **France**, did cause delays in planting winter wheat crops, no serious problems were reported and early establishment progressed well. Winter barley crops generally emerged around two weeks earlier than 2013 as a result of the warm conditions. Early indications suggest that the area sown to winter wheat is likely to be virtually unchanged from the previous season, reflecting the mostly favourable planting conditions and comparably favourable returns are expected.

The **EU's** aggregate cereal output in 2014 is now estimated at 322.5 million tonnes, 5.6 percent up from 2013. Of the total, wheat accounts for an estimated 155 million tonnes, 7.8 percent up from last year's output. With a significant increase in maize output among the main producing countries, the latest estimate for aggregate coarse grains production in 2014 is also well up on the previous year's level at 164.7 million tonnes.

CIS in Europe

Unseasonally cold weather affecting recently-planted winter crops

The area planted under 2015 winter crops (wheat, rye and barley) is estimated at a higher level than last year. In **the Russian Federation,** the targeted planted area of 16.5 million hectares for winter crops, 2 million hectares higher than the corresponding season last year, was achieved. However, early cold weather, with frost since late October, has raised concern about crop establishment.

In **Ukraine**, winter cereal plantings have concluded. The area planted is estimated to be close to last year's level. Early estimates indicate that about 7.5 million hectares of winter crops have been sown, including 6.4 million hectares under wheat, about 1 million hectares under barley and 0.15 million hectares under rye.

In **Belarus** and **the Republic of Moldova**, the area planted to winter cereals is officially estimated to be close to last year's level.

Record 2014 cereal harvest

In the *European CIS* countries (**Belarus**, **the Republic of Moldova**, **the Russian Federation** and **Ukraine**), harvesting of the 2014 cereal crops is complete. The subregion's aggregate cereal output is forecast at 178 million tonnes, 9 percent up from last year's bumper level. The wheat output accounts for half of the 2014 harvest. In **the Russian Federation**, the cereal harvest is estimated at approximately 104 million tonnes, a 16 percent increase compared to last year's good level. This is mainly attributed to higher yields, following favourable weather conditions throughout the cropping season and continued Government support. Most of the growth is accounted for by wheat and barley, estimated at 60.8 million tonnes (up by 17 percent compared to last year's level) and 20.8 million tonnes (up by 35 percent), respectively.

In **Belarus**, a record cereal harvest was gathered, mainly due to higher barley and wheat outputs. In **Ukraine**, the 2014 aggregate cereal production is estimated at about 61.9 million tonnes marginally below last year's record level and around 25 percent above the five-year average. This output reflects near-record yields, following favourable weather conditions during the cropping season, which more than offset a slight contraction in the planted area compared to last year. In **the Republic of Moldova**, the 2014 cereal output is also estimated at a close level to 2013's harvest.

Exports in the 2014/15 marketing year forecast at record levels

The above-average 2014 cereal production is anticipated to contribute to boost levels of exports in the subregion. Aggregate cereal exports in the 2014/15 marketing year are forecast to reach a record level of 61.3 million tonnes, 5.4 percent up compared to the 2013/14 marketing year. The increase is mainly attributed to higher wheat and barley exports from **the Russian Federation**, forecast at 22.5 and 3.5 million tonnes, respectively, or 22 and 32 percent higher than their levels of the previous year.

Wheat export prices increased in November 2014

Wheat export prices in **the Russian Federation** and **Ukraine** increased in November by 5 percent after declining since April 2014. This mainly reflects the recent devaluation of the national currencies, coupled with concerns about adverse weather in parts of **the Russian Federation** affecting the newly-planted wheat crop. In **the Republic of Moldova**, domestic wheat prices slightly decreased in November, while those of **Belarus** remained unchanged.

Oceania

Winter grains harvest underway but output expectations down due to persisting dryness

Prospects for the **Australian** winter grains harvest have deteriorated further due to persisting dry weather, particularly in Queensland, New South Wales and Victoria. Latest official forecasts, as of early December, put production of wheat in 2014 at 23.2 million tonnes, 14 percent lower than 2013, despite an increase in plantings. Production of barley, is forecast to fall by 22 percent to 7.4 million tonnes. Harvesting of winter crops is largely complete in Queensland and northern New South Wales and well underway in Western Australia, South Australia, southern New South Wales and Victoria. Regarding the summer crops for harvest in 2015, less than favourable seasonal conditions during winter and spring in Queensland and northern New South Wales depleted soil moisture levels and irrigation water availability, resulting in unfavourable planting conditions. Nevertheless, the area sown to sorghum is estimated to have risen by 8 percent from the previous year's low level to some 500 000 hectares, but still 24 percent less than the ten-year average. Given the low level of soil moisture in summer cropping regions, sufficient and timely rainfall during the growing season will be critical for the development of the sorghum crop in 2015.

