



Crop Prospects and Food Situation

HIGHLIGHTS

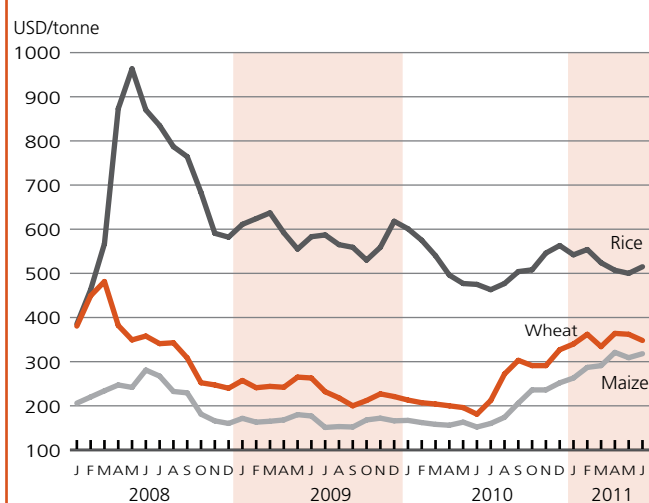
- **FAO's latest cereal production forecast for 2011 stands at 2 302 million tonnes, nearly 3 percent higher than in 2010, but 13 million tonnes lower than the forecast published in *Food Outlook* on 7 June.** At this revised level, world cereal production would now be slightly below overall utilization, leading to a further decline in world stocks. The revision largely reflects a downward adjustment to this year's official maize production forecast in the United States, released on 9 June by USDA.*
- **International grain prices remained high in the first half of June.** Cereal prices continue to rise in several developing country regions, particularly in import-dependent CIS, Central America and drought-affected Eastern Africa. Staple food prices, however, have remained low and relatively stable in southern and western Africa due to relatively good domestic production in 2010, and in most countries of North Africa due to government interventions.
- **The aggregate cereal output of LIFDCs is forecast to increase by about 2 percent in 2011.** However, excluding India, the production of this group is anticipated to remain around the level of 2010.
- **In Eastern Africa, food insecurity has reached an alarming level in some areas of Djibouti, Ethiopia, Kenya and Somalia** due to two consecutive seasons of below-average rainfall which reduced harvests and grazing resources, as well as to escalating food and fuel prices.
- **In North Africa, prospects for the winter cereal crops in most countries remain favourable.** However, the ongoing armed conflict in **Libyan Arab Jamahiriya** has resulted in large population displacements, both internally and externally, with serious impacts on food security in the subregion.
- **In Western Africa, food insecurity remains a concern due to the impact of the recent post-election crisis in Côte d'Ivoire and the effects of the conflict in Libyan Arab Jamahiriya.**
- **In the Far East, harvests of the 2011 winter wheat and the first season rice (mainly as a secondary crop) have been generally satisfactory** but in **Japan**, the triple disaster - earthquake, tsunami and nuclear radiation - is expected to reduce rice production this year.
- **In CIS, the 2011 cereal production is anticipated to recover from the drought-affected crop of 2010.**

*FAO's global market outlook for major food commodities, including cereals, is published twice a year (June and November) in *Food Outlook*. The last issue of *Food Outlook*, published on 7 June, reported a slightly higher cereal production forecast for 2011, before the latest official maize production forecast for the United States was available. FAO monitors the world cereal situation closely and publishes monthly *Global Cereal Supply and Demand Briefs* on its World Food Situation portal at: <http://www.fao.org/worldfoodsituation>. The next issue will be released on 7 July 2011.

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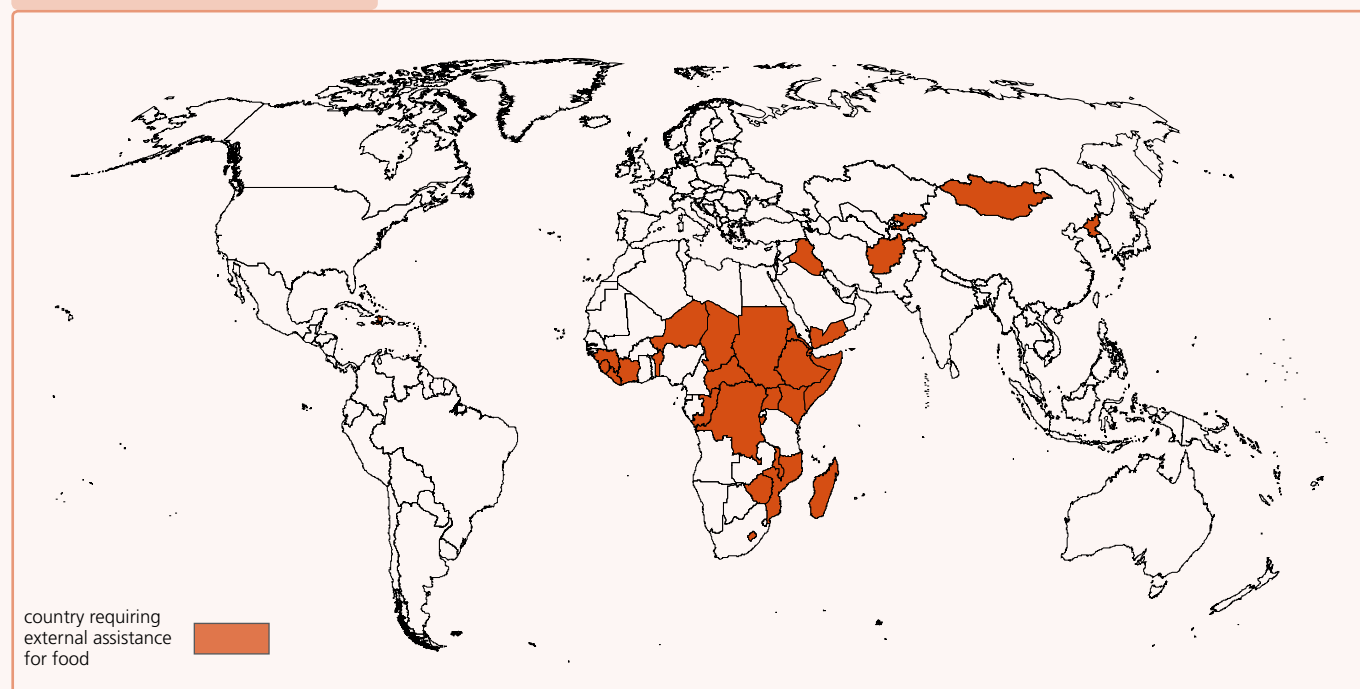
Selected international cereal prices



