



# Crop Prospects and Food Situation

## HIGHLIGHTS

- **FAO's first forecast for world wheat production in 2011 stands at 676 million tonnes, 3.4 percent up from 2010.** This level of production would still be below the bumper harvests of 2008 and 2009.
- **International grain prices remained volatile in the first three weeks of March.**
- **The cereal import volume in LIFDCs as a group is anticipated to decline in 2010/11 due to increased production. However, their import bill is forecast to rise by 20 percent following higher international prices.**
- **In Asia, prospects for the 2011 wheat crop are mostly favourable.** In **China**, the outlook remains uncertain but the easing of the drought situation in the North China Plain is a positive development. In **Japan**, a powerful earthquake and subsequent tsunami have caused devastation with a potentially significant impact on agriculture and food trade.
- **In North Africa, the current situation in Libyan Arab Jamahiriya has resulted in the displacement of large numbers of people** and disruption to the flow of goods and services in this heavily cereal import dependent region. WFP has initiated a regional emergency operation to provide food assistance to the affected people.
- **In Southern Africa, prospects for the main 2011 maize crop are generally favourable** and relatively low prices have helped stabilize food security.
- **In Eastern Africa, food insecurity has increased in drought-affected pastoral areas of Somalia, Kenya and Ethiopia** despite bumper harvests in 2010 and generally low and stable food prices.
- **In Western Africa, post-election violence continues to cause a large population disruption and disturb trade and livelihoods in Côte d'Ivoire and the neighbouring countries.**

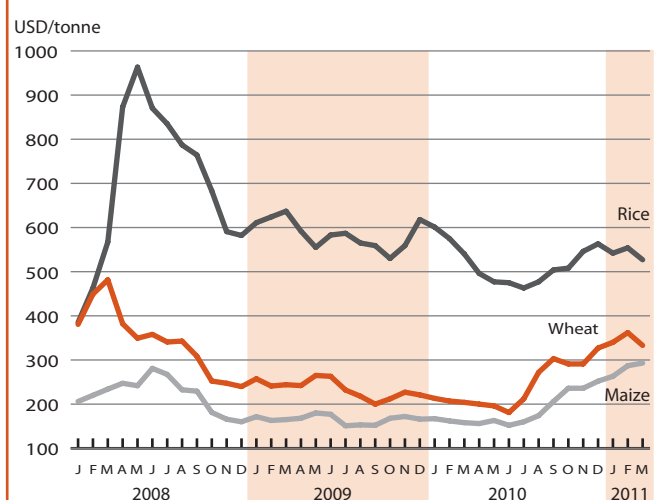
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Beginning March 2011, FAO launched the **FAO Global Cereal Supply and Demand Brief**, a monthly overview of the global cereal situation and outlook that is available on the FAO World Food Situation portal at: <http://www.fao.org/worldfoodsituation>.

A detailed assessment of cereal production as well as supply and demand conditions by country/region will continue to be published in the quarterly **Crop Prospects and Food Situation** (March, June, September, December), while analyses of world markets for cereals, as well as other major food commodities, are published biannually in **Food Outlook** (June and November).

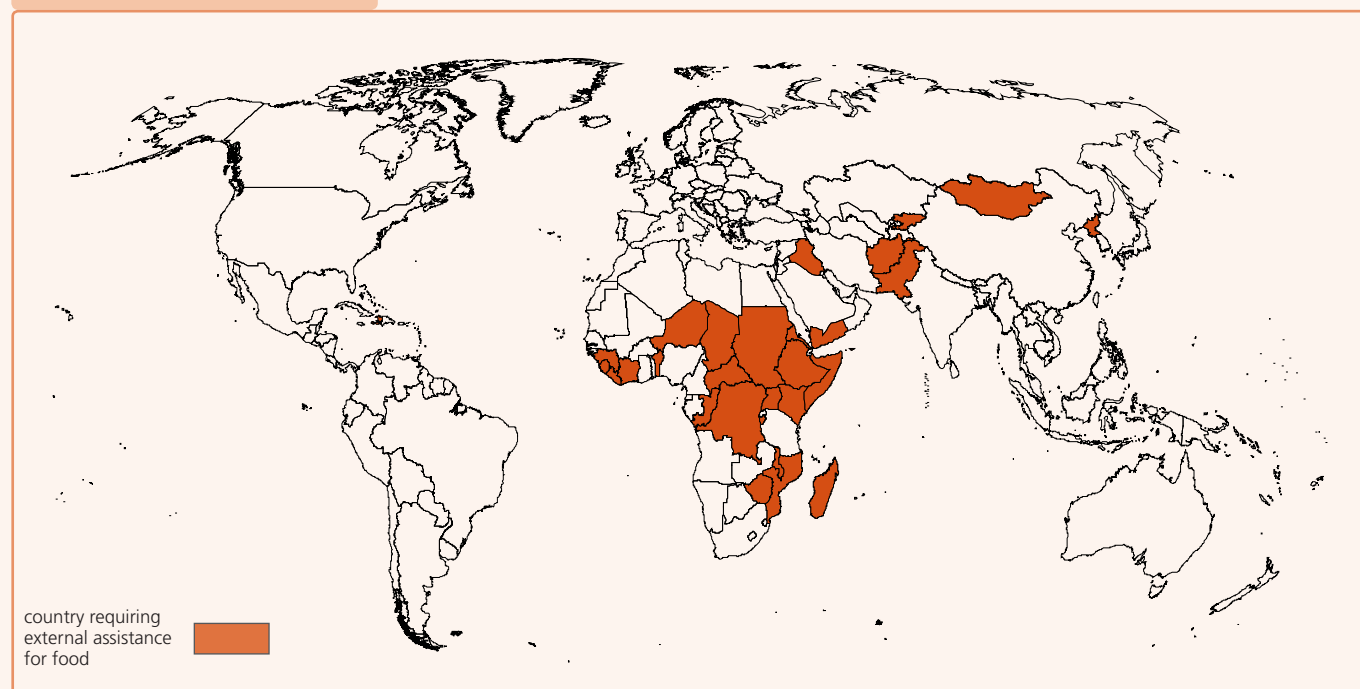
Selected international cereal prices



Note: Prices refer to monthly average. See Table 3 for details

# Countries requiring external assistance for food<sup>1</sup>

World: 29 countries



## AFRICA (21 countries)

### Exceptional shortfall in aggregate food production/supplies

#### Zimbabwe

An estimated 1.68 million persons in rural and urban areas require food assistance despite overall improved food security conditions

### Widespread lack of access

#### Eritrea

A high level of food insecurity persists due to economic constraints and internal displacement of population

#### Liberia

Slow recovery from war-related damage. Inadequate social services and infrastructure, as well as poor market access. Massive influx of refugees from Côte d'Ivoire: over 35 000 people have fled to Nimba, Grand Gedeh and Maryland counties, and taken refuge in 32 villages along the border

#### Niger

Lingering effects of the 2009/10 food crisis which resulted in depletion of household assets, including loss of animals and high levels of indebtedness

#### Sierra Leone

Slow recovery from war-related damage. Depreciation of currency led to higher inflation rates negatively impacting households' purchasing power and food security conditions

#### Somalia

About 2.4 million people are in need of food assistance due to the ongoing civil conflict and the severe drought during the 2010/11 secondary "deyr" season

### Severe localized food insecurity

#### Benin

Severe flooding affected 680 000 people causing damage to housing, infrastructure, crops and livestock

#### Burundi

Poor crop production in the north and north-east and high food prices exacerbate current food insecurity situation

#### Central African Republic

Civil insecurity restricts access to agricultural land, while volatile prices hamper food access.

#### Chad

Large numbers of refugees located in southern and eastern regions - approximately 270 000 Sudanese and 82 000 from Central African Republic. Lingering effects of drought that led to livestock deaths and other damages in 2009/10, notably in west-central areas of the country

#### Congo

Influx of more than 100 000 refugees, mostly from DRC, since the end of 2009, increased pressure on limited food resources

#### Côte d'Ivoire

Conflict-related damage. Agriculture seriously damaged in recent years due to the lack of support services mainly in the northern regions. The current post-election crisis has forced over 41 000 people to leave the country and seek refuge mostly in eastern Liberia. Another 40 000 people have been internally displaced in the western part of the country mostly in Duékoué, as of early February 2011

#### Dem. Rep. of Congo

Civil strife, internally displaced persons, returnees and high food prices

#### Ethiopia

Despite a good 2010 "meher" harvest, the estimated number of people requiring food assistance has recently increased from 2.3 to 2.8 million due to the poor rains from October to December in southern and south-eastern areas affecting pastoral and agro-pastoral households

#### Guinea

Access to food is negatively affected by high food prices and inflation

**Kenya**

An estimated 2.4 million people are food insecure, mainly in pastoralist and agro-pastoralist areas in north-western, south-eastern and coastal lowlands due to drier-than-normal weather conditions during the 2010/11 short-rains season

**Madagascar**

Food insecurity persists in southern regions, due to poor crop production in 2010, tightening market supplies and increasing prices. Localized flooding and the passing of Cyclone Bingiza in February has also damaged infrastructure and some crops. Nationally, an estimated 2.25 million people suffer from severe food insecurity

**Malawi**

Severe crop losses recorded in southern districts, but food security conditions have improved due to a good winter harvest and the distribution of food aid. The number of people estimated to be food insecure was reduced to 508 088 down from 1 million

**Mozambique**

Localized flooding in central and southern provinces result in some crop damage in 2011. About 335 000 persons in need of assistance during peak lean season, down from the initial assessment findings, as a result of production shortfalls in 2010

**Sudan**

About 6 million people in need of food assistance, due to a combination of factors, including civil strife (Darfur), insecurity and returnees (southern Sudan) and high food prices

**Uganda**

The country is generally food secure following the good production of 2010 first and second seasons. However, about 815 000 people are still moderately food insecure, mainly in Karamoja region

**ASIA (7 countries)****Exceptional shortfall in aggregate food production/supplies****Iraq**

Severe civil insecurity

**Widespread lack of access****DPR Korea**

Economic constraints and lack of agricultural inputs leading to inadequate food production and aggravated food insecurity. Severe winter conditions are expected to reduce wheat harvest

**Mongolia**

Lingering effects of the extreme cold (Dzud) last winter resulted in the death of nearly 6 million heads of livestock out of a total of 44 million and adversely affected livelihoods of some 500 000 people

**Severe localized food insecurity****Afghanistan**

Conflict, insecurity and high food prices. Moderately food insecure areas are in the centre and north-east of the country

**Kyrgyzstan**

Effects of social unrest, recent ethnic conflicts, internally displaced persons

**Pakistan**

The lingering effects of severe flooding last year, which affected some 18 million people causing damage to housing, infrastructure and crops

**Yemen**

Effects of unrest and recent conflict, internally displaced persons (about 300 000 people still in camps) and refugees (about 170 000 people)

**LATIN AMERICA AND THE CARIBBEAN (1 country)****Severe localized food insecurity****Haiti**

Over 3 million people will need food assistance in April-May. The majority of food-insecure households are mostly in poor and extremely poor areas affected by the cholera epidemic and Hurricane Tomas. Socio-political situation uncertain and high food prices

**Countries with unfavourable prospects for current crops<sup>2</sup>****AFRICA (5 countries)****Kenya**

Delayed and insufficient rains during the 2010/11 secondary season affecting crop production and pasture conditions

**Lesotho**

Heavy rains and flooding caused damage to crops, 30 to 60 percent losses reported in worst-affected areas

**Madagascar**

Delayed seasonal rains, followed by localized flooding, in northern and eastern regions

**Somalia**

Delayed and insufficient rains during the 2010/11 "deyr" season severely affecting crop production and grazing resources

**United Republic of Tanzania**

Delayed and insufficient rainfall during the 2010/11 "vuli" season affecting crop production in bimodal rainfall areas

**Key - Changes since last report (December 2010)**

No change ■ Improving ▲ Deteriorating ▼ New Entry +

**Terminology**

<sup>1</sup> **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.

<sup>2</sup> **Countries facing unfavourable prospects for current crops** are countries where prospects point to a shortfall in production of current crops as a result of the area planted and/or adverse weather conditions, plant pests, diseases and other calamities, which indicate a need for close monitoring of the crops for the remainder of the growing season.

# Global cereal supply and demand brief

## EARLY PROSPECTS FOR 2011 CROPS

### Overall favourable outlook for global 2011 wheat production

At this stage of the season, with the bulk of the coarse grains and paddy crops yet to be planted in the coming months, it is still too early for even a preliminary forecast of global cereal output in 2011. For wheat, however, in the northern hemisphere, which accounts for the bulk of the global production, winter crops are already developing or soon to come out of dormancy, while spring planting is underway in some countries and a preliminary picture of global prospects is already available.

FAO's first forecast for world wheat production in 2011 stands at 676 million tonnes, representing a growth of 3.4 percent from 2010. Plantings have increased, or are expected to increase, in many countries in response to strong prices, and yield recoveries are expected

in areas that were affected by drought in 2010, the Russian Federation in particular. The global output forecast for 2011 would be still below the bumper harvests in 2008 and 2009.

In the EU, the overall wheat planted area is expected to be up by about 2 percent, and with generally satisfactory conditions so far, the aggregate 2011 output is tentatively forecast to increase by 4 percent. In the Russian Federation, the winter wheat area was reduced because of dry conditions but the decline is expected to be more than offset by increased spring plantings. Coupled with an expected yield recovery after last year's drought, a sizeable increase in the country's 2011 wheat production over 2010 is forecast. Also Ukraine looks set to harvest more wheat this year, with relatively unchanged plantings but very favourable growing conditions reported in contrast to last year when dry conditions affected some areas. In North America, the early forecast for wheat production

in the United States points to a decline in 2011. Although winter plantings increased significantly, adverse dry conditions in parts could increase the level of abandonment this year and the spring wheat area is forecast to decline under strong competition from other crops. In Canada, the bulk of the wheat is spring sown and significantly larger plantings are expected in response to this year's higher prices, especially in view of last year's relatively low area.

In Asia, prospects for the 2011 wheat crop, to be harvested from April, are mostly favourable in India and Pakistan, where good harvests are forecast. However, the outlook in China is uncertain because of winter drought in the North China Plain despite recent beneficial precipitation. In the Asia CIS subregion, Kazakhstan is the major producer and the bulk of the crop is yet to be sown this spring. Weather permitting, farmers are expected to maintain the relatively high planting level of the past two years, especially in view of strong prices. Assuming also a recovery in yields after last year's drought-reduced level, a significant increase in production could be achieved. In North Africa, early prospects for the 2011 wheat crops are generally favourable, except in Tunisia where dry conditions point to a repeat of last year's drought-reduced crop.

In the southern hemisphere, where the major wheat crops are still to be sown, producers are also expected to increase plantings in response to this year's favourable price prospects. However, this may not translate to larger crops in Australia or Argentina, where yields are assumed to return to average after bumper levels in 2010.

### Mixed outlook for southern hemisphere 2011 coarse grain crops

The major coarse grains crops in the northern hemisphere are yet to be sown but in the southern hemisphere the season is well advanced. In South

Table 1. Wheat production: leading producers<sup>1</sup>  
(million tonnes)

	Average 2008-10	2009	2010 estimate	2011 forecast	Change: 2011 over 2010 (%)
EU	141.8	138.5	136.5	142.0	4.0
China (Mainland)	114.2	115.1	115.1	113.0	-1.8
India	80.0	80.7	80.8	81.5	0.9
United States	62.8	60.4	60.1	56.6	-5.8
Russian Federation	55.7	61.7	41.5	55.0	32.5
Canada	26.2	26.8	23.2	25.0	7.8
Australia	23.2	21.9	26.3	24.0	-8.8
Pakistan	22.8	24.0	23.3	24.0	3.0
Ukraine	20.7	20.8	17.2	21.0	22.1
Turkey	19.3	20.6	19.5	19.8	1.5
Kazakhstan	14.3	17.0	10.0	15.6	56.2
Iran Islamic Rep. of	12.4	13.0	14.5	13.2	-9.0
Argentina	10.4	8.8	14.0	13.5	-3.6
Egypt	8.3	8.5	8.5	8.6	0.9
Uzbekistan	6.5	6.6	6.7	6.6	-1.5
<b>World</b>	<b>674.4</b>	<b>684.5</b>	<b>653.7</b>	<b>676.0</b>	<b>3.4</b>

<sup>1</sup> Countries ranked according to average production 2008-10.

**America**, prospects for the 2011 maize crop are unfavourable in **Argentina** and **Uruguay** due to persistent dry weather linked to La Niña that has affected parts of the subregion. In **Brazil**, by contrast, the outlook is positive after good rainfall since planting improved soil moisture conditions for developing crops.

In Southern Africa, prospects for the current main coarse grains season are overall good. Weather conditions have been generally favourable despite localized floods and a recent dry spell, and large input subsidy programmes were implemented in Malawi, Zambia and Zimbabwe. In **Malawi** and **Zambia** maize production is forecast to reach record levels. In **South Africa**, however, the largest producer in the subregion, despite favourable growing conditions, a sharp drop in production is forecast from last year's high level following reduced plantings in response to high carryover stocks and low prices for maize at planting, inducing farmers to switch to other crops with better returns prospects such as soybean or sunflower.

### First 2011 rice crops already developing along and south of the equator

The first 2011 season rice crops have already been planted along and south of the equatorial line, and early indications point to significant production increases in **Argentina, Australia, Brazil, Indonesia** and **Uruguay** reflecting much improved weather conditions compared to last year. However, excessive precipitation/flooding are undermining expectations in **Sri Lanka**.

