



CROP PROSPECTS and FOOD SITUATION

Quarterly Global Report

Countries in need of
external assistance
for food

41

COUNTRIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD

FAO assesses that globally 41 countries, of which 31 in Africa, are in need of external assistance for food. Continuing conflicts remain the primary driver of high levels of severe food insecurity. Also adverse weather conditions and consequent impacts on agricultural production have acutely affected food availability and access.

| | |
|-----------------------------------|------|
| Asia | 0.6 |
| Africa | -6.2 |
| Central America and the Caribbean | 3.1 |
| South America | 13.2 |
| North America | -6.8 |
| Europe | 7.8 |
| Oceania | 16.1 |
| World | 1.2 |

WORLD

Cereal production 2019 over 2018

(yearly percentage change)

1.2%

REGIONAL HIGHLIGHTS

AFRICA Cyclone damage and rainfall deficits in 2019 caused significant production declines in Southern Africa, while in East Africa severe dryness reduced first season harvests and led to a degradation of rangeland conditions. Rainfall in West Africa is predicted to be below average, constraining production prospects.

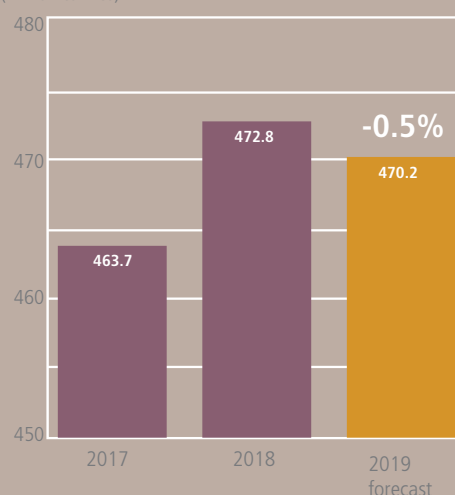
ASIA Cereal production in 2019 in Far East Asia is forecast to rise marginally, mostly resting on a larger harvest in India. Similarly, in the Near East, despite damaging floods and persistent conflicts, production is set to increase for the region as a whole. Cereal production is also seen to increase in CIS Asia.

LATIN AMERICA AND THE CARIBBEAN Significant production upturn is forecast in South America in 2019, compared to last year's reduced output. In Central America and the Caribbean, irregular rains have raised concerns over the maize harvests in all countries, except Mexico, where crop prospect are favourable.

LIFDCs
Cereal production 2019 over 2018

-0.5%

(million tonnes)



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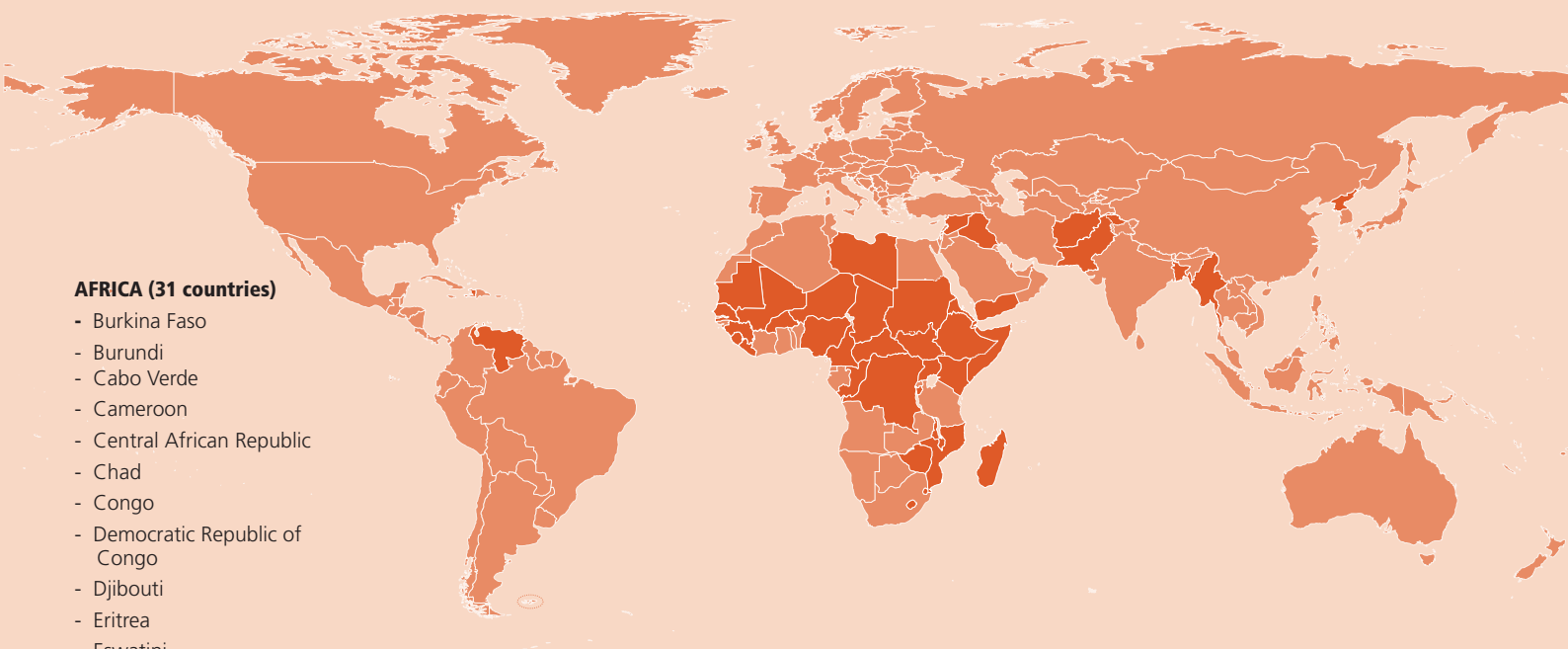
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COUNTRIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD



AFRICA (31 countries)

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

ASIA (8 countries)

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

LATIN AMERICA AND THE CARIBBEAN (2 countries)

- Haiti
- Venezuela

Source: GIEWS (disputed territories and boundaries in conformity with UN maps)**

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

AFRICA (31 COUNTRIES)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/ SUPPLIES

Central African Republic

Conflict, displacements and food supply constraints

- The Internally Displaced People (IDP) caseload in April 2019 was estimated at about 612 000 compared to about 641 000 in December 2018. This marks a slight improvement of the still very hostile and aggravated situation.
- Violent clashes and inter-communal tensions persist, fueling massive displacements, with severe negative impacts on food security.

Zimbabwe

Sharp drop in cereal production

- Food insecurity is expected to worsen significantly in 2019 on account of a weather-driven decrease in cereal production, considerable spikes in staple food prices and a poor economic environment, which has diminished income-generating opportunities.
- At the start of 2019 nearly 3 million people were assessed to be food insecure.

WIDESPREAD LACK OF ACCESS

Burundi

Civil insecurity, economic downturn and localized crop production shortfalls

- Disruptions to markets, farming activities and livelihoods, coupled with limited humanitarian assistance and declining food import capacity, continue to seriously affect food security conditions. The areas most affected by food insecurity are the westernmost parts of Makama, Rutana, Ruygi and Cankuzo provinces, where torrential rains in 2018 triggered floods and landslides resulting in crop losses.
- About 1.72 million people were estimated to be severely food insecure in late 2018 (latest available information).

Chad

Civil insecurity

- According to the "Cadre Harmonisé", about 641 000 people were projected to be food insecure between June and August 2019.
- Nearly 130 000 people remained internally displaced, almost entirely on account of the insurgency in the northeast. In addition, the country hosts about 462 000 refugees.

Democratic Republic of the Congo

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

- The total IDP caseload is estimated at 4.5 million. In addition, the country hosts 217 000 refugees from Rwanda, 172 000 from the Central African Republic, 100 000 from South Sudan and 45 000 from Burundi.
- An outbreak of the Ebola Virus Disease (EVD) has resulted in the loss of 1 571 lives (as of June). In addition, the EVD outbreak has disrupted market functions, adversely impacting households' access to food in the affected areas.

Djibouti

Impact of consecutive unfavourable rainy seasons on pastoral livelihoods

- About 150 000 people were estimated to be severely food insecure in 2018 (latest available information), in rural areas, due to consecutive unfavourable rainy seasons.

Eritrea

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

Ethiopia

Impact of drought on local livelihood systems

- An estimated 8.13 million people were estimated to be severely food insecure in early 2019, mainly in southeastern agro-pastoral areas due to the cumulative impact of the 2016/17 drought and the poor 2018 October-December "Deyr/Hageya" rains.

Niger

Civil insecurity

- According to the last "Cadre Harmonisé" analysis, about 1.2 million people in the June-August 2019 period were projected to be in need of immediate food assistance.
- Due to insecurity in the country and civil conflict in neighbouring countries, about 254 000 people are internally displaced and 178 000 reside as refugees.

Nigeria

Persisting conflict and insecurity

- According to the "Cadre Harmonisé" analysis, about 4.95 million people were projected to be in need of assistance between June and August 2019. In addition about 1.9 million people are internally displaced.

- Persisting civil insecurity continues to affect the main sources of food and income, limiting access to food for vulnerable households. The areas inaccessible to humanitarian interventions are facing the worst food security conditions.

South Sudan

Conflict, civil insecurity and severe economic downturn

- Despite sustained humanitarian assistance, food insecurity still affects large segments of the population. The number of severely food insecure people for the May-July 2019 period is estimated at 6.96 million, about 60 percent of the total population. The dire food security situation is a result of persisting insecurity, insufficient food supplies, an economic downturn, trade disruptions and high food prices.
- In addition, the internally displaced caseload was estimated at 1.78 million people in May 2019.

SEVERE LOCALIZED FOOD INSECURITY**Burkina Faso**

Civil insecurity in the north

- According to the last "Cadre Harmonisé" analysis, the number of people in need of food assistance were projected to be 687 000 in the June-August 2019 period, mainly due to civil insecurity in the north.
- An estimated 25 000 refugees, most of them from Mali, are living in the country, while 148 000 individuals are internally displaced.

Cabo Verde

Poor performance of the 2018 agro-pastoral cropping season caused difficult food situation

- According to the last "Cadre Harmonisé" analysis, about 9 000 people (approximately 2 percent of the total population) were projected to be in Phase 3: "Crisis" in the June-August 2019 period.

Cameroon

Civil strife and influx of refugees putting strain on host communities

- The number of refugees from the Central African Republic was estimated at 279 000 at the end of April 2019.

- Persisting civil strife since October 2016 has led to the displacement of about 444 000 people in the northwest and southwest Anglophone regions.

Congo

Influx of refugees straining the already limited resources of host communities

- An estimated 24 000 refugees from the Democratic Republic of Congo are sheltering in the country.

Eswatini

Localized production shortfalls

- The estimated decrease in cereal production, on account of adverse weather conditions, is expected to provoke an increase in the number of food insecure in 2019/20.
- An estimated 247 000 people were in need of humanitarian assistance between January and March 2019.

Guinea

Localized production shortfalls

- About 289 000 people were projected to be in need of food assistance during June-August 2019.

Kenya

Consecutive unfavourable rainy seasons

- About 2 million people are severely food insecure, mainly located in northern and eastern areas as a result of the cumulative impact of poor 2018 October-December "short-rains" and severe dryness during most of the 2019 March-May "long-rains" season.

Lesotho

Reduced cereal production

- The weather-driven decline in cereal production is expected to intensify the food insecurity situation in 2019/20.
- Approximately 273 000 people were estimated to be affected by food insecurity between December 2018 and February 2019.

Liberia

High food prices

- About 41 400 people are estimated to be in need of food assistance.

Libya

Civil insecurity

- The total number of people in need of humanitarian assistance is estimated at 0.82 million (11 percent of the population), of which 0.3 million persons

require food assistance. Refugees, asylum seekers and internally displaced are among the most vulnerable.

Madagascar

Reduced access to food in southern areas

- At the national level, an increase in the cereal harvest in 2019 is anticipated to improve the overall food security situation. However, in southern regions, which have been affected by consecutive years of low agricultural outputs, conditions are expected to remain poor.

Malawi

Localized production shortfalls and higher prices

- At the national level, cereal production increased in 2019, however, adverse weather conditions caused reduced harvests in southern districts which are anticipated to worsen the food security situation in these areas.
- The number of people assessed to be food insecure in the period from October 2018 to March 2019 was estimated at 3.3 million. This figure is expected to decline, but food assistance needs are anticipated to remain high in southern districts.

Mali

Persistent insecurity in the centre and north of the country

- The country is hosting approximately 27 000 refugees, while 106 000 internally displaced people and 74 000 returnees, also mainly depend on humanitarian assistance.
- About 549 000 people were projected to be in need of food assistance between June and August 2019, according to the last "Cadre Harmonisé" analysis, as a result of the persisting civil conflict.

Mauritania

Reduced availability of pasture

- According to the last "Cadre Harmonisé" analysis, about 607 000 people were projected to be in need of assistance from June to August 2019.
- About 60 000 refugees, mostly from Mali, reside in the country.

Mozambique

Cyclone damage and production shortfalls

- The impact of two major cyclones and severe dry conditions are expected to

result in a significant increase in food insecurity in central and southern regions.

- Cereal production is estimated to have fallen in 2019, reducing food availability for farming households, while higher prices are negatively affecting access to food.

Senegal

Rainfall deficits in localized areas

- According to the last "Cadre Harmonisé" analysis, about 341 000 people were projected to be in need of assistance between March and May 2019.
- An estimated 15 000 refugees, mostly from Mauritania, are residing in the country.

Sierra Leone

High food prices and low purchasing power

- About 124 000 people were projected to be severely food insecure during June-August 2019 period.

Somalia

Conflict, civil insecurity and consecutive unfavourable rainy seasons

- About 2.2 million people are estimated to be in need of emergency assistance, mainly agro-pastoral and pastoral communities affected by poor 2018 October-December "Deyr" rains and severe dryness during most of the 2019 April-June "Gu" season.

Sudan

Conflict, civil insecurity and soaring food prices

- The number of severely food insecure people was estimated at 5.76 million for the period January-March 2019, mainly IDPs and host communities in conflict affected areas. Vulnerable households affected by soaring food prices are also of concern.

Uganda

Localized crop production shortfalls and refugee influx

- About 0.5 million people are estimated to be severely food insecure in eastern Teso Region and northeastern Karamoja Region, mainly as a result of a sharply reduced 2018 crop production.
- About 838 000 refugees from South Sudan and about 352 000 refugees from the Democratic Republic of the Congo are hosted in camps and rely on humanitarian assistance.

ASIA (8 COUNTRIES)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/SUPPLIES

Syrian Arab Republic

Civil conflict

- About 5.5 million Syrians are food insecure and require some form of food assistance. In addition, between 500 000 and 800 000 people may be food insecure in Idleb Governorate.
- Although some international food assistance is being provided, Syrian refugees are also straining host communities' resources in neighbouring countries.

WIDESPREAD LACK OF ACCESS

Democratic People's Republic of Korea

Production shortfalls for main and secondary 2018 crops and economic downturn

- The 2018 aggregate food crop production was estimated to be well below the previous year's near-average level and the lowest since 2008/09 due to unfavourable weather conditions during the cropping season.
- According to the joint 2019 FAO/WFP rapid Food Security Assessment Mission, conducted from 29 March to 12 April, 10.1 million people (40 percent of the total population) are food insecure and in urgent need for food assistance.

Yemen

Conflict, poverty and high food and fuel prices

- In the December 2018-January 2019 period, some 15.9 million people (corresponding to 53 percent of the population) faced severe acute food insecurity (IPC Phase 3: "Crisis" and above), including 63 500 in IPC Phase 5: "Catastrophe".

SEVERE LOCALIZED FOOD INSECURITY

Afghanistan

Civil conflict and population displacement

- The Humanitarian Needs Overview (HNO) from December 2018 estimates that 13.5 million people are facing

IPC Phase 3: "Crisis" or worse levels of food insecurity, 6 million more than this time last year, of which 3.6 million are facing IPC Phase 4: "Emergency" levels. Continuing conflict, natural hazards and limited economic opportunities have increased the vulnerability of the poorest households, including subsistence farmers.

Bangladesh

Large numbers of refugees putting strain on host communities

- According to the latest figures from UNHCR, as of May 2019, about 910 000 Rohingya refugees from Myanmar were sheltering in Bangladesh, mainly in the Cox's Bazar District. Most refugees fled to Bangladesh following the resurgence of violence in Rakhine State in Myanmar in late August 2017.

Iraq

Civil conflict

- An estimated 1.8 million people remained internally displaced.
- Some 2.4 million people are vulnerable to food insecurity.

Myanmar

Conflict in parts of Kachin, Shan and Rakhine states

- As of May, an estimated 160 000 people were internally displaced in Rakhine and 106 500 in Kachin and northern Shan states due to ongoing conflict. These IDPs reside in temporary settlements, where they suffer from high levels of food insecurity and require humanitarian assistance to cover their basic needs.

Pakistan

Population displacement and localized cereal production shortfalls

- In parts of Balochistan and Sindh districts, the persisting dry conditions in 2018 and 2019 led to a reduction in cereal production and losses of livestock,

aggravating food insecurity and causing increased prevalence of acute malnutrition.

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

LATIN AMERICA AND THE CARIBBEAN (2 COUNTRIES)

WIDESPREAD LACK OF ACCESS

Venezuela

Severe economic crisis

- Amidst the severe and protracted economic crisis, the number of refugees and migrants from Venezuela is estimated at 3.7 million persons. They have settled in neighbouring countries in *South America and the Caribbean*. Humanitarian needs to assist refugees and migrants in host countries are significant.
- In the country, on account of hyper-inflation, purchasing power has been severely eroded, resulting in acute constraints on households' access to food. In addition, cereal production in 2019 is forecast to reduce from last year's already low level, mostly reflecting the lack of agricultural inputs.

SEVERE LOCALIZED FOOD INSECURITY

Haiti

Prolonged dry spells and high inflation

- About 2.6 million people were forecast to be in need of assistance between March and June 2019, due to the adverse impact of dry spells on cereal production (especially maize), coupled with high prices of imported goods, including rice, the staple food.

Terminology

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

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

* Unfavourable Production Prospects

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

[page 10 \(Africa\)](#)

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

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

GLOBAL CEREAL OVERVIEW

Cereal Supply and Demand Overview¹

Tighter cereal supplies in 2019/20 mostly on reduced maize production

The forecast for world cereal **production** in 2019 stands at 2 685 million tonnes, virtually unchanged from the forecast made in June, pointing to a 1.2 percent increase from 2018. The bulk of the year on-year growth is attributed to a higher production of wheat, currently forecast at nearly 771 million tonnes, up 5.6 percent from last year's level. The latest forecast for global wheat production includes an upward revision in India, where expected exceptional yields are now seen boosting production to a record high. By contrast, at 1 398 million tonnes, FAO's forecast for world production of coarse grains in 2019 is slightly lower than in 2018, as a reduced global maize output is expected to more than compensate for higher production of barley.

Most of the decline in maize production is foreseen to take place in the United States of America where an abnormal wet spring has delayed plantings and is seen to result in lower yields. Diminished crop prospects in China (Mainland) as well as in *East* and *Southern Africa* have further dented the overall maize production, more than countering a likely upturn in Argentina. FAO's forecast of world rice production (milled equivalent) stands at 516 million tonnes, almost unchanged from June and close to last year's high level. Expected year-on-year output decreases in China (Mainland), Brazil and the United States of America will likely be offset by expansions in India and Thailand.