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

Countries requiring external assistance for food¹

World: 30 countries



AFRICA (23 countries)

Exceptional shortfall in aggregate food production/supplies

Lesotho

Heavy rains, flooding and prolonged water-logging caused a large decline in 2010/11 cereal production

Zimbabwe

Economic constraints and reduced production in southern areas aggravated food insecurity despite the overall improvement in availability of maize and good production prospects

Widespread lack of access

Djibouti

About 120 000 people are in need of humanitarian assistance due to high food prices and the effects on pastoralists of four consecutive poor rainy seasons

Eritrea

A high level of food insecurity persists due to economic constraints, internal displacement of population and the negative impact of dry weather conditions especially for the pastoralists

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: as of early May over 165 000 people have fled to Nimba, Grand Gedeh and Maryland counties, in the western part of Liberia

Niger

Lingering effects of the 2009/10 food crisis which had depleted household assets, including loss of animals and high level of indebtedness

Sierra Leone

Slow recovery from war-related damage. Depreciation of currency led to higher inflation rates negatively affecting 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 that has affected pasture and crops since last October

Severe localized food insecurity

Benin

Reduced crop harvest in 2010, generally low food stocks and persistent high prices exacerbate current food insecurity situation

Burundi

Reduced crop harvest in early 2011, generally low food stocks and sustained high prices worsen current food security 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. Also, the lingering effects of drought that led to livestock deaths and other damages in 2009/10, notably in western-central areas of the country

Congo

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

Côte d'Ivoire

Conflict-related damage to agriculture in recent years and the lack of support services mainly in the northern regions. The recent post-election crisis has forced over 180 000 people to leave the country and seek refuge mostly in eastern Liberia. Another 150 000 people have been internally displaced including 82 000 in the western part of the country mostly in Duékoué, as of early May 2011

Dem. Rep. of Congo

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

Ethiopia

The estimated number of people requiring food assistance increased from 2.8 to 3.2 million due to poor rains in "belg" areas and in southern and south-eastern pastoral areas

Guinea

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

Kenya

An estimated 2.4 million people are food insecure, mainly in pastoralist and agro-pastoralist areas in northern, eastern and north-eastern pastoral areas and in south-eastern and coastal lowlands due to late and erratic 2011 long-rains

Madagascar

Localized flooding and the passing of Cyclone Bingiza in early 2011 caused damage to infrastructure and crops in eastern and southern parts of the country

Malawi

Flooding and a dry-spell have caused localized crop losses, particularly affecting the northern district of Karonga. However, a bumper maize crop will assist to improve food security conditions

Mozambique

Flooding and dry conditions in central and southern provinces result in localized production losses of the 2011 crop. Overall, good production prospects will help to improve the food security situation

Sudan

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

Uganda

High food prices affecting urban households. About 815 000 people are estimated to be moderately food insecure, mainly in Karamoja region

ASIA (6 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 of the main season and aggravated food insecurity. Further severe winter conditions reduced wheat harvest and damaged stored seed potatoes

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. Poor prospects for 2011 wheat harvest likely to exacerbate food insecurity condition

Kyrgyzstan

Lingering effects of socio-political conflict during April-June 2010 in Jalalabad, Osh and Batken Oblasts; and sharp rise in food prices since July 2010

Yemen

Effects of recent socio-political unrest, high food prices, 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**

Food assistance needed for food-insecure households affected by the cholera epidemic and Hurricane Tomas; lingering effects of devastating earthquake in January 2010

Countries with unfavourable prospects for current crops²**AFRICA (6 countries)****Djibouti**

Poor 2011 "diraac/sougum" short rains severely affecting grazing resources

Ethiopia

Delayed and insufficient 2011 "belg" short rains in Amhara, Oromia, SNNPR and Tigray

Kenya

Delayed and insufficient 2011 long rains affecting crop production in southern and coastal marginal agricultural areas

Somalia

Delayed and insufficient rains during the 2011 "gu" season severely affecting crop production and grazing resources

United Republic of Tanzania

Delayed and insufficient rainfall during the 2011 "msimu" season affecting crops in central uni-modal rainfall areas

Uganda

Delayed and erratic rainfall during the 2011 long-rains season affecting pasture and crops in northern regions of Acholi, West Nile and Karamoja

ASIA (1 country)**Afghanistan**

Unfavourable weather - long precipitation deficit and localized floods

Key - Changes since last report (March 2011)

No change ■ Improving ▲ Deteriorating ▼ New Entry +

Terminology

¹ **Countries requiring external assistance for food** are expected to lack the resources to deal with reported critical problems of food insecurity. Food crises are nearly always due to a combination of factors but for the purpose of response planning, it is important to establish whether the nature of food crises is **predominantly** related to lack of food availability, limited access to food, or severe but localized problems. Accordingly, the list of countries requiring external assistance is organized into three broad, not mutually exclusive, categories:

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

² **Countries facing unfavourable prospects for current crops** are countries where prospects point to a shortfall in production of current crops as a result of 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 overview

GLOBAL SUPPLY AND DEMAND SUMMARY

A tight cereal supply and demand balance to prevail in 2011/12

FAO's latest forecast for world cereal production in 2011 stands at 2 302 million tonnes, 2.9 percent up from the 2010 harvest. This forecast is 13 million tonnes lower than was reported at the beginning of the month (June issue of Food Outlook), reflecting a downward adjustment to the 2011 maize production forecast in the United States (based on the latest official forecast published on 9 June, USDA/WASDA-495), and a cut in the forecasts for the wheat and barley

crops in the EU. Excessive wet conditions continued in the United States in June, significantly hindering maize planting, while persistent dry weather in major grain growing regions of Europe has led to a reduction in yield forecasts.