Statistical appendix

Table A1. Global cereal supply and demand indicators

(percent)

	Average 2007/08 - 2011/12	2010/11	2011/12	2012/13	2013/14	2014/15
1. Ratio of world stocks to utilization						
Wheat	25.2	26.4	26.3	23.0	24.9	27.0
Coarse grains	15.9	14.8	15.4	13.9	17.6	20.3
Rice	30.0	30.9	33.9	35.8	36.3	34.8
Total cereals	21.5	21.6	22.4	20.9	23.5	25.2
2. Ratio of major grain exporters' supplies to normal market requirements	121.1	124.5	115.8	118.3	108.1	121.8
3. Ratio of major exporters' stocks to their total disappearance						
Wheat	18.3	20.7	18.0	14.1	14.1	16.0
Coarse grains	12.9	10.7	10.8	8.4	11.1	15.0
Rice	21.9	20.7	25.0	28.2	27.6	24.8
Total cereals	17.7	17.4	17.9	16.9	17.6	18.6
	Annual trend growth rate 2004-2013	**Change from previous year**				
		2010	**2011**	**2012**	**2013**	**2014**
4. Changes in world cereal production	2.2	-0.4	4.3	-2.1	9.6	0.3
5. Changes in cereal production in the LIFDCs	1.2	8.9	1.7	4.5	0.7	-1.3
6. Changes in cereal production in the LIFDCs less India	-0.6	9.9	-3.7	6.3	0.8	0.3
	Average 2007-2011	**Change from previous year**				
		2010	**2011**	**2012**	**2013**	**2014***
7. Selected cereal price indices:						
Wheat	184.9	10.6	31.8	-4.8	-4.9	-7.0
Maize	194.8	12.0	57.6	2.2	-12.9	-26.8
Rice	232.2	-10.0	6.6	-4.6	0.8	1.0

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.

Major wheat exporters are Argentina, Australia, Canada, the EU, Kazakhstan, the Russian Federation, Ukraine and the United States of America; major coarse grain exporters are Argentina, Australia, Brazil, Canada, the EU, 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.

Normal market requirements for major grain exporters are defined as the average of domestic utilization plus exports in the three preceding seasons.

Disappearance is defined as domestic utilization plus exports for any given season.

Price indices: The Wheat Price Index has been constructed based on the IGC 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[1]

(million tonnes)