World cereal **utilization** in 2019/20 is forecast up marginally from June, now set to exceed 2 708 million tonnes, 1.0 percent higher than in 2018/19. Total wheat utilization is forecast at 758 million tonnes, 1.5 percent higher than in 2018/19, with most of

Table 1. World cereal production¹

(million tonnes)

| | 2017 | 2018 estimate | 2019 forecast | Change: 2019 over 2018 (%) |
|--|----------------|------------------|------------------|-------------------------------|
| Asia | 1 202.3 | 1 200.2 | 1 208.1 | 0.7 |
| Far East | 1 100.2 | 1 102.3 | 1 103.3 | 0.1 |
| Near East | 67.4 | 64.0 | 69.7 | 9.0 |
| CIS in Asia | 34.7 | 34.0 | 35.1 | 3.3 |
| Africa | 188.4 | 191.9 | 180.1 | -6.2 |
| North Africa | 36.0 | 38.5 | 36.0 | -6.5 |
| West Africa | 59.3 | 63.1 | 60.9 | -3.5 |
| Central Africa | 4.5 | 4.6 | 4.7 | 2.7 |
| East Africa | 50.2 | 54.8 | 50.5 | -7.8 |
| Southern Africa | 38.4 | 30.9 | 27.9 | -9.8 |
| Central America and the Caribbean | 44.0 | 42.3 | 43.6 | 3.1 |
| South America | 215.5 | 195.9 | 221.6 | 13.2 |
| North America | 494.2 | 496.7 | 462.9 | -6.8 |
| Europe | 523.8 | 495.7 | 534.4 | 7.8 |
| European Union | 309.7 | 293.2 | 316.6 | 8.0 |
| CIS in Europe | 202.6 | 187.3 | 203.2 | 8.5 |
| Oceania | 34.6 | 29.9 | 34.7 | 16.1 |
| World | 2 702.7 | 2 652.6 | 2 685.4 | 1.2 |
| Developing countries | 1 587.0 | 1 572.5 | 1 595.8 | 1.5 |
| Developed countries | 1 115.6 | 1 080.1 | 1 089.7 | 0.9 |
| - wheat | 759.7 | 730.2 | 770.8 | 5.6 |
| - coarse grains | 1 433.6 | 1 405.4 | 1 398.3 | -0.5 |
| - rice (milled) | 509.4 | 517.0 | 516.3 | -0.1 |

Note: Totals and percentage change computed from unrounded data.

¹ Includes rice in milled terms.

¹ Based on the [FAO Cereal Supply and Demand Brief](#) released on 6 June 2019.

the anticipated growth in food use. By contrast, the year-on-year growth in total consumption of coarse grains is trimmed further, to only 0.6 percent, following this month's downward revisions to overall maize utilization in several countries, most notably in Brazil and Mexico. World rice utilization in 2019/20 is pegged at 518 million tonnes, up 1.4 percent from 2018/19, with food intake in *Asia* and *Africa* accounting for the bulk of the expected expansion.

The forecast for world cereal **stocks** by the close of the 2019 seasons has been lowered slightly since June to 828 million tonnes, now some 27 million tonnes or 3.2 percent, below the opening level with maize accounting for most of the decrease. Total coarse grain stocks are anticipated to decline by 9.1 percent to 371 million tonnes in 2019/20, of which maize inventories are forecast to drop to around 311 million tonnes, down as much as 12.4 percent (44 million tonnes) from their opening level with most of the reduction concentrated in China (Mainland) and the United States of America. However, global wheat stocks are set to expand by 4.5 percent (12 million tonnes) in 2019/20, underpinned by expected increases in China (Mainland), the European Union and the Russian Federation. By contrast, FAO has lowered its forecast of global rice stocks in 2019/20 by 400 000 tonnes since the previous estimate of June, to 179 million

tonnes, reflecting downward adjustments to inventories in the Philippines and the United States of America. The latest forecast puts total rice stocks at 1.1 percent below their record opening level. Overall, while the stocks-to-use ratio for cereals in 2019/20 is expected to remain at a relatively a high level of 29.6 percent, for coarse grains it is forecast to drop to a six-year low of 24.7 percent.

The forecast for world **trade** in cereals in 2019/20 has been raised slightly since June to 415 million tonnes, now up 2 percent (8.3 million tonnes) from 2018/19. The expected expansion primarily reflects a likely strong rebound in wheat trade, which is forecast to rise by 3.9 percent from the 2018/19 reduced level, in view of the potential for larger exports by Australia, the European Union and the Russian Federation. While world trade in coarse grains is likely to remain close to the 2018/19 estimated level, the European Union maize imports are forecast to decline sharply year on year, on account of large carryovers from the 2018/19 season. Regarding maize exports, this season's tighter availability in the United States of America is likely to be largely compensated by ample supplies in *South America*. World rice trade in 2019 is still expected to contract by as much as 3 percent, while FAO's tentative forecast for rice trade in 2020 points to a rebound, possibly reaching an all-time high level of 48.9 million tonnes.

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

| | 2017/18 | 2018/19 estimate | 2019/20 forecast | Change: 2019/20 over 2018/19 (%) |
|---|----------------|---------------------|---------------------|-------------------------------------|
| Production ¹ | 2 702.7 | 2 652.6 | 2 685.4 | 1.2 |
| Developing countries | 1 587.0 | 1 572.5 | 1 595.8 | 1.5 |
| Developed countries | 1 115.6 | 1 080.1 | 1 089.7 | 0.9 |
| Trade ² | 422.3 | 406.8 | 415.1 | 2.0 |
| Developing countries | 141.1 | 130.3 | 146.1 | 12.1 |
| Developed countries | 281.2 | 276.5 | 269.0 | -2.7 |
| Utilization | 2 657.3 | 2 681.0 | 2 708.2 | 1.0 |
| Developing countries | 1 745.8 | 1 771.2 | 1 794.1 | 1.3 |
| Developed countries | 911.5 | 909.8 | 914.1 | 0.5 |
| Per caput cereal food use (kg per year) | 149.3 | 149.3 | 149.3 | 0.0 |
| Stocks ³ | 871.3 | 855.3 | 828.1 | -3.2 |
| Developing countries | 664.1 | 659.4 | 647.0 | -1.9 |
| Developed countries | 207.1 | 195.9 | 181.1 | -7.5 |
| World stock-to-use ratio (%) | 32.5 | 31.6 | 29.6 | -6.2 |

Note: Totals and percentage change computed from unrounded data.

¹ Data refer to calendar year of the first year shown and includes 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.

LOW-INCOME FOOD-DEFICIT COUNTRIES' FOOD SITUATION OVERVIEW²

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

(million tonnes, rice in milled basis)

| | 2017/18 | 2018/19 estimate | 2019/20 forecast | Change: 2019/20 over 2018/19 (%) |
|---|--------------|------------------|------------------|----------------------------------|
| Cereal production¹ | 463.7 | 472.8 | 470.2 | -0.5 |
| excluding India | 246.3 | 250.4 | 247.1 | -1.3 |
| Utilization | 503.8 | 516.7 | 520.3 | 0.7 |
| Food use | 382.2 | 391.0 | 395.2 | 1.1 |
| excluding India | 215.1 | 221.1 | 223.9 | 1.3 |
| Per caput cereal food use (kg per year) | 149.5 | 150.5 | 149.7 | -0.5 |
| excluding India | 152.0 | 153.0 | 151.7 | -0.8 |
| Feed | 55.1 | 55.9 | 55.8 | -0.3 |
| excluding India | 39.9 | 40.3 | 39.9 | -1.1 |
| End of season stocks² | 97.3 | 98.9 | 97.4 | -1.5 |
| excluding India | 60.5 | 55.6 | 51.2 | -8.0 |

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.

Table 4. Cereal production¹ of LIFDCs

(million tonnes)

| | 5-year average | 2018 estimate | 2019 forecast | Change: 2019 over 2018 (%) |
|--|----------------|---------------|---------------|----------------------------|
| Africa (37 countries) | 100.6 | 108.3 | 101.7 | -6.1 |
| East Africa | 51.6 | 54.8 | 50.5 | -7.8 |
| Southern Africa | 10.1 | 10.5 | 9.7 | -8.0 |
| West Africa | 34.2 | 38.4 | 36.8 | -4.3 |
| Central Africa | 4.7 | 4.5 | 4.6 | 2.7 |
| Asia (11 countries) | 351.8 | 363.4 | 367.5 | 1.1 |
| CIS in Asia | 10.6 | 9.6 | 10.4 | 8.2 |
| Far East | 332.5 | 347.4 | 349.4 | 0.6 |
| - India | 248.0 | 261.5 | 262.4 | 0.3 |
| Near East | 8.8 | 6.5 | 7.7 | 19.3 |
| Central America and the Caribbean (2 countries) | 1.0 | 1.1 | 1.1 | 0.1 |
| Oceania (1 country) | 0.0 | 0.0 | 0.0 | 0.0 |
| LIFDCs (51 countries) | 453.5 | 472.8 | 470.2 | -0.5 |

Note: Totals and percentage change computed from unrounded data.

The five-year average refers to the 2014-2018 period.

¹ Includes rice in milled terms.

Production in Low-Income Food-Deficit Countries (LIFDCs) forecast to fall in 2019

FAO's cereal production forecast for LIFDCs in 2019 stands at 470.2 million tonnes, a marginal decrease compared to the previous year's bumper output, but still well above the average.

The yearly decline mainly reflects downgraded production forecasts in several *East and Southern African* countries. Extreme weather events and prolonged periods of rainfall deficits cut outputs in **Mozambique** and **Zimbabwe** for a second consecutive year, with the output in Zimbabwe, in particular, expected to fall to a well below-average level. However, more beneficial rains were observed in **Madagascar** and **Malawi**, where average harvests are forecast. In *East Africa*, drought conditions earlier in the year depressed first season harvests and poor rains at the start of the main cropping season have adversely affected planting activities and crop establishment, lowering production expectations in several countries. The largest year-on-year decreases, in relative terms, are forecast in **Kenya**, **Somalia** and **the Sudan**, where harvests are anticipated at below-average levels. In *West Africa*, unfavourable weather forecasts have diminished crop production prospects, while in *Central Africa*, persistent conflict and civil unrest have continued to undermine agricultural productive capacities, curtailing expectations for the 2019 harvests.

In *Asia*, the production outlook for the 2019 wheat crop in the *Far East* subregion is mixed. In **India**, reflecting record high yields that more than offset

² The inclusion of a country in the Low-Income Food-Deficit Countries (LIFDCs) group is based on three criteria: 1) the level of the annual per capita Gross National Income (GNI); 2) the net food trade position; and 3) self exclusion (when countries that meet the first two criteria request to be excluded from the category). The current (2018) list of the LIFDCs includes 51 countries, one less than in the previous list but with some changes. For full details see: www.fao.org/countryprofiles/lifdc

the impact of a contraction in plantings, wheat production is estimated to increase in 2019 to an above-average level. By contrast, in **Pakistan**, below-average irrigation water supplies and reduced precipitation at the start of the season resulted in a production decline. In the *Near East*, notwithstanding the generally favourable weather conditions, ongoing conflict and lack of inputs in **the Syrian Arab Republic** and **Yemen** continued to severely debilitate the agriculture sector, curtailing cereals outputs.

Larger import needs in weather stricken East and Southern Africa

In response to the overall trend in production in 2019, aggregate cereal imports by LIFDCs in the 2019/20 marketing year are forecast at 73.6 million

tonnes, an increase of about 3.3 million tonnes on a yearly basis. The current projected increase follows a reduction in import quantities in 2018/19, which was the first year-on-year decrease since 2012/13.

Most of the expected increase in 2019/20 is associated with larger import requirements in *Southern Africa* as most countries seek to bolster their supplies to compensate for the weather-reduced harvests. Similarly, larger import volumes are forecast in most *East African* countries, particularly in **Kenya**, with import forecast to rise from last year's below-average level. Decreases in import quotations are forecast in several *Asian* countries, notably **Bangladesh**, where a recovery in production buttressed national availabilities, lessening the need for external supplies.

Table 5. Cereal imports of LIFDCs
(thousand tonnes)

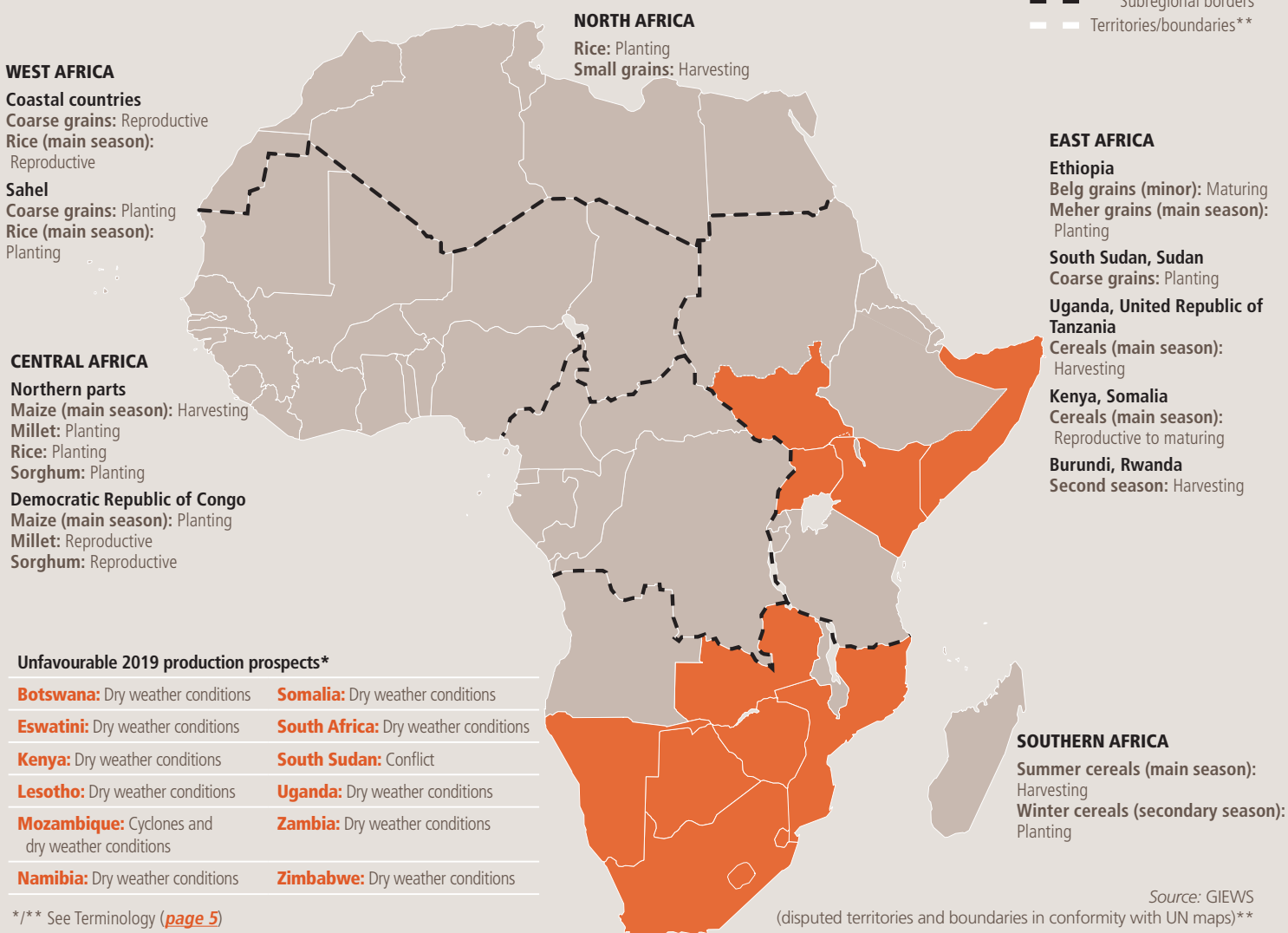
| | 2017/18 or 2018 | 2018/19 or 2019 | | 2019/2020 or 2020 | |
|--|-----------------|-----------------|-------------------|---------------------------------|-------------------|
| | Actual imports | Import forecast | of which food aid | Import requirement ¹ | of which food aid |
| Africa (37 countries) | 28 784 | 27 271 | 1 008 | 30 531 | 1 173 |
| East Africa | 12 202 | 11 198 | 698 | 12 109 | 828 |
| Southern Africa | 2 746 | 2 347 | 15 | 3 628 | 19 |
| West Africa | 11 321 | 11 149 | 139 | 12 095 | 170 |
| Central Africa | 2 515 | 2 577 | 156 | 2 698 | 156 |
| Asia (11 countries) | 44 667 | 42 132 | 986 | 41 580 | 824 |
| CIS in Asia | 4 857 | 4 944 | 0 | 4 870 | 0 |
| Far East | 29 308 | 25 641 | 359 | 25 289 | 197 |
| Near East | 10 502 | 11 547 | 627 | 11 422 | 627 |
| Central America and the Caribbean (2 countries) | 1 390 | 1 395 | 10 | 1 460 | 10 |
| Oceania (1 country) | 64 | 64 | 0 | 62 | 0 |
| LIFDC (51 countries) | 74 905 | 70 862 | 2 004 | 73 633 | 2 007 |

Note: Totals computed from unrounded data.

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

REGIONAL REVIEWS

AFRICA

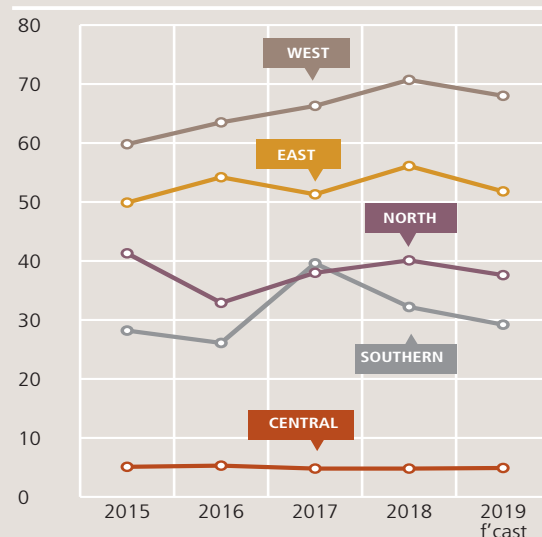


Source: GIEWS
(disputed territories and boundaries in conformity with UN maps)**

Africa Production Overview

Aggregate cereal production in Africa is forecast at 192 million tonnes in 2019, close to the five-year average but down from the good outturn in 2018. The yearly decrease mainly concerns expected declines in coarse grain production in East African and Southern African countries, where adverse weather conditions have resulted in reduced plantings and lowered yields.

In West Africa, expectations of unfavourable rainfall have led to a decline in the production forecast for the 2019 crops compared to the exceptional harvests in 2018, but the outputs are still anticipated to stay above average. Similarly, in North Africa, with most of the main wheat crop harvested, production is set to remain above average, although slightly down year on year as dry weather conditions reduced yields in parts of the subregion. In Central Africa, the agriculture sector continues to be debilitated by conflicts in several countries, which are expected to keep outputs stagnant in 2019 and close to the average.

Cereal production
(million tonnes)

NORTH AFRICA



Cereal harvests in 2019 expected to be close to average

In **Egypt**, **Libya** and **Morocco**, harvesting of the 2019 winter wheat crop, the most important winter grain, generally concluded in mid-June and finished slightly later in **Tunisia**. In **Algeria**, the wheat harvest takes place from mid-June up to mid-August. In all countries, a comparatively minor winter barley crop is harvested before wheat. With the exception of **Egypt**, where the use of irrigation systems guarantee a relatively stable cereal output, harvests in the rest of the subregion vary greatly year to year depending on rainfall volumes and distribution.

Abundant precipitation in autumn 2018 in the main growing areas of the subregion was conducive for initial crop development and positively impacted the early production outlook. Between January and March 2019, while generally average rains maintained favourable crop prospects elsewhere, dry conditions emerged in parts of **Morocco** and western **Algeria**. The dry conditions in **Algeria** were alleviated by above-average rainfall from March through April. In **Morocco**, however, below-average rainfall since December, combined with above-average temperatures, constrained yield potential particularly in the northeast (Oriental) and central parts of the country. Expectations of a bumper output in

Tunisia were curbed slightly by heavy rains towards the end of the season, which resulted in water logging in the north and central regions. High temperatures also increased incidences of fires that destroyed crops before the harvest. In **Egypt**, no major problems were reported. In **Libya**, conflict-related constraints, which have caused a lack of inputs or inflated prices, have curtailed production capacities.

At 37.6 million tonnes, the subregion's cereal production in 2019 is forecast to decrease by 6.2 percent from the bumper crop harvested in 2018, but remain close to the average. The decrease compared to last year is driven mostly by a below-average harvest in **Morocco**, where preliminary information points to cereal outturn of about 6.4 million tonnes, more than one-third lower than the previous year's exceptional harvest and about 25 percent below average. In **Algeria**, an exceptional harvest of 6.1 million tonnes, slightly above the already bumper 2018 harvest, is forecast. In **Tunisia**, estimates for the 2019 cereal production point to a bumper cereal crop of almost 2.2 million tonnes, 57 percent above the 2018 weather-stricken harvest and over 40 percent above the average, although heavy rains towards the end of the season could lead to a slight downward revision. In **Egypt**, the 2019 cereal production is expected at a near-average level, a slight recovery compared to the lower production obtained last year. The moderate year-on-year increase is mainly associated with the forecast increase in wheat production, which was supported by a widespread application of improved wheat seed varieties.