Based on latest indications, global wheat output is expected to be 2.8 percent higher than last year's reduced crop, mostly reflecting improved yield prospects in the Russian Federation. World production of coarse grains could increase by 3 percent, slightly exceeding the 2008 record. Most of this increase is expected in the United States, in spite of the latest downward revision, and in the Commonwealth of Independent States (CIS). Although still very tentative, FAO's

forecast for world paddy production in 2011 points to a new record high, 2.5 percent up from 2010, based largely on the assumption of a return to normal weather conditions.

World cereal utilization in 2011/12 is forecast to increase by 1.2 percent from 2010/11, compared with a 2 percent rise in 2010/11, as a result of a slowdown in the rate of increase of industrial use of cereals for production of biofuels.

Given the latest production forecast and the expectation for utilization in 2011/12, world cereal stocks at the close of crop seasons ending in 2012 are now estimated at about 486 million tonnes, marginally below their sharply reduced opening levels. Except for rice, the inventories of which are forecast to increase, stocks of coarse grains and wheat are anticipated to decline. As a result, the cereal stocks-to-use ratio, which at the time of publication of *Food Outlook* was expected to remain close to the 2010/11 low of 21.2 percent, is now heading to a second consecutive annual decline, to 20.7 percent.

With total cereal production in 2011 below the anticipated utilization, international prices are likely to remain high, especially in the wheat and coarse grain markets. The removal of the Russian Federation export ban from 1 July could help to offset reduced exportable supplies from the EU, but with grain inventories remaining at low levels, especially for maize, international grain prices are expected to stay not only high, but also volatile in the 2011/12 marketing season.

GLOBAL PRODUCTION ROUNDUP

World wheat production to recover in 2011

FAO's latest forecast for 2011 global wheat production stands at about 671 million tonnes, significantly below earlier expectations because of deteriorating yield prospects in some parts

Table 1. World cereal production¹
(million tonnes)

	2009	2010 estimate	2011 forecast	Change: 2011 over 2010 (%)
Asia	986.8	1 007.4	1 029.3	2.2
Far East	885.2	913.1	930.3	1.9
Near East	66.6	68.6	67.7	-1.3
CIS in Asia	34.9	25.7	31.1	21.0
Africa	155.3	159.6	157.7	-1.2
North Africa	40.2	32.9	35.9	9.1
Western Africa	49.6	55.2	53.6	-2.9
Central Africa	3.1	3.3	3.3	0.0
Eastern Africa	32.4	36.8	34.4	-6.5
Southern Africa	30.0	31.5	30.6	-2.9
Central America and Caribbean	37.3	40.0	38.9	-2.8
South America	118.4	142.6	141.9	-0.5
North America	466.0	443.6	460.2	3.7
Europe	463.2	403.6	435.6	7.9
EU	296.4	279.0	281.0	0.7
CIS in Europe	150.3	107.9	137.9	27.8
Oceania	35.6	40.9	38.0	-7.1
World	2 262.7	2 237.8	2 301.7	2.9
Developing countries	1 239.2	1 299.9	1 314.4	1.1
Developed countries	1 023.4	937.9	987.3	5.3
- wheat	684.7	652.6	670.9	2.8
- coarse grains	1 122.3	1 121.4	1 155.3	3.0
- rice (milled)	455.6	463.8	475.5	2.5

Note: Totals computed from unrounded data.

¹ Includes rice in milled terms.

of the United States and Europe due to dry weather. However, at the current forecast level, global wheat output in 2011 would still be 2.8 percent up from last year's reduced crop, reflecting expectations of an overall increase in planted area in response to strong prices and of yield recoveries in some areas, the Russian Federation in particular, that were affected by severe drought in 2010.

In the **EU**, latest indications point to a wheat crop of 134 million tonnes in 2011, less than earlier expected but still up marginally from the 2010 harvest. Drought conditions in major producing parts have reduced yield prospects. Elsewhere in Europe, a strong recovery in production is still expected in the CIS region, particularly in the **Russian Federation**, after last year's sharply reduced crop. In North America, persisting severe drought in the **United States'** central and southern plains has caused further deterioration of crop conditions over the past weeks and national output is now forecast at 56 million tonnes, down 7 percent from last year. In **Canada**, this year's wheat area is forecast to rebound sharply in response to high prices, assuming satisfactory weather for the completion of planting by the end of June.

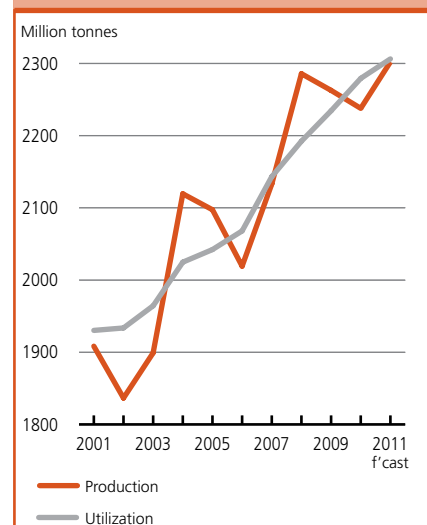
In Asia, prospects for the 2011 wheat crop in **China** remain satisfactory despite a persistent lack of rainfall in some areas. Intensive government initiatives to provide irrigation and other inputs are expected to mitigate the impact of the drought in the affected areas. This year's output, forecast at 114.5 million tonnes, is just marginally down from last year's. Elsewhere, in the Far East subregion, a record crop of nearly 84 million tonnes is being harvested in **India**, where high prices spurred a large area increase and growing conditions were mostly favourable. In **Pakistan**, in spite of the severe flood-related damage to infrastructure and seed stocks last year, production is expected to recover in 2011 and match the record level of 2009. In the CIS in Asia subregion, the bulk of the

spring crop is cultivated in **Kazakhstan**, which is the main producer. Plantings are expected to be maintained at the relatively high level of the past two years, and assuming a recovery in yields after last year's drought-reduced level, a significant increase in production is forecast. In the Near East, overall wheat output this year looks likely to remain virtually unchanged. A forecast increase in **Turkey** will be virtually offset by the reductions elsewhere in the subregion.

In North Africa, growing conditions for wheat production have generally improved this year after last year's drought. Overall production in the subregion is forecast to recover by about 14 percent from the 2010 reduced harvest.