### 2010/11 SUPPLY AND DEMAND

#### Estimate of world cereal production in 2010 slightly up on December forecast

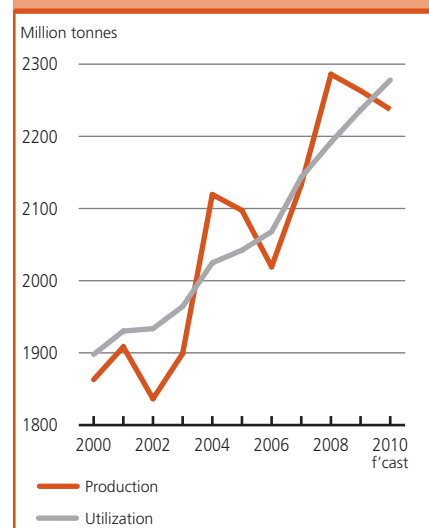
The estimate for world **cereal** production in 2010 has been revised upward slightly since previously reported (Crop Prospects

and Food Situation, December 2010) to 2 237 million tonnes (including rice in milled terms), just 1.1 percent below the bumper output in 2009. The decline in cereal production in 2010 was entirely due to lower output in developed countries while in developing countries production rose significantly by almost 5 percent.

The estimate for world **wheat** production in 2010 now stands at almost 654 million tonnes, 1 million tonnes above FAO's December forecast but still some 4 percent less than in 2009. The latest revision mostly reflects a better than expected outcome of the harvest in **Argentina**, which more than offset some downward adjustments to estimates in **Asia** (most notably **Kazakhstan**) and **Europe** (mostly the **Russian Federation**).

For **coarse grains**, the estimate of output in 2010 is now put at 1 117 million tonnes, 7 million tonnes up from the

Figure 1. World cereal production and utilization



previous forecast and just marginally less than the 2009 level. The upward revision was largely driven by increased estimates for **China, India, Ethiopia** and **Sudan**.

Table 2. Basic facts of world cereal situation

(million tonnes)

	2008/09	2009/10 estimate	2010/11 forecast	Change: 2010/11 over 2009/10 (%)
<b>PRODUCTION 1/</b>				
<b>World</b>	<b>2 286.0</b>	<b>2 263.1</b>	<b>2 237.3</b>	<b>-1.1</b>
Developing countries	1 240.6	1 239.2	1 299.7	4.9
Developed countries	1 045.3	1 024.0	937.6	-8.4
<b>TRADE 2/</b>				
<b>World</b>	<b>282.3</b>	<b>272.2</b>	<b>272.4</b>	<b>0.1</b>
Developing countries	72.8	74.4	84.5	13.6
Developed countries	209.5	197.9	187.8	-5.1
<b>UTILIZATION</b>				
<b>World</b>	<b>2 191.7</b>	<b>2 236.3</b>	<b>2 278.0</b>	<b>1.9</b>
Developing countries	1 341.4	1 369.1	1 410.9	3.1
Developed countries	850.3	867.2	867.1	0.0
Per caput cereal food use (kg per year)	151.8	152.2	153.5	0.9
<b>STOCKS 3/</b>				
<b>World</b>	<b>501.2</b>	<b>525.2</b>	<b>479.1</b>	<b>-8.8</b>
Developing countries	333.9	344.7	355.0	3.0
Developed countries	167.3	180.5	124.1	-31.2
<b>WORLD STOCK-TO-USE RATIO%</b>	<b>23.2</b>	<b>24.0</b>	<b>23.0</b>	<b>-4.2</b>

Note: totals computed from unrounded data.

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

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

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

The estimate for global **rice** production in 2010 remains unchanged since December at 466 million tonnes (in milled terms). Improved prospects for **Brazil**, **China** mainland and **Thailand** largely offset a sizeable downward revision for **India**. At this level, the aggregate output of the 2010 rice seasons, which will close when the northern hemisphere countries complete the harvest of their secondary crops by May/June, would be 2 percent up from 2009, mostly on account of large gains in Asia, where **Bangladesh**, **China**, **India** and **Indonesia**, the leading world producers, are all expected to tally larger crops.

### Tighter cereal supply and demand balance in 2010/11

FAO's latest forecasts confirm a tightening of the global cereal supply and demand balance in 2010/11. A decline in world production in 2010 in the face of growing demand is expected to result in a sharp drawdown of world stocks. Reflecting this prospect, international cereal prices have increased sharply with export prices of major grains up over 70 percent from this time last year.

World **trade** in cereals in 2010/11 is forecast to remain steady with larger trade in coarse grains offsetting a decline in wheat while rice trade is forecast to increase a little (about 1 percent).

The forecast for world cereal **utilization** in 2010/11 has been revised up by 18 million tonnes since December. The bulk of the revision reflects adjustments to the feed and industrial utilization of coarse grains. Larger use of maize for ethanol production in the United States and statistical adjustments to China's historical (since 2006/07) supply and demand balance for maize are the main reasons for the revision.

### Sharp fall in world stocks

World cereal **stocks** for crop seasons ending in 2011 are forecast to fall sharply because of a decline in inventories of wheat and coarse grains. A plunge in

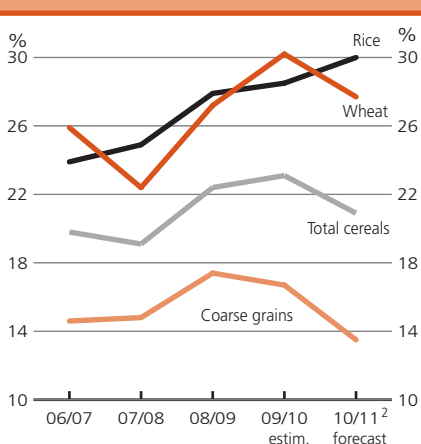
stocks of coarse grains at the global level as well as for major exporters is expected to push down stock usage ratios of coarse grains to the lowest level in three decades.

### International grain prices volatile in March

International prices of **wheat** that had risen by 7 percent in February, declined in the first three weeks of March, with the benchmark US wheat price (US No. 2 Hard Red winter) averaging USD 333 per tonne, about 48 percent higher than the same period last year, but 40 percent below its peak in March 2008. Wheat markets came under downward pressure in March following some improvements in weather in the United States and China and reports of possible delays in purchases by some of the countries hit by the recent wave of political unrest. However, prices rebounded sharply during the third week in March.

Export prices of **maize** rose sharply in February before declining in early March as slower export sales from the United States put downward pressure on markets in spite of cuts in the official forecast of inventories there. In the first three weeks of March the benchmark US maize price (US No. 2, Yellow) averaged USD 293 per tonne, 83 percent higher than at the

Figure 2. Ratio of world cereal stocks to utilization<sup>1</sup>



<sup>1</sup> Compares closing stocks with utilization in following season.  
<sup>2</sup> Utilization in 2010/11 is a trend value based on extrapolation from the 1999/00-2009/10 period.

same time a year earlier, but 13 percent below the June 2008 peak.

Export prices of **rice** that were generally stable in February, declined in the first three weeks of March with the benchmark export price (Thai white rice 100% B) averaging USD 527 per tonne, 3 percent below its level at the corresponding period in 2010 and 50 percent below the peak of May 2008. The decrease in prices reflects ample availabilities from recent harvests and sluggish demand.

Table 3. Cereal export prices\*  
(USD/tonne)

	2010				2011		
	Feb.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.*
<b>United States</b>							
Wheat1/	207	291	291	327	340	362	333
Maize2/	162	236	236	252	263	287	293
Sorghum2/	169	231	234	251	262	276	281
<b>Argentina3/</b>							
Wheat	221	294	295	300	317	347	348
Maize	164	248	246	260	272	288	291
<b>Thailand4/</b>							
Rice, white5/	575	509	541	563	542	554	527
Rice, broken6/	410	431	430	422	412	433	432

\*Prices refer to the monthly average. For March 2011, three weeks average.

<sup>1</sup> No.2 Hard Red Winter (Ordinary Protein) f.o.b. Gulf.

<sup>2</sup> No.2 Yellow, Gulf.

<sup>3</sup> Up river, f.o.b.

<sup>4</sup> Indicative traded prices.

<sup>5</sup> 100% second grade, f.o.b. Bangkok.

<sup>6</sup> A1 super, f.o.b. Bangkok.

# Low-Income Food-Deficit Countries food situation overview<sup>1</sup>

## Prospects for the 2011 cereal crops favourable for LIFDCs

Harvesting of winter cereals in the northern hemisphere generally begins in April and the bulk of the crop is gathered in June. Prospects for the 2011 winter crops, mainly wheat and barley, are favourable in countries such as **India, Pakistan, Egypt, Syrian Arab Republic** and **Iraq** where higher plantings have been reported. However, uncertain or poor harvest forecasts are made for winter wheat in most countries in **Asian CIS** and in **Eastern Africa**. By contrast, the outlook for main summer season crops, primarily maize, in the southern hemisphere, approaching maturity is promising in several **southern African** countries. In spite of localized flooding across the Zambezi basin, the above-normal rains in the region, consistent with the La Niña conditions, have proven conducive for bumper crops in several countries, notably in **Malawi** and **Zambia**.

## The aggregate 2010 cereal production of LIFDCs revised upwards from December estimates

The latest estimate of the total 2010 cereal production in LIFDCs has been revised upwards since December 2010 reflecting better than expected outputs in Eastern Africa, and most subregions of

Asia. In aggregate, cereal production of the 70 LIFDCs is now estimated to have risen by 5.6 percent in 2010, marking a third consecutive year of sustained growth. Most importantly, the growth in global cereal production in 2010 came entirely from LIFDCs as the world aggregate production was reduced by 1.1 percent over 2009. Most regions with the exception of North Africa and CIS in Asia had larger crops in 2010 as compared to 2009. The significant percentage increase among LIFDC groups was in Eastern Africa (22.6 percent), Western Africa (11.8 percent), Near East Asia (9.4 percent), Europe (Republic of Moldova, 9 percent), Southern Africa (5.8 percent), Far East Asia (3.8 percent) and Central Africa (3.2 percent), while in Central America there was no change. It should be noted, however, that the population of the LIFDCs as a group grew by about 1.8 percent in 2010, thus leaving the per

capita cereal production growth rate at 3.8 percent. By comparison, the per capita domestic cereal availability in non-LIFDCs declined by about the same percentage. With the improved cereal supply situation in LIFDCs, cereal consumption levels in the 2010/11 marketing year are expected to improve, as indicated by the increase in total utilization (Table 4). Part of the increase in production is also expected to go in stock build-up.

Within regions, however, performance of individual countries varied a great deal. In **Africa**, over one-third increase in total cereal production in 2010 from that in 2009 is estimated in **Sudan** and **Kenya** in Eastern Africa, **Chad, Niger** and **Mauritania** in Western Africa (recovering from the drought in 2009) and **Lesotho** and **Zambia** in Southern Africa primarily due to favourable rainfall and input support programmes. By contrast, a decline in cereal production in 2010 is estimated in **Malawi** and **Mozambique** from their record levels in 2009 in Southern Africa and **Egypt** in North Africa reflecting planned reductions in paddy plantings.

In the LIFDCs in **Asia**, the aggregate 2010 cereal output estimate is revised

**Table 4. Basic facts of the Low-Income Food-Deficit Countries (LIFDCs)<sup>1</sup> cereal situation** (million tonnes, rice in milled basis)

	2008/09	2009/10	2010/11	Change: 2010/11 over 2009/10 (%)
<b>Cereal production<sup>2</sup></b>	<b>518.5</b>	<b>517.6</b>	<b>546.5</b>	<b>5.6</b>
<i>excluding India</i>	301.2	313.9	329.7	5.0
<b>Utilization</b>	<b>570.8</b>	<b>583.2</b>	<b>602.4</b>	<b>3.3</b>
Food use	458.6	468.2	480.4	2.6
<i>excluding India</i>	277.6	284.7	292.3	2.7
Per caput cereal food use (kg per year)	156.6	157.2	158.4	0.8
<i>excluding India</i>	158.9	159.9	160.8	0.6
Feed	53.2	54.5	57.6	5.7
<i>excluding India</i>	42.7	44.4	47.1	6.1
<b>End of season stocks<sup>3</sup></b>	<b>99.7</b>	<b>101.5</b>	<b>105.3</b>	<b>3.7</b>
<i>excluding India</i>	54.3	61.7	64.1	3.9

<sup>1</sup> The Low-Income Food-Deficit (LIFDC) group of countries 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 1 855 in 2008); for full details see <http://www.fao.org/countryprofiles/lifdc.asp>. The 2011 list of LIFDCs includes 70 countries as opposed 77 on the earlier list. Countries removed from the list are Angola, Armenia, Azerbaijan, China, Equatorial Guinea, Morocco and Swaziland.

<sup>1</sup> The Low-Income Food-Deficit (LIFDC) group of countries 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 1 855 in 2008); for full details see <http://www.fao.org/countryprofiles/lifdc.asp>.

<sup>2</sup> Data refer to calendar year of the first year shown.

<sup>3</sup> May not equal the difference between supply and utilization because of differences in individual country marketing years.

upwards to 410 million tonnes, 3.8 percent from the good harvest of 2009. Larger crops in **Sri Lanka**, **Bhutan** and **Cambodia** in the Far East, bumper harvests in **Turkmenistan** and **Tajikistan** from central Asia, as well as above 50 percent increases, mainly in wheat production in **Iraq** and **Yemen** in the subregion of Near East helped improve the aggregate 2010 cereal production. Significant reduction in the final estimates of wheat or other cereals production in 2010 is recorded in **Georgia**, **Kyrgyzstan**, **Pakistan** and **Mongolia**. Most of these countries (except Pakistan) continue to be heavily dependent on wheat imports and their import bill is expected to rise in 2010/11 owing to the rising prices of this commodity in the international markets.

Of the three LIFDC countries in Central America and the Caribbean, 2010 cereal production suffered a great deal in **Haiti** due to the aftermath of the earthquake and severe damage to the second season crops by Hurricane Tomas.

In the **Republic of Moldova**, the only LIFDC in Europe, cereal output in 2010 has been revised upwards and is now estimated to be 13 percent over the near-average level of the year before.

### Cereal import volumes revised upwards since December 2010 but still expected to be lower than in 2010/11

In spite of the upward revision of the 2010 total cereal production, the import requirements for 2010/11 or 2011 are revised slightly upwards, resulting in some stock replenishments (see Table 4). However, in view of the increased domestic production in 2010, the cereal import requirements of the LIFDCs, as a group, in marketing year 2010/11 or 2011 are forecast to fall to some 75.4 million tonnes, 7 percent lower than the previous year's actual (estimated) imports. Import requirements are expected to decline in Asian and in African LIFDCs but increase slightly in the rest. Within

the Africa region, however, North Africa and Central Africa as subregions are expected to increase their cereal import requirements primarily due to the poor harvests domestically in 2010.

As shown in Figure 3, some 32 of the 70 LIFDCs have very high cereal import dependency with an import share in the past five years of one-third or higher of total domestic utilization. Of these, the

**Table 5. Cereal production<sup>1</sup> of LIFDCs**  
(million tonnes)

	2008	2009	2010	Change: 2010 over 2009 (%)
<b>Africa (39 countries)</b>	<b>117.7</b>	<b>118.6</b>	<b>132.2</b>	<b>11.5</b>
North Africa	21.4	20.9	20.5	-1.9
Eastern Africa	32.9	32.7	40.1	22.6
Southern Africa	10.9	13.7	14.5	5.8
Western Africa	49.3	48.2	53.9	11.8
Central Africa	3.3	3.1	3.2	3.2
<b>Asia (22 countries)</b>	<b>396.0</b>	<b>394.9</b>	<b>409.9</b>	<b>3.8</b>
CIS in Asia	10.4	11.6	11.4	-1.7
Far East	376.6	369.4	383.4	3.8
- India	217.3	203.7	216.8	6.4
Near East	8.9	13.8	15.1	9.4
<b>Central America (3 countries)</b>	<b>1.8</b>	<b>1.9</b>	<b>1.9</b>	<b>0.0</b>
<b>Oceania (5 countries)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Europe (1 country)</b>	<b>3.0</b>	<b>2.2</b>	<b>2.4</b>	<b>9.1</b>
<b>LIFDC (70 countries)</b>	<b>518.5</b>	<b>517.6</b>	<b>546.5</b>	<b>5.6</b>

Note: Totals computed from unrounded data.

<sup>1</sup> Includes rice in milled terms. '-' means nil or negligible.

**Table 6. Cereal import position of LIFDCs**  
(thousand tonnes)

	2009/10 or 2010	2010/11 or 2011			
		Requirements <sup>1</sup>		Import position <sup>2</sup>	
	Actual imports	Total imports:	of which food aid	Total imports:	of which food aid pledges
<b>Africa (39 countries)</b>	<b>40 302</b>	<b>37 179</b>	<b>2 461</b>	<b>10 483</b>	<b>631</b>
North Africa	15 326	15 625	0	8 602	0
Eastern Africa	8 464	6 025	1 712	636	269
Southern Africa	2 191	1 724	273	951	213
Western Africa	12 581	11 908	333	191	119
Central Africa	1 740	1 897	143	103	30
<b>Asia (22 countries)</b>	<b>38 681</b>	<b>35 942</b>	<b>1 050</b>	<b>15 817</b>	<b>434</b>
CIS in Asia	3 830	3 613	42	1 880	34
Far East	19 185	19 108	859	10 794	313
Near East	15 665	13 221	149	3 143	87
<b>Central America (3 countries)</b>	<b>1 820</b>	<b>1 826</b>	<b>180</b>	<b>410</b>	<b>114</b>
<b>Oceania (5 countries)</b>	<b>387</b>	<b>413</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Europe (1 country)</b>	<b>75</b>	<b>80</b>	<b>0</b>	<b>43</b>	<b>0</b>
<b>Total (70 countries)</b>	<b>81 265</b>	<b>75 441</b>	<b>3 691</b>	<b>26 753</b>	<b>1 179</b>

Note: Totals computed from unrounded data.