All *North African* countries rely heavily on wheat imports from the international

market to cover their domestic consumption needs. With a close-to-average 2019 harvest, the subregion's aggregate cereal import requirement (of which wheat accounts for about 60 percent) for the 2019/20 marketing year (July/June) is estimated at approximately 50 million tonnes, 3 percent above the import requirement of previous year and the previous five-year average, mainly reflecting population growth.

Seasonal increases in food inflation during Ramadan

Food inflation rates across the subregion in spring 2019 (actual months depend on data availability), did not exhibit large variations on a monthly basis, but for countries with information available for May 2019, increased food demand during the holy month of Ramadan contributed to seasonal price increases. In **Tunisia**, the food inflation rate in May 2019 increased to 7.3 percent, up from 6.6 percent recorded in April 2019. In **Egypt**, annual food price inflation increased from 13 percent in April 2019 to 15 percent in May 2019, still down from over 20 percent recorded in October 2018 when increased prices of energy and transportation sharply pushed up food inflation. Up to March 2019 (latest available information), the food inflation rate in **Algeria** remained stable at about 3 percent.

Negative food inflation rates were recorded in **Morocco** (-1.9 percent in April 2019, down from the already low levels of around 3 percent in spring 2018) and **Libya** (-3.7 percent in February 2019, latest information available, significantly down from over 40 percent registered in January 2018). The strong decline in **Libya** mostly reflects a strengthening of the national currency.

Table 6. North Africa cereal production
(million tonnes)

| | Wheat | | | Coarse grains | | | Rice (paddy) | | | Total cereals | | | |
|---------------------|-------------|-------------|-------------|---------------|-------------|-------------|--------------|------------|-------------|---------------|-------------|-------------|-----------------------|
| | 5-yr Avg. | 2018 estim | 2019 f'cast | 5-yr Avg. | 2018 estim | 2019 f'cast | 5-yr Avg. | 2018 estim | 2019 f'cast | 5-yr Avg. | 2018 estim | 2019 f'cast | Change: 2019/2018 (%) |
| North Africa | 19.2 | 21.3 | 19.8 | 12.7 | 13.8 | 12.8 | 6.0 | 5.0 | 5.1 | 38.0 | 40.1 | 37.6 | -6.2 |
| Algeria | 2.8 | 3.9 | 4.0 | 1.2 | 2.0 | 2.1 | 0.0 | 0.0 | 0.0 | 4.0 | 6.0 | 6.1 | 1.7 |
| Egypt | 9.1 | 8.8 | 9.2 | 8.6 | 8.3 | 8.4 | 5.9 | 4.9 | 5.0 | 23.6 | 22.0 | 22.6 | 3.0 |
| Morocco | 6.1 | 7.3 | 4.9 | 2.4 | 3.1 | 1.4 | 0.0 | 0.1 | 0.1 | 8.5 | 10.5 | 6.4 | -38.8 |
| Tunisia | 1.1 | 1.1 | 1.5 | 0.5 | 0.4 | 0.7 | 0.0 | 0.0 | 0.0 | 1.6 | 1.4 | 2.2 | 56.8 |

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2014-2018 period.

WEST AFRICA



Unfavourable rainfall forecasts diminish production prospects for 2019 crops

Planting of the 2019 main season maize crop, to be harvested from July, was completed in May in southern parts of the coastal countries along the Gulf of Guinea. Planting of coarse grain crops continued in the Sudanian zone, including **Ghana, Cote d'Ivoire**, southern **Mali** and **Burkina Faso**, north-central **Nigeria**, **Benin** and **Togo**, where the rainy season began in May. In the Sahel belt, central **Burkina Faso**, **Mali**, **Chad**, **Niger** and the extreme southeast of **Senegal**, planting operations for the main season crops, to be harvested from October, are underway and are expected to be finalized in July. Sowing of the main season paddy crop continued in June in **Sierra Leone**, **Ghana** and **Nigeria**, while the second season rice is being harvested in **Senegal**. Seasonal rainfall in June was well distributed

and, with no major outbreaks of pests and diseases, facilitated normal crop development. However, despite the timely start of seasonal rains, prospects for the 2019 cereal output remain uncertain. The latest weather forecast for the entire rainy season (June–October) across the Sahel and Soudanian zones, released by the Forum of Seasonal Agro-Climatic in April, points to below-average rainfall and further indicates likely spells of prolonged dry periods and an early cessation of rains in coastal areas. Rainfall deficits are also expected in **Chad**, **Niger** and **Nigeria**. If this forecast materializes, the weather conditions are expected to adversely impact agricultural production, the availability of pasture and water for livestock, and consequently pastoralists' livelihoods.

In addition to unfavourable weather forecasts, heightened tensions and ongoing conflicts in northeast **Nigeria**, the Lake Chad Basin, northern and central **Mali**, northeastern **Burkina Faso** and western **Niger**, have increasingly limited access to farmland and hampered agricultural activities, with negative effects on the planted area and yield prospects.

Overall, the 2019 subregional grain output is forecast at 68 million tonnes, down from the 2018 record but still above the five-year average.

Coarse grains prices generally stable due to good availabilities

Although cereal supplies have declined seasonally in recent months, markets are generally well stocked in most countries as a result of good harvests in 2018, as well as regular internal and cross-border trade flows, easing the supply pressure on prices. Furthermore, despite the Ramadan period, which usually heightens demand for food, the availability of off-season products and reduced institutional purchases have contributed to keeping prices stable in the second quarter of 2019 and sustained lower year-on-year levels in **Burkina Faso**, **Chad**, **Mali** and **Niger**. By contrast, prices are atypically high in conflict-affected zones of the Lake Chad Basin and the northern region of Chad (Tibesti, Borkou and Ennedi), northern and central Mali and the Liptako-Gourma Region (Burkina Faso, Mali and Niger).

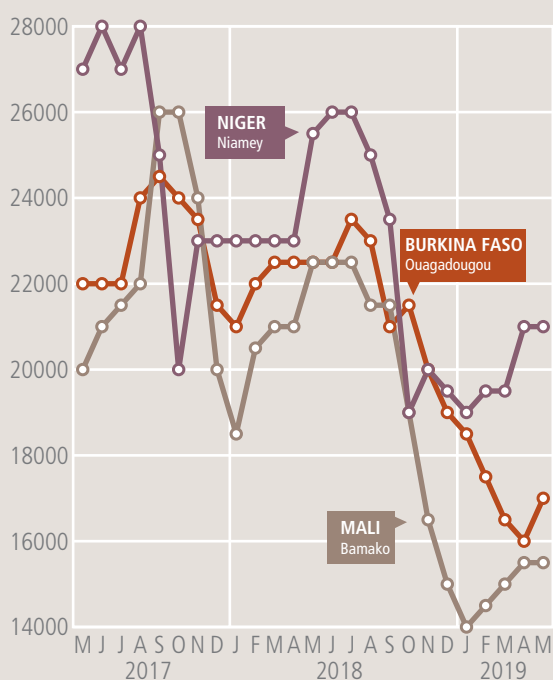
In most coastal countries along the Gulf of Guinea, prices of coarse grains remained also stable or increased seasonally in the second quarter of 2019. In **Ghana**, prices of maize generally firmed up in May following seasonal patterns. Good market availabilities capped stronger increases, while in the capital, Accra, prices declined. In **Benin**, prices of maize increased in May in line with seasonal trends, but remained well below their year-earlier levels, while they remained mostly stable in **Togo** in

Table 7. West Africa cereal production
(million tonnes)

| | Coarse grains | | | Rice (paddy) | | | Total cereals ¹ | | | |
|--------------------|---------------|-------------|-------------|--------------|-------------|-------------|----------------------------|-------------|-------------|-----------------------|
| | 5-yr Avg. | 2018 estim | 2019 f'cast | 5-yr Avg. | 2018 estim | 2019 f'cast | 5-yr Avg. | 2018 estim | 2019 f'cast | Change: 2019/2018 (%) |
| West Africa | 45.7 | 50.1 | 48.8 | 18.1 | 20.5 | 19.1 | 64.0 | 70.7 | 68.0 | -3.8 |
| Burkina Faso | 4.1 | 4.8 | 4.3 | 0.3 | 0.4 | 0.4 | 4.5 | 5.2 | 4.7 | -9.9 |
| Chad | 2.5 | 2.8 | 2.6 | 0.3 | 0.3 | 0.3 | 2.8 | 3.0 | 2.9 | -5.6 |
| Ghana | 2.3 | 2.7 | 2.4 | 0.7 | 0.8 | 0.9 | 3.0 | 3.5 | 3.3 | -3.3 |
| Mali | 6.1 | 7.0 | 7.1 | 2.6 | 3.2 | 2.8 | 8.8 | 10.2 | 9.9 | -2.9 |
| Niger | 5.5 | 6.0 | 5.7 | 0.1 | 0.1 | 0.1 | 5.7 | 6.1 | 5.9 | -3.8 |
| Nigeria | 18.3 | 19.2 | 19.3 | 7.8 | 8.9 | 8.0 | 26.1 | 28.2 | 27.3 | -3.2 |

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2014–2018 period.

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

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

Source: Afrique Verte.

April. In **Nigeria**, prices of coarse grains were relatively steady or declined in some markets in April as a result of adequate market supplies from the dry season harvest and destocking of last year's crop by farmers. Prices remained well below the

high levels of the previous two years, while they were relatively higher in the northeast of the country due to restricted market activities, on account of the Boko Haram conflict.

Crisis conditions prevail in some countries as a result of continued insecurity and civil conflict

Food security conditions are generally favourable across the subregion reflecting satisfactory food availability and access, on account of the average to above-average cereal outputs in 2018, adequate flows of imports, relatively stable food prices and widespread interventions by governments and partners institutions, which includes cash transfers and the free distribution of food. The aggregate number of food insecure people in need of urgent assistance has declined for the second

consecutive year. According to the March 2019 "Cadre Harmonisé" analyses, about 4.8 million people were estimated to be in need of food assistance (CH Phase 3: "Crisis" and above) between March and May 2019, a significant decrease from the

7.2 million food insecure people estimated in the March-May 2018 period. The number of food insecure is, however, expected to rise to 9.6 million people in the June-August 2019 period, if appropriate measures and responses are not implemented; nevertheless, this number would still remain below the 10.6 million people estimated to have needed food assistance in the corresponding period of 2018.

In several countries, food insecurity, however, remains a major concern due to persisting civil insecurity and armed banditry, which continue to disrupt markets and households' main livelihood activities and caused significant displacement of people. The most affected areas include, northeastern **Nigeria**, central and northern **Mali**, eastern **Niger**, northern **Burkina Faso**, the Liptako Gourma Region (that traverses **Burkina Faso**, **Mali** and **Niger**) as well as the Lake Chad Basin and Tibesti Region in **Chad**. According to the United Nations Office for the Coordination of Humanitarian Affairs (UNOCHA), about 300 000 people are internally displaced in Liptako-Gourma Region, while about 100 000 reside as refugees as of May 2019. In addition, as a result of the ongoing civil insecurity in the Sudan, the Central African Republic and Libya, over 400 000 people remained displaced in **Chad**, mainly as refugees.

CENTRAL AFRICA



Conflict continues to negatively affect production prospects in most countries

In the central and southern parts of Cameroon and the Central African Republic, harvesting of the 2019 main season maize crop is expected to begin in July. In **Cameroon**, rainfall from March to May were generally adequate. However, crop production was adversely impacted in the Far North Region as well as in the Northwest and Southwest Anglophone regions due to persisting civil unrest that disrupted agricultural activities. In **the Central African Republic**, the timely start of seasonal rains in March in bi-modal rainfall areas of the centre and the south, facilitated planting of the 2019 maize crop. Despite favourable weather conditions since the beginning of the season, the area planted is estimated to have dropped significantly from last year's level following the abandonment of a substantial number of farms as a result of the ongoing civil insecurity. In **the Democratic Republic of the Congo**, harvesting of the 2019 maize crop was concluded in May in southern uni-modal rainfall areas, while the secondary season maize harvest is underway in central and northern bi-modal rainfall areas. Although crops benefited from adequate rains during the season in the main producing areas, the ongoing

conflict in the Kasai, North Kivu, South Kivu, Ituri and Tanganyika regions continued to limit farmers' access to crop growing areas adversely impacting on plantings. In the northern region of **the Republic of the Congo** and in **Gabon**, harvesting of the second season 2019 maize crops started in May and production is expected to be slightly above average due to adequate cumulative rainfall in most departments.

Food prices increased in recent months

In **the Central African Republic**, staple food prices have risen significantly in recent months due to the ongoing lean season (April to July) and the blocking of the border with Cameroon, that lowered import flows. The situation is particularly worrying in the localities of Zemio and Obo, which face shortages of food staples, such as maize, beans and rice. In **the Democratic Republic of Congo**, prices of cassava and rice have also risen considerably in recent months due to limited supplies in local markets on account of low production in the previous cropping season and increased deterioration in transport infrastructure. In **Cameroon**, food prices are increasing as the persisting conflict has caused a significant decrease in international trade as well as severely disrupting internal flows of commodities.

Food security situation remains alarming in the Central African Republic, the Democratic Republic of the Congo and parts of Cameroon due to persisting conflict

The persisting conflict in Cameroon, the Central African Republic and the Democratic Republic of the Congo continues to cause massive population displacements as well as hinder food

availability and access. In **the Central African Republic**, widespread insecurity remains the leading cause of severe food insecurity. According to UNOCHA, as of late April 2019, the total number of internally displaced persons was estimated at 612 000 and about two-thirds of them living with host communities, while the rest reside in IDP sites. Moreover, the conflict is also restricting the delivery of humanitarian assistance and disrupting agricultural activities. In **the Democratic Republic of the Congo**, civil conflict has continued to severely damage local livelihood systems and caused massive population displacements in eastern and southern areas. Furthermore, there has been a major humanitarian crisis in the Kasai Region since September 2016. Most households in North Kivu, South Kivu, Tanganyika, Ituri, Kasai, Central Kasai and Ecuador regions, face serious food access constraints. As of February 2019, the total IDP caseload in the country is estimated at 4.5 million. A significant portion of them live with host communities, whose limited resources are put under additional stress, heightening their risk of falling into unsustainable coping mechanisms and livelihood strategies. The country also hosts about 543 000 refugees from Burundi, Central African Republic, Rwanda and South Sudan.

Moreover, the Ebola virus disease outbreak continues to be a growing and serious concern with over 2 000 cases reported in the country as of June 2019. In **Cameroon**, the food security situation has deteriorated in recent months due to violence and clashes in the Northwest and Southwest Anglophone regions. As of May 2019, about 444 000 people in these areas have been displaced, similar to the IDP levels recorded in the beginning of the year.

Table 8. Central Africa cereal production
(million tonnes)

| | Coarse grains | | | Rice (paddy) | | | Total cereals ¹ | | | |
|----------------------------------|---------------|------------|-------------|--------------|------------|-------------|----------------------------|------------|-------------|-----------------------|
| | 5-yr Avg. | 2018 estim | 2019 f'cast | 5-yr Avg. | 2018 estim | 2019 f'cast | 5-yr Avg. | 2018 estim | 2019 f'cast | Change: 2019/2018 (%) |
| Central Africa | 4.3 | 4.1 | 4.2 | 0.6 | 0.7 | 0.7 | 5.0 | 4.8 | 4.9 | 2.4 |
| Cameroon | 2.9 | 2.7 | 2.8 | 0.3 | 0.4 | 0.4 | 3.2 | 3.1 | 3.2 | 3.5 |
| Central African Republic | 0.1 | 0.1 | 0.1 | 0.0 | 0.0 | 0.0 | 0.1 | 0.1 | 0.2 | 1.1 |
| Democratic Republic of the Congo | 1.2 | 1.2 | 1.2 | 0.3 | 0.3 | 0.3 | 1.6 | 1.5 | 1.6 | 0.5 |

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2014-2018 period.

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

EAST AFRICA



Poor rains affect 2019 first season crops

After a late onset of seasonal rains, planting of the 2019 main season crops was concluded in April in **Somalia** ("Gu"), **Kenya** ("long-rains"), southern **South Sudan**, northern and northeastern **United Republic of Tanzania** ("Masika"), while it was recently completed in the Karamoja Region in northeastern **Uganda**. The March-May rainy season has been characterized by exceptional dryness during March and in the first two dekads of April, with cumulative precipitation estimated to be about 80 percent below the average across most of the Horn of Africa. The unfavourable weather conditions, among the driest on record in several areas, resulted in germination failures and crop wilting, with a negative impact on the planted area and yields. Above-average precipitation in late April and May reduced moisture deficits and marginally improved vegetation conditions, but damage to crops was irreversible in several cropping areas. In **Somalia**, "Gu" rains started in late April, after a three-week delay, severely affecting crop germination and establishment in southern key cereal producing areas. Abundant precipitation

in May did not significantly improve crop prospects as they occurred too late during the growing season and the "Gu" harvest is consequently expected to be 50 percent below average. In **Kenya**, seasonal rains in March and April were generally very poor, with the most severe rainfall deficits recorded in southeastern and coastal marginal agriculture livelihood zones. Improved rains in May partly offset moisture deficits and improved vegetation conditions. If rains, as forecasted, will be above-average between June and September in major southwestern growing areas, a substantial recovery of water-stressed crops is still possible, as the growing season continues up to October. By contrast, in southeastern and coastal marginal agriculture areas, damage to crops is irreversible and the harvest is forecast to be about 50 percent below average. In southern bi-modal rainfall areas of **South Sudan**, planting of the first season crops began in April with a one-month delay, due to a late onset of seasonal rains. Adequate precipitation in May and June benefited crop germination and current vegetation conditions are favourable. Localized improvements of the security situation encouraged some voluntary returns of displaced farmers, but the planted area remains well below the pre-conflict levels as insecurity persists in several areas and still constrains access to fields. In bi-modal rainfall areas of northeastern **United Republic of Tanzania**, "Masika" rains were erratic and below average in several areas and crop production shortfalls are expected in Arusha, Kilimanjaro and Tanga regions. In the Karamoja Region in northeastern **Uganda**, the April-September rains did not fully establish until mid-May, substantially delaying planting. Subsequently, torrential

rains in the first dekad of June offset the moisture deficits, but excessive soil moisture hindered ploughing and sowing activities in some areas. As a result, the planted area is estimated to be below average.

In western **Ethiopia**, **Eritrea**, central and northern **South Sudan** and **the Sudan**, planting of the 2019 main season crop is underway under generally favourable weather conditions, except in parts of western Ethiopia, where below-average rainfall in May and early June has delayed planting activities and adversely affected the establishment of early planted crops. According to the latest weather forecast by the Greater Horn of Africa Climate Outlook Forum (GHACOF), the June-to-September rains are expected to be average to above average in most of **Uganda**, **the Sudan** and **Eritrea**, as well as western **Kenya**, and central and northwestern **South Sudan**. By contrast, weather conditions are likely to be drier than usual in western and central **Ethiopia**, in southern and eastern **South Sudan**, in parts of South Darfur and Kassala states in **the Sudan**, in westernmost areas of **Uganda**, in northwestern **Eritrea** and in northeastern **Somalia**.

The 2019 main season is more advanced in southern cropping areas of the subregion, including in southern and central **United Republic of Tanzania** ("Msimu"), **Uganda** ("first season") as well as in **Rwanda** and **Burundi** ("B season"). In central and southern uni-modal areas of **the United Republic of Tanzania**, crop prospects for the major "Msimu" harvest are favourable, as seasonal rains were adequate over most cropping areas. In central and southern bi-modal rainfall areas of **Uganda**, harvesting of the 2019 first season crops

Table 9. East Africa cereal production
(million tonnes)

| | Wheat | | | Coarse grains | | | Total cereals ¹ | | | |
|-----------------------------|------------|------------|-------------|---------------|-------------|-------------|----------------------------|-------------|-------------|-----------------------|
| | 5-yr Avg. | 2018 estim | 2019 f'cast | 5-yr Avg. | 2018 estim | 2019 f'cast | 5-yr Avg. | 2018 estim | 2019 f'cast | Change: 2019/2018 (%) |
| East Africa | 5.6 | 5.8 | 5.5 | 43.6 | 46.5 | 42.6 | 52.9 | 56.1 | 51.8 | -7.7 |
| Ethiopia | 4.5 | 4.6 | 4.4 | 20.9 | 21.9 | 20.8 | 25.6 | 26.7 | 25.4 | -4.8 |
| Kenya | 0.2 | 0.4 | 0.3 | 3.9 | 4.4 | 3.5 | 4.3 | 4.9 | 3.9 | -20.4 |
| Sudan | 0.6 | 0.6 | 0.6 | 6.2 | 7.6 | 6.0 | 6.9 | 8.3 | 6.7 | -19.4 |
| Uganda | 0.0 | 0.0 | 0.0 | 3.3 | 3.3 | 2.9 | 3.5 | 3.5 | 3.1 | -11.9 |
| United Republic of Tanzania | 0.1 | 0.1 | 0.1 | 7.3 | 7.3 | 7.4 | 10.3 | 10.5 | 10.5 | 0.4 |

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2014-2018 period.