In the southern hemisphere, where wheat sowing takes place from May to July in the major producing countries, plantings are expected to increase in

Figure 1. World cereal production and utilization



Australia and **Argentina** in response to this year's favourable price prospects. However, at this early stage, yields are

Table 2. Basic facts of world cereal situation

(million tonnes)

	2009/10	2010/11 estimate	2011/12 forecast	Change: 2011/12 over 2010/11 (%)
PRODUCTION¹				
World	2 262.7	2 237.8	2 301.7	2.9
Developing countries	1 239.2	1 299.9	1 314.4	1.1
Developed countries	1 023.4	937.9	987.3	5.3
TRADE²				
World	276.1	274.8	275.9	0.4
Developing countries	75.2	86.0	85.9	-0.1
Developed countries	201.0	188.8	190.0	0.6
UTILIZATION				
World	2 234.4	2 279.3	2 306.3	1.2
Developing countries	1 370.7	1 413.3	1 436.7	1.7
Developed countries	863.7	866.0	869.6	0.4
Per caput cereal food use (kg per year)	151.9	152.5	154.1	1.0
STOCKS³				
World	533.6	489.1	486.2	-0.6
Developing countries	351.4	363.6	369.1	1.5
Developed countries	182.2	125.5	117.2	-6.6
WORLD STOCK-TO-USE RATIO%	23.4	21.2	20.7	-2.3

Note: totals computed from unrounded data.

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

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

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

assumed to return to average after bumper levels in 2010 in both countries, which may more than offset the increase in area and result in lower outputs in 2011.

Global output of coarse grains in 2011 could reach a record

FAO's first forecast for world production of coarse grains in 2011 stands at 1 155 million tonnes, a record level that is 3 percent up from last year and some 13 million tonnes above the previous high in 2008. The bulk of the increase is expected in the United States, the world's largest producer, where a record maize crop is forecast, as well as in the Russian Federation where production of coarse grains is set to recover sharply after last year's drought-reduced harvest. In the **United States**, adverse wet weather has likely resulted in reduced plantings in some major growing areas, contrary to earlier intentions pointing to widespread area expansion. However, with larger plantings reported in some unaffected parts, the official forecast in early June still points to a large crop, maybe just topping the previous record in 2009. In the **EU**, as for wheat, favourable early prospects for coarse grains production have been dampened somewhat by drought conditions in major producing areas. Given larger area estimates, output is forecast to increase compared to 2010 but rainfall in the coming weeks in the dry areas will be critical to prevent yield expectations from dropping further. Elsewhere in the European region, output in the **Russian Federation** is forecast to recover sharply from last year's drought-devastated level and also recover in **Ukraine**. In Asia, production of coarse grains in **China** is expected to remain virtually unchanged from last year's record and increase slightly in **India**.

In the southern hemisphere, the main 2011 maize harvests are already complete or in the final stages. In South America, **Brazil's** maize aggregate output (first

and second seasons) in 2011 is forecast at almost 58 million tonnes, a bumper crop that is 3 percent up from 2010, reflecting favourable growing conditions. By contrast, the recently completed 2011 harvest in **Argentina** was somewhat reduced by dry weather linked to *La Niña* earlier in the growing season. In southern Africa, prospects for the current main coarse grains season are mixed. In **South Africa**, the largest producer in the subregion, a 14 percent reduction in output to 11.6 million tonnes is forecast, due to a smaller area planted in response to low maize prices in 2010.

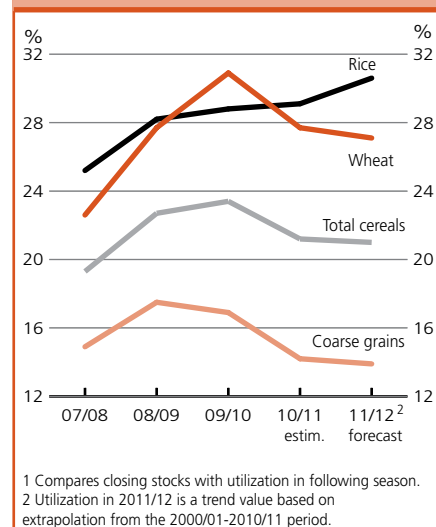
World rice production reaches new record in 2010 and may increase further in 2011

FAO's latest estimate of world paddy production in 2010 stands at 696 million tonnes (464 million tonnes, milled basis), 1.8 percent up from the previous season's poor performance, and a new record. Much of the season's 13 million tonne increase reflects a recovery in **India**, where an erratic monsoon had impaired rice cultivation in 2009. Elsewhere in Asia, **Bangladesh**, **Indonesia**, the **Philippines** and **Viet Nam** also reaped substantially larger crops in 2010, in spite of unfavourable weather. However, adverse growing conditions virtually suppressed growth in **China** and caused output to dip in the **Lao People's Democratic Republic**, **Myanmar**, **Pakistan**, the **Republic of Korea** and **Thailand**.

In Africa, a government-led cut in rice cultivation in **Egypt** was compensated by increases in Western Africa. In Latin America and the Caribbean, the prevalence of *El Niño* conditions depressed output, particularly affecting **Brazil**, **Colombia**, **Peru**, **Uruguay** and **Venezuela**.

Although very preliminary, world paddy production in 2011 is forecast to expand by 2.5 percent to 713 million tonnes (about 476 million tonnes, milled

Figure 2. Ratio of world cereal stocks to utilization¹



basis), reflecting expectations of improved weather conditions, as the influence of *La Niña* is expected to fade away by June. Excellent progress of crops in most of the southern hemisphere countries, where the season is quite advanced, already tends to confirm this positive outlook. In Asia, output is anticipated to grow by 2.5 percent to 645 million tonnes (430 million tonnes, milled basis), with particularly large increases expected in **China** and **India** and a recovery in **Pakistan**. By contrast, the outlook has been marred in **Sri Lanka** by a consecutive round of floods, and in **Japan** by the 11 March catastrophic earthquake, ensuing tsunami and the Fukushima nuclear plant radioactive leakage. The event particularly affected the Tohoku district, which accounts for a quarter of Japan's rice output. In Africa, production of rice in 2011 is expected to remain close to the 2010 level, with some increases in **Western Africa** compensating for reductions in **Egypt** and **Madagascar**. In Latin America and the Caribbean, paddy production is forecast to recover in 2011 after the previous year's reduced crop, underpinned by a strong recovery in the southern part of the continent, in particular in **Argentina**, **Brazil**,

Colombia, Uruguay and **Venezuela**, where harvesting of the 2011 main paddy crops is virtually completed.