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

<sup>2</sup> Estimates based on information available as of early February 2011.

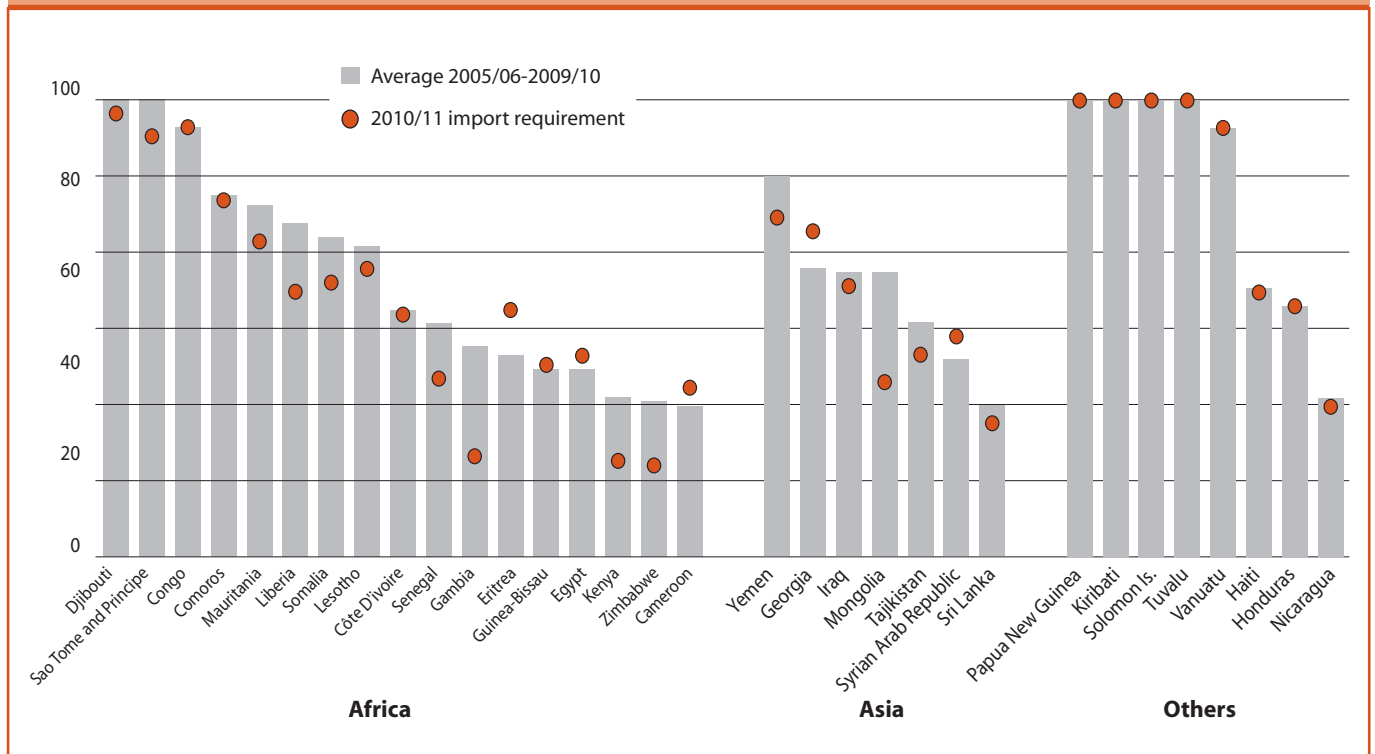


bulk of the countries, 17 are in Africa and 7 in Asia. The sharp increase in international prices of the main traded cereals (wheat, rice and maize) since the beginning of the 2010/11 marketing season is having serious impact on the cereal import bills of these countries. The total LIFDC import bill

for 2010/11 or 2011 is forecast to increase by about 20 percent, with coarse grains imports having the maximum impact of up to 44 percent increase due to the sharpest rise in the export price of maize. Rice import bills are expected to go up the least in accordance with the relatively

slower rise in the international export prices of rice. Although the forecast cereal import bill of the LIFDCs is still below the record level reached during the food crisis in 2007/08, it is a serious cause of concern for food security of these low income countries.

Figure 3. Share of imports in total domestic utilization of cereals (average share one-third or more)



# Regional reviews

## Africa

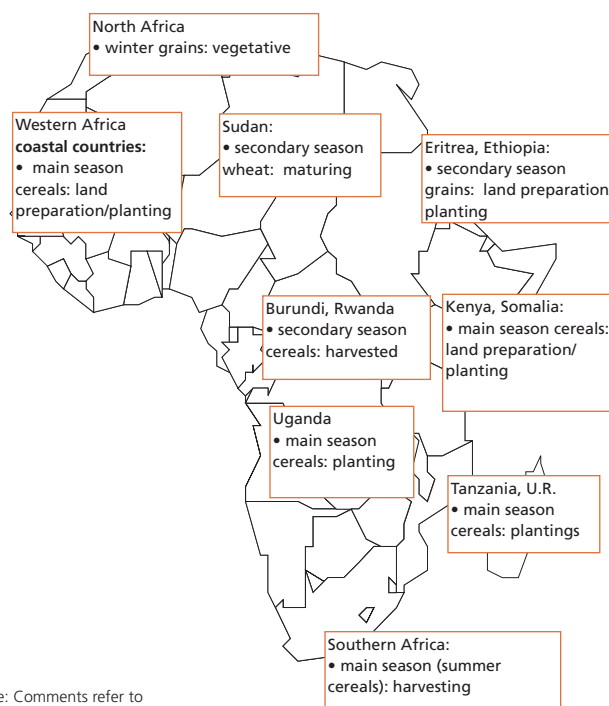
### North Africa

#### Early prospects for the 2011 winter crops are favourable

In **North Africa**, early prospects for the 2011 winter wheat and coarse grains, to be harvested from May, are favourable, except in **Tunisia** where dry conditions in January have dampened hopes for a robust recovery in wheat production following last year's drought-affected poor harvest. In **Morocco** and **Algeria**, a good cereal production is expected this year owing to favourable weather since the beginning of the cropping season and government support towards the agriculture sector. In **Egypt**, the largest producer in the subregion, where most crops are irrigated, weather conditions were also reported to be generally satisfactory and average to above-average cereal output is anticipated.

#### Decline in cereal production in 2010 is estimated

The subregion's 2010 aggregate output of wheat (the main crop) is estimated at 17.3 million tonnes, 11.8 percent down from the record crop of 2009, and that of coarse grains at about 13.6 million tonnes, a 14.8 percent decline. The drop in production is mostly the result of insufficient soil moisture at planting and subsequent erratic rains in the main growing areas of **Morocco** and **Tunisia**. Moreover, rice output also dropped by 18 percent in **Egypt**, reflecting government policy to reduce area planted to rice in order to restrict water use. Thus the subregion's 2010 aggregate cereal production is estimated at 35.4 million tonnes, 14 percent down from the record crop of 2009, just slightly above the average of the previous five years.



Note: Comments refer to situation as of March.

#### Cereal import bills forecast to increase significantly in 2010/11

North African countries rely heavily on wheat imports from the international market to cover their consumption needs. **Egypt** is the world's largest wheat importer, with about 10 million tonnes of wheat imported in marketing year 2009/10 (July/June). **Algeria, Morocco** and **Tunisia** imported about 5.2 million, 2.3 million and 1.4 million tonnes, respectively, in spite of the bumper crops gathered in 2009. Import levels are anticipated to be much higher during 2010/11 in countries affected by a reduced crop last year. Consequently, the recent sharp increase in international export prices has raised serious concerns over the food supply outlook in the subregion. The major impact will be on the countries' food import bills and low-income consumers, although food is subsidized to some extent in most countries.

**Table 7. North Africa cereal production**

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2008	2009	2010 estim.	2008	2009	2010 estim.	2008	2009	2010 estim.	2008	2009	2010 estim.	Change: 2010/2009 (%)
<b>North Africa</b>	<b>13.9</b>	<b>19.6</b>	<b>17.3</b>	<b>11.2</b>	<b>15.9</b>	<b>13.6</b>	<b>7.3</b>	<b>5.6</b>	<b>4.5</b>	<b>32.4</b>	<b>41.1</b>	<b>35.4</b>	<b>-13.9</b>
Algeria	1.1	3.0	3.0	0.9	2.3	1.5	-	-	-	2.0	5.3	4.5	-15.1
Egypt	8.0	8.5	8.5	8.4	8.6	8.9	7.3	5.5	4.5	23.6	22.7	21.9	-3.5
Morocco	3.8	6.4	4.9	1.5	4.0	2.8	-	-	-	5.3	10.4	7.7	-26.0
Tunisia	0.9	1.7	0.8	0.3	0.9	0.3	-	-	-	1.2	2.5	1.1	-56.0

Note: Totals computed from unrounded data, '-' means nil or negligible.

In **Egypt**, where provision of subsidized bread is considered crucial to government food policy and the food security of the poor, the increase in world prices of wheat will add substantially to the cost of Egyptian wheat imports in 2010/11 and to the expenditure on the Government's bread subsidy programme. The benchmark international export price of US Hard Red Winter wheat increased by 73 percent in March 2011 over the same month a year earlier. For most consumers, while the high cost of imported wheat may not be felt due to the country's safety net programme, increases in the non-subsidized wheat flour price have caused prices of other wheat products to go up. At national level, nominal wheat prices increased by 32 percent in the year to December 2010. Domestic rice prices also increased due to lower rice production that followed the Government's policy of economizing on water use. These developments increased the inflationary pressure towards the end of 2010. Nonetheless the inflation rate still remained well below its peak of 18.3 percent in 2008. The year-on-year rate of inflation was estimated at 10.3 percent in December 2010 compared to 23.7 percent in August 2008. Inflation rates in the food sector (food and drinks account for more than 40 percent of the consumer price index) were 17.2 percent and 30.9 percent in December 2010 and August 2008, respectively.

Civil disturbances in **Tunisia, Egypt and Libyan Arab Jamahiriya** that began at the end of last year have resulted in increasing levels of internal insecurity and population displacement, both internally and externally. Current estimates indicate that more than 207 000 people have fled Libyan Arab Jamahiriya since 19 February. Food security conditions of the vulnerable population, particularly migrants, are of grave concern. The situation is further aggravated given the high import dependence of these countries for cereals and the rising international prices which have contributed to enlarging national import bills and consumer prices - outside of the national safety net programmes. As an immediate response to the humanitarian situation, WFP has initiated an emergency operation to distribute food aid to about 1 million people in the affected countries for a period of three months (March to May 2011). It should be noted, however, that in **Tunisia and Morocco**, as of December 2010, the hike in international food prices was not translated into high domestic prices; the food sector year-on-year inflation rates there were estimated at 4.8 and 4 percent, respectively. In **Algeria**, although the year-on-year inflation rate in

November 2010 was only 2.45 percent for food and 2.42 percent for cereals, the sugar price rose by 23.5 percent and the oil price by 13.5 percent. In order to curb rising prices of sugar and oil, the Government slashed taxes and import duties on these commodities in early January which were reduced by about 40 percent.

## Western Africa

In **Western Africa**, currently seasonably dry conditions have prevailed in the Sahel. In the coastal countries along the Gulf of Guinea, land preparation for the first maize crop is underway. Plantings will begin with the arrival of rains, usually from April.

### Record harvest gathered in 2010 in most Sahelian countries

The subregion's aggregate cereal output in 2010 was provisionally estimated at a record 59 million tonnes, 11.6 percent up from 2009 and 20 percent above the five-year average. A record crop was gathered in most Sahelian countries, including **Burkina Faso, Chad, the Gambia, Guinea-Bissau, Mali, Niger and Senegal**. Estimates also indicate good cereal and root and tuber production in the coastal countries along the Gulf of Guinea, notably in **Nigeria**, the largest producer in the subregion, whose agricultural sector can strongly affect the food supply position of its neighbouring Sahelian countries. The main exception is **Benin** where cereal production is estimated down by 20 percent due to irregular rains and floods during the growing season.

### Food security to be affected by civil insecurity and the international commodity markets

Reflecting the good harvests, markets are generally well supplied and coarse grains prices have been generally lower compared to the previous year. For example, in **Nigeria**, following a peak in May 2010, maize prices dropped by over 32 percent in December 2010 in Kano, in the northern part of the country. Millet prices in markets in **Mali (Bamako), Niger (Niamey) and Burkina Faso**

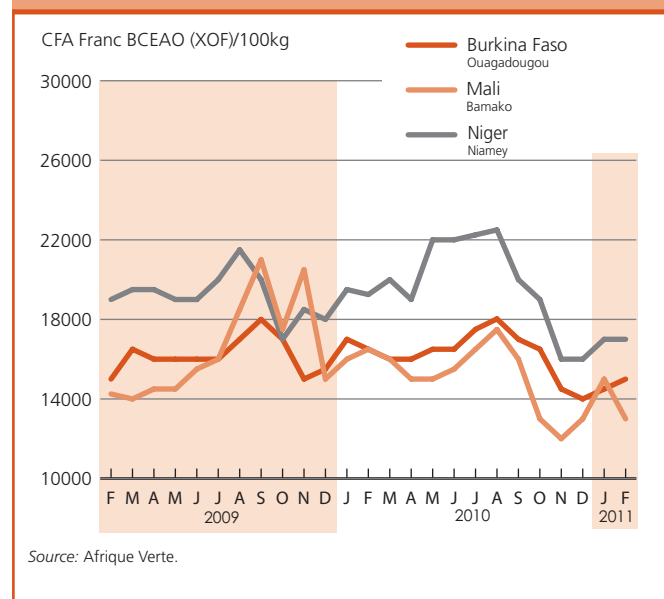
**Table 8. Western Africa cereal production**  
(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals <sup>1</sup>			
	2008	2009	2010 estim.	2008	2009	2010 estim.	2008	2009	2010 estim.	Change: 2010/2009 (%)
<b>Western Africa</b>	<b>42.5</b>	<b>40.9</b>	<b>45.9</b>	<b>10.5</b>	<b>11.4</b>	<b>12.5</b>	<b>53.2</b>	<b>52.4</b>	<b>58.5</b>	<b>11.6</b>
Burkina Faso	4.2	3.4	4.2	0.2	0.2	0.2	4.4	3.6	4.5	25.0
Chad	1.6	1.4	2.4	0.2	0.1	0.2	1.8	1.6	2.7	68.8
Ghana	2.0	2.2	2.3	0.3	0.4	0.4	2.3	2.6	2.7	3.8
Mali	2.7	3.0	3.1	1.6	2.0	2.3	4.4	5.0	5.4	8.0
Niger	5.0	3.4	5.5	0.1	0.1	0.1	5.0	3.5	5.6	60.0
Nigeria	21.5	21.3	22.3	4.2	4.3	4.5	25.8	25.7	26.8	4.3

Note: Totals computed from unrounded data, '-' means nil or negligible.

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

**Figure 4. Millet prices in selected Western African markets**



(Ouagadougou) in February 2011 were 21, 12 and 9 percent, respectively, lower than in February 2010. However, the situation is different for the prices of imported commodities, which are determined by world prices and have exhibited significant pass-through from the international market. For example, in **Mauritania**, average wheat prices are reported to have increased by 40 percent in 2010 in Nouakchott. Although changes in rice export prices have been limited so far, domestic prices have been following an upward trend in recent months in several countries; about 14 percent higher in **Senegal** in November 2010 and 20 percent higher in **Niger** in February 2011 than a year earlier. The change in domestic prices of imported rice in these countries is also driven by the recent depreciation of the CFA (which is pegged to the Euro) against the US dollar.

In spite of last year's good harvests, the food outlook for 2011 remains uncertain, due to several factors including the high dependence of several countries on imported cereals. In addition, in **Côte d'Ivoire**, the current post-election crisis has forced over 41 000 people to leave the country and seek refuge mostly in eastern **Liberia**. Another 40 000 people have been internally displaced in the western part of the country, mostly in Duékoué, as of late February. These numbers are forecast to continue to increase due to the deterioration of the security situation in the country. The crisis has also led to serious disruptions in

trade flows, causing food prices to increase in several areas. On 18 January 2011, the United Nations and partners, launched the Côte d'Ivoire and neighbouring countries' (including Liberia) Emergency Humanitarian Action Plan (EHAP), requesting about USD 33 million to facilitate humanitarian organizations' preparedness and cover the most urgent humanitarian needs for the next six months.

## Central Africa

### Favourable rainfall supported production gains in 2010

In **Cameroon** and the **Central African Republic**, the sowing of the 2011 main maize crop, due for harvest from July, will begin soon in the south. Harvesting of the 2010 secondary maize crop was completed late last year. Judging from satellite images, the overall rainfall conditions during the cropping season were adequate, and tentative estimates point to an improved 2010 harvest as compared to the previous year. Growing conditions were also favourable in **Gabon** and **Republic of Congo**, where cereal production is limited and the bulk of the national cereal utilization requirement is imported.