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

will begin in July with a one-month delay. Exceptionally dry conditions prevailing in March and April delayed planting and severely affected crop germination and establishment. Abundant rains in May and early June mostly offset the rainfall deficits, but vegetation conditions remained generally poor. In addition, heavy downpours triggered localized floods, likely resulting in some damage to standing crops. As a result, the harvest is expected to be 30-50 percent below average. In **Ethiopia**, harvesting of secondary “Belg” season crops is underway in central and eastern areas and the production outlook is mixed. The February-to-May rainy season was characterized by adequate precipitation volumes in the highlands of eastern Amhara and southern Tigray regions, while in eastern SNNRP Region, early-season dryness was followed by improved precipitation. In the eastern Oromia Region, rains were poor and consequently significant crop production shortfalls are expected. In **Rwanda** and **Burundi**, cumulative rains in February and March were up to 50 percent below average, but above-average rains in April and May offset the moisture deficits and the “B season” harvests, about to be completed, are expected at average to above-average levels.

Pastoral areas have been severely affected by the cumulative impact of below-average 2018 October-December “Deyr/short-rains”, followed by a harsh January-March 2019 dry season and by a very poor performance of the March-May “Gu/Genna/long-rains”. The exceptionally dry conditions in March and April, especially in **Somalia**, southeastern **Ethiopia** and most of **Kenya**, have caused a deterioration of rangeland resources to extremely poor levels. The severe pasture and water deficits resulted in livestock emaciation and increased mortality rates, as well as a sharp decline in milk production. Heavy showers received in May had some localized positive impacts on rangeland and livestock conditions, but these improvements will be short-lived as the dry season has already started in June.

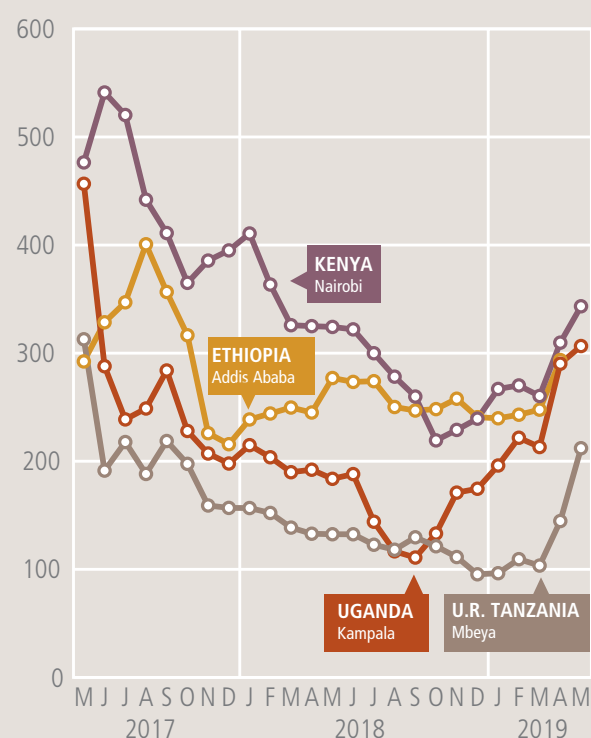
Prices of cereals and pulses increased sharply in several countries

In several countries, prices of maize and beans sharply increased to very high levels in April and May as seasonal patterns were compounded by concerns over the impact of the poor performance of seasonal rains

on current crops. In **Kenya** and **Uganda**, prices of maize surged by 35-80 percent between March and May, and were up to 70 percent higher than one year earlier. Similarly, prices of beans increased over the same period by up to 70 percent in Kenya and by about 30 percent in Uganda, and in May they were 35-60 percent higher on a yearly basis. In **the United Republic of Tanzania**, prices of maize increased by 20-35 percent between March and May in several markets, while they more than doubled over the same period in Mbeya market, located in a southern key-growing area, despite the good performance of the ongoing “Msimu” harvest. Following the recent increases, mainly driven by the sustained export demand from Kenya and some

Southern African countries, prices in May were up to 60 percent higher than in the same month of the previous year. Similarly, prices of beans increased by about 20 percent between March and May, but they remained around their year-earlier levels. In **Ethiopia**, prices of maize increased by 15-20 percent in April in some markets as seasonal upward trends were intensified by concerns over the performance of the ongoing “Belg” harvest. As a result of the recent increases, prices in April were 20-30 percent above their year-earlier levels. In **Somalia**, prices of maize and sorghum seasonally increased by 10-30 percent between January and May in several markets. Despite a reduced 2018 secondary “Deyr” harvest and concerns over the upcoming 2019 main “Gu” harvest, prices of coarse grains in May were around their year-earlier levels as imports from neighbouring Ethiopia helped to bolster national availabilities and ease supply pressure. In **Burundi**, prices of maize increased seasonally by about 10 percent in May, but remained 25 percent lower than in the same month of the previous year due to adequate domestic supplies. In **Rwanda**, prices of maize remained mostly stable in recent months and were around their year-earlier levels. In **the Sudan**, prices of sorghum

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



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

increased seasonally by about 30 percent between January and May, while prices of millet remained firm over the same period due to the ample supplies from the bumper 2018 harvest in the main millet growing areas. Prices of coarse grains in May were up to 80 percent above the already high levels of one year earlier and at near-record highs, driven by the significant depreciation of the country's currency, fuel shortages, political uncertainty, social unrest and soaring prices of agricultural inputs, which raised production costs. In **South Sudan**, prices of sorghum and maize increased by 20 and 35 percent between December 2018 and May 2019 in the capital, Juba, as the South Sudanese pound depreciated and seasonal patterns were exacerbated by the early depletion of stocks from the record low 2018 harvest. Prices in May were generally down from a year earlier, but still at exceptionally high levels, more than ten times higher than in July 2015 when they started surging as the country's currency began to rapidly depreciate. The high price levels are the result insufficient cereal supplies, widespread insecurity that has hindered normal trade flows and agricultural activities, as well as high transportation costs and a weak local currency.

Food security situation sharply deteriorating in South Sudan, Kenya and Somalia

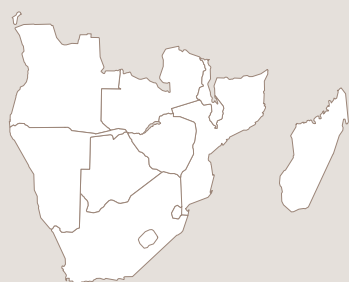
The aggregate number of people in need of humanitarian assistance in the subregion is estimated at about 27.3 million, with the largest caseloads recorded in **Ethiopia** (8.13 million), **South Sudan** (6.96 million) and **the Sudan** (5.76 million).

In **South Sudan**, 6.96 million people (about 60 percent of the total population) are estimated to be severely food insecure between May and July 2019, the highest food insecure caseload on record. The current alarming food insecurity conditions are mainly driven by a prolonged lean season, which had an early start as stocks from the record low 2018 harvest were depleted earlier than usual. In addition, the lean season will be extended further by the late onset of the 2019 seasonal rains, which

will result in delayed 2019 harvests. Despite some localized improvements of the security situation since mid-2018, the prolonged conflict is resulting in severe food availability and access constraints, and in a major economic crisis critically affecting income earning opportunities for large segments of the population. The areas of major concern are former Lakes, Northern Bahr el Ghazal, Jonglei, Upper Nile and Unity states, where 65-75 percent of the population faces IPC Phases 3: "Crisis", 4: "Emergency" and 5: "Catastrophe" levels of food insecurity. In **Kenya** and **Somalia**, the food security situation has significantly deteriorated since early 2019 due to the cumulative impact of two consecutive poor rainy seasons on livelihoods in pastoral, agro-pastoral and marginal agricultural areas. In pastoral areas, the decline in terms of trade and shortages of livestock products (mainly milk) are severely affecting food

availability and access, while in subsistence farming livelihood zones, poor cropping conditions have caused a significant decline in agricultural labour opportunities and consequently households' incomes. In **Somalia**, 2.2 million people are estimated to be severely food insecure in July, the caseload being more than 40 percent higher than the estimate of 1.55 million people in early 2019. The areas with the highest levels of food insecurity are central Galgadud and Mudug regions and northern Nugal, Bari, Sool, Sanag, Awdal and Woqooyi Galbeed regions, where IPC Phase 4: "Emergency" levels prevail. In **Kenya**, the current food insecure caseload is 2 million, more than twice the estimate of 800 000 individuals at the beginning of 2019. The areas most affected by food insecurity are northern Turkana, Marsabit and Wajir counties, eastern Garissa and Tana River counties and eastern Baringo County.

SOUTHERN AFRICA



Adverse weather conditions reduce 2019 cereal output

Harvesting of the main 2019 season cereal crops is expected to be finalized in July, while harvesting of the winter wheat crop, which is currently being planted and is mostly produced in **South Africa** and **Zambia**, will take place in the last quarter of the year. Overall, cereal production in 2019 is forecast at 29.2 million tonnes, about 9 percent below the previous year's average outturn, driven by large maize production decreases (in absolute terms) in **Mozambique**, **South Africa** and **Zimbabwe**. The expected decline is largely the result of adverse weather conditions, including a delayed start of seasonal precipitation, severe dry periods and two major cyclones. Economic instability in some countries was an additional factor that contributed to curbing plantings, further negatively weighing on this year's cereal output.

In western countries of the subregion, significant rainfall deficits were the main factor that affected yields and the area harvested, particularly in **Botswana** and **Namibia**, where outputs were estimated to have fallen by approximately 50 percent on a yearly basis to well below-average

levels. In **Angola**, cereal production is estimated to have contracted by 7 percent to an average level, as generally beneficial weather conditions in parts of the central regions, which constitute some of the main cereal-producing areas, averted a larger decline at the national level. The aggregate maize output in **South Africa** is forecast at 11.5 million tonnes, 1 million tonnes below the average, owing to rainfall deficits in western areas that curtailed yields. However, this production estimate exceeds earlier expectations, on account of improved weather conditions in the latter stages of the cropping season, which helped to raise yields in eastern areas. In **Zimbabwe**, the maize harvest is estimated at approximately 780 000 tonnes, 41 percent lower than the five-year average and more than 50 percent below the previous year's good output. The sharp decline reflects a reduction in yields, mainly due to poor cumulative seasonal rains. In addition, a delayed start of seasonal rains, coupled with high inflation rates and liquidity constraints that inhibited farmers' access to agricultural inputs, caused a contraction in the area sown. In **Zambia**, the maize output decreased by 16 percent to 2 million tonnes, resulting in a second consecutive below-average harvest, following severe rainfall deficits in key producing western regions. In **Mozambique**, crop conditions were mostly favourable until the landfall of Cyclone Idai in March in central regions and Cyclone Kenneth in April in northern regions. The two cyclones caused significant crop losses in some of the most productive regions and production is estimated to have declined to a near-average level. Further details will be provided by the report of a jointly fielded FAO/WFP Crop and Food Security Assessment Mission in May to be published July. By contrast, precipitation in **Malawi** was generally more conducive for

crop development and consequently maize production is estimated to have rebounded to an above-average level of 3.3 million tonnes. Similarly, in **Madagascar**, paddy (rice) production, the national food staple, is estimated to have risen, but is still likely to remain below the average, as structural challenges continue to impede agricultural productivity. In **Eswatini** and **Lesotho**, both structurally cereal-deficit countries, harvests are estimated to have decreased compared to the previous year to below-average levels, on account of the adverse weather conditions.

Rainfall deficits have also had an adverse impact on pasture productivity and quality as well as diminishing water resources for livestock, notably in western parts of the subregion, including **Botswana** and **Namibia**. As a result, there has been an increase in livestock mortality rates, while the cyclones in **Mozambique** have also resulted in an increased number of livestock deaths.

Import requirements grow in 2019/20

In the 2019/20 marketing year (generally April/March), based on the estimated cereal production decreases and lower domestic stocks, import requirements have increased. However, at the aggregate level, import volumes are still expected to remain below average. Most of the yearly increase is anticipated to stem from larger import needs in **Zimbabwe** to compensate for the significant production shortfall, while in **Mozambique**, increased quantities of imports are expected on account of the cyclones' damage to the agricultural sector. Small increases are also foreseen in the import-dependent countries of **Botswana**, **Eswatini**, **Lesotho** and **Namibia**, as they seek to bolster national supplies due to weather-reduced cereal harvests.

Table 10. Southern Africa cereal production
(million tonnes)

| | Wheat | | | Coarse grains | | | Rice (paddy) | | | Total cereals | | | |
|------------------------|------------|------------|-------------|---------------|-------------|-------------|--------------|------------|-------------|---------------|-------------|-------------|-----------------------|
| | 5-yr Avg. | 2018 estim | 2019 f'cast | 5-yr Avg. | 2018 estim | 2019 f'cast | 5-yr Avg. | 2018 estim | 2019 f'cast | 5-yr Avg. | 2018 estim | 2019 f'cast | Change: 2019/2018 (%) |
| Southern Africa | 2.0 | 2.1 | 2.1 | 26.2 | 26.1 | 23.1 | 4.2 | 4.0 | 4.0 | 32.3 | 32.2 | 29.2 | -9.4 |
| - excl. South Africa | 0.3 | 0.3 | 0.2 | 12.9 | 13.0 | 11.5 | 4.2 | 4.0 | 4.0 | 17.3 | 17.3 | 15.7 | -8.9 |
| Madagascar | 0.0 | 0.0 | 0.0 | 0.3 | 0.2 | 0.3 | 3.6 | 3.3 | 3.4 | 3.9 | 3.5 | 3.7 | 3.9 |
| Malawi | 0.0 | 0.0 | 0.0 | 3.2 | 2.9 | 3.4 | 0.1 | 0.1 | 0.1 | 3.3 | 3.0 | 3.5 | 17.3 |
| Mozambique | 0.0 | 0.0 | 0.0 | 2.2 | 2.7 | 2.4 | 0.4 | 0.4 | 0.4 | 2.6 | 3.2 | 2.7 | -13.7 |
| South Africa | 1.7 | 1.9 | 1.9 | 13.3 | 13.1 | 11.6 | 0.0 | 0.0 | 0.0 | 15.0 | 15.0 | 13.5 | -9.9 |
| Zambia | 0.2 | 0.1 | 0.2 | 3.0 | 2.4 | 2.0 | 0.0 | 0.0 | 0.0 | 3.3 | 2.6 | 2.2 | -14.6 |
| Zimbabwe | 0.0 | 0.1 | 0.1 | 1.5 | 1.9 | 0.9 | 0.0 | 0.0 | 0.0 | 1.6 | 2.0 | 0.9 | -52.7 |

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2014-2018 period.

Subregional cereal exports are almost entirely comprised of maize shipments from South Africa. In recent years, there have been sizeable export volumes shipped by Zambia to neighbouring countries, but a second consecutive below-average output in 2019 is foreseen to cut exports deliveries considerably. Exports from South Africa are expected to surpass 1 million tonnes in 2019/20, approximately half of the previous year's quantity, but remain below the five-year average of about 1.7 million tonnes.

Prices of cereals at high levels following sustained increases since early 2019

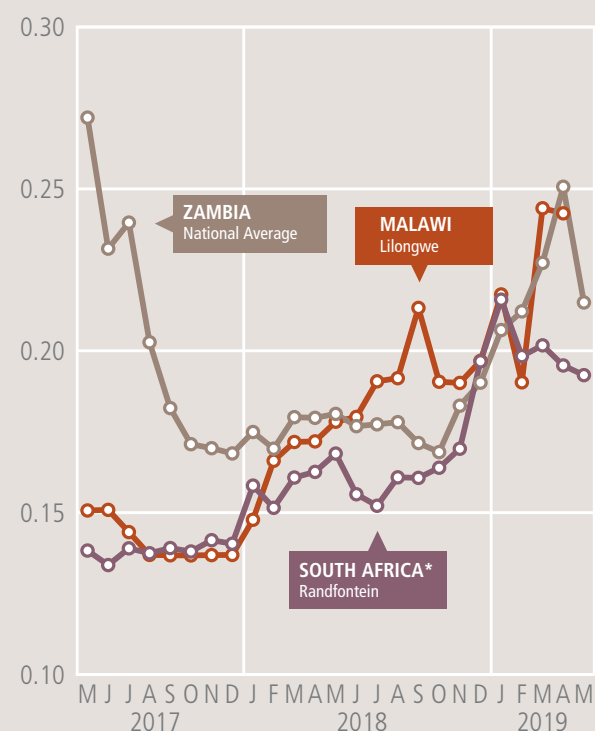
In **Zambia**, despite recent seasonal declines, prices of maize grain remained significantly higher on a yearly basis as of May, owing to the impact of dry weather conditions which reduced harvest prospects and a sharp loss in the value of the country's currency since mid-2018 that raised transportation costs. Similarly, in **Mozambique**, although prices of maize declined seasonally since March, they were still well above their year-earlier levels in May, reflecting the impact of two cyclones that caused widespread crop losses in the affected areas and consequently resulted in tighter market supplies. In **Malawi**, prices of maize declined as newly-harvested crops augmented market supplies and prices are likely to come under stronger downward pressure in 2019 compared to 2018 on account of this year's larger maize output. In contrast to these seasonal decreases, prices of maize in **South Africa** firmed up slightly since March, sustaining higher year-on-year levels. The rise mainly reflects a hike in international quotations and a small depreciation of the country's currency, which mostly offset the effects

of several upward revisions to the maize production estimate, that boosted the domestic supply outlook. In April, prices of maize and wheat flour spiked in **Zimbabwe** and reinforced the considerably higher year-on-year levels. The rapid growth in April mostly stemmed from an increase in prices set by the national milling association, while further support came from the continuing depreciation of the country's currency and the reduced 2019 harvest. In **Madagascar**, prices of rice continued to decline and were marginally lower on a yearly basis as of May, reflecting an expected increase in 2019 production.