INTERNATIONAL PRICE ROUNDUP

International prices of wheat eased in the first half of June, but those of maize and rice strengthened

Export prices of **wheat** declined during the first two weeks of June, reacting to some improvements in weather conditions in major growing areas of the European Union as well as an upward adjustment to the forecast of wheat crop in the United States. The confirmation that the Russian Federation would lift its export ban from July also puts downward pressure on prices. The benchmark US wheat price (No. 2 Hard Red Winter, f.o.b.) averaged USD 348 per tonne in the first half of June, 4 percent down from its May average.

After a modest decline in May, international prices of **maize** strengthened during the first two weeks of June with the

benchmark US maize price (Yellow, No. 2, f.o.b.) averaging USD 318 per tonne, only marginally below the record level reached in April. Maize prices rebounded sharply in June following the release of the latest official forecast from the United States which pointed to lower 2011 production than was anticipated earlier.

Export prices of **rice** that were stable in May increased slightly in the first two weeks of June. The benchmark Thai rice price (Thai white rice 100% B) averaged USD 516 per tonne, 3 percent higher than its May average. Markets were supported by renewed export demand, particularly from Africa and Near East countries.

Table 3. Cereal export prices*

(USD/tonne)

	2010		2011				
	May	Jan	Feb	Mar	Apr	May	June*
United States							
Wheat ¹	196	340	362	334	364	362	348
Maize ²	163	263	287	291	321	309	318
Sorghum ²	164	262	276	279	302	277	287
Argentina³							
Wheat	243	317	347	348	352	351	348
Maize	170	263	288	288	314	303	315
Thailand⁴							
Rice, white ⁵	477	542	554	524	507	500	516
Rice, broken ⁶	320	412	433	429	423	418	417

*Prices refer to the monthly average. For June 2011, two weeks average.

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

² No.2 Yellow, Gulf.

³ Up river, f.o.b.

⁴ Indicative traded prices.

⁵ 100% second grade, f.o.b. Bangkok.

⁶ A1 super, f.o.b. Bangkok.

Low-Income Food-Deficit Countries food situation overview¹

Favourable cereal production in 2011 in LIFDCs as a group but mixed performance in individual countries

Harvesting of winter cereals in the northern hemisphere countries and of the main summer (wet) season crops in the southern hemisphere countries will be nearly completed in June. The main wet season crops, mainly rice and coarse grains, in the north and the winter season crops, mainly wheat and barley, in the south are currently being planted in most countries under generally favourable rainfall conditions. The projected annual total cereal production (including estimates for the first and forecast for the second season for 2011) of all 70 LIFDCs is likely to increase by about 2 percent over the bumper production of 2010 (see Tables 4 and 5). However, much of this increase is due to India alone. In fact, the aggregate cereal production of LIFDCs, excluding India, in 2011 is anticipated to remain more or less at the same level as in 2010. Prospects for bumper cereal harvests are foreseen in **Cambodia, India, Pakistan** and the **Philippines**, in the southern part of Asia, where rainfall for the winter crops was generally good and early forecasts of the second season crops are considered favourable. Similarly, the main rainy season for maize and other coarse grains, the dominant crops in the

region, has resulted in bumper harvests in southern Africa for **Malawi** and **Zambia**. Elsewhere, in **Egypt, Senegal** and **Turkmenistan** among others, cereal production is estimated to rise over the previous year due to the conducive weather, improved input supplies and high commodity prices. However, poor or uncertain harvest forecasts are in the offing for cereal crops in **Afghanistan, Iraq, Sri Lanka, Uzbekistan** in Asia and **Chad, Ethiopia, Ghana, Kenya, Niger, Sudan, United Republic of Tanzania** and **Uganda** in Africa.

Among regions, Asian LIFDCs (22 countries), in aggregate, are forecast to increase 2011 cereal production as compared to 2010, while the total cereal production of 39 African LIFDCs is expected to decline. The biggest positive change is foreseen in the Southern Africa and Far East subregions and in Europe (one country), while the biggest declines

are forecast in the Near East and Eastern Africa subregions.

The aggregate 2010 cereal production of LIFDCs estimated at record level with highest year-on-year growth rate in the previous five year period

The latest revised 2010 cereal production in the 70 LIFDCs is now estimated at 543 million tonnes (including rice in milled basis), or 4.8 percent higher than the poor and nearly stagnant harvest of 2009. Most importantly, the growth in global cereal production in 2010 came entirely from LIFDCs as the world aggregate production declined 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. 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 percent. By comparison, the per capita domestic cereal availability in non-LIFDCs declined by about 3.6 percent. The improved cereal supply situation in 2010 in LIFDCs resulted in the increase in cereal consumption levels in 2010/11 as indicated by the estimated

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

	2009/10	2010/11	2011/12	Change: 2011/12 over 2010/11 (%)
Cereal production²	518.3	543.0	553.2	1.9
<i>excluding India</i>	314.7	328.0	327.6	-0.1
Utilization	583.8	603.2	615.2	2.0
Food use	468.6	480.5	491.4	2.3
<i>excluding India</i>	285.0	292.3	299.1	2.3
Per caput cereal food use (kg per year)	156.9	158.0	159.2	0.8
<i>excluding India</i>	159.3	160.0	161.1	0.7
Feed	54.3	57.6	59.3	3.0
<i>excluding India</i>	44.2	47.0	48.0	2.1
End of season stocks³	105.0	107.8	108.2	0.4
<i>excluding India</i>	64.7	67.1	65.0	-3.1

¹ 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 to 77 on the earlier list. Countries removed from the list are Angola, Armenia, Azerbaijan, China, Equatorial Guinea, Morocco and Swaziland.

¹ 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>.

² Data refer to calendar year of the first year shown.

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

rise in total utilization (Table 4). Part of the increase in production is estimated to have gone to stock build-up in 2010/11.

Cereal imports of LIFDCs for 2011/12 estimated to go up compared to the year before

Given that the 2011 aggregate cereal production of LIFDCs, excluding India, is forecast to remain stagnant, the cereal imports of LIFDCs as a group for 2011/12 (marketing years) are estimated to rise to 81.35 million, some 3 million tonnes above the previous year (Table 6). Only the Far East and North Africa subregions are expected to experience lower import requirements, mainly due to better domestic food availability.