In **Cameroon**, reflecting the good harvest, markets are well supplied, and cereal prices have declined significantly across the country. For example, in the markets of Garoua and Bafoussam, during December 2010, maize prices were at 17 and 23 percent below levels recorded in the corresponding period in the previous year. By contrast, in **Gabon**, recent developments in the international cereals market have resulted in high inflationary pressure on the domestic food market, due to the country's high dependence on cereal imports. The year-on-year inflation in the food sector increased from 1.5 percent in April 2010 and 4.1 percent in September to 10.7 percent in November 2010.

### Civil insecurity still a major cause of food insecurity

Persistent civil insecurity continues to impede agricultural recovery and restrict humanitarian work in the region. Armed clashes in the Equateur province in the **Democratic Republic of Congo** have led to more than 100 000 civilians crossing the border into the **Republic of Congo** and the **Central African Republic** since

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

	Coarse grains			Rice (paddy)			Total cereals <sup>1</sup>			
	2008	2009	2010 estim.	2008	2009	2010 estim.	2008	2009	2010 estim.	Change: 2010/2009 (%)
<b>Central Africa</b>	<b>3.0</b>	<b>2.8</b>	<b>2.9</b>	<b>0.4</b>	<b>0.5</b>	<b>0.5</b>	<b>3.4</b>	<b>3.3</b>	<b>3.4</b>	<b>3.0</b>
Cameroon	1.6	1.3	1.4	0.1	0.1	0.1	1.6	1.5	1.5	0.0
Central Africa Rep.	0.2	0.2	0.2	-	-	-	0.2	0.2	0.2	0.0

Note: Totals computed from unrounded data, '-' means nil or negligible.

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

the end of 2009. The influx of refugees has placed additional demands on the already strained food supply situation of Likouala Province, in the north-east of the Republic of Congo, causing a deterioration in the food security of both refugees and the host population. An emergency operation (EMOP) was put in place during 2010, to provide food assistance to 124 700 people. A similar situation is reported in eastern and northern parts of the **Central African Republic**, where civil conflict has exacerbated the already poor food security situation. Some 100 000 IDPs and 30 000 refugees and asylum seekers from the Democratic Republic of Congo, Chad and Sudan continue to require food assistance.

## Eastern Africa

### Unfavourable prospects for current second season crops and pasture growth due to drought

Harvesting of the 2010/11 second season crops is almost complete in most countries, except in Ethiopia, where planting is about to commence. The drought conditions that prevailed from October 2010 to January 2011, mainly due to the meteorological phenomenon of La Niña, affected large parts of the subregion, including pastoral and agro-pastoral areas in eastern and north-eastern Kenya, central and southern Somalia, southern and south-eastern Ethiopia, northern and north-eastern United Republic of Tanzania and inland Djibouti. In these areas, production of the 2010 secondary season crops has almost completely failed and grazing conditions have gradually deteriorated, worsening livestock body conditions, increasing mortality rates and negatively impacting on milk production. Abnormal livestock migrations in search of better pasture and water are widely reported, increasing the risk of disease outbreaks due to the high concentration of animals in a few areas and conflicts among herders competing for grazing and water.

The overall performance of 2011 main season crops will strongly depend on the evolution of the next rainy season that normally begins in April. Early meteorological forecasts indicate the persistence of a moderate La Niña phenomenon, that would normally result in a late and erratic onset of rains and overall below-average precipitation levels. Major risks include an extended dry period in eastern pastoral and agro-pastoral areas of the Horn of Africa where 2010 secondary season rains were already poor.

### A record cereal crop gathered in the main cropping season of 2010

The aggregate 2010 cereal output (main and secondary seasons) for the subregion is estimated at a record 40.9 million tonnes, 24 percent higher than the average of the previous five years. Based on official estimates, record production was obtained in **Ethiopia**, **Kenya** and **Uganda**. Above-average and well distributed rains during the 2010 main cropping season, and increased planting in key growing areas led to bumper output in all countries of the subregion, more than compensating for the unfavourable prospects of the current secondary season crops. The share of the secondary season cereal harvest in the annual production typically ranges from 5 percent in Ethiopia to 40 percent in Uganda.

### Cereal prices are generally on the rise with some exceptions

In Kenya, Uganda, central and southern Somalia, southern Sudan and Darfur, cereal prices continued on their upward trend that had started in September-October 2010. Notable increases in maize prices are reported in Kampala, Mogadishu and Nairobi markets, where current prices are respectively about 95, 80 and 50 percent above their corresponding levels of five-six months earlier. In southern Sudan, especially in markets along the north-south border and in the capital city Juba, cereal prices started to increase by the end of November 2010, following trade disruptions during the pre- and post-referendum period. Grain supply has declined in several markets as traders from northern Sudan, Uganda and Kenya, have reduced their activities and some have even left the country.

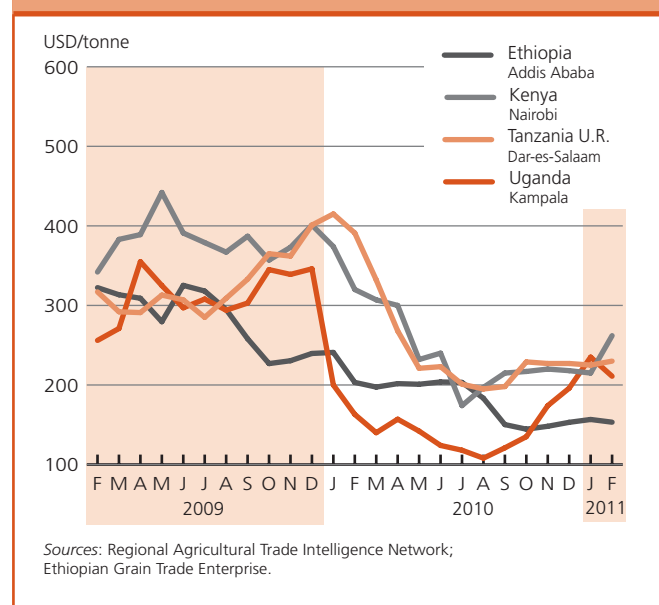
By contrast, cereal prices have declined in most markets in "meher" dependant areas of Ethiopia following the good harvest in 2010. Currently cereal prices are between 25 and 30 percent below their levels of one year earlier. In northern Sudan, following the very good production of the 2010 main season, sorghum prices have declined substantially in main markets (except in Darfur due to insecurity) and it is currently traded at about USD 350 per tonne in Khartoum, almost half the record

**Table 10. Eastern Africa cereal production**  
(million tonnes)

	Wheat			Coarse grains			Total cereals <sup>1</sup>			
	2008	2009	2010 estim.	2008	2009	2010 estim.	2008	2009	2010 estim.	Change: 2010/2009 (%)
<b>Eastern Africa</b>	<b>3.8</b>	<b>4.2</b>	<b>4.1</b>	<b>27.9</b>	<b>27.2</b>	<b>34.7</b>	<b>33.5</b>	<b>33.4</b>	<b>40.9</b>	<b>22.5</b>
Ethiopia	2.6	3.3	3.0	12.5	13.4	15.6	15.2	16.9	18.8	11.2
Kenya	0.3	0.2	0.4	2.5	2.6	3.9	2.9	2.9	4.4	51.7
Sudan	0.6	0.4	0.5	4.9	3.1	5.9	5.5	3.6	6.4	77.8
Tanzania U.R.	0.1	0.1	0.1	4.6	4.3	4.7	6.1	5.7	6.2	8.8
Uganda	-	-	-	2.5	2.6	3.2	2.7	2.8	3.4	21.4

Note: Totals computed from unrounded data, '-' means nil or negligible.

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

**Figure 5. Maize prices in selected Eastern African markets**

price of May 2010 but still above the pre- high food prices crisis in early 2008. In some areas of north-western Somalia that were not affected by the recent drought, prices of both maize and sorghum have been stable in the last months, at levels similar to a year earlier.

### Rising food insecurity in drought-affected areas

Food insecurity has significantly increased in the last few months, especially in drought-affected areas of Somalia, Kenya and Ethiopia. The total number of food insecure people in need of humanitarian assistance in the subregion is currently estimated at about 15.3 million people (including 6 million in Sudan, 2.8 million in Ethiopia, 2.4 million each in Kenya and Somalia), about 2 million people more than the previous FAO estimate in December 2010. Food security conditions may deteriorate further in the coming months if current dry weather conditions persist in

pastoralist and agro-pastoralist areas, preventing any possibility of recovery of local household livelihoods.

Civil conflicts and insecurity continue to negatively affect the food security situation in most areas of southern and central Somalia and in Darfur in Sudan, disrupting local markets and trade flows and hindering humanitarian aid distribution. In Southern Sudan, food security prospects are still uncertain and depend on the developments with regard to insecurity in the period up to the predetermined date of 9 July 2011 for the creation of an independent state and the post-independence period. So far, close to 250 000 people have returned to Southern Sudan (plus about 38 000 people in the Abyei area) since late October 2010. The number of returnees is expected to increase in the run-up to independence and the immediate post-independence period.

## Southern Africa

### Despite localized floods and a recent dry-spell, prospects for current crops are favourable

In **Southern Africa**, harvesting of the early planted 2010/11 cereal crops began in February 2011; the main harvest will commence in March or April. Rainfall during the first three months of the cropping season (October-December) was generally favourable, despite some early water deficits observed in northern parts of Malawi, Mozambique and Madagascar (Figure 6). Towards the end of 2010 and into January, torrential rains across the Zambezi basin and southern and western parts of the subregion resulted in localized flooding causing crop damage. This was followed by a dry-spell during most of February and beginning of March, affecting portions of Botswana, Zimbabwe, central and southern Mozambique, southern Zambia and Malawi, and northern parts of South Africa's maize triangle, causing some soil moisture stress to early planted maize which was at the grain filling stage. However, some improvement in rainfall levels was seen in the first dekad of March in parts of the subregion. Currently, prospects remain favourable for most areas of the subregion.

As in previous years, large seed and fertilizer subsidy

**Table 11. Southern Africa cereal production**

(million tonnes)

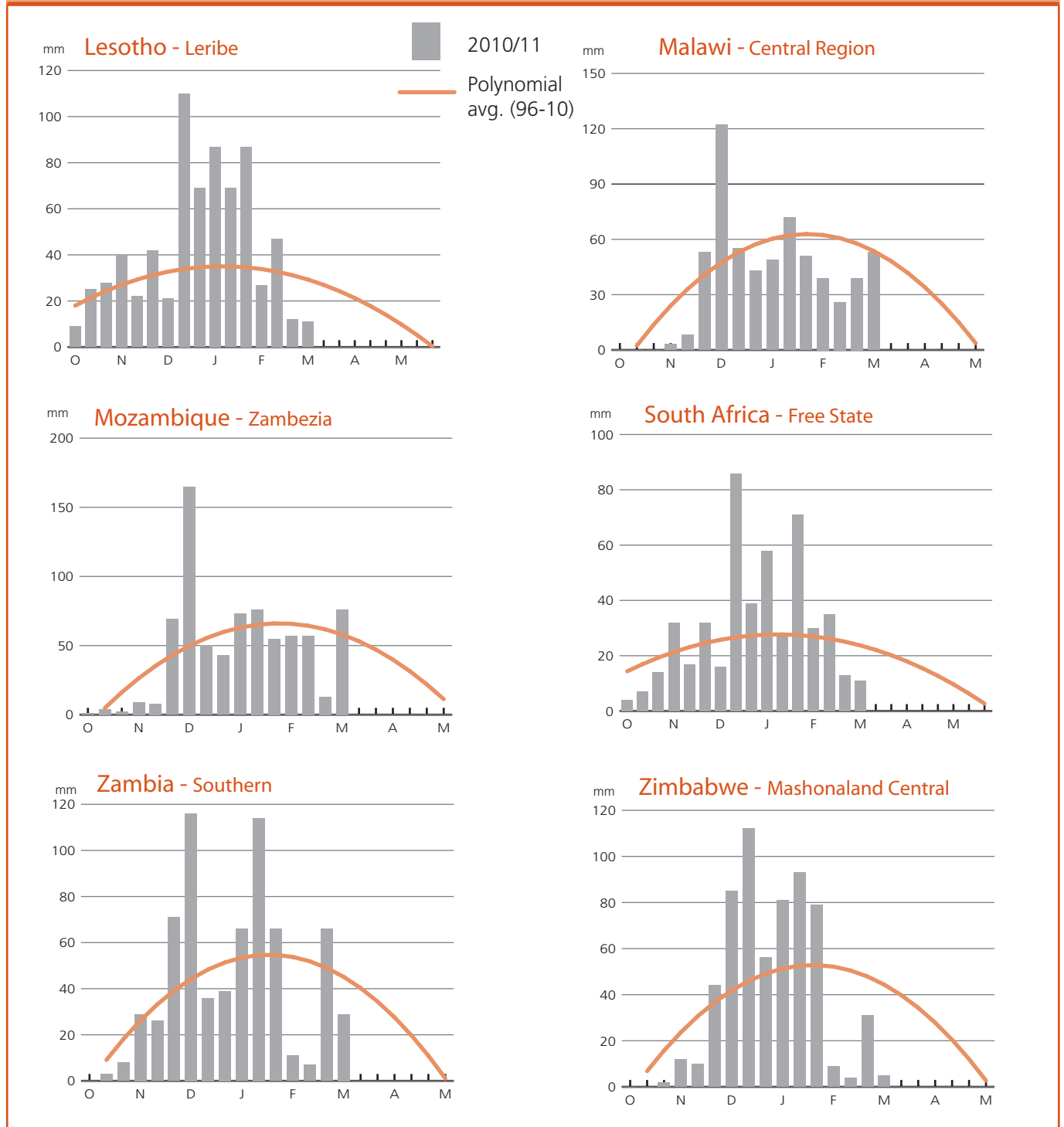
	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2008	2009	2010 estim.	2008	2009	2010 estim.	2008	2009	2010 estim.	2008	2009	2010 estim.	Change: 2010/2009 (%)
<b>Southern Africa</b>	<b>2.4</b>	<b>2.3</b>	<b>1.8</b>	<b>21.8</b>	<b>24.7</b>	<b>26.4</b>	<b>4.3</b>	<b>5.0</b>	<b>5.1</b>	<b>28.5</b>	<b>31.9</b>	<b>33.2</b>	<b>4.1</b>
- excl. South Africa	0.3	0.3	0.3	8.8	11.6	12.4	4.3	5.0	5.1	13.3	16.8	17.8	6.0
Madagascar	-	-	-	0.4	0.4	0.4	3.9	4.5	4.8	4.4	4.9	5.2	6.1
Malawi	-	-	-	2.9	3.7	3.5	0.1	0.1	0.1	3.0	3.9	3.6	-7.7
Mozambique	-	-	-	2.1	2.4	2.3	0.2	0.3	0.2	2.3	2.6	2.5	-3.8
South Africa	2.2	2.0	1.5	13.0	13.1	13.9	-	-	-	15.2	15.1	15.5	2.6
Zambia	0.2	0.2	0.2	1.5	2.0	2.9	-	-	0.1	1.7	2.2	3.1	40.9
Zimbabwe	-	-	-	0.8	1.5	1.6	-	-	-	0.8	1.6	1.6	0.0

Note: Totals computed from unrounded data, '-' means nil or negligible.

programmes were implemented in the 2010/11 agricultural season in Zambia, Malawi and Zimbabwe. Early maize official production estimates point to record harvests in **Malawi** at about 3.9 million tonnes and **Zambia** over 2.8 million tonnes. In **Mozambique** and **Zimbabwe**, crop conditions are

generally satisfactory, despite minor losses in riverine areas due to the localized flooding in central and southern provinces of Mozambique and the impact of the recent dry spell. Similarly, in **Lesotho**, heavy rains in January caused some crop damage in the lowland areas, and in some of the worst affected

**Figure 6. 2011 main cereal crop season - Rainfall pattern in main selected growing areas in Southern Africa, up to the first dekad of March**



areas reports indicate crop losses of 30 to 60 percent. In **Madagascar**, cyclone Bingiza caused damage in north-eastern and south-eastern districts during February. In **South Africa**, the latest maize production forecast in 2011 is put at 11.65 million tonnes, some 13 percent below last year's crop but still above the average of the preceding five years (2005-2010). The large stock levels in the country resulted in low maize prices last year, which in turn induced farmers to switch to more profitable crops (such as soybean and sunflower) and led to a decline in maize plantings by about 13 percent. White maize production is estimated to fall by 19 percent, compared with 6 percent for yellow maize, which is predominantly used for feed. By contrast, sorghum production is anticipated to rise by about 7 percent over last year's output.