	2010	2011	2012	2013	2014 estimate	2015 forecast
TOTAL CEREALS	**523.9**	**501.8**	**522.3**	**506.1**	**578.6**	**628.4**
Wheat	**190.1**	**184.8**	**181.0**	**158.3**	**175.3**	**192.7**
held by:						
- main exporters[2]	55.2	51.2	42.7	36.0	40.1	42.4
- others	134.9	133.6	138.3	122.3	135.2	150.3
Coarse grains	**195.9**	**171.6**	**179.3**	**172.1**	**222.1**	**258.3**
held by:						
- main exporters[2]	87.7	62.8	59.5	47.8	69.5	93.2
- others	108.2	108.8	119.8	124.3	152.6	165.1
Rice (milled basis)	**137.8**	**145.4**	**162.0**	**175.7**	**181.2**	**177.4**
held by:						
- main exporters[2]	33.4	33.3	41.3	47.2	48.2	44.1
- others	104.4	112.1	120.7	128.5	133.0	133.3
Developed countries	**191.7**	**153.3**	**150.5**	**117.8**	**141.9**	**177.5**
Australia	7.5	9.7	7.8	5.1	6.7	4.7
Canada	13.6	11.2	9.4	8.2	14.5	7.2
European Union	45.7	32.5	32.7	25.8	33.4	45.1
Japan	4.8	4.8	4.9	5.2	4.7	5.3
Russian Federation	21.2	18.0	15.2	7.6	8.5	15.0
South Africa	3.1	4.0	2.5	2.3	1.6	2.7
Ukraine	6.8	5.3	10.9	6.6	8.1	10.2
United States	75.9	57.3	49.3	44.2	51.5	72.8
Developing countries	**332.2**	**348.5**	**371.8**	**388.3**	**436.7**	**450.9**
Asia	**275.9**	**285.2**	**306.1**	**331.8**	**366.9**	**379.2**
China	164.1	167.6	172.6	188.9	217.2	229.6
India	35.5	38.3	45.6	49.4	52.2	53.8
Indonesia	8.3	10.4	12.4	13.6	14.0	13.2
Iran (Islamic Republic of)	5.0	3.6	2.1	6.6	7.6	8.7
Korea, Republic of	3.8	4.3	4.2	4.0	4.3	4.2
Pakistan	4.8	3.4	5.4	3.7	3.7	4.0
Philippines	4.3	3.3	2.6	3.1	2.7	3.1
Syrian Arab Republic	4.7	3.8	3.4	2.6	2.2	1.3
Turkey	4.2	4.1	4.9	4.2	5.2	4.1
Africa	**30.4**	**35.1**	**37.7**	**35.5**	**38.5**	**35.1**
Algeria	3.5	4.0	4.7	5.4	6.9	6.2
Egypt	6.8	5.8	7.9	6.0	6.6	5.4
Ethiopia	1.5	1.9	2.0	1.9	2.3	2.1
Morocco	3.1	4.0	4.6	3.4	5.9	5.1
Nigeria	1.2	1.4	1.3	0.8	1.2	1.0
Tunisia	1.5	0.8	0.8	1.3	1.1	1.3
Central America	**4.9**	**6.7**	**5.4**	**5.6**	**6.7**	**7.0**
Mexico	2.4	3.7	2.3	2.6	3.4	3.7
South America	**20.6**	**21.1**	**22.2**	**14.9**	**24.3**	**29.1**
Argentina	2.1	5.5	4.9	2.2	5.2	7.7
Brazil	11.9	8.4	9.1	5.6	11.3	13.9

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

[1] 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.

[2] Major wheat exporters are Argentina, Australia, Canada, the EU, Kazakhstan, the Russian Federation, Ukraine and the United States of America; major coarse grain exporters are Argentina, Australia, Brazil, Canada, the EU, 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. Prot.[1]	US Soft Red Winter No.2 [2]	Argentina Trigo Pan[3]	US No.2 Yellow[2]	Argentina[3]	US No.2 Yellow[2]
Annual (July/June)						
2003/04	161	149	154	115	109	118
2004/05	154	138	123	97	90	99
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
Monthly						
2012 - November	374	346	345	324	294	289
2012 - December	359	325	360	310	288	288
2013 - January	348	311	362	303	294	287
2013 - February	329	297	358	303	283	288
2013 - March	323	286	346	309	276	297
2013 - April	324	279	324	282	242	261
2013 - May	329	277	315	295	257	254
2013 - June	321	270	310	300	264	246
2013 - July	311	257	302	282	241	232
2013 - August	315	251	281	238	221	219
2013 - September	312	258	300	209	219	217
2013 - October	333	289	344	201	207	204
2013 - November	317	274	353	199	207	196
2013 - December	301	267	340	197	212	207
2014 - January	288	248	330	198	215	216
2014 - February	303	261	328	209	218	224
2014 - March	334	285	340	222	226	228
2014 - April	340	281	361	224	229	226
2014 - May	345	271	372	217	224	223
2014 - June	314	235	365	202	204	220
2014 - July	294	218	287	182	192	203
2014 - August	284	219	270	175	181	183
2014 - September	279	204	248	164	166	174
2014 - October	289	223	242	165	171	189
2014 - November	280	236	252	178	179	197

Sources: International Grains Council and USDA.

[1] Delivered United States f.o.b. Gulf.

[2] Delivered United States Gulf.

[3] Up River f.o.b.