Table 5. Cereal production¹ of LIFDCs (million tonnes)

	2009	2010 estimate	2011 forecast	Change: 2011 over 2010 (%)
Africa (39 countries)	119.6	128.8	126.1	-2.1
North Africa	20.9	19.1	19.7	3.1
Eastern Africa	32.4	36.8	34.4	-6.5
Southern Africa	13.7	14.5	15.2	4.8
Western Africa	49.6	55.2	53.6	-2.9
Central Africa	3.1	3.2	3.2	0.0
Asia (22 countries)	394.6	409.8	422.6	3.1
CIS in Asia	11.6	11.4	11.3	-0.9
Far East	369.1	383.9	398.3	3.8
- India	203.7	215.0	225.7	5.0
Near East	13.8	14.5	13.0	-10.3
Central America (3 countries)	2.0	2.0	2.0	0.0
Oceania (5 countries)	-	-	-	-
Europe (1 country)	2.2	2.4	2.5	4.2
LIFDC (70 countries)	518.3	543.0	553.2	1.9

Note: Totals computed from unrounded data.

¹ 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				2011/12 or 2012	
		Requirements ¹		Import position ²		Requirements ¹	
		Actual imports	Total imports:	of which food aid	Total imports:	of which food aid pledges	Total imports:
Africa (39 countries)	40 750	38 044	2 453	17 093	792	40 087	2 498
North Africa	15 652	15 971	0	11 606	0	15 761	0
Eastern Africa	8 558	6 304	1 717	1 582	350	7 761	1 847
Southern Africa	2 174	1 707	242	1 411	234	1 909	211
Western Africa	12 590	12 246	376	2 115	165	12 742	296
Central Africa	1 776	1 816	119	380	43	1 914	145
Asia (22 countries)	39 459	38 087	1 514	23 808	538	39 015	1 059
CIS in Asia	3 841	3 702	54	2 747	53	3 990	38
Far East	19 490	21 537	1 284	16 247	377	19 608	851
Near East	16 128	12 848	176	4 814	108	15 417	170
Central America (3 countries)	1 669	1 716	183	803	121	1 711	183
Oceania (5 countries)	435	452	0	44	0	463	0
Europe (1 country)	75	61	0	49	0	76	0
Total (70 countries)	82 388	78 360	4 150	41 796	1 451	81 351	3 740

Note: Totals computed from unrounded data.

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

² Estimates based on information available as of mid-May 2011.

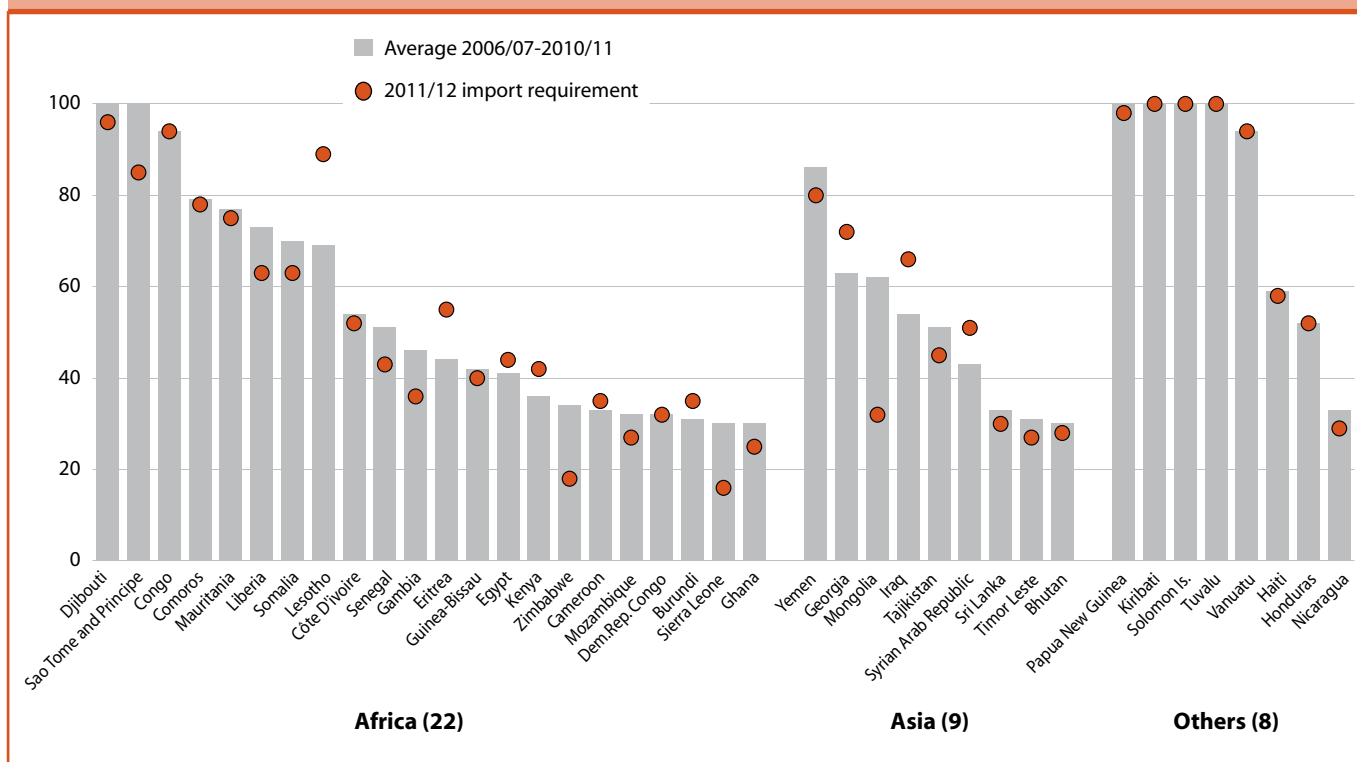
In 2010/11, consistent with the record domestic production of cereals in 2010 for the LIFDCs as a whole, the cereal import requirements were estimated at 78.4 million tonnes, 5 percent lower than the previous year's actual imports. Imports were estimated to decline in Asia and in Africa but increase slightly elsewhere.