**Lower import levels in response to good harvest in the past few years**

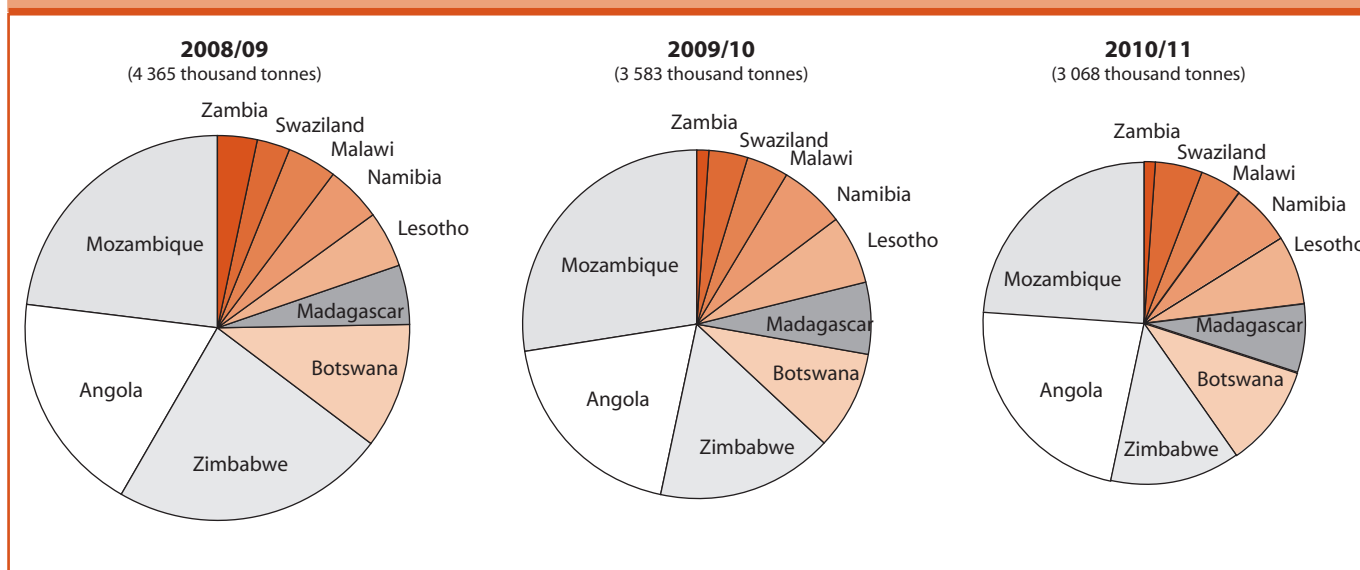
Over the past three marketing years (2008/09-2010/11), an expansion in cereal production resulted in a contraction in import requirements for the subregion as a whole (Figure 7). For the current 2010/11 marketing year, maize import requirements of the subregion, excluding South Africa and Mauritius, are estimated at 900 000 tonnes, compared to the preceding five-year average of nearly 1.7 million tonnes. Total cereal imports are estimated to be just over 3 million tonnes marking a 21 percent fall from the five-year average. However, for the structurally food deficit countries, import requirements have remained relatively constant over this period, with only small variations observed. While in Mozambique, despite achieving a national self sufficiency for maize, the significant transportation costs and access to competitively priced maize supplies in South Africa,

have led to high import levels, primarily to meet the consumption requirements in the southern parts of the country. With regard to wheat, as the subregion is in deficit, quantities of imports have remained comparatively constant, and for the current marketing year are estimated at 3.1 million tonnes, with South Africa alone estimated to import 1.5 million tonnes. In addition to the formal trade, informal trade has continued as normal in the 2010/11 marketing year.

**Maize prices have begun to strengthen following generally stable at relatively low levels in 2010**

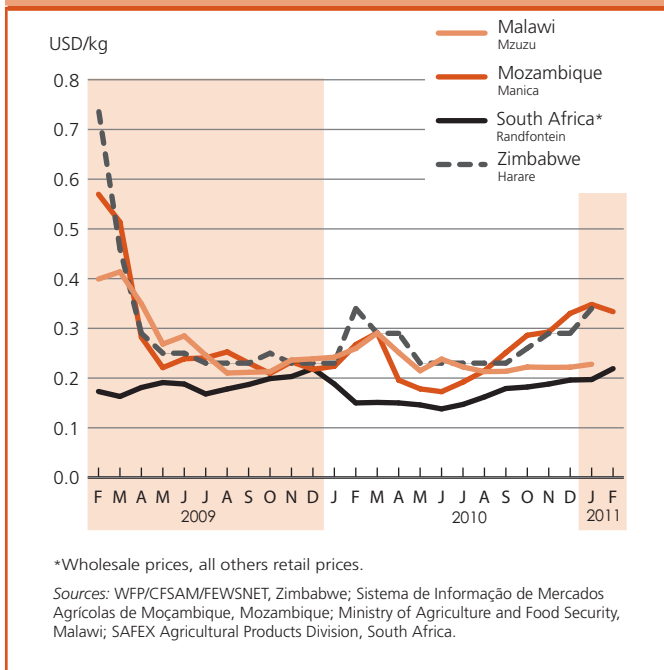
Following comparatively stable levels during 2010, maize prices have shown signs of strengthening across the subregion in recent months, conforming to annual trends, as households shift to market purchases to satisfy their consumption needs. In Mozambique, production shortfalls that were experienced last season and depreciation of the national currency have contributed to an increase in maize and rice prices, with maize prices in Manica and Maxixe about 30 and 42 percent higher in February compared with one year earlier. Rice prices in Madagascar are similarly high, with prices of local varieties rising by 12 percent between December and February. In South Africa, which is the largest exporter of maize in the subregion, the prices generally remained low in 2010, following consecutive bumper harvests and the retention of large domestic stocks. However, in January and February, prices of both yellow and white maize increased following concerns about the impact of heavy rains and a recent dry-spell on the 2011 harvest. Sustained exports to Asia have also supported a strengthening of yellow maize prices. In February

Figure 7. Southern Africa imports (excluding South Africa and Mauritius), from 2008/09 to 2010/11





**Figure 8. White maize prices in selected Southern African markets**



2011, despite some decline towards the end of the month, the average price of white maize was ZAR 1 567 per tonne, about 36 percent above last year's level.

### Overall food security conditions are stable, but areas affected by floods and high prices raise concerns

Food supplies are expected to improve in the coming months as the main harvest commences in most areas, enabling households to replenish their stocks and augmenting local market supplies. However, despite adequate national and subregional cereal supplies as well as normal flows of trade that helped to stabilize food security conditions, localized areas – particularly in southern regions of Malawi and in the arid and semi-arid zones of Mozambique – food insecurity conditions remain prevalent due to production shortfalls. Vulnerable groups in the areas that were recently affected by localized flooding and crop losses, particularly in the Zambezi basin area and Lesotho, require close monitoring. Limited income levels, in addition, may further constrain households' ability to purchase

staple foods in areas that are experiencing higher food prices during the current lean season.

## Great Lakes Region

### Poor rains result in a reduced harvest of the secondary season crops in 2011

In **Burundi** and **Rwanda**, early reports indicate a reduced bean and maize harvest from the secondary 2011 A season, completed in February. The poor harvest follows an extended period of below-average rains during the cropping season, attributed to the effects of La Niña, which delayed planting activities and negatively impacted crop development. This was followed by heavy rains during harvesting that also caused some crop damage. In Burundi, preliminary estimates point to a 3 percent decline in food production compared with the corresponding season in 2010. The lower seasonal supplies are expected to constrain households' ability to replenish food stocks. In February, during the start of the planting period for the main 2011 B season, below-average rains were observed across most regions, except for far western areas. In both countries, as in previous years, seeds and inputs will be provided by FAO and partners to farmers. Approximately 73 000 households have been targeted to receive cereal and vegetable seeds to support production for the main season in Burundi.

With the arrival of new supplies from the 2011 A harvest, the price of beans declined in both countries in January 2011. However, prices of rice and maize strengthened at the start of 2011 but are at similar levels compared with the same month last year. Given the large portion of households' income allocated to food purchases, the higher prices are expected to further aggravate the food insecurity conditions of vulnerable groups.

In the **Democratic Republic of Congo** harvesting of main season's maize crop is underway in central and southern parts, with erratic rainfall characterising much of the 2010/11 cropping season, particularly in central and western areas. Prices of imported rice, cassava and maize declined at the end of 2010, following generally stable levels throughout the year. Civil insecurity continues to constrain agricultural production and exacerbates the food insecurity conditions of vulnerable groups, particularly in north-eastern parts of the country, with seven territories of the Orientale Province categorized as severely food insecure.

## Asia

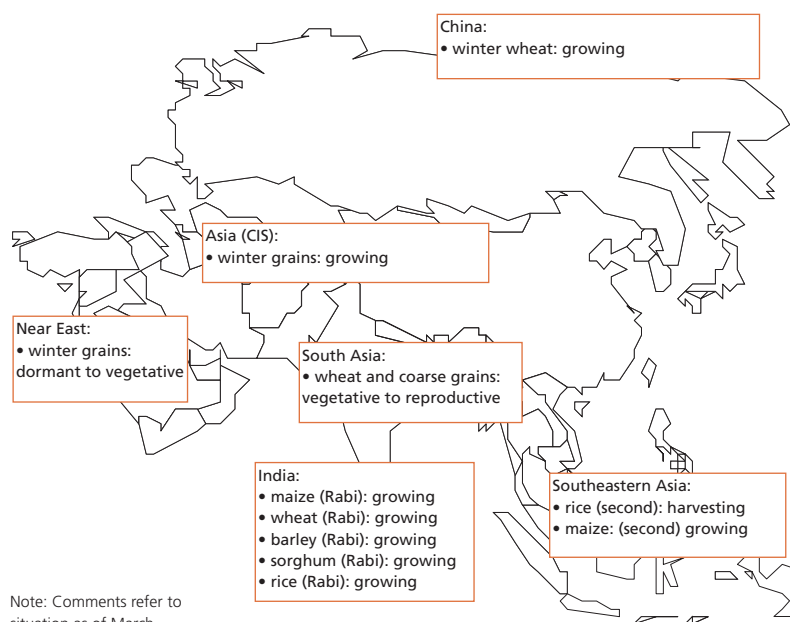
### Far East

#### Mixed prospects for 2011 main wheat and secondary rice crops in the subregion

The harvesting of 2011 main winter wheat and secondary rice crops, sown from October onwards, is at early stages in most countries of the subregion. Prospects for the winter wheat crop are favourable in **India, Pakistan** (despite the widespread damage caused by floods in July-August 2010) and **Mongolia** but uncertain in **China**, the subregion's main producer, due to the winter drought in the North China Plain. Substantially below-normal rainfall since October 2010 in eight of the country's main winter wheat producing provinces may put the winter wheat harvest at risk. However, some precipitation since mid-February and increased efforts to provide irrigation facilities are helping to reduce the moisture deficit impact on the final outcome.

FAO's early forecast for the subregion's 2011 wheat harvest stands at 222 million tonnes, a slight drop by 1 million tonnes from the 2010 level, which in itself was just above the 2009 record harvest. Slight improvements in wheat harvests in Pakistan and India would not be enough to compensate for the expected decline in China.

Despite weather irregularities during the season, prospects for the irrigation dependent secondary rice harvests in 2011 are good in **Cambodia, China, India, Thailand** and **Viet Nam**. By contrast, severe floods during December and January in the



eastern parts of **Sri Lanka** are forecast to reduce the main season (*Maha*) paddy crop harvest there by some 7 percent from the previous year's record production.

#### 2010 aggregate cereal production improved with significant gains in coarse grains

Harvesting of the 2010 main season rice and other summer cereals was completed by the end of the year. With most official estimates now available, FAO has revised the 2010 aggregate output of cereals to 1 118.5 million tonnes (including rice in paddy terms) up by about 7.5 million tonnes from the December forecast, primarily based on the better-than-expected coarse grains performance especially in **China** and to a lesser extent

**Table 12. Far East cereal production**  
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2008	2009	2010 estim.	2008	2009	2010 estim.	2008	2009	2010 estim.	2008	2009	2010 estim.	Change: 2010/2009 (%)
<b>Far East</b>	<b>215.8</b>	<b>223.4</b>	<b>223.2</b>	<b>260.9</b>	<b>253.8</b>	<b>268.2</b>	<b>618.4</b>	<b>611.6</b>	<b>627.1</b>	<b>1 095.1</b>	<b>1 088.8</b>	<b>1 118.5</b>	<b>2.7</b>
Bangladesh	0.8	0.8	0.9	1.4	1.0	1.1	47.0	48.4	50.3	49.2	50.2	52.2	4.0
Cambodia	-	-	-	0.6	0.9	0.9	7.2	7.6	8.0	7.8	8.5	8.9	4.7
China	112.5	115.1	115.1	175.9	173.2	182.0	193.4	196.7	200.5	481.7	485.0	497.6	2.6
India	78.6	80.7	80.8	39.5	33.9	39.8	148.8	133.6	144.3	266.9	248.2	264.9	6.7
Indonesia	-	-	-	16.3	17.6	17.8	60.3	64.4	66.0	76.6	82.0	83.8	2.2
Korea Rep. of	-	-	-	0.3	0.4	0.4	6.5	6.6	5.8	6.8	7.0	6.2	-11.4
Korea DPR	0.2	0.1	0.2	1.9	1.8	2.0	2.0	2.3	2.4	4.1	4.3	4.6	7.0
Myanmar	0.2	0.2	0.2	1.3	1.3	1.3	30.5	31.0	30.8	32.0	32.5	32.2	-0.9
Nepal	1.6	1.3	1.6	2.2	2.2	2.2	4.5	4.0	4.1	8.3	7.6	7.9	3.9
Pakistan	21.0	24.0	23.3	4.1	3.8	4.0	10.4	10.3	6.3	35.5	38.1	33.6	-11.8
Philippines	-	-	-	6.9	7.0	6.4	17.1	15.5	16.8	24.0	22.5	23.2	3.1
Thailand	-	-	-	4.4	4.8	4.1	31.7	32.1	31.4	36.1	36.9	35.5	-3.8
Viet Nam	-	-	-	4.6	4.4	4.7	38.7	38.9	39.9	43.3	43.3	44.6	3.0

Note: Totals computed from unrounded data, '-' means nil or negligible.

in **India**. Thus, the revised 2010 total cereal production for the region as a whole represents an increase of 2.7 percent over the 2009 production that was reduced by a drought-affected rice harvest in India. The revised estimates indicate significant improvement in this year's national aggregate cereal outputs in order of percentage change in **Sri Lanka, Democratic People's Republic of Korea, India, Cambodia, Bangladesh, Nepal, Viet Nam, the Philippines, China, Indonesia** and **Japan**. However, poor harvests were gathered in **Pakistan** due to severe flooding, and in the **Republic of Korea, Mongolia, Thailand** and **Malaysia** due to delayed/erratic rains.

The 2010 production of rice (paddy), the major staple cereal in the subregion, accounting for more than 50 percent of the total, is estimated at a record level of 627 million tonnes or 2.5 percent up from the above-average harvest of 2009 mainly reflecting a recovery in **Sri Lanka, India, the Philippines** and **Cambodia**. The 2010 wheat output is estimated at 223.2 million tonnes, just below the previous year's record output.

### Cereal imports by countries in the subregion expected to decrease in 2010/11 marketing year

Although the Far East subregion as a whole is a net exporter of rice it is a net importer of cereals. Several food-deficit countries are heavily dependent on imports to meet their domestic demand. The average share of imports in total domestic utilization (consumption) has ranged in the high low-income import countries from 10 percent in Bangladesh to 62 percent in Mongolia. Total cereal imports of the subregion as a whole are expected to decline slightly in 2010/11 compared to the year before, in particular that of wheat and rice due to the improved supplies, production plus carryover stocks, of these commodities. On the other hand, despite increased supplies the import requirements of maize for the 2010/11 marketing year are estimated to rise significantly due to the strong global demand for food and non-food purposes of the commodity. In the rising international cereal price markets the low-income countries are considered the most at risk owing to likely higher cereal import bills.

### Rice prices show some signs of softening, wheat prices remain firm

Prices of rice in US dollar terms, declined slightly in February from the recent peaks reached in the last few months in **Thailand, Viet Nam, and China**, but remained firm in **India, Bangladesh, and Cambodia**. The decline/softening in some of these countries, such as China, Thailand and India coincides with the arrival of the new harvest of the early season crop. However, prices in some importing countries such as **Indonesia** and the **Philippines** are yet to reflect the downturn seen in other countries and are much higher and have risen faster in recent months than in the

### Japan - The aftermath of the earthquake and tsunami

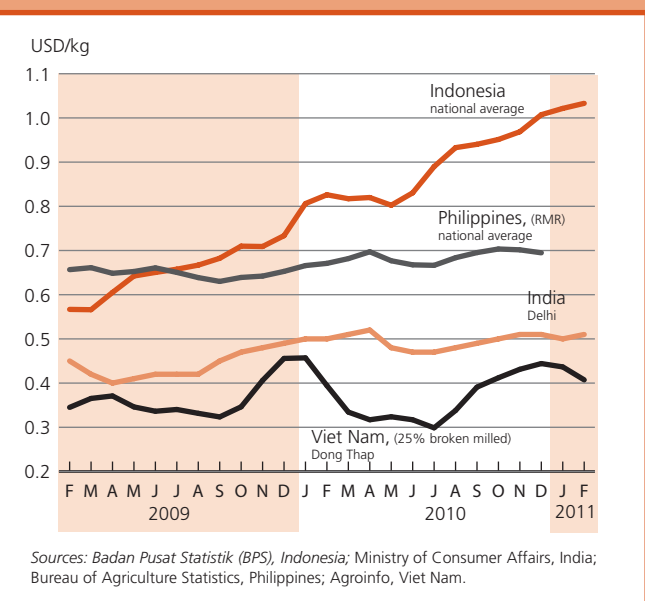
Japan was hit by a powerful earthquake and consequent tsunami on 11 March 2011 on its east coast causing a heavy death toll and an enormous devastation. It is too early to estimate the impact of this natural disaster and the subsequent potential nuclear implications for the agricultural production and food trade. However, it could be considerable as the region that suffered the most is well known for paddy cultivation. The loss of fishermen and fishing equipment could also result in a significant decline in fish production. Initial damage estimates are reported in the order of USD 200 billion.