Table A4a. Cereal import requirements of Low-Income Food-Deficit Countries[1], 2013/14 or 2014 estimates

(thousand tonnes)

		2012/13 or 2013 Actual imports			2013/14 or 2014 Import position[2]			
	Marketing year	Commercial purchases	Food aid	Total commercial and aid	Total import requirements (excl. re-exports)	Total commercial and aid	Food aid allocated, committed or shipped	Commercial purchases
AFRICA		**24 923.3**	**1 135.9**	**26 059.2**	**29 250.6**	**19 713.8**	**966.0**	**18 747.8**
Eastern Africa		**6 795.9**	**512.0**	**7 307.9**	**8 664.9**	**7 135.3**	**658.2**	**6 477.1**
Burundi	Jan/Dec	138.4	13.3	151.7	126.1	36.2	5.1	31.1
Comoros	Jan/Dec	59.5	0.0	59.5	61.0	31.0	0.0	31.0
Djibouti	Jan/Dec	97.1	10.4	107.5	161.0	161.0	6.5	154.5
Eritrea	Jan/Dec	399.0	7.0	406.0	419.0	0.6	0.0	0.6
Ethiopia	Jan/Dec	329.1	129.7	458.8	683.0	386.8	154.4	232.4
Kenya	Oct/Sep	1 951.0	76.6	2 027.6	2 372.3	2 372.3	113.3	2 259.0
Rwanda	Jan/Dec	146.0	0.7	146.7	128.2	66.8	0.8	66.0
Somalia	Aug/Jul	392.8	63.3	456.1	530.8	530.8	99.3	431.5
Sudan	Nov/Oct	2 139.9	172.6	2 312.5	2 860.0	2 456.6	222.6	2 234.0
Tanzania U.R.	Jun/May	768.6	9.3	777.9	858.5	858.5	47.9	810.6
Uganda	Jan/Dec	374.5	29.1	403.6	465.0	234.7	8.3	226.4
Southern Africa		**1 795.3**	**220.0**	**2 015.3**	**3 029.2**	**3 029.2**	**153.5**	**2 875.7**
Lesotho	Apr/Mar	242.0	5.0	247.0	173.0	173.0	7.0	166.0
Madagascar	Apr/Mar	241.5	16.6	258.1	570.4	570.4	14.4	556.0
Malawi	Apr/Mar	79.0	18.2	97.2	212.0	212.0	2.0	210.0
Mozambique	Apr/Mar	760.2	120.8	881.0	1 254.0	1 254.0	75.0	1 179.0
Zimbabwe	Apr/Mar	472.6	59.4	532.0	819.8	819.8	55.1	764.7
Western Africa		**14 428.5**	**228.7**	**14 657.2**	**15 435.5**	**8 496.5**	**113.2**	**8 383.3**
Coastal Countries		***10 920.9***	***79.0***	***10 999.9***	***11 735.5***	***6 158.6***	***10.5***	***6 148.1***
Benin	Jan/Dec	433.0	14.0	447.0	462.0	462.0	0.0	462.0
Côte d'Ivoire	Jan/Dec	1 767.2	3.4	1 770.6	1 820.5	893.3	3.9	889.4
Ghana	Jan/Dec	1 038.9	6.1	1 045.0	1 050.0	483.9	2.4	481.5
Guinea	Jan/Dec	456.8	5.6	462.4	532.5	311.5	1.5	310.0
Liberia	Jan/Dec	340.0	44.0	384.0	380.0	121.8	0.7	121.1
Nigeria	Jan/Dec	6 320.0	0.0	6 320.0	6 920.0	3 459.0	0.0	3 459.0
Sierra Leone	Jan/Dec	320.0	5.4	325.4	285.0	209.5	2.0	207.5
Togo	Jan/Dec	245.0	0.5	245.5	285.5	217.6	0.0	217.6
Sahelian Countries		***3 507.6***	***149.7***	***3 657.3***	***3 700.0***	***2 337.9***	***102.7***	***2 235.2***
Burkina Faso	Nov/Oct	436.9	7.2	444.1	415.0	98.9	11.7	87.2
Chad	Nov/Oct	118.2	59.6	177.8	142.2	77.7	35.4	42.3
Gambia	Nov/Oct	192.0	20.5	212.5	205.5	176.0	0.2	175.8
Guinea-Bissau	Nov/Oct	148.1	6.2	154.3	154.3	35.7	1.7	34.0
Mali	Nov/Oct	199.6	11.6	211.2	315.2	211.6	18.9	192.7
Mauritania	Nov/Oct	457.0	13.5	470.5	487.0	385.9	3.2	382.7
Niger	Nov/Oct	431.7	30.2	461.9	457.4	93.7	23.9	69.8
Senegal	Nov/Oct	1 524.1	0.9	1 525.0	1 523.4	1 258.4	7.7	1 250.7
Central Africa		**1 903.6**	**175.2**	**2 078.8**	**2 121.0**	**1 052.8**	**41.1**	**1 011.7**
Cameroon	Jan/Dec	948.3	1.8	950.1	947.0	591.4	5.5	585.9
Cent.Afr.Rep.	Jan/Dec	39.7	11.3	51.0	75.0	18.0	8.9	9.1
Congo	Jan/Dec	303.2	7.8	311.0	312.0	192.2	0.8	191.4
Dem.Rep.of the Congo	Jan/Dec	599.7	150.3	750.0	770.0	243.5	25.6	217.9
Sao Tome and Principe	Jan/Dec	12.7	4.0	16.7	17.0	7.7	0.3	7.4