As shown in Figure 3, more than half (some 39) of the LIFDCs have very high cereal import dependency measured

by the import share in the past five years averaging at 30 percent or higher in the total domestic utilization. Of these, the bulk of the countries are in Africa (22) and the rest in Asia (9) and elsewhere (8). These countries are highly vulnerable to food insecurity caused by high food prices and, thus, require constant monitoring. The sharp increase in international prices of the main traded cereals (wheat, rice and

maize) during 2010/11 has had an impact on the cereal import bills of these import dependent countries. Further, as indicated in FAO's *Food Outlook* (June 2011 issue), anticipating higher import volumes, strong international prices, and generally weak US dollar against major currencies, the cereal import bills during 2011, especially for LIFDCs, are expected to rise significantly above the levels in 2010.

Figure 3. Share of imports in total domestic utilization of cereals (where average share is 30 percent or more)



Regional reviews

Africa

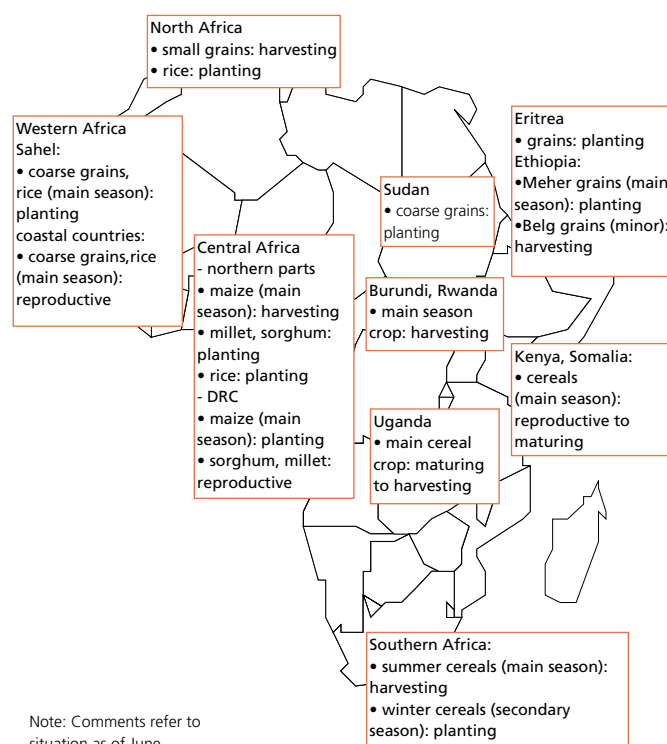
North Africa

Overall crop prospects remain favourable

Harvesting of the 2011 winter cereal crops is due to start from June in most countries of the subregion. Crop prospects are generally favourable, especially in **Algeria, Egypt, Morocco** and **Tunisia**. FAO forecasts the aggregate output of wheat in the subregion at about 18 million tonnes, 14 percent up on last year's average crop, while that of barley is put at about 5.5 million tonnes, an increase of nearly 22 percent compared to the 2010 crop. In Tunisia, substantial recovery in output from last year's drought-reduced crop is expected, provided normal weather prevails in the coming weeks. Although insufficient rains affected crops in parts of the country in January and February, increased precipitation from March boosted yields and improved harvest prospects in main producing zones. The outlook is also favourable in Egypt, the largest cereal producer of the subregion, due to the increase in area planted to wheat and the use of improved seeds; crops are also largely irrigated. Early prospects are also good in Algeria and Morocco, where in addition to adequate weather since the beginning of the growing season, governments have continued their support to the agricultural sector mostly through input subsidies.

Wheat imports remain high, but food inflation is moderate, except, in Egypt

Northern African countries rely heavily on wheat imports from the international market to cover their consumption needs, with **Egypt** being the world's largest wheat importer. Given the relatively good prospects for 2011 crops, the import requirements for the marketing year 2011/12 (July/June) are likely to be lower than this year. In the past, over 50 percent of



Egypt's wheat imports used to be from the Russian Federation. In view of the reduced supply from that country, alternative sources are sought. As a result, in spite of the high level of international prices due to last year's reduced crop production, the subregion's aggregate imports of wheat in 2010/11 (July/June) were estimated to increase by almost 10 percent to about 22.6 million tonnes.

So far, however, the hike in international food prices has not translated into high domestic prices in most countries due to government intervention. In **Tunisia**, the inflation rate in the food sector remained low and stable in the first quarter of 2011, with the year-on-year inflation rate estimated at about 3 percent in April 2011. In **Morocco**, the food price inflation rate has been following a downward trend since November 2010, while in **Algeria**, the year-on-year inflation rate in March 2011 was 3.7 percent in the food sector and

Table 7. North Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2009	2010 estim.	2011 f'cast	2009	2010 estim.	2011 f'cast	2009	2010 estim.	2011 f'cast	2009	2010 estim.	2011 f'cast	Change: 2011/2010 (%)
North Africa	20.3	16.1	18.3	16.1	13.6	14.6	5.6	4.5	4.3	42.0	34.3	37.3	8.7
Algeria	3.6	3.1	3.1	2.5	1.6	1.6	-	-	-	6.1	4.7	4.7	0.0
Egypt	8.5	7.2	7.9	8.6	8.9	8.8	5.5	4.5	4.3	22.7	20.5	21.1	2.9
Morocco	6.4	4.9	5.9	4.0	2.8	3.3	-	-	-	10.4	7.7	9.3	20.8
Tunisia	1.7	0.8	1.3	0.9	0.3	0.7	-	-	-	2.5	1.1	2.0	81.8

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

only 1.8 percent in the cereal sector. The moderate food inflation rate in these countries is due to a variety of measures taken by governments, including subsidizing or reducing import taxes on some food items. The situation is different in **Egypt**, where the year-on-year rate of inflation in the food sector was estimated at 21.7 percent in April 2011. The high food inflation rate in Egypt (in spite of the Government's bread subsidy programme) is driven mostly by a 38 percent increase in wheat price in the year to April 2011 as well as a 52 percent jump in the price of fruits and vegetables and a 16 percent rise in the prices of other food items (excluding fruits and vegetables) over the same period.