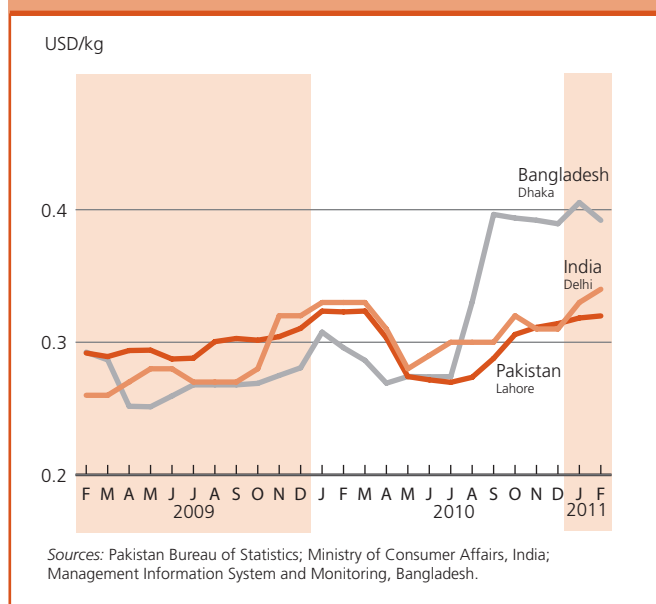
Rice production in 2010 is estimated at 7.7 million tonnes (in milled terms), accounting for about 90 percent of total cereal production in Japan. The paddy crop is normally planted in May and harvested in October. Japan's annual net imports of rice average around 500 000 tonnes, or 5.6 percent of domestic consumption. The country is a major importer of maize (16.5 million tonnes) and wheat (5.3 million tonnes). The four main affected prefectures also represent an important livestock farming region.

exporting countries.

Wheat prices on the other hand remained firm at a high level in February in wheat staple countries such as **India, Pakistan, China** and to some extent **Afghanistan** where slight decline in

Figure 9. Rice retail prices in selected Far East countries



**Figure 10. Wheat retail prices in selected Far East countries**

some markets was observed heralding the improved prospects for the 2011 winter wheat, to be harvested from May. The price impact on overall food consumption of the vulnerable population is expected to be substantial.

## Near East

### Favourable prospects for 2011 winter crops

Across the subregion, planting of 2011 winter cereal crops, mainly wheat and barley, has been completed. The area planted this year is expected to be substantially higher as a direct response to the prevailing high wheat prices. After a late onset and erratic performance of the rainy season recent abundant precipitation and snowfall in the mountainous areas in **Turkey, Iraq, Syrian Arab Republic, Afghanistan, the Islamic Republic of Iran** and **Lebanon**, have improved soil moisture and irrigation reserves for dormant and greening crops. During the winter, minimum temperatures remained well above the

threshold for potential crop damage, avoiding the risk of winterkill. These factors have improved prospects for wheat and barley production to be harvested from June.

The subregion's cereal production in 2010 is estimated at 69.6 million tonnes, about 2 percent higher than the 2009 good output. Despite some losses due to a widespread yellow rust outbreak, abundant and well distributed rains across the season favoured wheat and barley crops. In **Yemen**, despite the record cereal production in 2010 due to abundant rains, the population facing severe food insecurity is estimated at 2.7 million people in addition to IDPs and refugees estimated at about 400 000.

## CIS in Asia

### Uncertain prospects for the 2011 winter cereal crops

The outlook for the 2011 winter cereals, mainly wheat, is uncertain. Planting was completed in October-November in most countries of the subregion under less favourable weather conditions than last year due to low levels of precipitation and soil moisture. Official reports from different countries indicate that the dormant winter wheat crop has not been affected so far, but more rains are needed in the coming weeks for the development of the crops during spring. The area planted to winter cereal crops is estimated to decrease slightly in **Kyrgyzstan** and **Tajikistan**. However, prospects for the subregion's 2011 cereal crop will depend greatly on plantings in **Kazakhstan**, the main cereals producer in this group of countries (60 percent of the total) where the bulk of the crop will be sown in the spring.

### Significant decline in 2010 cereal production

The revised estimates of the 2010 aggregate cereal output in the subregion indicate a crop of 25.9 million tonnes, 27 percent lower than the record level of 2009 and 18 percent lower than the average of the past five years. The decline in production mostly reflects unfavourable weather conditions during the

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

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2008	2009	2010 estim.	2008	2009	2010 estim.	2008	2009	2010 estim.	2008	2009	2010 estim.	Change: 2010/2009 (%)
<b>Near East</b>	<b>35.6</b>	<b>45.5</b>	<b>46.0</b>	<b>16.3</b>	<b>18.9</b>	<b>19.5</b>	<b>3.8</b>	<b>3.8</b>	<b>4.2</b>	<b>55.7</b>	<b>68.2</b>	<b>69.6</b>	<b>2.1</b>
Afghanistan	2.6	5.1	4.5	0.6	0.8	0.8	0.6	0.6	0.6	3.9	6.5	5.9	-9.2
Iran (Islamic Rep. of)	1.6	1.8	1.3	0.7	0.6	0.6	-	-	-	2.3	2.4	1.9	-20.8
Iraq	1.3	1.4	2.2	0.6	0.7	1.3	0.2	0.2	0.2	2.1	2.2	3.7	68.2
Syrian Arab Republic	2.1	3.7	3.6	0.4	1.0	1.2	-	-	-	2.6	4.7	4.8	2.1
Turkey	17.8	20.6	19.5	10.8	12.2	12.1	0.8	0.8	0.8	29.3	33.6	32.3	-3.9

Note: Totals computed from unrounded data, '-' means nil or negligible.

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

(million tonnes)

	Wheat			Coarse grains			Total cereals <sup>1</sup>			
	2008	2009	2010 estim.	2008	2009	2010 estim.	2008	2009	2010 estim.	Change: 2010/2009 (%)
<b>CIS in Asia</b>	<b>26.5</b>	<b>28.7</b>	<b>21.2</b>	<b>5.1</b>	<b>5.8</b>	<b>4.0</b>	<b>32.2</b>	<b>35.2</b>	<b>25.9</b>	-26.4
Azerbaijan	1.6	1.8	1.3	0.7	0.6	0.6	2.3	2.4	1.9	-20.8
Kazakhstan	16.0	17.0	10.0	2.7	3.3	1.9	19.0	20.6	12.2	-40.8
Kyrgyzstan	0.8	1.1	0.8	0.7	0.8	0.7	1.5	1.9	1.5	-21.1
Tajikistan	0.7	0.9	0.9	0.1	0.2	0.2	0.8	1.1	1.1	0.0
Turkmenistan	1.0	1.1	1.3	-	-	0.1	1.2	1.3	1.5	15.4
Uzbekistan	6.1	6.6	6.7	0.3	0.3	0.2	6.6	7.1	7.1	0.0

Note: Totals computed from unrounded data, <sup>1</sup> means nil or negligible.

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

growing season that resulted in an average yield decrease of 26 percent comparing to the previous year. In **Kazakhstan**, the 2010 cereal production dropped by 41 percent following severe drought during summer. As a result, cereal exports are forecast to decline 33 percent in marketing year 2010/11 (July/June). Cereal production decreased to below-average levels in **Armenia**, **Azerbaijan** and **Kyrgyzstan** and as a result, these countries' dependence on imported cereals, mainly wheat, is expected to increase further during 2010/11.

### Wheat prices at high levels

In Asia CIS countries that heavily depend on imports of wheat, their main staple, prices of the commodity have shown mixed trends in the past months. In some countries prices of wheat products have stabilized or declined following government policy interventions. Prices of wheat flour in Kyrgyzstan, which have been steadily increasing since August 2010, further rose in February. Prices are currently 70 percent higher than a year earlier and only 5 percent below their peaks in mid-2008.

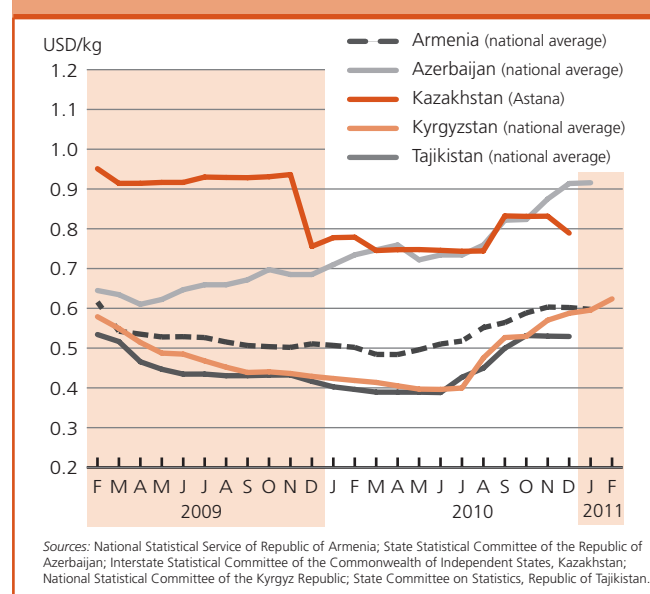
Prices of wheat flour and bread in Armenia increased by 15 and 9 percent, respectively in January 2011 compared to July

2010 reflecting the trend of international wheat prices. In Azerbaijan, prices of wheat flour and bread remained at a record high level in December 2010 and January 2011 which was about 28 percent higher than a year earlier. However, prices of bread declined slightly in January.

In Tajikistan prices of wheat flour, after having increased from July to October, remained stable in the last two months of 2010.

Prices in December were 32 percent higher than a year earlier and near record levels.

**Figure 11. Retail wheat flour prices in selected CIS in Asia countries**

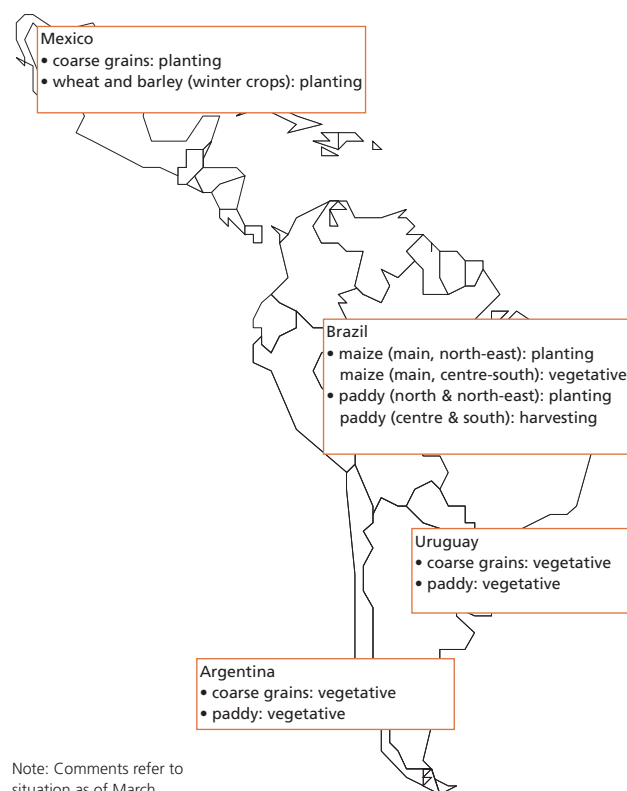


## Latin America and the Caribbean

### Central America and the Caribbean Overall higher cereal production in 2010 but beans output down in most countries

Harvesting of 2010/11 third season maize and bean crops is about to start, however the prospects are poor due to dry weather during the cropping season in **Nicaragua**, **El Salvador** and **Honduras**. Planting of the 2011 secondary winter maize crop has been completed in **Mexico**. Early prospects are uncertain due to snow and below-normal temperatures in early February that adversely affected crops in the northern part of the country. In the main producing areas of Sinaloa state crop damage due to hail has been reported in 12 municipalities. Sinaloa state produces approximately 70 percent of the winter season maize crop. The cold weather has also affected the states of Sonora, Chihuahua, Coahuila, Nuevo León, Tamaulipas and Durango. Sonora state is the main winter wheat producer as it produces about 44 percent of national wheat production.

The output of the 2010 second season maize and beans crops was reduced reflecting water logging during the first part of the crop season and prolonged dry spell during the second half. Despite reduced production in Caribbean islands, the 2010 first season output was overall satisfactory, except in **Haiti** and **Cuba** where the cereal production is estimated to be lower than the previous year. The 2011 aggregate (first, second and third seasons) cereal production of the subregion is estimated by FAO at an about-average level of 43.1 million tonnes, about 11 percent higher than the previous year.



### Prices of beans at high levels in Central American countries

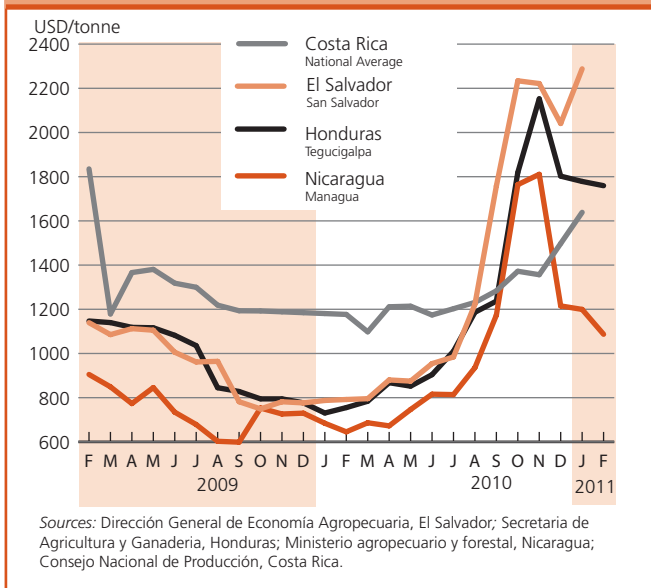
In Central American countries, prices of beans that reached record highs in November 2010, started to decline in December, after harvesting of the second season crops and the implementation of price-control measures adopted by some countries such as Honduras and Nicaragua. By contrast, prices of beans in **El Salvador** were still increasing in January 2011 due to a poor 2010 bean harvest and low supply of beans from Nicaragua

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

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2008	2009	2010 estim.	2008	2009	2010 estim.	2008	2009	2010 estim.	2008	2009	2010 estim.	Change: 2010/2009 (%)
<b>Central America &amp; Caribbean</b>	<b>4.0</b>	<b>4.2</b>	<b>3.9</b>	<b>36.1</b>	<b>31.7</b>	<b>36.4</b>	<b>2.5</b>	<b>2.8</b>	<b>2.9</b>	<b>42.6</b>	<b>38.7</b>	<b>43.1</b>	<b>11.4</b>
El Salvador	-	-	-	1.2	1.0	0.9	-	-	-	1.2	1.0	0.9	-10.0
Guatemala	-	-	-	1.0	1.3	1.3	-	-	-	1.1	1.3	1.3	0.0
Honduras	-	-	-	0.6	0.6	0.6	-	-	-	0.6	0.6	0.7	16.7
Mexico	4.0	4.1	3.9	31.9	27.3	32.0	0.2	0.3	0.3	36.1	31.7	36.3	14.5
Nicaragua	-	-	-	0.6	0.6	0.6	0.3	0.3	0.3	0.9	0.9	0.9	0.0
<b>South America</b>	<b>18.2</b>	<b>18.9</b>	<b>24.2</b>	<b>101.9</b>	<b>83.1</b>	<b>100.6</b>	<b>24.6</b>	<b>25.7</b>	<b>23.9</b>	<b>144.6</b>	<b>127.6</b>	<b>148.8</b>	<b>16.6</b>
Argentina	8.4	8.8	14.0	27.0	16.5	29.1	1.2	1.3	1.2	36.6	26.6	44.4	66.9
Brazil	5.9	5.0	6.0	61.6	53.7	58.3	12.1	12.6	11.7	79.6	71.2	75.9	6.6
Chile	1.1	1.5	1.2	1.8	1.8	1.8	0.1	0.1	0.1	3.1	3.4	3.1	-8.8

Note: Totals computed from unrounded data, '-' means nil or negligible.

**Figure 12. Wholesale red beans prices in selected countries in Central America**



their main supplier. The Government of El Salvador, in order to meet the domestic demand, has recently announced the import of red beans from China. Prices of white maize have recently increased in the subregion due to the indirect effect of the high international prices.

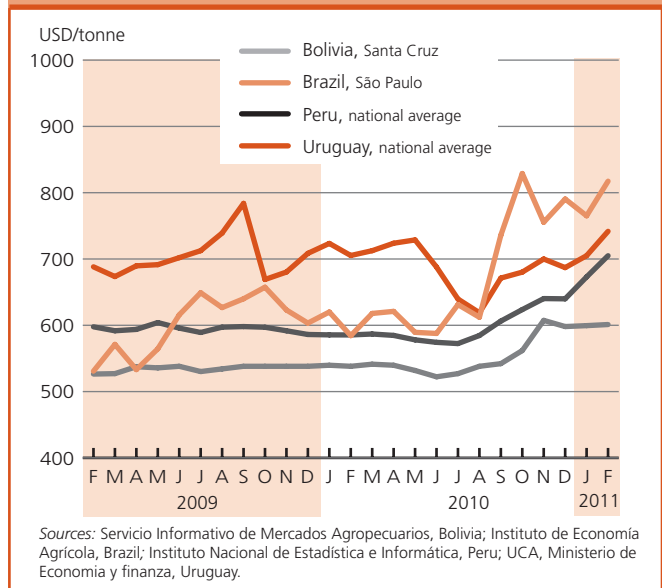
## South America

### Mixed outlook for the 2011 cereal crops

In **Brazil**, the main producer of the subregion, the outlook for the 2011 main season maize and rice crops is positive. Planting of the summer maize, soybean and irrigated-rice for harvest in 2011 was concluded in December 2010. Subsequent good rainfall improved soil moisture conditions in most areas of Rio Grande do Sul state, where crops were suffering from water stress due to low and irregular rainfall, and benefited crops in other states. Prospects are also satisfactory for the irrigated paddy crop (80 percent of the national total) in the centre/south of the country as a result of good water availability in the dams and favourable planting weather.