Food insecure numbers expected to rise sharply

Overall food security conditions are expected to worsen in the subregion during the 2019/20 marketing year (generally April/March) because of the reduced harvests and higher food prices that will impinge on households' access to food. Although the aggregate number of people in need of assistance for food is foreseen to rise on a yearly basis, it is expected to remain lower than the levels experienced in 2016, when an El Niño-impacted agricultural season severely worsened the food security situation. The 2019 national Vulnerability Assessment Committees' evaluations have just been conducted or are currently

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



* Wholesale prices, all others retail prices

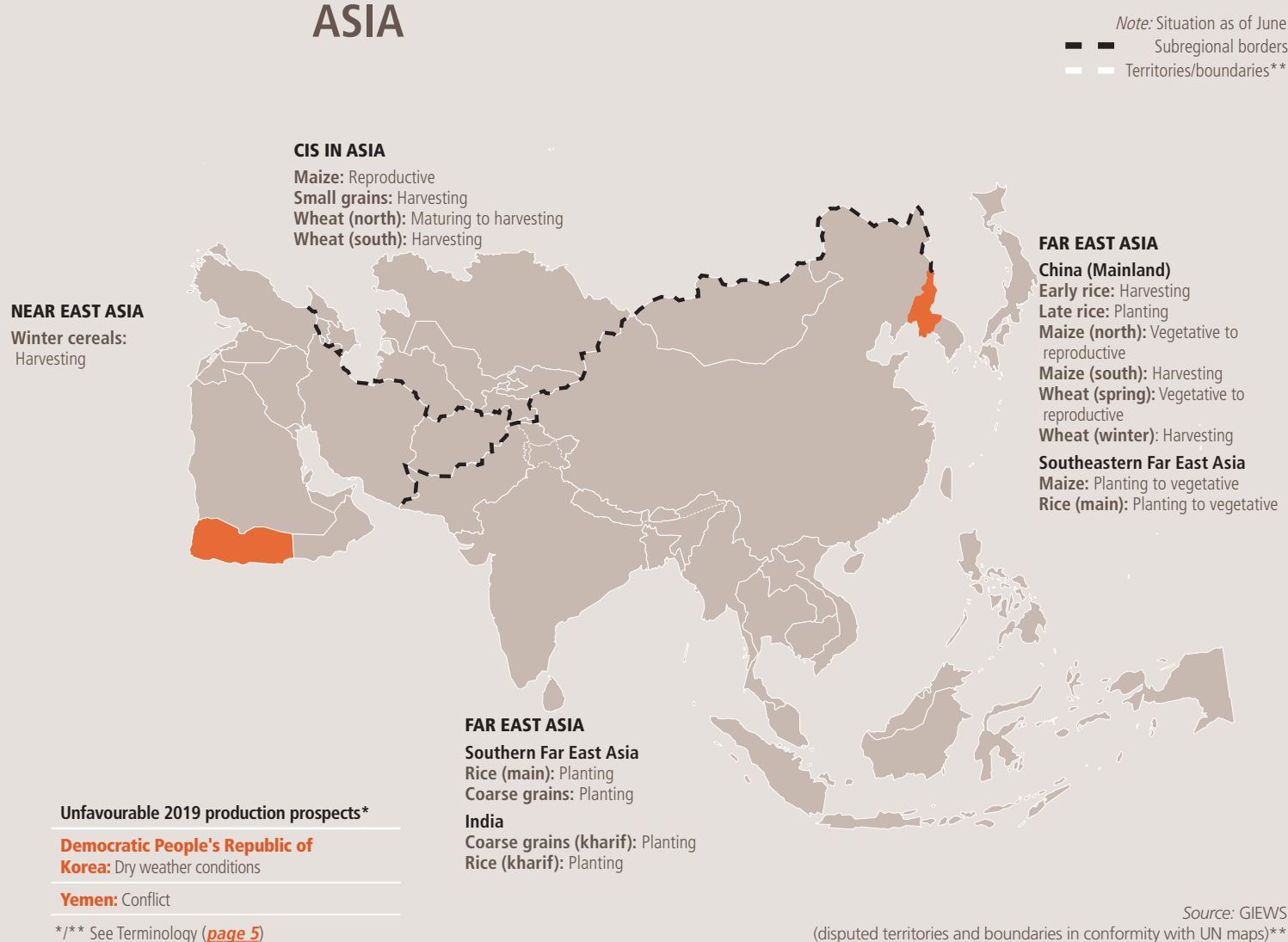
Sources: Central Statistical Office, Zambia; Ministry of Agriculture and Food Security, Malawi; SAFEX Agricultural Products Division, South Africa.

underway in most countries and results are expected to be released in July, providing official estimates of the number of food insecure people.

The latest IPC analyses for the peak 2018/19 lean season (January-March) put the number of food insecure people in the subregion at nearly 11 million (excluding Angola, Mauritius and South Africa). This level was the second highest estimate in the last ten years and approximately 30 percent higher than the previous year.

REGIONAL REVIEWS

ASIA

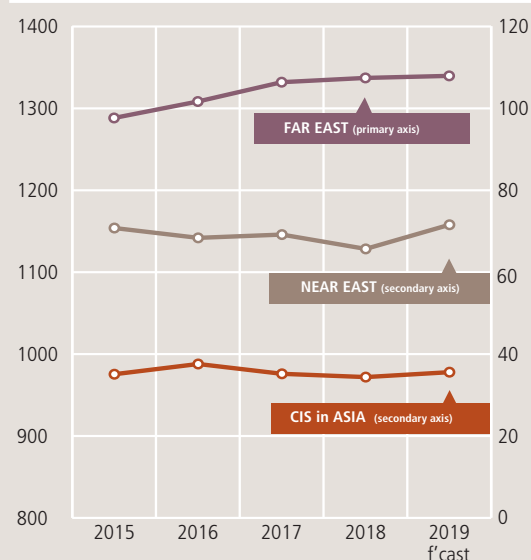


Source: GIEWS
(disputed territories and boundaries in conformity with UN maps)**

Asia Production Overview

The aggregate 2019 cereal output is forecast at 1 447 million tonnes, an above-average level and marginally higher than the previous year. The small upturn mostly reflects larger wheat and paddy outputs that are anticipated to more than compensate for a forecasted decrease in coarse grain production.

In the Far East, most countries are expected to gather larger harvests in 2019, however the Democratic People's Republic of Korea has been affected by unfavourable weather conditions and consequently a below-average output is expected. Total cereal production in CIS Asia is forecast to slightly exceed the average, on account of above-average wheat and maize harvests that reflect generally conducive weather conditions. In the Near East, in spite of damaging floods, areas that were not adversely impacted benefited from the abundant rains, contributing to larger cereal harvests in 2019 compared to the previous year. However, conflicts in some countries in the Near East continue to constrain the production potential of the agriculture sector.

Cereal production
(million tonnes)

FAR EAST



Cereal production in 2019 preliminarily forecast close to previous year's record level

Harvesting of the 2019, mostly irrigated, wheat crop is nearing completion and the subregion's aggregate production is estimated at an above-average 263.4 million tonnes. In **China (Mainland)**, the subregion's main producer, the 2019 wheat output is forecast at 132 million tonnes, close to last year's average output. In **India**, wheat production is officially estimated at an all-time high of 101.2 million tonnes, reflecting record yields, supported by favourable weather conditions and ample irrigation water supplies, which more than offset a 5 percent contraction in plantings due to the late withdrawal of the monsoon rains at an early stage of the planting period. The season started unfavourably in **Pakistan**, due to prolonged dry weather between October and December 2018,

combined with limited irrigation supplies that hampered planting operations and adversely affected germination and establishment of early planted crops. Rains improved from January and remained well above average until May, a critical period for crop development, helping to raise yield levels. As a result, despite a slight contraction in plantings and localized crop losses, an average output of 25.2 million tonnes has been harvested. Bumper wheat outputs are estimated in **Bangladesh** and **Nepal**, reflecting above-average plantings, sustained by strong local demand and favourable weather conditions which, coupled with widespread use of high-yielding seed varieties and fertilizers, increased crop productivity. A below-average 2019 wheat output is estimated in **the Democratic People's Republic of Korea**, mostly due to reduced rainfall and a lack of snow cover during the winter period, which left crops exposed to freezing temperatures, causing increased crop losses and leading to a considerable reduction in yields.

In Northern Hemisphere countries, land preparation and early planting of the 2019 main season crops, mostly rice and coarse grains, for harvest towards the end of the year, is ongoing. Concerns exist in the main cereal producing southern and central parts of **the Democratic People's Republic of Korea**, where below-average rains in April and May and low irrigation water availability delayed planting activities and adversely affected the establishment of early planted

crops. Rains returned to average levels in early June, allowing the planting pace to quicken and helping to improve vegetation conditions, although damage to crops in some localized areas is considered to be irreversible. In the main cereal-producing areas located in the north of **Cambodia**, the rainy season started in late May, almost one-month behind the normal schedule, causing delays in sowing activities. However, if rains remain close to average levels in the next months, the planting progress is expected to pick up, with the sowing season stretching to August. The 2019 secondary season crops are expected to be planted towards the end of the year.

Countries along or south of the equator, namely **Indonesia**, **Sri Lanka** and **Timor-Leste**, have concluded the 2019 main season harvests and current estimates point to bumper outputs in all three countries, reflecting average to above-average rains in most of the main cereal-producing areas. Farmers are currently engaged in the 2019 secondary season plantings.

The subregional aggregate 2019 paddy output is preliminarily forecast at a record high of 702 million tonnes, mostly due to expectations that plantings will surpass the previous year's high level, supported by government programmes that promote rice production and strong demand. The exception to this trend is **the Republic of Korea**, where the area planted has steadily declined since 2002, reflecting the

Table 11. Far East cereal production
(million tonnes)

| | Wheat | | | Coarse grains | | | Rice (paddy) | | | Total cereals | | | |
|-------------------|--------------|--------------|--------------|---------------|--------------|--------------|--------------|--------------|--------------|----------------|----------------|----------------|-----------------------|
| | 5-yr Avg. | 2018 estim | 2019 f'cast | 5-yr Avg. | 2018 estim | 2019 f'cast | 5-yr Avg. | 2018 estim | 2019 f'cast | 5-yr Avg. | 2018 estim | 2019 f'cast | Change: 2019/2018 (%) |
| Far East | 257.0 | 260.9 | 263.4 | 371.8 | 378.7 | 374.4 | 680.9 | 697.7 | 702.0 | 1 309.7 | 1 337.2 | 1 339.7 | 0.2 |
| Bangladesh | 1.3 | 1.1 | 1.3 | 2.6 | 3.2 | 3.3 | 52.5 | 54.2 | 55.0 | 56.4 | 58.5 | 59.6 | 1.8 |
| Cambodia | 0.0 | 0.0 | 0.0 | 0.8 | 1.2 | 1.2 | 10.0 | 10.9 | 11.0 | 10.8 | 12.1 | 12.2 | 0.7 |
| China (Mainland) | 132.1 | 131.4 | 132.0 | 268.6 | 267.3 | 264.3 | 211.5 | 212.1 | 209.4 | 612.3 | 610.9 | 605.7 | -0.9 |
| India | 94.6 | 99.9 | 101.2 | 43.7 | 46.0 | 43.7 | 164.4 | 173.4 | 176.3 | 302.7 | 319.3 | 321.2 | 0.6 |
| Japan | 0.9 | 0.8 | 0.9 | 0.2 | 0.2 | 0.2 | 10.9 | 10.8 | 11.0 | 12.0 | 11.8 | 12.1 | 2.7 |
| Myanmar | 0.1 | 0.1 | 0.1 | 2.5 | 2.8 | 2.9 | 28.9 | 30.4 | 30.5 | 31.5 | 33.3 | 33.5 | 0.5 |
| Nepal | 1.9 | 2.0 | 2.2 | 2.7 | 3.0 | 3.0 | 5.0 | 5.3 | 5.4 | 9.6 | 10.3 | 10.6 | 2.5 |
| Pakistan | 0.0 | 25.1 | 25.2 | 0.0 | 6.8 | 6.8 | 0.0 | 10.8 | 10.9 | 0.0 | 42.7 | 42.9 | 0.6 |
| Philippines | 0.0 | 0.0 | 0.0 | 0.0 | 7.8 | 8.0 | 0.0 | 19.0 | 19.4 | 0.0 | 26.8 | 27.4 | 2.4 |
| Republic of Korea | 0.0 | 0.0 | 0.0 | 0.0 | 0.2 | 0.2 | 0.0 | 5.2 | 5.2 | 0.0 | 5.4 | 5.4 | 0.2 |
| Sri Lanka | 0.0 | 0.0 | 0.0 | 0.0 | 0.3 | 0.3 | 0.0 | 3.9 | 4.5 | 0.0 | 4.2 | 4.8 | 14.3 |
| Thailand | 0.0 | 0.0 | 0.0 | 0.0 | 5.2 | 5.2 | 0.0 | 32.0 | 33.2 | 0.0 | 37.2 | 38.4 | 3.2 |
| Viet Nam | 0.0 | 0.0 | 0.0 | 0.0 | 4.9 | 4.9 | 0.0 | 44.0 | 43.6 | 0.0 | 48.9 | 48.5 | -0.7 |

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2014-2018 period.

Government initiative to encourage farmers to shift away from paddy production in order to avert an oversupply problem. In **China (Mainland)**, the planted area with paddy crops in 2019 is expected to be slightly below the average, as farmers are likely to switch to more profitable crops, including soybeans

The subregional aggregate 2019 maize output is forecast at 346 million tonnes, close to last year's near-record level as plantings are anticipated to remain at a high level, mainly driven by the strong demand from the feed industry. Concerns exist in **China (Mainland)**, the largest maize producer in the subregion, as Fall Armyworm (FAW) infestations reportedly affected crops in localized areas in 19 out of the 34 provincial-level administrative divisions, mostly in southern parts of the country. Official estimates, as of mid-June, indicate that less than 1 percent of the total area planted with maize had been affected. However, this number is expected to increase if the spread is not contained. Reports from the country indicate that there is an increasing risk that FAW could spread to northern parts of the country.

Aggregate cereal import requirements in 2019/20 forecast close to average

Wheat import requirements are estimated at an above average level of 51.4 million tonnes, reflecting strong demand from **the Philippines, Thailand, Bangladesh and the Republic of Korea**, the largest importers in the subregion.

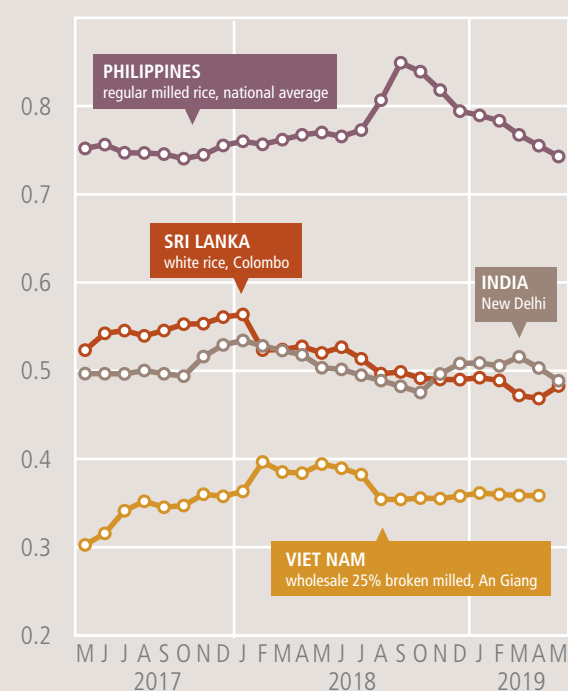
Aggregate imports of coarse grains, mostly maize, are forecast at 62.3 million tonnes, 6 percent below the previous five-year average. The estimated decline is mainly driven by expectations of decreased demand from **China (Mainland)** as a result of the Government's programme that aims to reduce the large national stocks of maize through increased sales from State reserves. Import requirements for maize to be used as feed are anticipated to remain high in **the Republic of Korea, the Philippines and Viet Nam**. Imports of rice in 2019 are forecast at 13.1 million tonnes, well below the five-year average due to expectations of bumper outputs in most countries of the subregion. Overall, aggregate cereal import requirements in the 2019/20 marketing year are forecast at about 127 million tonnes, close to the previous five-year average. Exports of cereals, mainly rice, are forecast at 46.6 million tonnes in 2019, close to the above-average level in 2018.

Rice prices followed mixed trend and wheat prices were stable

Domestic prices of rice followed mixed trends between February and May 2019 and were generally below their year-earlier levels. In **Viet Nam**, prices of rice increased

Rice retail prices in selected Far East countries

(USD/kg)



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

between March and mid-May, but declined in the second half of May with the start of the summer/autumn harvest. In **Thailand** and **Myanmar**, prices of rice have been generally declining since the beginning of the year due to improved markets supplies from the 2018 main and secondary harvests and lower demand for exports. In **India**, the world's leading rice exporter, prices remained generally stable from February to April and increased slightly in May as

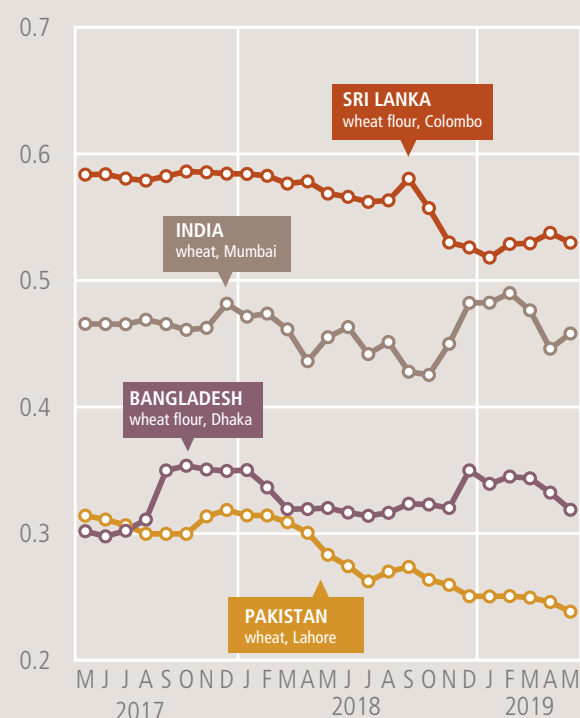
Table 12. Far East cereal production and anticipated trade in 2019/20 ¹
(thousand tonnes)

| | Avg 5-ys (2014/15 to 2018/19) | 2018/19 | 2019/20 | 2019/20 over 2018/19 (%) | 2019/20 over 5-yr avg (%) |
|----------------------|-------------------------------------|---------|---------|--------------------------------|---------------------------------|
| Coarse grains | | | | | |
| Exports | 3 628 | 4 114 | 3 565 | -13.3 | -1.7 |
| Imports | 66 210 | 63 056 | 62 355 | -1.1 | -5.8 |
| Production | 371 765 | 378 664 | 374 353 | -1.1 | 0.7 |
| Rice (milled) | | | | | |
| Exports | 38 142 | 39 371 | 41 038 | 4.2 | 7.6 |
| Imports | 14 616 | 13 268 | 13 090 | -1.3 | -10.4 |
| Production | 451 833 | 462 738 | 465 513 | 0.6 | 3.0 |
| Wheat | | | | | |
| Exports | 3 057 | 2 717 | 2 362 | -13.1 | -22.7 |
| Imports | 48 806 | 48 474 | 51 439 | 6.1 | 5.4 |
| Production | 257 033 | 260 851 | 263 398 | 1.0 | 2.5 |

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

Wheat and wheat flour retail prices in selected Far East countries

(USD/kg)



Sources: Pakistan Bureau of Statistics; Ministry of Consumer Affairs, India; Department of Census and Statistics, Sri Lanka; Management Information System and Monitoring, Bangladesh.

large Government procurement purchases have offset the downward pressure from the harvest of the minor “Rabi” paddy crop. According to official estimates, as of early June, about 63 million tonnes of paddy have been procured, representing about one-third of the country’s annual rice production. In **Cambodia**, prices of rice decreased or remained stable in most markets, but increased in the key producing province of Battambang in May, mainly reflecting concerns about the impact of dry weather conditions on the 2019 main season crops. In **China (Mainland)**, prices of rice remained generally stable or weakened, and were

close to their year-earlier levels, reflecting ample availabilities from the 2018 output and large carryover stocks. In **the Philippines**, prices eased for the eighth consecutive month in May as a result of improved supplies from the 2018 harvests, and increased quantities of rice imports. Prices increased seasonally in **Sri Lanka**, while in **Bangladesh**, they firmed up but remained at a low level, following steady decreases registered since August 2018.

Prices of wheat and wheat flour were generally stable or decreased in recent months, on account of improved supplies from the 2019 bumper harvests. In **China (Mainland)**, prices of wheat declined in most markets with the onset of the 2019 harvest. In **India**, ongoing large Government procurement purchases reached 33.2 million tonnes and, similar to rice purchases, they amounted to more

than one-third of the country’s annual production, offsetting the downward pressure from the recently concluded record 2019 harvest and maintaining stable prices. In importing countries, prices of wheat flour decreased in **Bangladesh** and in **Sri Lanka**, reflecting high imports in recent months.

Food security generally stable, but concerns remain in some countries

Overall, the food security situation in the subregion is stable. However, pockets of severe food insecurity conditions persist in some countries. In **the Democratic People’s Republic of Korea**, according

to the findings of a recent FAO/WFP rapid Food Security Assessment Mission, about 10.1 million people (40 percent of the total population) are estimated to be food insecure and in urgent need of food assistance. As of May 2019, about 910 000 refugees from **Myanmar** were hosted in Cox’s Bazar District in **Bangladesh**. They reside in temporary settlements and require humanitarian assistance to cover their basic needs. In addition, the high number of refugees is putting a strain on the already limited resources of the host communities. In **Myanmar**, as of May, an estimated 160 000 people were internally displaced in Rakhine and 106 500 in Kachin and northern Shan states due to ongoing conflict. The IDPs are affected by high levels of food insecurity, with the conflict hampering the deployment of adequate humanitarian assistance and impeding the restoration of livelihoods. In **Pakistan**, there are increased concerns about food insecurity, mainly in rural communities in the Balochistan and Sindh districts, as persisting dry conditions in 2018 and 2019 led to a reduction in the cereal outputs and losses of livestock. In addition, about 1.4 million Afghan refugees are sheltering in Pakistan, which are straining the already limited resources of the host communities.