Source: FAO

[1] 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 1 945 in 2011); for full details see http://www.fao.org/countryprofiles/lifdc

[2] Estimates based on information as of early November 2014.

Table A4b. Cereal import requirements of Low-Income Food-Deficit Countries[1], 2013/14 or 2014 estimates

(thousand tonnes)

		2012/13 or 2013 Actual imports			2013/14 or 2014 Import position[2]			
	Marketing year	Commercial purchases	Food aid	Total commercial and aid	Total import requirements *(excl. re-exports)*	Total commercial and aid	Food aid allocated, committed or shipped	Commercial purchases
ASIA		**17 034.9**	**654.1**	**17 689.0**	**20 818.6**	**17 921.6**	**268.0**	**17 653.6**
Cis in Asia		**3 657.5**	**3.7**	**3 661.2**	**3 978.1**	**3 978.1**	**1.0**	**3 977.1**
Kyrgyzstan	Jul/Jun	525.5	3.7	529.2	566.1	566.1	1.0	565.1
Tajikistan	Jul/Jun	1 112.0	0.0	1 112.0	1 022.0	1 022.0	0.0	1 022.0
Uzbekistan	Jul/Jun	2 020.0	0.0	2 020.0	2 390.0	2 390.0	0.0	2 390.0
Far East		**7 876.4**	**499.4**	**8 375.8**	**10 678.5**	**10 296.7**	**183.1**	**10 113.6**
Bangladesh	Jul/Jun	1 973.3	131.2	2 104.5	3 421.0	3 421.0	80.6	3 340.4
Bhutan	Jul/Jun	78.0	0.0	78.0	77.1	77.1	0.0	77.1
D.P.R. of Korea	Nov/Oct	108.3	290.3	398.6	340.1	244.7	26.1	218.6
India	Apr/Mar	116.6	0.5	117.1	131.0	131.0	0.0	131.0
Mongolia	Oct/Sep	115.8	0.0	115.8	130.8	130.8	0.0	130.8
Nepal	Jul/Jun	530.1	1.7	531.8	521.8	521.8	30.0	491.8
Philippines	Jul/Jun	3 851.0	40.0	3 891.0	5 031.0	5 031.0	45.9	4 985.1
Sri Lanka	Jan/Dec	1 103.3	35.7	1 139.0	1 025.7	739.3	0.5	738.8
Near East		**5 501.0**	**151.0**	**5 652.0**	**6 162.0**	**3 646.8**	**83.9**	**3 562.9**
Afghanistan	Jul/Jun	1 551.0	101.0	1 652.0	1 942.0	955.6	14.8	940.8
Yemen	Jan/Dec	3 950.0	50.0	4 000.0	4 220.0	2 691.2	69.1	2 622.1
CENTRAL AMERICA		**1 703.1**	**91.2**	**1 794.3**	**1 907.2**	**1 907.2**	**88.1**	**1 819.1**
Haiti	Jul/Jun	542.3	82.4	624.7	656.1	656.1	79.8	576.3
Honduras	Jul/Jun	749.2	6.0	755.2	810.0	810.0	5.5	804.5
Nicaragua	Jul/Jun	411.6	2.8	414.4	441.1	441.1	2.8	438.3
OCEANIA		**470.9**	**0.0**	**470.9**	**450.2**	**182.4**	**0.0**	**182.4**
Papua New Guinea	Jan/Dec	390.2	0.0	390.2	415.2	168.3	0.0	168.3
Solomon Islands	Jan/Dec	80.7	0.0	80.7	35.0	14.1	0.0	14.1
TOTAL		**44 132.2**	**1 881.2**	**46 013.4**	**52 426.6**	**39 725.0**	**1 322.1**	**38 402.9**

Source: FAO

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[2] Estimates based on available information as of early November 2014.