Elsewhere in the subregion, the 2011 summer coarse grains and rice crops, currently in flowering and grain filling stages, have been affected by dry weather linked to La Niña phenomenon in several southern countries of the subregion. Consequently, the outlook for 2011 crops is also unfavourable in **Argentina** and **Uruguay** and uncertain in **Bolivia**. In Argentina, the maize and sorghum crops are affected by delayed planting and drought. Official estimates indicate losses of maize area (10 percent in Rio Cuarto) and 30-50 percent maize yield reductions, mainly in Buenos Aires, La

**Figure 13. Wholesale wheat flour prices in selected countries in South America**



Pampa and Santa Fe provinces. In Uruguay also, planting and early development of the crops have been affected by erratic weather this season. In Bolivia, the main cereal producing areas of Santa Cruz, Chuquisaca, Cochabamba and Tarija were seriously affected by drought during the last quarter of 2010 and planting has been delayed. Since January 2011, rainfall has been satisfactory; however in some areas as Tarija flash floods as a result of rising of river levels and hailstorm are reported to have damaged crops in February 2011. In **Colombia**, the overall 2010 cereal production was satisfactory. The agriculture emergency of late 2010 as a result of localized torrential rains has been overcome following timely interventions by the Government and the international community.

### Sharp recovery in cereal production in 2010

Cereal production in the subregion is estimated to have increased 16.6 percent from the poor harvest of the previous year to a well-above average level of about 149 million tonnes. The increase mainly reflects a recovery of production in Argentina and a bumper crop in Brazil.

### Staple food prices rising in South America

In South America, prices of yellow maize and wheat flour are generally increasing. The general hike in prices reflects uncertain prospects for 2011 cereals in the subregion and higher international prices. Particularly in **Bolivia**, prices of maize, in the main area of Santa Cruz, rose nearly 70 percent between October and February, affecting poultry production costs. The Government announced the import of large quantities of maize in order to increase supplies and curb prices.

## North America, Europe and Oceania

### North America

#### Winter wheat area up sharply in the United States

The area sown to winter wheat in the **United States**, which normally accounts for about 70 percent of the total wheat plantings nationally, is officially estimated at 16.6 million hectares, about 10 percent up from the previous year's reduced level. Although spring wheat plantings are forecast to decline slightly in the main producing areas because of better return prospects from oil crops, the aggregate wheat plantings for 2011 are forecast at some 23 million hectares, up 6 percent from 2010. However, the final harvested wheat area in 2011 is expected to be down fractionally from last year at some 19 million hectares, reflecting expectations of increased abandonment in parts of the central and southern Plains because of persistent drought, which would lead to a fall in the harvested-to-planted ratio from last year's particularly high value and the average. At this early stage, based on the area forecast and assuming a return to trend yields after last year's record level for the major wheat types, the country's aggregate wheat output is tentatively forecast at about 56.6 million tonnes, 6 percent down from last year's level, and the smallest crop since 2007. In **Canada**, the bulk of the wheat is spring planted during March and April. With farmers encouraged by strong price prospects, the 2011 wheat area is forecast to increase by almost 10 percent to some 9 million hectares. Should these plantings be realized, assuming a normal season, output is forecast to increase to about 25 million tonnes.

### European Union

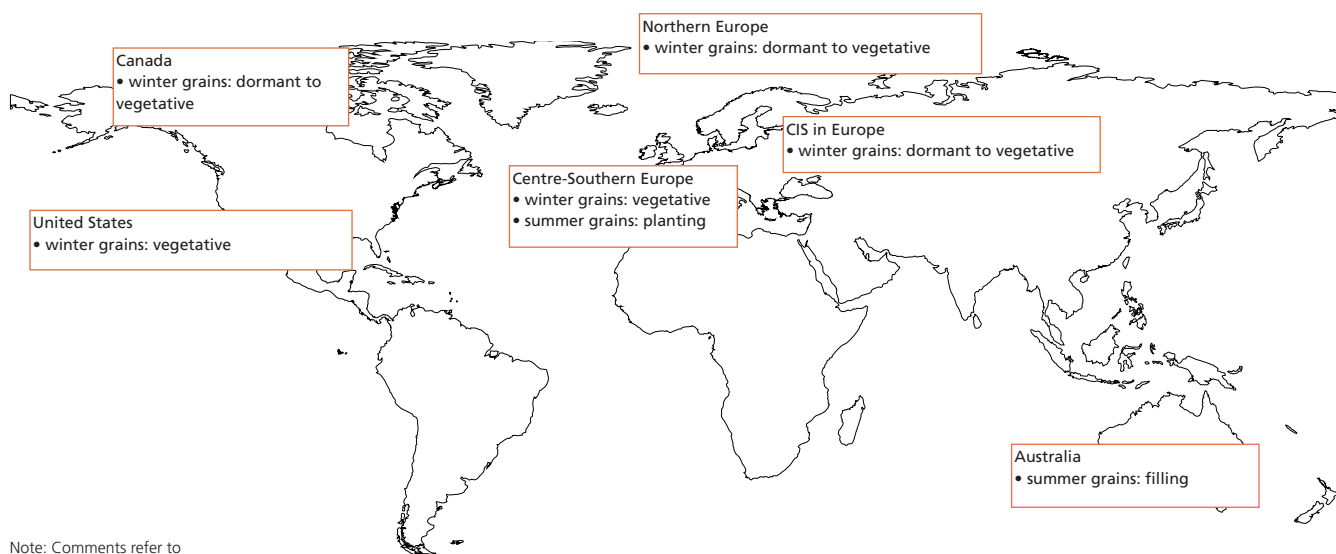
#### Total wheat area to rise in the EU

In the **EU**, the 2011 wheat area is estimated up by nearly 2 percent at 26.3 million hectares. Strong price prospects are an incentive to farmers and most of the additional area compared to last year is expected to come from land that was previously enrolled in the voluntary set-aside programme. At the forecast level of plantings, and assuming normal growing conditions during the season, the EU's aggregate wheat production in 2011 is forecast to reach 142 million tonnes, 4 percent up from last year's crop. Early indications also point to a recovery in EU barley production in 2011 after a significant area and output reduction last year. Latest forecasts indicate a crop of some 55 million tonnes, up from 53 million tonnes in 2010.

### CIS in Europe

#### Early prospects for the 2011 winter crops favourable

In the **Russian Federation** and **Ukraine**, the two main exporters of the subregion, planting of the 2011 winter cereal, barley and rye crops was delayed due to limited soil moisture following extreme dry weather during summer. Subsequent good rains after the first dekad of November favoured crop germination and early establishment and most of the crop are reported in satisfactory conditions. In Ukraine, the area planted to winter cereals is estimated around the same level as the previous season. According to official information, the crops prospects for the harvest are favourable. By early March some 56 percent of the crops were reported in very good conditions and 36 percent in





satisfactory conditions. In the Russian Federation, the dry condition at planting resulted in a decline in the area planted comparing to the previous year. In spite of cold weather and severe frosts during winter, the wheat crop is reported generally in good conditions having received adequate snow cover. Planting of the spring crops, but also barley, rye and maize, which represents two-thirds of the total area planted, is scheduled to start in April and the area planted is expected to increase from last year, to compensate reductions in the winter plantings. Assuming good weather in the remaining of the cropping season an average cereal crop could be obtained in the subregion in 2011 to maintain export earnings and satisfy domestic demand.

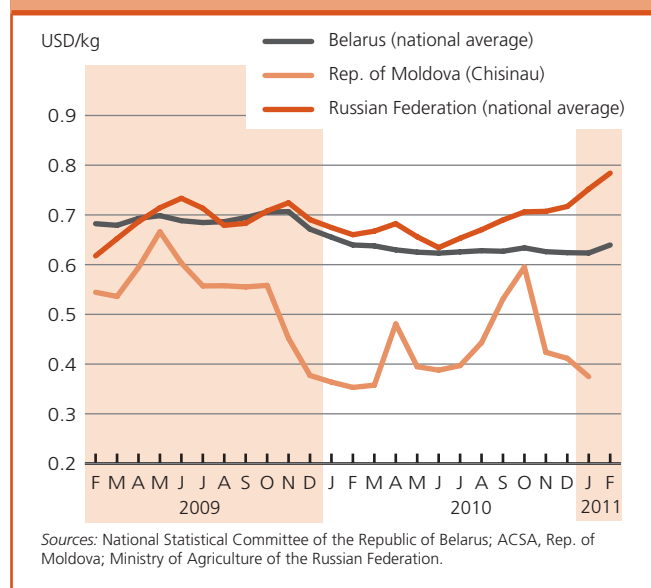
### Crop production fell sharply in 2010

The four countries of the subregion (Belarus, Republic of Moldova, Russian Federation and Ukraine) faced extremely dry weather conditions last summer. The aggregate 2010 cereal production fell to about 108 million tonnes, 28 percent below the previous year and the lowest level since 2005. By contrast, despite unfavourable weather conditions production increased in the Republic of Moldova since the bulk of weather-related damage was in non-cereal areas.

### Mixed trends of wheat prices

In the **Russian Federation** prices of wheat and wheat products rose in spite of the government announcement of plans for grain distribution and intervention sales at prices below the market level in early February. Prices of wheat flour and bread in February were 14 and 17 percent higher, respectively, than their levels at the end of July 2010 before introduction of export bans. In **Ukraine**, prices of wheat and wheat flour rose by an average 6 percent in February comparing to the previous month. Prices of wheat flour in **Belarus** and the **Republic of Moldova**, which

Figure 14. Retail wheat flour prices in Belarus, Russian Federation and Republic of Moldova



had increased in the second half of 2010, decreased in December and January.

### Oceania

#### Good potential for another big Australian wheat crop in 2011

Although the 2011 wheat crop in **Australia** will not be sown until April-May, early indications point to another big crop. Growers in the country's eastern states, in particular, who have just reaped a bumper 2010 crop, are expected to be encouraged by high price prospects. This, coupled with high soil moisture levels in many eastern growing regions following heavy summer rains and the likelihood of a persistent La Niña weather event bringing

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

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2008	2009	2010 estim.	2008	2009	2010 estim.	2008	2009	2010 estim.	2008	2009	2010 estim.	Change: 2010/2009 (%)
<b>North America</b>	<b>96.6</b>	<b>87.2</b>	<b>83.3</b>	<b>353.6</b>	<b>372.1</b>	<b>352.7</b>	<b>9.2</b>	<b>10.0</b>	<b>11.0</b>	<b>459.5</b>	<b>469.3</b>	<b>447.0</b>	<b>-4.8</b>
Canada	28.6	26.8	23.2	27.4	22.6	22.2	-	-	-	56.0	49.5	45.3	-8.5
United States	68.0	60.4	60.1	326.3	349.5	330.5	9.2	10.0	11.0	403.5	419.8	401.7	-4.3
<b>Europe</b>	<b>246.1</b>	<b>228.1</b>	<b>201.9</b>	<b>247.8</b>	<b>232.4</b>	<b>198.5</b>	<b>3.4</b>	<b>4.3</b>	<b>4.3</b>	<b>497.3</b>	<b>464.7</b>	<b>404.7</b>	<b>-12.9</b>
Belarus	1.6	1.6	1.7	5.7	5.7	5.2	-	-	-	7.3	7.3	6.9	-5.5
EU	150.5	138.5	136.5	163.3	155.9	140.1	2.5	3.2	3.1	316.4	297.6	279.7	-6.0
Russian Federation	63.8	61.7	41.5	41.8	33.4	17.2	0.7	0.9	1.1	106.3	96.1	59.8	-37.8
Serbia	2.1	2.1	1.6	7.0	6.9	7.6	-	-	-	9.2	9.0	9.2	2.2
Ukraine	24.2	20.8	17.2	23.0	24.2	21.7	0.1	0.1	0.1	47.3	45.1	39.0	-13.5
<b>Oceania</b>	<b>21.7</b>	<b>22.2</b>	<b>26.6</b>	<b>14.3</b>	<b>13.3</b>	<b>14.1</b>	-	<b>0.1</b>	<b>0.2</b>	<b>36.1</b>	<b>35.6</b>	<b>41.0</b>	<b>15.2</b>
Australia	21.4	21.9	26.3	13.8	12.8	13.5	-	0.1	0.2	35.2	34.8	40.1	15.2

Note: Totals computed from unrounded data, '-' means nil or negligible.

good precipitation throughout the planting period, means good potential for the 2011 production. In Western Australia, a return to normal production after severe drought in 2010 would be sufficient to consolidate another good crop at national level in 2011.

The latest official estimate in February of the recently completed 2010 wheat harvest stands at 26.3 million tonnes, slightly less than expectations in December but a bumper crop nevertheless. Heavy rains in several eastern parts during

the harvest had some impact on the final output but more importantly severely downgraded the average quality of the 2010 crop. Regarding the summer grain crop for harvest in 2011 (mostly sorghum), plantings are estimated to have risen by 23 percent to 637 000 hectares. Yields are forecast to be above average in most growing regions, reflecting above average rainfall so far and favourable growing conditions. Production is forecast to increase by 39 percent to just over 2.2 million tonnes.

# Statistical appendix

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**Table A1. Global cereal supply and demand indicators**

	Average 2003/04 - 2007/08	2006/07	2007/08	2008/09	2009/10	2010/11
<b>1. Ratio of world stocks to utilization (%)</b>						
Wheat	26.7	25.9	22.4	27.2	30.2	27.7
Coarse grains	16.3	14.6	14.8	17.4	16.7	13.5
Rice	24.5	23.9	24.9	27.9	28.5	30.0
Total cereals	21.1	19.8	19.1	22.4	23.1	20.9
<b>2. Ratio of major grain exporters' supplies to normal market requirements (%)</b>						
	124.8	116.2	119.7	124.2	120.9	118.4
<b>3. Ratio of major exporters' stocks to their total disappearance (%)</b>						
Wheat	18.4	16.1	12.0	17.5	21.8	18.9
Coarse grains	14.3	12.0	12.1	14.6	14.6	8.1
Rice	15.6	15.4	17.5	21.7	19.4	19.1
Total cereals	16.1	14.5	13.9	18.0	18.6	15.4
	Annual trend growth rate 2000-2009	2006	Change from previous year		2009	2010
			2007	2008		
<b>4. Changes in world cereal production (%)</b>						
	2.2	-1.6	5.6	7.2	-1.0	-1.1
<b>5. Changes in cereal production in the LIFDCs (%)</b>						
	2.4	1.8	4.7	3.5	-0.2	5.6
<b>6. Changes in cereal production in the LIFDCs less India (%)</b>						
	3.7	2.4	1.9	4.7	4.2	5.0
	Average 2004-2008	2007	Change from previous year (%)			2011*
			2008	2009	2010	
<b>7. Selected cereal price indices:</b>						
Wheat	106.2	17.1	49.1	31.5	-34.6	5.8
Maize	103.5	23.3	34.1	36.5	-25.5	8.4
Rice	118.6	9.9	17.3	83.7	-14.1	-10.5

Notes:

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

Cereals refer to wheat, coarse grains and rice; grains refer to wheat and coarse grains.

Major grain exporters are Argentina, Australia, Canada, the EU, and the United States; major rice exporters are India, Pakistan, Thailand, the United States and Viet Nam.

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

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

Price indices: The wheat price index has been constructed based on the IGC wheat price index, rebased to 2002-2004=100; For maize, the U.S. maize No.2 Yellow (delivered U.S. Gulf ports) with base 2002-2004=100; For rice, the FAO Rice Price Index, 2002-2004=100, is based on 16 rice export quotations.

\*January-February average.