Extensive outbreaks of African Swine Fever (ASF), across several countries of the subregion, raise concerns about the livelihoods and food security of large numbers of people relying on the production and processing of pigs. ASF has been reported in China (Mainland), Viet Nam, Cambodia, Mongolia, the Democratic People’s Republic of Korea and Lao People’s Democratic Republic, with official estimates indicating that a large number of animals have perished ([see Special Feature on page 27 for further information](#)).

NEAR EAST



Above-average 2018 cereal output expected despite damaging floods and persistent conflict

Harvesting of the 2019 winter cereal crops began in May and is expected to be finalized in July in most counties of the subregion. Abundant rainfall since the start of the season resulted in flooding across many parts of the subregion, causing substantial damage to infrastructure, particularly in **Iran (Islamic Republic of)** and **Iraq**. However, production losses in the flooded areas were more than offset by production gains in areas where the increased precipitation was conducive for crop development. As a result, in **Iran (Islamic Republic of)**, a cereal harvest of 21.6 million tonnes is expected, about 15 percent above the five-year average and 8 percent higher than last year. Abundant precipitation particularly benefited the wheat crop, contributing to a production of 14.5 million tonnes, almost 20 percent above the average. In **Iraq**, the 2019 wheat harvest is likely to exceed 4 million tonnes, almost double the previous year's harvest and 34 percent above average. In **the Syrian Arab Republic**, although the national production potential remains constrained by the ongoing or recently ceased conflict, which had continued to impact the availability of agricultural inputs

and affect agricultural production, beneficial and timely distribution of rains contributed to a production recovery. An FAO/WFP Crop and Food Security Assessment Mission was fielded in June 2019 and its results will be available in late summer.

In **Turkey**, the subregion's main cereal producer, the first production forecast from the Turkish Statistical Institute indicates a cereal harvest of 34.7 million tonnes, of which 19.5 million tonnes are wheat, 7.5 million tonnes are barley and 6 million tonnes are maize, on par with last year and slightly below the five-year average.

In **Afghanistan**, owing to favourable rainfall distribution, crop conditions are average to above average across the country. However, structural issues, including a lack of agricultural inputs, are likely to constrain production potential. Challenging conditions prevail in **Yemen**, where the conflict continues to debilitate agricultural livelihoods.

At the subregional level, early production estimates indicate an aggregate wheat output of about 45.3 million tonnes, about 10 percent above last year's output and 5 percent above the five-year average. Total cereal production in 2018 is forecast at an above-average level of 71.4 million tonnes.

Subregional cereal imports in the 2019/20 (July/June) marketing year are forecast at 72.8 million tonnes, approximately 2 million tonnes above the previous year and about 8 percent above the five-year average, supported by the continuous growth in coarse grain imports for feed. At approximately 28 million tonnes, the wheat import requirement is forecast to remain similar to the previous year's level and the five-year average.

Persisting conflicts continued to worsen food security

In **Yemen**, according to the latest IPC analysis, about 15.9 million people (corresponding to 53 percent of the population) faced severe acute food insecurity (IPC Phase 3: "Crisis" and above), including 63 500 people in IPC Phase 5: "Catastrophe" in the December 2018-January 2019 period. In the absence of humanitarian food assistance, it is estimated that about 20 million people (or 67 percent of total population) would have been in need of urgent action to save lives and livelihoods. This would include about 240 000 people in IPC Phase 5: "Catastrophe". Current figures are likely to be higher.

In **the Syrian Arab Republic**, as of August 2018 (latest available figures), about 5.5 million Syrians were estimated to be food insecure and require some form of food assistance. In addition, as many as 500 000 to 800 000 people are estimated to be food insecure in the Idlib Governorate. The most recent number of food insecure people will be available in late summer with the release of the report based on the recently concluded FAO/WFP Crop and Food Security Assessment Mission.

In **Afghanistan**, the Humanitarian Needs Overview from December 2018 estimated that 13.5 million people faced severe acute food insecurity (IPC Phase 3: "Crisis" and above), about 6 million people above the level estimated in the corresponding period of 2017. Continuing conflict, natural hazards and limited economic opportunities have increased the vulnerability of the poorest households, including subsistence farmers.

Table 13. Near East cereal production
(million tonnes)

| | Wheat | | | Coarse grains | | | Rice (paddy) | | | Total cereals | | | |
|----------------------------|-------------|-------------|-------------|---------------|-------------|-------------|--------------|------------|-------------|---------------|-------------|-------------|-----------------------|
| | 5-yr Avg. | 2018 estim | 2019 f'cast | 5-yr Avg. | 2018 estim | 2019 f'cast | 5-yr Avg. | 2018 estim | 2019 f'cast | 5-yr Avg. | 2018 estim | 2019 f'cast | Change: 2019/2018 (%) |
| Near East | 43.0 | 41.4 | 45.3 | 21.2 | 19.6 | 21.4 | 4.4 | 4.6 | 4.8 | 68.6 | 65.6 | 71.5 | 8.9 |
| Afghanistan | 4.5 | 3.6 | 4.0 | 0.6 | 0.4 | 0.4 | 0.6 | 0.5 | 0.6 | 5.7 | 4.5 | 5.0 | 10.5 |
| Iran (Islamic Republic of) | 11.8 | 13.4 | 14.5 | 4.2 | 3.7 | 4.1 | 2.7 | 3.0 | 3.0 | 18.8 | 20.1 | 21.6 | 7.5 |
| Iraq | 3.2 | 2.2 | 4.3 | 0.9 | 0.7 | 1.1 | 0.2 | 0.1 | 0.2 | 4.3 | 3.0 | 5.6 | 83.4 |
| Turkey | 20.7 | 20.0 | 19.5 | 13.8 | 13.4 | 14.2 | 0.9 | 0.9 | 1.0 | 35.4 | 34.4 | 34.7 | 1.0 |

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2014-2018 period.

CIS IN ASIA³

Cereal production forecast at a near-average level in 2019

Harvesting of winter crops started in early June under favourable weather conditions and is expected to be finalized in August. The 2019 aggregate cereal output is preliminarily forecast at 35.5 million tonnes, close to the five-year average. Wheat production, which accounts for about 70 percent of the total subregional cereal output, is forecast at an average level of 25.5 million tonnes, as lower-than-average outputs in **Armenia** and **Kyrgyzstan** are likely to be compensated by an above-average production in **Azerbaijan**.

Wheat harvests in **Armenia** and **Kyrgyzstan** are forecast at below-average levels of 180 000 and 600 000 tonnes,

respectively, mainly reflecting a continuing contraction in the planted area. In

Armenia, for instance, the area sown in 2019 is estimated to be about 50 percent below the peak reached in 2015. By contrast, in **Azerbaijan**, wheat production in 2019 is expected at about 2.1 million tonnes, 16 percent above the five-year average, as a result of a gradual increase in plantings in recent years. The total cereal output in Azerbaijan, forecast at 3.2 million tonnes, is about 10 percent higher than the average.

In **Kazakhstan**, **Georgia**, **Tajikistan**, **Turkmenistan** and **Uzbekistan**, wheat outputs are forecast to be close to average levels, due to generally favourable weather conditions.

Planting of the 2019 spring cereals is virtually complete. In **Kazakhstan**, spring cereal crops were planted over a near-average area of 14.3 million hectares, below the previous year's level, and current crop conditions are reported to be good. Assuming favourable weather conditions for the remainder of the spring season, which accounts for more than 90 percent of the total national wheat output, wheat production is expected to be at a near average level of 14 million

tonnes. The barley output is forecast at 3.9 million tonnes, close to the record high of 2018, on account of a large expansion in plantings. Overall, aggregate cereal production (winter and spring crops) in 2019 is forecast at a slightly above-average level of about 20 million tonnes.

Trade in 2019/20 forecast to increase slightly

Except for Kazakhstan, countries of the subregion are heavily dependent on cereal imports, mainly wheat, to satisfy their domestic consumption needs. For the 2019/20 marketing year (July/June) the aggregate cereal import requirement is estimated at 7.6 million tonnes, slightly higher than the five-year average, resting on increased import needs in **Armenia**, **Kyrgyzstan**, **Tajikistan** and **Turkmenistan**.

Total exports of cereals from **Kazakhstan** are forecast at 9.5 million tonnes, 10 percent above average, mainly due to larger shipments of wheat that are forecast at 8 million tonnes in 2019/20. The higher-than-average export volume is mainly driven by the favourable supply outlook, based on expectations of a good wheat harvest in 2019, and robust demand for export from neighbouring countries.

Table 14. CIS in Asia cereal production

(million tonnes)

| | Wheat | | | Coarse grains | | | Total cereals ¹ | | | |
|--------------------|-------------|-------------|-------------|---------------|------------|-------------|----------------------------|-------------|-------------|-----------------------|
| | 5-yr Avg. | 2018 estim | 2019 f'cast | 5-yr Avg. | 2018 estim | 2019 f'cast | 5-yr Avg. | 2018 estim | 2019 f'cast | Change: 2019/2018 (%) |
| CIS in Asia | 25.5 | 24.3 | 25.5 | 8.2 | 9.0 | 8.9 | 34.8 | 34.3 | 35.5 | 3.4 |
| Armenia | 0.3 | 0.2 | 0.2 | 0.2 | 0.1 | 0.1 | 0.5 | 0.3 | 0.3 | -4.0 |
| Azerbaijan | 1.8 | 2.0 | 2.1 | 1.1 | 1.2 | 1.1 | 2.9 | 3.3 | 3.2 | -2.8 |
| Georgia | 0.1 | 0.1 | 0.1 | 0.3 | 0.3 | 0.2 | 0.4 | 0.4 | 0.3 | -16.9 |
| Kazakhstan | 14.1 | 13.9 | 14.0 | 4.3 | 5.3 | 5.3 | 18.9 | 19.7 | 19.8 | 0.0 |
| Kyrgyzstan | 0.6 | 0.6 | 0.6 | 1.0 | 1.1 | 1.1 | 1.7 | 1.8 | 1.8 | -0.9 |
| Tajikistan | 0.9 | 0.7 | 0.8 | 0.3 | 0.3 | 0.3 | 1.3 | 1.1 | 1.3 | 15.0 |
| Turkmenistan | 1.2 | 0.7 | 1.2 | 0.1 | 0.1 | 0.1 | 1.4 | 0.9 | 1.4 | 56.2 |
| Uzbekistan | 6.6 | 6.0 | 6.6 | 0.9 | 0.6 | 0.6 | 7.8 | 6.8 | 7.5 | 9.9 |

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2014-2018 period.

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

³ Georgia is no longer a member of CIS but its inclusion in this group is maintained for the time being.

Export and domestic prices of wheat remained generally stable or increased slightly

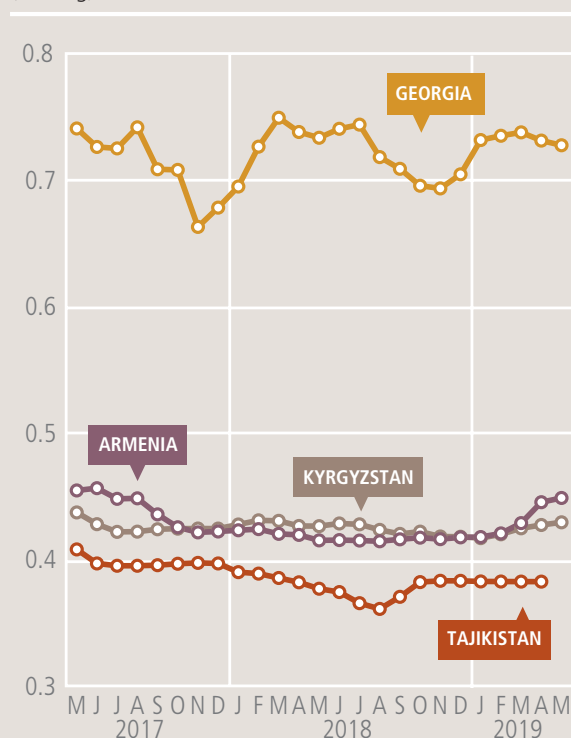
In **Kazakhstan**, export prices of milling wheat remained mostly stable between March and May. Prices then decreased slightly in June, but were still more than 20 percent above their year-earlier levels, amid a strong pace of exports during the season, supported by a weaker domestic currency that increased the country's export competitiveness. Retail prices of wheat flour have generally increased over the last months in line with seasonal trends.

In the importing countries of the subregion, retail prices of wheat flour increased slightly or remained stable. In **Kyrgyzstan** and **Armenia**, prices remained virtually unchanged over the preceding months and were slightly higher compared to the corresponding period in the previous year. While in **Tajikistan**, prices were well above their levels in May 2018, mainly due to high export quotations from Kazakhstan, the country's main supplier of cereals. In **Georgia**, wheat prices have been generally increasing since

February and, in May, were more than 10 percent higher on a yearly basis. The primary factors pushing up prices in Georgia were the depreciation of the country's currency and higher transportation costs.

With regard to potatoes, another key staple food, prices have generally followed seasonal trends and in May had increased in all countries. The sharpest increases were recorded in **Georgia** and **Armenia**, where prices rose by more than 30 percent month on month and reached levels about 60 percent above those in May 2018. Prices also increased in **Kyrgyzstan** and **Kazakhstan**, but remained below their year-earlier levels. Harvesting of the 2019 crops is about to start and the new supplies are expected to put downward pressure on prices in the next months.

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



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

SPECIAL FEATURE - AFRICAN SWINE FEVER

African Swine Fever (ASF), a contagious disease affecting domestic and wild pigs, is spreading within East and Southeast Asia, threatening the livelihood and food security of millions of people, particularly vulnerable subsistence pig farmers. In **China (Mainland)**, as of mid-June, the disease has been reported in 32 out of the 34 provincial level administrative divisions and more than 1.1 million pigs have perished or have been culled. Additionally, the disease has been reported in **Viet Nam, Cambodia, Mongolia, the Democratic People's Republic of Korea** and **the Lao People's Democratic Republic**, with official estimates indicating that millions of pigs in these countries have already died as a result of ASF. One of the main drivers of the epidemic is the small scale structure of most of the pig industry in the subregion. This hampers the implementation of biosecurity standards, an important control measure that can contribute to halting the spread of the disease. Additionally, intra-regional trade of pig meat products, which may be contaminated, has also contributed to the high prevalence. As a result, animal health experts believe that the disease will inevitably spread farther in the coming months. This raises concerns regarding the livelihood and food security situation of the most vulnerable subsistence small scale farmers, as they lack the expertise and/or funds to protect their herds. Reports from the affected countries have already indicated that animal losses have caused reductions in farmers' incomes.

Moreover, the decline in pig meat production and the depletion of the current frozen stocks are expected to result in price hikes. In consideration that pork is largely consumed by poor households, and given the likely increase in prices, food security conditions of the most vulnerable segments of the population are expected to be adversely impacted. Part of the protein supply gap, caused by reduced pork consumption, is foreseen to be covered by increased demand for other types of meat, in particular poultry.

For further information see the report: GIEWS Update - East and Southeast Asia

<http://www.fao.org/3/ca5273en/ca5273en.pdf>



Sources: China (Mainland): Ministry of Agriculture and Rural Affairs (MARA); Mongolia: World Animal Health Information System (WAHIS); Viet Nam: WAHIS and media information; Cambodia: Ministry of Agriculture, Forestry and Fisheries (MAFF); other countries: WAHIS. Compiled by FAO's Animal Production and Health Division.

REGIONAL REVIEWS

LATIN AMERICA AND THE CARIBBEAN

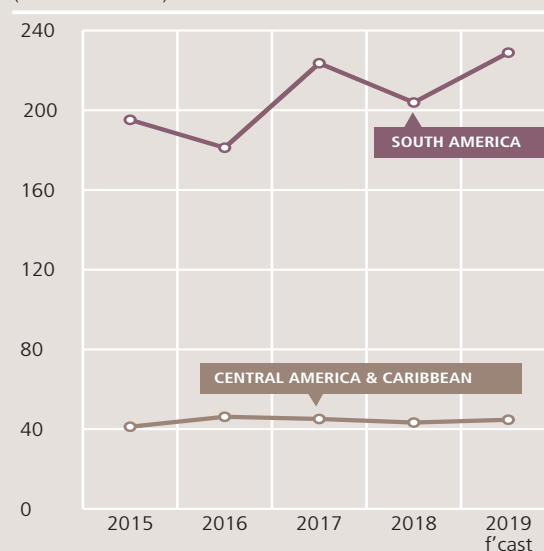


Latin America and the Caribbean Production Overview

Cereal production in Latin America and the Caribbean in 2019 is forecast at a record high of 274 million tonnes. The expected increase mostly reflects a strong recovery in maize production in South America, mainly the result of enlarged plantings and, secondarily, improved yields.

In Central America, an above-average cereal output is anticipated in Mexico, resting on an expansion in the sown area. Elsewhere in the subregion prospects are uncertain due to irregular rainfall distribution.

Cereal production
(million tonnes)



CENTRAL AMERICA AND THE CARIBBEAN



Wheat production forecast below average due to reduced plantings

In **Mexico**, virtually the only wheat producer in the subregion, harvesting of the 2019 main winter crop, which accounts for 95 percent of the annual output, is underway. Overall, aggregate production is forecast at a below-average level of 3.2 million tonnes. This year's reduced output reflects a continuation of decreasing wheat plantings, with the area sown in the 2018/19 cropping season estimated to be 17 percent lower than the average.

Maize production set to remain above average, supported by larger plantings in Mexico

FAO's preliminary maize production forecast points to an above-average subregional output of 31.8 million tonnes in 2019. The anticipated increase mainly concerns a production rebound in **Mexico**, which

accounts for 86 percent of the subregion's total maize output.

In **Mexico**, harvesting of the minor season crop and planting of the main season crop are underway, and harvest prospects for both seasons are favourable due to an expected rebound in aggregate plantings compared to last year's low level, instigated by higher market prices coupled with the Government's price support programme. Consequently aggregate production in Mexico is forecast at an above-average level of 37 million tonnes in 2019.

Elsewhere in the subregion, planting of the 2019 main season maize crop is nearing completion and the sown area is estimated to have increased, driven by higher domestic prices. However, production prospects are uncertain reflecting a delayed start of seasonal rains and concerns over repeated periods of dryness. In **Guatemala** and **Nicaragua**, where the impact of dryness was less severe than in other countries, maize planting are consequently estimated to have increased. In the Pacific coastal areas of **El Salvador**, **Honduras**, **Costa Rica** and **Panama**, rainfall amounts are predicted to be at below-average levels during the month of July, raising concerns over yield prospects. In **Haiti**, where harvesting of the 2019 main maize crop is ongoing, early forecasts point to a slightly below-average production due to dry

conditions at the beginning of the cropping season, and prospects were further diminished by localized flooding in the major maize-producing Ouest Department in June. Plantings of the main maize crop are estimated at a below-average level due to higher production costs that reflect a significant depreciation of the country's currency, as well as shortages and rising costs of fuel. By contrast, production prospects for the main 2019 paddy crop are generally positive, owing to good soil moisture levels and beneficial rainfall in the major producing Artibonite Department. In **the Dominican Republic**, production prospects were boosted by an expansion in plantings.

Cereal imports forecast to increase in 2019/20

Cereal imports have been increasing in the subregion for more than five consecutive years, mainly due to the increasing demand for yellow maize, used as feed and wheat for food use. Cereal import requirements in the 2019/20 marketing year (September/August), are forecast at a well above-average level of about 37 million tonnes.