Table A5. Cereal import requirements of Low-Income Food-Deficit Countries[1], 2014/15 estimates

(thousand tonnes)

		2013/14			2014/15			
		Actual imports			Import position[2]			
	Marketing year	Commercial purchases	Food aid	Total commercial and aid	Total import requirements *(excl. re-exports)*	Total commercial and aid	Food aid allocated, committed or shipped	Commercial purchases
AFRICA		**6 376.8**	**414.0**	**6 790.8**	**6 413.5**	**837.5**	**44.0**	**793.5**
Eastern Africa		**3 501.1**	**260.5**	**3 761.6**	**3 934.5**	**213.6**	**25.6**	**188.0**
Kenya	Oct/Sep	2 259.0	113.3	2 372.3	2 545.0	18.0	18.0	0.0
Somalia	Aug/Jul	431.5	99.3	530.8	579.5	12.1	6.0	6.1
United Rep. of Tanzania	Jun/May	810.6	47.9	858.5	810.0	183.5	1.6	181.9
Southern Africa		**2 875.7**	**153.5**	**3 029.2**	**2 479.0**	**623.9**	**18.4**	**605.5**
Lesotho	Apr/Mar	166.0	7.0	173.0	228.0	111.1	1.1	110.0
Madagascar	Apr/Mar	556.0	14.4	570.4	660.0	33.7	3.3	30.4
Malawi	Apr/Mar	210.0	2.0	212.0	111.0	52.1	11.1	41.0
Mozambique	Apr/Mar	1 179.0	75.0	1 254.0	975.0	273.7	0.9	272.8
Zimbabwe	Apr/Mar	764.7	55.1	819.8	505.0	153.3	2.0	151.3
ASIA		**14 074.1**	**172.3**	**14 246.4**	**15 735.5**	**2 375.1**	**18.0**	**2 357.1**
CIS in Asia		**3 977.1**	**1.0**	**3 978.1**	**3 853.2**	**785.5**	**0.0**	**785.5**
Kyrgyzstan	Jul/Jun	565.1	1.0	566.1	626.2	96.8	0.0	96.8
Tajikistan	Jul/Jun	1 022.0	0.0	1 022.0	1 060.0	204.3	0.0	204.3
Uzbekistan	Jul/Jun	2 390.0	0.0	2 390.0	2 167.0	484.4	0.0	484.4
Far East		**9 156.2**	**156.5**	**9 312.7**	**9 835.3**	**1 514.6**	**2.8**	**1 511.8**
Bangladesh	Jul/Jun	3 340.4	80.6	3 421.0	3 529.0	547.6	2.8	544.8
Bhutan	Jul/Jun	77.1	0.0	77.1	77.8	0.0	0.0	0.0
India	Apr/Mar	131.0	0.0	131.0	113.9	1.2	0.0	1.2
Mongolia	Oct/Sep	130.8	0.0	130.8	105.8	0.0	0.0	0.0
Nepal	Jul/Jun	491.8	30.0	521.8	571.8	0.3	0.0	0.3
Philippines	Jul/Jun	4 985.1	45.9	5 031.0	5 437.0	965.5	0.0	965.5
Near East		**940.8**	**14.8**	**955.6**	**2 047.0**	**75.0**	**15.2**	**59.8**
Afghanistan	Jul/Jun	940.8	14.8	955.6	2 047.0	75.0	15.2	59.8
CENTRAL AMERICA		**1 819.1**	**88.1**	**1 907.2**	**2 133.1**	**100.6**	**1.4**	**99.2**
Haiti	Jul/Jun	576.3	79.8	656.1	705.1	22.6	0.0	22.6
Honduras	Jul/Jun	804.5	5.5	810.0	950.0	37.5	0.1	37.4
Nicaragua	Jul/Jun	438.3	2.8	441.1	478.0	40.5	1.3	39.2
TOTAL		**22 270.0**	**674.4**	**22 944.4**	**24 282.1**	**3 313.2**	**63.4**	**3 249.8**

Source: FAO

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[2] Estimates based on information as of early November 2014.

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