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

	2006	2007	2008	2009	2010 estimate	2011 forecast
<b>TOTAL CEREALS</b>	<b>470.7</b>	<b>424.7</b>	<b>418.2</b>	<b>501.2</b>	<b>525.2</b>	<b>479.1</b>
<b>Wheat</b>	<b>182.1</b>	<b>162.9</b>	<b>144.9</b>	<b>180.2</b>	<b>202.4</b>	<b>184.3</b>
held by:						
- main exporters <sup>2</sup>	58.9	39.5	29.7	47.3	55.9	51.6
- others	123.2	123.4	115.2	132.9	146.5	132.7
<b>Coarse grains</b>	<b>184.6</b>	<b>157.8</b>	<b>162.6</b>	<b>195.5</b>	<b>191.4</b>	<b>158.0</b>
held by:						
- main exporters <sup>2</sup>	90.0	60.0	69.8	81.3	82.3	47.0
- others	94.6	97.8	92.8	114.2	109.1	111.0
<b>Rice (milled basis)</b>	<b>104.0</b>	<b>104.0</b>	<b>110.8</b>	<b>125.5</b>	<b>131.3</b>	<b>136.8</b>
held by:						
- main exporters <sup>2</sup>	23.3	23.0	26.5	33.4	30.1	30.0
- others	80.7	81.0	84.3	92.1	101.2	106.8
<b>Developed countries</b>	<b>189.2</b>	<b>129.7</b>	<b>122.3</b>	<b>167.3</b>	<b>180.5</b>	<b>124.1</b>
Australia	13.5	6.3	5.4	5.9	5.9	9.6
Canada	16.2	10.5	8.5	13.0	13.6	11.4
European Union <sup>3</sup>	44.3	30.0	25.8	41.8	43.0	30.1
Japan	4.7	4.3	3.8	3.7	3.8	3.7
Russian Federation	9.3	6.5	7.3	16.7	16.1	5.3
South Africa	4.1	2.7	1.8	2.5	3.2	3.9
Ukraine	4.8	4.2	4.5	3.9	3.4	3.6
United States	71.7	49.8	54.3	65.9	75.8	44.7
<b>Developing countries</b>	<b>281.6</b>	<b>295.0</b>	<b>295.9</b>	<b>333.9</b>	<b>344.7</b>	<b>355.0</b>
<b>Asia</b>	<b>237.8</b>	<b>247.8</b>	<b>252.9</b>	<b>282.9</b>	<b>294.7</b>	<b>300.1</b>
China	149.0	158.0	155.8	172.1	183.4	190.5
India	25.8	28.5	37.0	45.4	39.8	41.1
Indonesia	4.8	5.2	6.1	7.4	8.8	9.4
Iran (Islamic Republic of)	3.6	3.5	3.0	5.0	4.0	2.8
Korea, Republic of	2.5	2.2	3.0	2.9	3.6	4.1
Pakistan	3.2	2.4	3.1	3.3	3.9	2.7
Philippines	2.9	2.8	3.1	4.2	4.9	4.2
Syrian Arab Republic	3.4	1.9	1.0	1.2	1.8	2.0
Turkey	6.1	7.1	5.2	4.1	4.5	4.3
<b>Africa</b>	<b>24.0</b>	<b>28.3</b>	<b>23.2</b>	<b>26.6</b>	<b>29.9</b>	<b>32.6</b>
Algeria	3.7	3.8	3.6	3.0	3.6	3.3
Egypt	4.3	4.3	3.3	5.6	7.1	7.5
Ethiopia	0.3	0.5	1.0	1.5	1.9	2.2
Morocco	2.6	4.0	2.1	1.6	2.9	3.3
Nigeria	1.4	2.1	1.0	1.5	1.6	1.4
Tunisia	1.3	1.2	2.0	1.6	1.7	1.2
<b>Central America</b>	<b>4.8</b>	<b>5.0</b>	<b>5.1</b>	<b>5.5</b>	<b>4.5</b>	<b>5.3</b>
Mexico	2.9	3.0	3.1	3.8	2.6	3.3
<b>South America</b>	<b>14.7</b>	<b>13.7</b>	<b>14.4</b>	<b>18.7</b>	<b>15.3</b>	<b>16.8</b>
Argentina	5.2	4.8	7.1	3.6	1.7	5.0
Brazil	4.4	3.6	2.2	9.8	8.2	6.6

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

<sup>1</sup> Stocks data are based on an aggregate of carryovers at the end of national crop years and do not represent world stock levels at any point in time.

<sup>2</sup> The major wheat and coarse grains exporters are Argentina, Australia, Canada, the EU and the United States. The major rice exporters are India, Pakistan, Thailand, the United States and Viet Nam.

<sup>3</sup> Up to 2007 25 member countries, from 2008 27 member countries.

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

	Wheat			Maize		Sorghum
	US No.2 Hard Red Winter Ord. Prot. <sup>1</sup>	US Soft Red Winter No.2 <sup>2</sup>	Argentina Trigo Pan <sup>3</sup>	US No.2 Yellow <sup>2</sup>	Argentina <sup>3</sup>	US No.2 Yellow <sup>2</sup>
<b>Annual (July/June)</b>						
2003/04	161	149	154	115	109	118
2004/05	154	138	123	97	90	99
2005/06	175	138	138	104	101	108
2006/07	212	176	188	150	145	155
2007/08	361	311	318	200	192	206
2008/09	270	201	234	188	180	170
2009/10	209	185	224	160	168	165
<b>Monthly</b>						
2009 - February	241	183	218	163	158	145
2009 - March	244	186	214	165	163	153
2009 - April	242	180	211	168	166	149
2009 - May	265	201	210	180	186	167
2009 - June	263	201	228	177	185	167
2009 - July	232	175	234	151	164	145
2009 - August	218	161	229	153	166	154
2009 - September	200	158	208	152	163	152
2009 - October	212	175	214	168	175	174
2009 - November	227	204	214	172	175	182
2009 - December	221	207	240	166	177	182
2010 - January	213	197	236	167	177	177
2010 - February	207	192	221	162	164	169
2010 - March	204	191	211	158	160	167
2010 - April	200	187	228	156	161	160
2010 - May	196	190	244	163	170	164
2010 - June	181	183	206	152	163	156
2010 - July	212	218	212	160	171	168
2010 - August	272	257	277	174	198	185
2010 - September	303	276	299	206	229	215
2010 - October	291	266	294	236	248	231
2010 - November	291	276	295	236	246	234
2010 - December	327	310	300	252	260	251
2011 - January	340	317	317	263	272	274
2011 - February	362	336	347	287	288	276
2011 - March (three weeks avg.)	333	302	348	293	291	281

Sources: International Grains Council and USDA.

<sup>1</sup> Delivered United States f.o.b. Gulf.

<sup>2</sup> Delivered United States Gulf.

<sup>3</sup> Up River f.o.b.

**Table A4a. Cereal import requirements of Low-Income Food-Deficit Countries<sup>1</sup>, 2010/11 or 2011 estimates**  
(thousand tonnes)

	Marketing year	2009/10 or 2010 Actual imports			2010/11 or 2011 Import position <sup>2</sup>			
		Commercial purchases	Food aid	Total commercial and aid	Total import requirements (excl. re-exports)	Total commercial and aid	Food aid allocated, committed or shipped	Commercial purchases
<b>AFRICA</b>		<b>37 165.6</b>	<b>3 136.3</b>	<b>40 301.9</b>	<b>37 179.2</b>	<b>10 482.5</b>	<b>630.8</b>	<b>9 851.7</b>
<b>North Africa</b>		<b>15 326.0</b>	<b>0.0</b>	<b>15 326.0</b>	<b>15 625.0</b>	<b>8 601.9</b>	<b>0.0</b>	<b>8 601.9</b>
Egypt	July/June	15 326.0	0.0	15 326.0	15 625.0	8 601.9	0.0	8 601.9
<b>Eastern Africa</b>		<b>6 267.4</b>	<b>2 196.3</b>	<b>8 463.7</b>	<b>6 025.0</b>	<b>636.1</b>	<b>269.4</b>	<b>366.7</b>
Burundi	Jan./Dec.	103.5	31.7	135.2	150.0	1.1	1.1	0.0
Comoros	Jan./Dec.	52.6	0.0	52.6	53.0	0.0	0.0	0.0
Djibouti	Jan./Dec.	80.8	10.3	91.1	92.0	1.1	1.1	0.0
Eritrea	Jan./Dec.	322.0	0.0	322.0	337.0	0.0	0.0	0.0
Ethiopia	Jan./Dec.	261.0	1 150.5	1 411.5	821.0	31.0	31.0	0.0
Kenya	Oct./Sept.	2 351.3	171.3	2 522.6	1 208.0	168.5	62.5	106.0
Rwanda	Jan./Dec.	156.0	1.8	157.8	110.0	5.6	5.6	0.0
Somalia	Aug./July	212.3	174.9	387.2	428.0	8.8	8.8	0.0
Sudan	Nov./Oct.	1 744.3	607.1	2 351.4	2 021.0	169.2	135.6	33.6
Uganda	Jan./Dec.	132.6	33.9	166.5	235.0	20.4	20.4	0.0
United Rep. of Tanzania	June/May	851.0	14.8	865.8	720.0	230.4	3.3	227.1
<b>Southern Africa</b>		<b>1 816.9</b>	<b>374.3</b>	<b>2 191.2</b>	<b>1 724.0</b>	<b>950.8</b>	<b>212.8</b>	<b>738.0</b>
Lesotho	April/March	228.3	3.1	231.4	216.0	149.9	0.5	149.4
Madagascar	April/March	214.9	20.6	235.5	218.0	37.9	12.8	25.1
Malawi	April/March	103.9	34.8	138.7	127.0	79.9	24.3	55.6
Mozambique	April/March	846.8	129.0	975.8	729.0	438.6	148.3	290.3
Zambia	May/April	31.9	1.6	33.5	29.0	12.7	0.9	11.8
Zimbabwe	April/March	391.1	185.2	576.3	405.0	231.8	26.0	205.8
<b>Western Africa</b>		<b>12 174.6</b>	<b>406.4</b>	<b>12 581.0</b>	<b>11 908.2</b>	<b>191.2</b>	<b>119.1</b>	<b>72.1</b>
<b>Coastal Countries</b>		<b>9 320.0</b>	<b>45.0</b>	<b>9 365.0</b>	<b>8 998.5</b>	<b>31.2</b>	<b>31.2</b>	<b>0.0</b>
Benin	Jan./Dec.	77.8	12.1	89.9	86.0	0.0	0.0	0.0
Côte d'Ivoire	Jan./Dec.	1 464.1	3.5	1 467.6	1 340.0	0.7	0.7	0.0
Ghana	Jan./Dec.	739.2	1.0	740.2	780.0	3.7	3.7	0.0
Guinea	Jan./Dec.	480.7	4.0	484.7	497.0	0.0	0.0	0.0
Liberia	Jan./Dec.	316.0	12.6	328.6	334.0	15.9	15.9	0.0
Nigeria	Jan./Dec.	6 020.0	0.0	6 020.0	5 720.0	0.0	0.0	0.0
Sierra Leone	Jan./Dec.	146.0	10.0	156.0	160.0	10.9	10.9	0.0
Togo	Jan./Dec.	76.2	1.8	78.0	81.5	0.0	0.0	0.0
<b>Sahelian Countries</b>		<b>2 854.6</b>	<b>361.4</b>	<b>3 216.0</b>	<b>2 909.7</b>	<b>160.0</b>	<b>87.9</b>	<b>72.1</b>
Burkina faso	Nov./Oct.	346.5	35.1	381.6	330.0	9.8	4.8	5.0
Chad	Nov./Oct.	104.9	103.9	208.8	161.3	48.8	45.6	3.2
Gambia	Nov./Oct.	<b>101.5</b>	<b>2.9</b>	<b>104.4</b>	<b>96.0</b>	<b>0.6</b>	<b>0.0</b>	<b>0.6</b>
Guinea-Bissau	Nov./Oct.	116.5	7.3	123.8	124.0	0.8	0.8	0.0
Mali	Nov./Oct.	211.3	13.9	225.2	206.5	5.8	0.6	5.2
Mauritania	Nov./Oct.	449.3	30.2	479.5	489.0	56.6	14.4	42.2
Niger	Nov./Oct.	355.8	133.3	489.1	356.9	17.4	17.4	0.0
Senegal	Nov./Oct.	1 168.8	34.8	1 203.6	1 146.0	20.2	4.3	15.9
<b>Central Africa</b>		<b>1 580.7</b>	<b>159.3</b>	<b>1 740.0</b>	<b>1 897.0</b>	<b>102.5</b>	<b>29.5</b>	<b>73.0</b>
Cameroon	Jan./Dec.	623.3	10.0	633.3	772.0	43.0	3.0	40.0
Cent.Afr.Rep.	Jan./Dec.	47.1	8.3	55.4	62.0	0.7	0.2	0.5
Congo	Jan./Dec.	320.8	7.2	328.0	330.0	1.8	1.8	0.0
Dem.Rep.of the Congo	Jan./Dec.	575.0	130.5	705.5	715.0	57.0	24.5	32.5
Sao Tome and Principe	Jan./Dec.	14.5	3.3	17.8	18.0	0.0	0.0	0.0

**Table A4b. Cereal import requirements of Low-Income Food-Deficit Countries<sup>1</sup>, 2010/11 or 2011 estimates**  
(thousand tonnes)

	Marketing year	2009/10 or 2010 Actual imports			2010/11 or 2011 Import position <sup>2</sup>			
		Commercial purchases	Food aid	Total commercial and aid	Total import requirements (excl. re-exports)	Total commercial and aid	Food aid allocated, committed or shipped	Commercial purchases
<b>ASIA</b>		<b>38 019.2</b>	<b>661.3</b>	<b>38 680.5</b>	<b>35 942.4</b>	<b>15 817.1</b>	<b>433.9</b>	<b>15 383.2</b>
<b>CIS in Asia<sup>3</sup></b>		<b>3 793.9</b>	<b>36.1</b>	<b>3 830.0</b>	<b>3 613.0</b>	<b>1 879.9</b>	<b>34.1</b>	<b>1 845.8</b>
Georgia	July/June	774.9	4.0	778.9	758.0	357.7	0.4	357.3
Kyrgyzstan	July/June	351.8	11.9	363.7	374.0	216.4	25.9	190.5
Tajikistan	July/June	868.7	20.2	888.9	916.0	552.2	7.8	544.4
Turkmenistan	July/June	95.1	0.0	95.1	104.0	42.1	0.0	42.1
Uzbekistan	July/June	1 703.4	0.0	1 703.4	1 461.0	711.5	0.0	711.5
<b>Far East</b>		<b>18 818.1</b>	<b>367.3</b>	<b>19 185.4</b>	<b>19 108.4</b>	<b>10 794.1</b>	<b>312.7</b>	<b>10 481.4</b>
Bangladesh	July/June	4 166.0	40.0	4 206.0	3 560.7	3 096.4	165.6	2 930.8
Bhutan	July/June	85.7	0.0	85.7	58.0	0.0	0.0	0.0
Cambodia	Jan./Dec.	50.5	4.5	55.0	40.0	0.0	0.0	0.0
D.P.R. of Korea	Nov./Oct.	319.0	65.5	384.5	867.0	88.6	88.6	0.0
India	April/March	401.7	7.2	408.9	452.7	440.7	0.0	440.7
Indonesia	April/March	6 742.8	0.0	6 742.8	7 425.1	5 705.8	0.0	5 705.8
Lao, P.D.R.	Jan./Dec.	31.6	11.8	43.4	42.9	0.4	0.4	0.0
Mongolia	Oct./Sept.	187.3	0.0	187.3	213.0	22.9	0.0	22.9
Nepal	July/June	294.4	45.6	340.0	290.0	71.9	1.7	70.2
Pakistan	May/April	138.7	94.9	233.6	457.6	75.5	56.4	19.1
Philippines	July/June	5 287.4	50.3	5 337.7	4 490.4	1 288.0	0.0	1 288.0
Sri Lanka	Jan./Dec.	1 065.3	46.7	1 112.0	1 165.0	0.0	0.0	0.0
Timor-Leste	July/June	47.7	0.8	48.5	46.0	3.9	0.0	3.9
<b>Near East</b>		<b>15 407.2</b>	<b>257.9</b>	<b>15 665.1</b>	<b>13 221.0</b>	<b>3 143.1</b>	<b>87.1</b>	<b>3 056.0</b>
Afghanistan	July/June	2 371.4	190.4	2 561.8	1 072.0	750.1	83.2	666.9
Iraq	July/June	5 209.7	17.2	5 226.9	4 825.0	893.3	0.1	893.2
Syrian Arab Republic	July/June	4 386.2	30.2	4 416.4	4 144.0	1 499.7	3.8	1 495.9
Yemen	Jan./Dec.	3 439.9	20.1	3 460.0	3 180.0	0.0	0.0	0.0
<b>CENTRAL AMERICA</b>		<b>1 669.1</b>	<b>151.0</b>	<b>1 820.1</b>	<b>1 826.0</b>	<b>409.9</b>	<b>114.0</b>	<b>295.9</b>
Haiti	July/June	489.6	149.5	639.1	636.0	125.1	114.0	11.1
Honduras	July/June	765.0	1.0	766.0	775.0	203.8	0.0	203.8
Nicaragua	July/June	414.5	0.5	415.0	415.0	81.0	0.0	81.0
<b>OCEANIA</b>		<b>387.3</b>	<b>0.0</b>	<b>387.3</b>	<b>413.3</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>
Kiribati	Jan./Dec.	8.7	0.0	8.7	8.7	0.0	0.0	0.0
Papua New Guinea	Jan./Dec.	330.0	0.0	330.0	355.0	0.0	0.0	0.0
Solomon Islands	Jan./Dec.	30.5	0.0	30.5	31.5	0.0	0.0	0.0
Tuvalu	Jan./Dec.	1.1	0.0	1.1	1.1	0.0	0.0	0.0
Vanuatu	Jan./Dec.	17.0	0.0	17.0	17.0	0.0	0.0	0.0
<b>EUROPE</b>		<b>75.0</b>	<b>0.0</b>	<b>75.0</b>	<b>80.0</b>	<b>43.3</b>	<b>0.0</b>	<b>43.3</b>
Republic of Moldova	July/June	75.0	0.0	75.0	80.0	43.3	0.0	43.3
<b>TOTAL</b>		<b>77 316.2</b>	<b>3 948.6</b>	<b>81 264.8</b>	<b>75 440.9</b>	<b>26 752.8</b>	<b>1 178.7</b>	<b>25 574.1</b>

Source: FAO

<sup>1</sup> The Low-Income Food-Deficit (LIFDC) group of countries 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 1 855 in 2008); for full details see <http://www.fao.org/countryprofiles/lifdc.asp>.<sup>2</sup> Estimates based on information as of early February 2011.<sup>3</sup> Georgia is no longer a member of CIS but its inclusion in this group is maintained temporarily.

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