Prices of maize increased seasonally in the March-May period

In most countries of the subregion, prices of white maize rose in the March-May period,

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

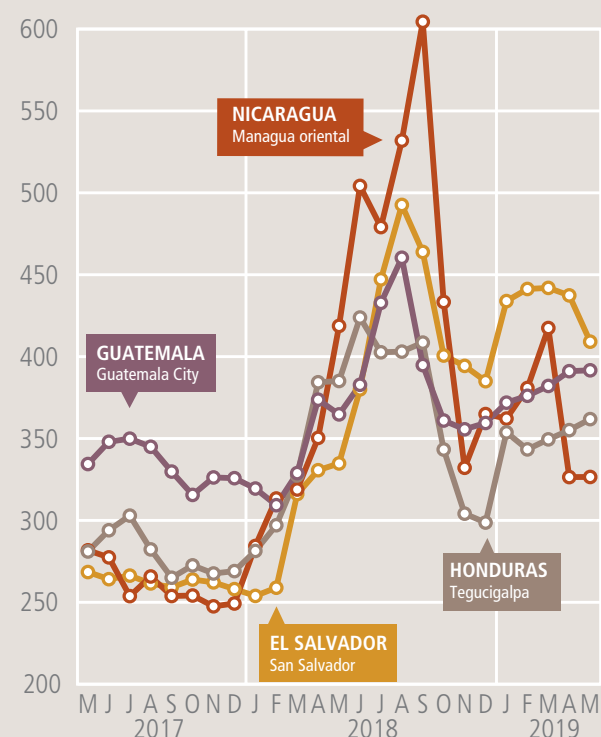
| | Wheat | | | Coarse grains | | | Rice (paddy) | | | Total cereals | | | |
|--|-------------|-------------|-------------|---------------|--------------|--------------|--------------|-------------|-------------|---------------|--------------|--------------|-----------------------|
| | 5-yr Avg. | 2018 estim | 2019 f'cast | 5-yr Avg. | 2018 estim | 2019 f'cast | 5-yr Avg. | 2018 estim | 2019 f'cast | 5-yr Avg. | 2018 estim | 2019 f'cast | Change: 2019/2018 (%) |
| Central America & Caribbean | 3.5 | 2.9 | 3.2 | 37.6 | 37.4 | 38.4 | 2.9 | 3.0 | 3.1 | 43.9 | 43.3 | 44.7 | 3.1 |
| El Salvador | 0.0 | 0.0 | 0.0 | 1.0 | 1.0 | 1.0 | 0.0 | 0.0 | 0.0 | 1.0 | 1.0 | 1.1 | 3.0 |
| Guatemala | 0.0 | 0.0 | 0.0 | 1.9 | 1.9 | 2.0 | 0.0 | 0.0 | 0.0 | 1.9 | 1.9 | 2.0 | 3.0 |
| Honduras | 0.0 | 0.0 | 0.0 | 0.6 | 0.6 | 0.6 | 0.1 | 0.1 | 0.1 | 0.6 | 0.6 | 0.6 | -0.9 |
| Mexico | 3.5 | 2.9 | 3.2 | 32.8 | 32.6 | 33.5 | 0.3 | 0.3 | 0.3 | 36.6 | 35.8 | 37.0 | 3.4 |
| Nicaragua | 0.0 | 0.0 | 0.0 | 0.5 | 0.5 | 0.5 | 0.3 | 0.4 | 0.4 | 0.8 | 0.9 | 0.9 | 2.4 |
| South America | 25.8 | 28.7 | 29.2 | 147.8 | 150.2 | 177.2 | 24.7 | 24.9 | 22.5 | 198.4 | 203.9 | 228.9 | 12.3 |
| Argentina | 16.3 | 19.5 | 20.0 | 47.3 | 50.8 | 63.4 | 1.4 | 1.4 | 1.2 | 65.1 | 71.6 | 84.6 | 18.1 |
| Brazil | 5.7 | 5.4 | 5.5 | 84.3 | 84.1 | 98.6 | 11.9 | 12.1 | 10.5 | 101.9 | 101.5 | 114.6 | 12.8 |

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2014-2018 period.

following seasonal trends. While prices were above their year-earlier levels in **El Salvador** and **Guatemala**, on account of increased production costs, they were lower on a yearly basis in **Honduras** and **Nicaragua**, reflecting adequate domestic supplies. In **Mexico**, prices of white maize were stable during this period but were slightly above their values a year earlier, supported by tighter supplies following a decrease in the 2018 output. Prices of black and red beans were stable or increased slightly during the March-May period and were below their levels of a year earlier, reflecting abundant supplies from the 2018 harvests. With regard to rice, prices were generally stable on account of adequate volumes of imports as most countries in the subregion cover a considerable share of domestic needs through imports. However, in **Haiti**, prices of rice, mostly imported, increased in the March-May period, underpinned by the recent significant depreciation of the national currency.

Wholesale white maize prices in selected countries in Central America

(USD/tonne)



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

SOUTH AMERICA



Larger plantings and favourable weather conditions result in a rebound in the 2019 maize production

In *South America*, harvesting is underway in the major producing countries and production prospects for the 2019 maize crop are generally favourable, reflecting

larger sowings and good weather conditions. The subregion's maize output in 2019 is anticipated at 164 million tonnes, more than 20 percent above the previous five-year average. In **Argentina**, harvesting operations are progressing at a normal rate in most areas, with the exception of the Northern Region where a high soil moisture content has impeded the harvesting pace. For the crops harvested as of mid-June, yields were exceptionally high in the main producing Córdoba and Buenos Aires provinces, reflecting favourable weather conditions during the crucial flowering and grain filling stages. As these high yields are expected to more than compensate for a slight contraction in plantings, the 2019 maize output is officially forecast at a record high of 56 million tonnes. Similarly, in **Brazil**, where harvesting of the 2019 main maize

crop is ongoing, production expectations are favourable on account of good yield prospects and an enlarged area sown for the main second season crop. Production of the 2019 first season maize crop is officially estimated to have fallen from last year's low level due to a continuing contraction in plantings, as farmers continue to shift away from maize cultivation to the more profitable soybean crop. By contrast, plantings of the main season's crop increased by 7 percent year on year and reached record levels, instigated by high prices. With favourable yields estimated, the main season output is officially anticipated to increase by 23 percent year on year compared with last year's drought-affected harvest. As a result, aggregate maize production in Brazil is forecast at a near-record level of 95.2 million tonnes. In **Uruguay**, the area planted to maize was estimated to be well-above average, driven by high prices, which, coupled with excellent yields, is expected to result in a record harvest. Elsewhere in the subregion, **Peru's** harvest is estimated to have increased slightly owing to higher yields that outweighed the impact of reduced plantings, while production prospects are unfavourable in **Bolivia (Plurinational State of)**, **Colombia** and **Ecuador**, resting on an anticipated contraction in plantings and adverse weather conditions. In **Chile**, where harvesting of the 2019 crop was completed in May, the output is estimated at a below-average level on account of the smallest planted area in a decade. In **Venezuela (Bolivarian Republic of)**, planting of the main maize crop started in May and the early production forecast points to a well below-average level as the planted area continues to shrink reflecting a lack of agricultural inputs, which are mostly imported, and the increasing cost of production. The introduction of producer price ceilings on white and yellow maize also discouraged plantings.

Planting of the 2019 wheat crop is underway in most of countries of the subregion. In **Argentina**, the major producer of the subregion, plantings are officially anticipated at 6.5 million hectares, a 3 percent increase from last year's record high. This expansion mainly

result from high domestic prices, due to strong demand for exports which largely reflect the significant depreciation of the country's currency. Assuming normal weather conditions for the rest of the season, Argentina's wheat output in 2019 is expected to reach a new peak. Elsewhere in the subregion, the area planted is expected to increase in **Chile** and **Uruguay** on account of remunerative prices, while plantings are anticipated to decline in **Brazil** and **Paraguay**. Weather forecasts for the next three months (June to August) indicate generally conducive conditions for development and maturation of the 2019 wheat crops.

Harvesting of the 2019 paddy crop is complete in **Brazil** and **Uruguay**. Outputs in these countries are estimated at below-average levels due to a significant contraction in plantings, driven by high production costs and farmers' decision to shift to more profitable crops, such as soybeans or maize. Similarly, plantings are anticipated to decline in **Colombia**, **Ecuador** and **Peru**, owing to reduced prices.

Cereal exports forecast at record levels in 2019/20

Aggregate cereal exports in the 2019/20 marketing year (March/February), mainly maize, are forecast at a record high of 90 million tonnes. The large quantity mainly reflects the expected well above-average cereal outputs and the weak local currencies in **Argentina** and **Brazil**, which have enhanced the countries' competitiveness in the international markets. Subregional maize exports are forecast at a record 68 million tonnes, almost 40 percent above average. Similarly, wheat exports from the subregion are forecast at an above-average

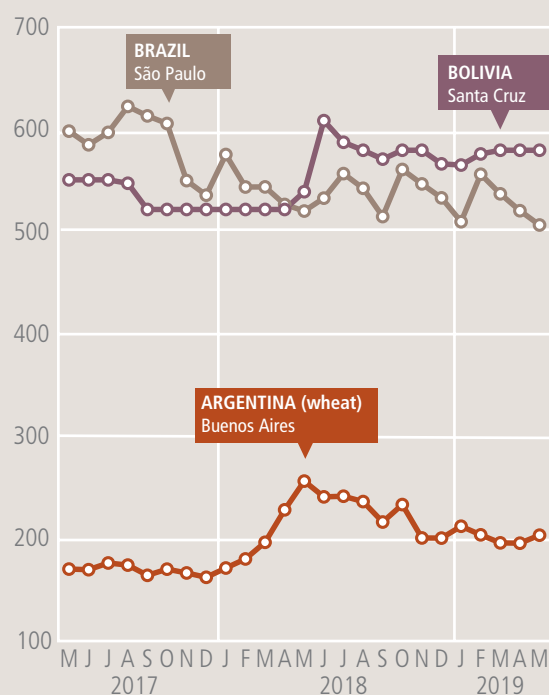
level of over 14 million tonnes, mainly reflecting larger exportable supplies in Argentina, which reflects the expected bumper harvest.

Maize prices decreased seasonally

Prices of yellow maize generally decreased in line with seasonal trends in the March-May period, with the notable exception of **Argentina**. Here, despite an expected record high output, prices of yellow maize continued to increase and were well above their year-earlier values due to the strong demand for exports, supported by the weakness of the national currency. Prices of yellow maize were lower on a yearly basis in **Brazil** and **Uruguay**, where favourable production prospects have improved the supply outlook, while in **Colombia** and **Ecuador** prices were above their year-earlier levels supported by diminished production prospects. In **Chile**, large quantities of imported maize between January and April 2019 eased supply pressure stemming from the reduced harvest and maintained stable prices.

For wheat, prices remained stable or increased seasonally. In **Argentina** and **Uruguay**, where the 2019 crop is being planted, domestic prices of wheat grain increased in the March-May period and were higher year on year, underpinned by robust demand for exports. In **Brazil**, a net importer of wheat, prices of wheat grain were stable during this period, but higher

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



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

on a yearly basis due to a weaker currency. In **Colombia**, **Ecuador** and **Peru**, prices of wheat flour were near their year-earlier levels.

With regards to rice, despite the recent completion of the 2019 harvests, prices strengthened in **Brazil** and in **Uruguay**, due to reduced outputs. By contrast, in **Peru** and **Ecuador**, prices of rice weakened in May with the start of the main harvests and were down from a year earlier pressured by good supplies from the 2018 harvest.

REGIONAL REVIEWS

NORTH AMERICA, EUROPE AND OCEANIA

Note: Situation as of June

Territories/boundaries**

NORTH AMERICA

Canada

Maize: Planting

Small grains: Vegetative

United States of America

Maize: Vegetative

Small grains: Maturing to harvesting

EUROPE

Northern Europe

Small grains: Reproductive

Southern Europe

Maize: Vegetative to reproductive

Small grains: Maturing to harvesting

CIS in Europe:

Maize: Reproductive

Small grains: Maturing to harvesting

Wheat: Maturing to harvesting

OCEANIA

Australia

Cereals (summer): Vegetative

Cereals (winter): Planting

Source: GIEWS

(disputed territories and boundaries in conformity with UN maps)**

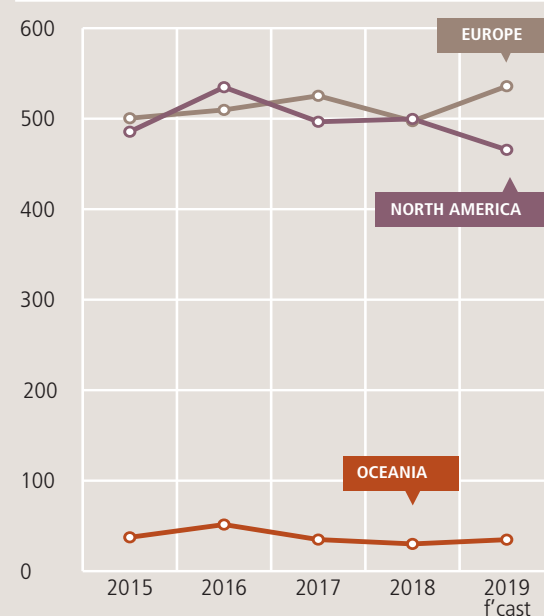
** See Terminology (page 5)

North America, Europe and Oceania Production Overview

In the United States of America, the 2019 wheat output is set to increase, driven by larger plantings and good yields. By contrast, maize production is foreseen to decline as excessively wet weather conditions sharply cut the area sown and diminished yield prospects. In Canada, wheat production is seen to increase in 2019 on account of an enlarged area sown and conducive weather conditions for both the winter and spring crops.

In Europe, wheat production is expected to rebound in the European Union in 2019, mostly reflecting larger plantings. Similarly, in the CIS countries of Europe, cereal production is forecast to rise significantly, mostly resting on an expected increase in wheat production in the Russian Federation and Ukraine.

In Oceania, wheat production in Australia in 2019 is seen to partly recover from the previous year's reduced level, although poor rains at the start of the season have restrained prospects.

Cereal production
(million tonnes)

NORTH AMERICA



Maize production in the United States of America expected to fall sharply

In the United States of America, harvesting of the 2019 main winter wheat crop is underway. The aggregate wheat output, including a forecast for the spring crop to be harvested in August, is pegged at 51.8 million tonnes, moderately higher than the preceding year although 5 percent lower than the average. The forecasted production upturn reflects an expected increase in the area harvested and higher yields, supported by generally conducive winter weather conditions. Early projections for the spring wheat output point to a moderate reduction, preventing a larger increase in the aggregate wheat output.

Regarding maize, the area planted in 2019 was revised sharply downward in June, compared to earlier expectations, on account of excessively wet weather that impeded planting operations. The adverse weather conditions have also lowered yield prospects, with only 56 percent of the maize crop reported to be in good or excellent condition as of late June, compared to an average of 77 percent. As a result, production of maize in 2019 is forecast at 330 million tonnes, approximately 36 million tonnes lower than the previous year's average outturn.

In Canada, the 2019 winter wheat harvest is underway, while the main spring crop is expected to be harvested from August. Aggregate production is officially forecast at 33.9 million tonnes, an above-average level and 7 percent higher on a yearly basis. This year's increase is mainly attributed to larger spring wheat plantings that are anticipated to more than negate a contraction in winter wheat sowing, while good yields are foreseen for both crops.

For the 2019 maize crop, widespread rains in June facilitated crop germination and benefited early growth, especially in northern and northcentral areas where precipitation was below average in April and May. Based on an expected increase in plantings, which are likely to be offset by a likely return to average yields following last year's high levels, the maize output in 2019 is forecast at 70 million tonnes, close to the previous year's outturn but 6 percent above the average.

EUROPE



EUROPEAN UNION

Favourable prospects for 2019 cereal production

In the European Union, winter cereal crops (mainly wheat and barley) are being harvested, while sowing of the summer cereal crops (predominantly maize) was finalized in May. The wheat output in 2019 is forecast at an above-average level of 153 million tonnes, about 10 percent higher than the level in 2018, driven mainly by larger plantings. Barley production is also seen to increase to an above-average level of 61 million tonnes in 2019, despite localized dryness in some northern areas, as production was boosted by a year-on-year expansion in plantings.

CIS IN EUROPE

Cereal production forecast to be above average in 2019

Harvesting of the 2019 winter wheat crop, which accounts for about 80 percent of the subregional wheat output, is expected to begin in July, while planting of the spring crops, predominantly coarse grains, is virtually complete. The early forecast for the 2019 aggregate cereal output, including the spring crop, stands at 204 million tonnes about 9 percent above 2018's average outturn. The bulk of the increase this year is expected to come from wheat production, which is forecast at 112 million tonnes; most of this growth is expected to occur in the Russian Federation.

Crop conditions in the Russian Federation were generally good as of June, despite some dry weather conditions at the start of the season in parts of the main winter wheat-producing areas, including Southern, North Caucasian and Volga districts. The total area planted with wheat (winter and

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

| | Wheat | | | Coarse grains | | | Rice (paddy) | | | Total cereals | | | |
|--------------------------|--------------|--------------|--------------|---------------|--------------|--------------|--------------|-------------|-------------|---------------|--------------|--------------|-----------------------|
| | 5-yr Avg. | 2018 estim | 2019 f'cast | 5-yr Avg. | 2018 estim | 2019 f'cast | 5-yr Avg. | 2018 estim | 2019 f'cast | 5-yr Avg. | 2018 estim | 2019 f'cast | Change: 2019/2018 (%) |
| North America | 84.7 | 83.1 | 85.6 | 408.0 | 406.5 | 371.0 | 9.5 | 10.2 | 9.0 | 502.2 | 499.7 | 465.6 | -6.8 |
| Canada | 30.2 | 31.8 | 33.9 | 25.4 | 26.3 | 28.2 | 0.0 | 0.0 | 0.0 | 55.6 | 58.0 | 62.0 | 6.9 |
| United States of America | 54.6 | 51.3 | 51.8 | 382.6 | 380.3 | 342.8 | 9.5 | 10.2 | 9.0 | 446.6 | 441.7 | 403.6 | -8.6 |
| Europe | 254.3 | 241.8 | 269.5 | 253.2 | 251.5 | 262.4 | 4.1 | 4.0 | 4.0 | 511.6 | 497.3 | 535.9 | 7.8 |
| Belarus | 2.5 | 1.8 | 2.5 | 4.9 | 3.3 | 4.9 | 0.0 | 0.0 | 0.0 | 7.4 | 5.2 | 7.4 | 42.9 |
| European Union | 150.3 | 137.5 | 153.0 | 157.1 | 154.0 | 161.9 | 2.9 | 2.8 | 2.9 | 310.4 | 294.4 | 317.7 | 7.9 |
| Russian Federation | 70.6 | 72.1 | 82.0 | 41.2 | 36.6 | 40.8 | 1.1 | 1.0 | 1.0 | 112.9 | 109.8 | 123.9 | 12.8 |
| Serbia | 2.6 | 2.9 | 2.7 | 6.8 | 7.6 | 7.2 | 0.0 | 0.0 | 0.0 | 9.4 | 10.5 | 9.8 | -6.5 |
| Ukraine | 25.5 | 24.6 | 26.5 | 38.3 | 44.6 | 42.8 | 0.1 | 0.1 | 0.1 | 63.9 | 69.3 | 69.4 | 0.1 |
| Oceania | 23.6 | 17.7 | 21.6 | 14.0 | 11.7 | 13.1 | 0.7 | 0.6 | 0.1 | 38.3 | 30.1 | 34.8 | 15.4 |
| Australia | 23.2 | 17.3 | 21.2 | 13.3 | 11.1 | 12.4 | 0.6 | 0.6 | 0.1 | 37.2 | 29.0 | 33.7 | 16.0 |

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2014-2018 period.

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

Source: International Grains Council.

rains helped to fully replenish soil moisture benefit crop development, following rainfall deficits earlier in the season.

In **Belarus**, conditions of winter and spring grains, as of early June, were reported to be favourable, with warmer-than average temperatures and near-average precipitation benefiting crop development. The preliminary forecast for 2019 aggregate cereal output is pegged at an average level of 7.4 million tonnes.

In **the Republic of Moldova**, precipitation has been adequate since November and, despite below-average rainfall in March, cumulative seasonal rains were above average by mid-June. The early forecast for the 2019 aggregate cereal production stands at a slightly above-average level of 3 million tonnes.

subregion, export prices of milling quality wheat peaked in February 2019, reaching a four-year high, amid tightening availabilities, following the below-average wheat output in 2018 and large quantities of exports. Since March, however, prices have been decreasing, pressured downward by favourable production prospects. Regarding the domestic market, prices of wheat grain and wheat flour generally increased in the first months of 2019 and remained mostly stable between March and June.

Prices of potatoes, another key food staple, have been increasing seasonally since January 2019 in **the Russian Federation** and in **Belarus**, the main exporters in the subregion.

OCEANIA



spring crops) in 2019 is estimated at an above-average level of 27.3 million hectares, reflecting an expansion in winter wheat plantings that outweighed a decrease in the area sown with spring wheat. As a result, if weather conditions are favourable for the remainder of the season, the 2019 aggregate wheat production is expected to reach 82 million tonnes, about 16 percent above the five-year average. The total cereal production in the Russian Federation is forecast at 123.5 million tonnes, about 10 percent above the average level.

In **Ukraine**, the 2019 cereal output is expected to increase slightly to a well above-average level of 69.4 million tonnes. The promising production outlook mainly relates to expectations of a bumper maize harvest, forecast at 33 million tonnes, which would make it the second highest output on record after last year's production. In addition, wheat production is forecast above the five-year average at 26.5 million tonnes. The favourable prospects for wheat mostly reflect beneficial rainfall in April and May, especially in western regions. These

Cereal exports in 2019/20 forecast above average

Total subregional cereal exports in the 2019/20 marketing year (July/June) are forecast at 94.5 million tonnes, 15 percent above the five-year average. This is mainly due to expected increases in shipments of cereals from **the Russian Federation** and **Ukraine**, foreseen at a well above-average level of 47 million tonnes and 46.4 million tonnes, respectively. In **the Russian Federation**, wheat shipments are forecast at 37 million tonnes, about 20 percent higher than the average, due to the good crop prospects and strong demand for Russian grain exports. In **Ukraine**, maize shipments are forecast at 25 million tonnes, the second highest quantity after last year's record. The high volumes are sustained by expectations of a second consecutive bumper harvest in 2019.

Export prices of wheat decreased in recent months due to favourable 2019 production prospects

In **Ukraine** and **the Russian Federation**, the main exporting countries of the

Wheat production forecast to partly recover in 2019

In **Australia**, planting of the 2019 wheat crop, the main winter cereal, is ongoing and expected to be finalized in August. Preliminary indications point to an expansion in the sown area to about 11 million hectares, which, however, would still be a below-average level as poor, early seasonal rains hampered planting operations and also inhibited early crop development. With weather forecasts predicting an increased chance of below-average rainfall in most winter cropping areas, except in the main producing state of Western Australia where favourable rains are expected, wheat production in 2019 is forecast to only partly recover from last year's drought-reduced harvest to 21 million tonnes, still a below-average level. Similarly, barley production is forecast to rise slightly to 9.1 million tonnes, although remaining below the five-year average.

STATISTICAL APPENDIX

Table A1. Global cereal supply and demand indicators

| | Average 2014/15 - 2018/19 | 2015/16 | 2016/17 | 2017/18 | 2018/19 | 2019/20 |
|---|--|---------|---------------------------|---------|---------|-------------------------------|
| Ratio of world stocks to utilization (%) | | | | | | |
| Wheat | 34.5 | 32.8 | 35.5 | 37.6 | 35.1 | 36.2 |
| Coarse grains | 28.2 | 27.5 | 28.4 | 29.3 | 28.5 | 24.7 |
| Rice | 34.1 | 33.7 | 33.6 | 34.0 | 34.8 | 34.0 |
| Total cereals | 31.1 | 30.2 | 31.3 | 32.5 | 31.6 | 29.6 |
| Ratio of major grain exporters' supplies to market requirements (%) ¹ | 122.1 | 124.0 | 123.4 | 122.7 | 116.1 | 117.6 |
| Ratio of major exporters' stocks to their total disappearance (%) ² | | | | | | |
| Wheat | 18.9 | 18.1 | 20.0 | 20.5 | 17.5 | 18.7 |
| Coarse grains | 14.3 | 12.8 | 14.1 | 15.1 | 15.3 | 12.9 |
| Rice | 20.4 | 19.7 | 18.8 | 18.1 | 20.7 | 21.3 |
| Total cereals | 17.9 | 16.9 | 17.6 | 17.9 | 17.8 | 17.6 |
| | Annual trend growth rate 2009-2018 | 2015 | Change from previous year | | | |
| | | | 2016 | 2017 | 2018 | 2019 |
| Changes in world cereal production (%) | 1.7 | -0.9 | 3.0 | 1.5 | -1.9 | 1.2 |
| Changes in cereal production in the LIFDCs (%) | 2.6 | -3.4 | 4.1 | 3.0 | 1.9 | -0.2 |
| Changes in cereal production in the LIFDCs excluding India (%) | 2.5 | -1.6 | 3.0 | -0.4 | 2.6 | -0.5 |
| | | 2016 | 2017 | 2018 | 2019* | Change 2019* over 2018* |
| Selected cereal price indices³ | | | | | | |
| Wheat | | 125.2 | 133.4 | 148.5 | 146.3 | 1.7% |
| Maize | | 151.0 | 146.3 | 155.9 | 163.0 | 2.1% |
| Rice | | 193.5 | 206.4 | 224.4 | 222.0 | -2.8% |

Source: FAO

Notes: Utilization is defined as the sum of food use, feed and other uses. Cereals refer to wheat, coarse grains and rice; grains refer to wheat and coarse grains (barley, maize, millet, sorghum and cereals NES).

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

² Disappearance is defined as domestic utilization plus exports for any given season.

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

* January-June average.

Table A2. World cereal stocks¹*(million tonnes)*

| | 2015 | 2016 | 2017 | 2018 | 2019 estimate | 2020 forecast |
|-------------------------------|--------------|--------------|--------------|--------------|------------------|------------------|
| TOTAL CEREALS | 762.7 | 790.7 | 832.7 | 871.3 | 855.3 | 828.1 |
| Wheat | 225.7 | 241.3 | 262.4 | 280.8 | 266.6 | 278.5 |
| held by: | | | | | | |
| - main exporters ² | 69.0 | 70.3 | 80.4 | 82.9 | 68.6 | 75.9 |
| - others | 156.7 | 171.0 | 182.0 | 197.9 | 198.0 | 202.6 |
| Coarse grains | 365.2 | 380.3 | 400.2 | 416.6 | 408.2 | 370.9 |
| held by: | | | | | | |
| - main exporters ² | 111.5 | 101.7 | 114.0 | 125.0 | 125.7 | 107.2 |
| - others | 253.7 | 278.6 | 286.2 | 291.6 | 282.5 | 263.7 |
| Rice (milled basis) | 171.8 | 169.2 | 170.0 | 173.9 | 180.6 | 178.6 |
| held by: | | | | | | |
| - main exporters ² | 43.6 | 34.5 | 33.1 | 32.2 | 36.7 | 38.5 |
| - others | 128.2 | 134.7 | 136.9 | 141.7 | 143.9 | 140.1 |
| Developed countries | 181.4 | 179.9 | 204.7 | 207.1 | 195.9 | 181.1 |
| Australia | 7.9 | 6.9 | 9.1 | 7.9 | 7.0 | 7.2 |
| Canada | 10.5 | 10.0 | 12.5 | 10.5 | 9.1 | 10.7 |
| European Union | 40.0 | 37.4 | 32.9 | 41.6 | 39.2 | 45.0 |
| Japan | 7.1 | 7.3 | 6.6 | 6.7 | 6.8 | 7.0 |
| Russian Federation | 12.9 | 12.3 | 20.1 | 22.8 | 15.9 | 18.5 |
| South Africa | 3.2 | 3.7 | 1.8 | 5.1 | 3.9 | 2.1 |
| Ukraine | 12.9 | 9.5 | 7.4 | 6.5 | 6.6 | 8.0 |
| United States of America | 69.0 | 76.1 | 95.8 | 88.8 | 91.5 | 64.9 |
| Developing countries | 581.3 | 610.8 | 628.0 | 664.1 | 659.4 | 647.0 |
| Asia | 481.3 | 514.2 | 530.0 | 549.5 | 547.9 | 537.1 |
| China (Mainland) | 332.9 | 379.4 | 411.1 | 426.8 | 427.0 | 415.8 |
| India | 48.7 | 42.3 | 34.6 | 42.1 | 47.2 | 48.8 |
| Indonesia | 9.9 | 9.6 | 8.9 | 10.0 | 10.4 | 9.9 |
| Iran (Islamic Republic of) | 9.3 | 9.9 | 8.4 | 6.2 | 5.1 | 4.8 |
| Korea, Republic of | 4.0 | 4.4 | 4.0 | 3.3 | 2.8 | 2.9 |
| Pakistan | 7.2 | 6.0 | 6.0 | 5.3 | 3.9 | 2.6 |
| Philippines | 4.2 | 4.0 | 3.7 | 4.1 | 4.7 | 4.9 |
| Syrian Arab Republic | 2.0 | 1.5 | 2.0 | 1.9 | 1.4 | 1.5 |
| Turkey | 6.4 | 5.9 | 4.5 | 5.6 | 4.8 | 4.4 |
| Africa | 50.2 | 52.2 | 51.7 | 54.4 | 55.9 | 51.9 |
| Algeria | 5.0 | 5.7 | 5.6 | 5.3 | 6.0 | 6.2 |
| Egypt | 6.4 | 7.3 | 6.8 | 6.4 | 6.1 | 6.1 |
| Ethiopia | 3.1 | 4.2 | 4.8 | 5.6 | 5.9 | 5.4 |
| Morocco | 5.4 | 8.4 | 5.9 | 6.6 | 7.2 | 5.9 |
| Nigeria | 4.3 | 2.9 | 2.5 | 2.9 | 3.7 | 3.6 |
| Tunisia | 1.2 | 1.0 | 1.0 | 1.1 | 1.0 | 1.2 |
| Central America | 8.0 | 9.4 | 11.3 | 12.0 | 11.1 | 10.6 |
| Mexico | 3.6 | 4.6 | 6.5 | 7.6 | 7.1 | 6.8 |
| South America | 41.3 | 34.6 | 34.5 | 47.9 | 44.2 | 47.0 |
| Argentina | 11.6 | 7.7 | 7.4 | 12.4 | 11.8 | 13.7 |
| Brazil | 17.5 | 14.2 | 12.7 | 19.9 | 16.8 | 18.7 |

Source: FAO

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 European Union, Kazakhstan, the Russian Federation, Ukraine and the United States of America; major coarse grains exporters are Argentina, Australia, Brazil, Canada, the European Union, the Russian Federation, Ukraine and the United States of America; major rice exporters are India, Pakistan, Thailand, the United States of America and Viet Nam.

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

| | Wheat | | | Maize | | Sorghum |
|---------------------------|---|--------------------------------------|----------------------------------|-----------------------------|------------------------|-----------------------------|
| | US No.2 Hard Red Winter Ord. Protein 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) | | | | | | |
| 2006/07 | 212 | 176 | 188 | 150 | 145 | 155 |
| 2007/08 | 361 | 311 | 318 | 200 | 192 | 206 |
| 2008/09 | 270 | 201 | 234 | 188 | 180 | 170 |
| 2009/10 | 209 | 185 | 224 | 160 | 168 | 165 |
| 2010/11 | 316 | 289 | 311 | 254 | 260 | 248 |
| 2011/12 | 300 | 256 | 264 | 281 | 269 | 264 |
| 2012/13 | 348 | 310 | 336 | 311 | 278 | 281 |
| 2013/14 | 318 | 265 | 335 | 217 | 219 | 218 |
| 2014/15 | 266 | 221 | 246 | 173 | 177 | 210 |
| 2015/16 | 211 | 194 | 208 | 166 | 170 | 174 |
| 2016/17 | 197 | 170 | 190 | 156 | 172 | 151 |
| 2017/18 | 230 | 188 | 203 | 159 | 165 | 174 |
| 2018/19 | 232 | 210 | 233 | 166 | 166 | 163 |
| Monthly | | | | | | |
| 2017 - June | 226 | 182 | 190 | 158 | 155 | 164 |
| 2017 - July | 240 | 206 | 193 | 159 | 150 | 173 |
| 2017 - August | 201 | 173 | 190 | 148 | 149 | 170 |
| 2017 - September | 215 | 176 | 181 | 147 | 149 | 169 |
| 2017 - October | 214 | 177 | 182 | 148 | 149 | 171 |
| 2017 - November | 220 | 176 | 179 | 148 | 150 | 167 |
| 2017 - December | 219 | 171 | 178 | 149 | 158 | 174 |
| 2018 - January | 229 | 178 | 178 | 156 | 164 | 178 |
| 2018 - February | 240 | 191 | 189 | 164 | 177 | 188 |
| 2018 - March | 245 | 198 | 211 | 171 | 188 | 181 |
| 2018 - April | 240 | 198 | 229 | 175 | 189 | 180 |
| 2018 - May | 250 | 211 | 261 | 179 | 192 | 165 |
| 2018 - June | 241 | 205 | 268 | 166 | 170 | 167 |
| 2018 - July | 235 | 207 | 245 | 157 | 165 | 147 |
| 2018 - August | 250 | 215 | 242 | 162 | 168 | 165 |
| 2018 - September | 242 | 203 | 235 | 156 | 160 | 165 |
| 2018 - October | 240 | 210 | 233 | 160 | 162 | 159 |
| 2018 - November | 232 | 210 | 220 | 160 | 161 | 157 |
| 2018 - December | 240 | 217 | 228 | 167 | 171 | 164 |
| 2019 - January | 238 | 219 | 234 | 166 | 173 | 162 |
| 2019 - February | 234 | 217 | 244 | 170 | 170 | 170 |
| 2019 - March | 223 | 201 | 231 | 167 | 163 | 170 |
| 2019 - April | 213 | 195 | 220 | 161 | 155 | 164 |
| 2019 - May | 212 | 203 | 218 | 172 | 166 | 164 |
| 2019 - June | 227 | 222 | 243 | 196 | 183 | 164 |

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. Estimated cereal import requirements of Low-Income Food-Deficit Countries¹ in 2018/19 or 2019*(thousand tonnes)*

| | Marketing year | 2017/18 or 2018 | | | 2018/19 or 2019 |
|----------------------------------|----------------|----------------------|----------------|---------------------------------------|---|
| | | Commercial purchases | Food aid | Total imports (commercial and aid) | Total import requirements (excl. re-exports) |
| AFRICA | | 27 739.3 | 1 044.7 | 28 784.0 | 27 271.2 |
| East Africa | | 11 468.9 | 733.0 | 12 201.9 | 11 198.3 |
| Burundi | Jan/Dec | 174.8 | 16.0 | 190.8 | 186.0 |
| Comoros | Jan/Dec | 61.0 | 0.0 | 61.0 | 66.0 |
| Djibouti | Jan/Dec | 81.0 | 4.0 | 85.0 | 86.0 |
| Eritrea | Jan/Dec | 447.7 | 0.0 | 447.7 | 448.3 |
| Ethiopia | Jan/Dec | 1 892.9 | 54.0 | 1 946.9 | 1 870.0 |
| Kenya | Oct/Sept | 3 590.0 | 85.0 | 3 675.0 | 3 009.0 |
| Rwanda | Jan/Dec | 315.0 | 0.0 | 315.0 | 300.0 |
| Somalia | Aug/Jul | 760.0 | 190.0 | 950.0 | 835.0 |
| South Sudan | Nov/Oct | 575.0 | 90.0 | 665.0 | 680.0 |
| Sudan | Nov/Oct | 2 090.0 | 260.0 | 2 350.0 | 2 235.0 |
| Uganda | Jan/Dec | 537.5 | 23.0 | 560.5 | 518.0 |
| United Republic of Tanzania | Jun/May | 944.0 | 11.0 | 955.0 | 965.0 |
| Southern Africa | | 2 731.5 | 14.8 | 2 746.3 | 2 347.0 |
| Lesotho | Apr/Mar | 188.5 | 0.6 | 189.1 | 200.9 |
| Madagascar | Apr/Mar | 881.1 | 8.0 | 889.1 | 480.0 |
| Malawi | Apr/Mar | 165.0 | 2.0 | 167.0 | 207.0 |
| Mozambique | Apr/Mar | 1 160.0 | 1.0 | 1 161.0 | 1 186.0 |
| Zimbabwe | Apr/Mar | 336.9 | 3.2 | 340.1 | 273.1 |
| West Africa | | 11 186.6 | 133.9 | 11 320.5 | 11 148.9 |
| Coastal Countries | | 6 416.6 | 44.5 | 6 461.1 | 6 124.5 |
| Benin | Jan/Dec | 606.0 | 6.0 | 612.0 | 477.0 |
| Côte d'Ivoire | Jan/Dec | 2 245.0 | 5.5 | 2 250.5 | 2 220.5 |
| Ghana | Jan/Dec | 1 447.6 | 5.0 | 1 452.6 | 1 375.0 |
| Guinea | Jan/Dec | 1 002.0 | 5.5 | 1 007.5 | 867.5 |
| Liberia | Jan/Dec | 475.0 | 12.0 | 487.0 | 507.0 |
| Sierra Leone | Jan/Dec | 346.0 | 10.0 | 356.0 | 400.0 |
| Togo | Jan/Dec | 295.0 | 0.5 | 295.5 | 277.5 |
| Sahelian Countries | | 4 770.0 | 89.4 | 4 859.4 | 5 024.4 |
| Burkina Faso | Nov/Oct | 668.0 | 10.0 | 678.0 | 724.0 |
| Chad | Nov/Oct | 131.0 | 38.6 | 169.6 | 189.6 |
| Gambia | Nov/Oct | 277.0 | 1.5 | 278.5 | 243.5 |
| Guinea-Bissau | Nov/Oct | 123.0 | 6.3 | 129.3 | 144.3 |
| Mali | Nov/Oct | 451.2 | 0.0 | 451.2 | 501.2 |
| Mauritania | Nov/Oct | 531.8 | 13.0 | 544.8 | 558.8 |
| Niger | Nov/Oct | 520.0 | 18.0 | 538.0 | 663.0 |
| Senegal | Nov/Oct | 2 068.0 | 2.0 | 2 070.0 | 2 000.0 |
| Central Africa | | 2 352.3 | 163.0 | 2 515.3 | 2 577.0 |
| Cameroon | Jan/Dec | 1 130.0 | 10.0 | 1 140.0 | 1 280.0 |
| Central African Republic | Jan/Dec | 67.0 | 23.0 | 90.0 | 96.0 |
| Democratic Republic of the Congo | Jan/Dec | 760.0 | 125.0 | 885.0 | 870.0 |
| Republic of the Congo | Jan/Dec | 380.0 | 2.0 | 382.0 | 312.0 |
| Sao Tome and Principe | Jan/Dec | 15.3 | 3.0 | 18.3 | 19.0 |

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 1 905 in 2018); for full details see <http://www.fao.org/countryprofiles/lifdc>

Table A4b. Estimated cereal import requirements of Low-Income Food-Deficit Countries¹ in 2018/19 or 2019*(thousand tonnes)*

| | Marketing year | 2017/18 or 2018 | | | 2018/19 or 2019 |
|--|----------------|----------------------|----------------|---------------------------------------|---|
| | | Commercial purchases | Food aid | Total imports (commercial and aid) | Total import requirements (excl. re-exports) |
| ASIA | | 43 813.0 | 853.6 | 44 666.6 | 42 131.5 |
| Cis in Asia | | 4 856.8 | 0.1 | 4 856.9 | 4 943.5 |
| Kyrgyzstan | Jul/Jun | 617.4 | 0.1 | 617.5 | 588.5 |
| Tajikistan | Jul/Jun | 1 032.5 | 0.0 | 1 032.5 | 1 232.0 |
| Uzbekistan | Jul/Jun | 3 206.9 | 0.0 | 3 206.9 | 3 123.0 |
| Far East | | 29 081.2 | 226.5 | 29 307.7 | 25 641.0 |
| Bangladesh | Jul/Jun | 10 771.9 | 101.5 | 10 873.4 | 8 109.0 |
| Democratic People's Republic of Korea | Nov/Oct | 518.0 | 123.0 | 641.0 | 1 585.0 |
| India | Apr/Mar | 1 893.8 | 0.0 | 1 893.8 | 382.2 |
| Nepal | Jul/Jun | 1 317.7 | 2.0 | 1 319.7 | 1 185.8 |
| Viet Nam | Jul/Jun | 14 579.8 | 0.0 | 14 579.8 | 14 379.0 |
| Near East | | 9 875.0 | 627.0 | 10 502.0 | 11 547.0 |
| Afghanistan | Jul/Jun | 2 782.0 | 100.0 | 2 882.0 | 3 492.0 |
| Syrian Arab Republic | Jul/Jun | 3 020.0 | 290.0 | 3 310.0 | 3 705.0 |
| Yemen | Jan/Dec | 4 073.0 | 237.0 | 4 310.0 | 4 350.0 |
| CENTRAL AMERICA AND THE CARIBBEAN | | 1 381.0 | 9.1 | 1 390.1 | 1 395.1 |
| Haiti | Jul/Jun | 766.0 | 9.1 | 775.1 | 820.1 |
| Nicaragua | Jul/Jun | 615.0 | 0.0 | 615.0 | 575.0 |
| OCEANIA | | 63.8 | 0.0 | 63.8 | 64.0 |
| Solomon Islands | Jan/Dec | 63.8 | 0.0 | 63.8 | 64.0 |
| TOTAL | | 72 997.1 | 1 907.4 | 74 904.5 | 70 861.8 |

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 1 905 in 2018); for full details see <http://www.fao.org/countryprofiles/lifdc>

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This report is based on information available as of **June 2019**.

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