Continued food assistance required due to massive movement of refugees and returnees from Libyan Arab Jamahiriya

The civil strife in **Libyan Arab Jamahiriya** has resulted in high levels of internal insecurity and population displacement, both internally and externally. Current estimates indicate that about one million people have fled the country as of early June. Most of them have crossed into **Tunisia, Egypt, Niger, Chad** and **Algeria**. Within Libyan Arab Jamahiriya, large numbers of internally displaced persons (IDPs) are also reported to be in need of food assistance and the affected areas are now widened to include western parts of the country. According to a recent assessment, food stocks are rapidly being depleted in Libyan Arab Jamahiriya in the absence of any replenishment pipeline because of insecurity. This, in addition to the deteriorating exchange rate, points to the risk of serious food shortage in the country. As a response to the humanitarian situation, WFP's Emergency Operation (EMOP), initiated in March 2011 to distribute food aid to about 1.5 million people in the affected countries, is now extended until August 2011.

Western Africa Onset of seasonal rains herald the start of the 2011 cropping season

In **western Africa**, rains started in April in southern parts of the coastal countries, allowing sowing of the first 2011 maize crops, for harvest from July. Planting of coarse grains will progress northwards in these countries following the onset of the rains. By contrast, seasonably dry

conditions prevail in the Sahelian zone where planting will start in June.

Good cereal harvest in 2010 following favourable weather conditions

Latest official estimates put the subregion's aggregate 2010 cereal output, consisting mostly of coarse grains, at a record 60 million tonnes, 11 percent up on 2009 and 20 percent above the past five-year average. Bumper cereal harvests were gathered in most Sahelian countries, including **Burkina Faso, Chad, the Gambia, Guinea-Bissau, Mali, Niger** and **Senegal**. Production was also good in the coastal countries along the Gulf of Guinea, notably in **Nigeria**.

Coarse grain prices have remained mostly stable, while prices of imported commodities, such as rice and wheat, are increasing

Reflecting the good harvests from late last year, markets were generally well supplied. Although coarse grain prices increased from January-February 2011 in most countries, following seasonal patterns, they remained generally below their levels of the corresponding months of the previous year. For instance, millet prices in markets in **Niger** (Niamey), **Burkina Faso** (Ouagadougou) and **Mali** (Bamako) in May 2011, were 14, 9 and 7 percent, respectively, lower than in May 2010. Millet prices in **Senegal** (Dakar) in March 2011, were about 8 percent below their level of a year earlier. In **Nigeria**, sorghum prices in Kano, in the northern part of the country, remained below their level of a year earlier until March 2011 but in April 2011 prices were up by about 7 percent on their levels of a year ago. The situation is generally 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**, the average wheat price is reported to have increased by 40 percent in the year to March 2011 in

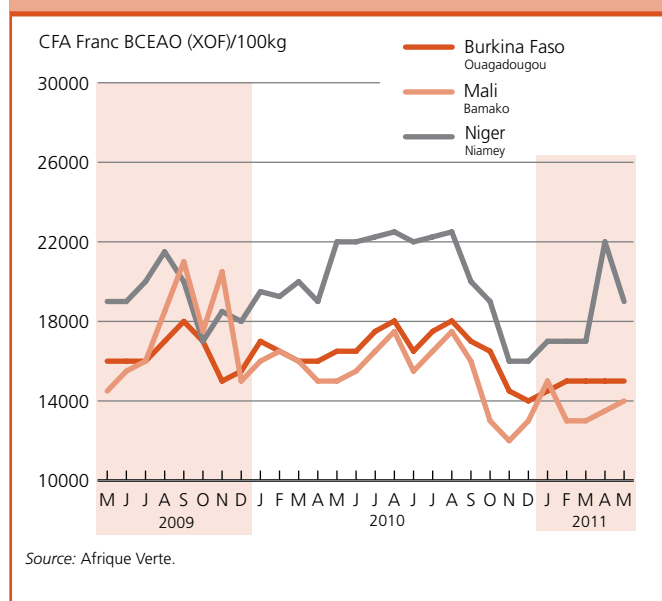
Table 8. Western Africa cereal production
(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals ¹			Change: 2011/2010 (%)
	2009	2010 estim.	2011 f'cast	2009	2010 estim.	2011 f'cast	2009	2010 estim.	2011 f'cast	
Western Africa	42.3	47.2	45.5	11.4	12.5	12.7	53.7	59.8	58.2	-2.7
Burkina Faso	3.4	4.3	3.8	0.2	0.3	0.3	3.6	4.6	4.1	-10.9
Chad	1.4	3.1	2.2	0.1	0.2	0.2	1.6	3.3	2.5	-24.2
Ghana	2.2	2.4	2.3	0.4	0.4	0.4	2.6	2.8	2.7	-3.6
Mali	4.4	4.1	4.0	2.0	2.3	2.3	6.3	6.4	6.4	0.0
Niger	3.4	5.2	4.8	0.1	0.1	0.1	3.5	5.2	4.9	-5.8
Nigeria	21.3	22.3	22.4	4.3	4.5	4.6	25.7	26.8	27.0	0.7

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

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

Figure 4. Millet prices in selected Western African markets



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 19 and 25 percent higher in **Niger** in March 2011 and **Mali** in May 2011, respectively, than a year earlier. Increased transport costs have contributed to higher price of imported rice. This effect has been exacerbated in **Burkina Faso, Mali, Niger** and **Liberia** by the impact of the recent political crisis in neighbouring Côte d'Ivoire which has adversely affected trade flows. In Liberia, rice prices have shown an increasing trend since the beginning of 2011 reflecting increased demand, partly due to the influx of refugees from Côte d'Ivoire. In affected areas, the price of imported rice has increased by over 60 percent since December 2010.

Depreciation of local currencies is also fuelling food price increases in several cereal import dependent countries such as **Guinea, Sierra Leone** and the **Gambia**.

Food security affected by civil insecurity

The recent post-election crisis in **Côte d'Ivoire** has forced over 180 000 people to leave the country and seek refuge, mostly in eastern Liberia. Another 150 000 people have been internally displaced including 82 000 in the western part of the country. While the return of some of the displaced persons

to their areas of origin was observed in Abidjan, following the reduction in violence, the return of IDPs has so far been limited. The crisis has also led to a serious disruption in trade flows, causing food prices to increase in several regions. In spite of the improved security situation, food security remains a major concern. Access to food for many households is being constrained by the disruption of their livelihoods. On 18 January 2011, the United Nations and partners, launched the Emergency Humanitarian Action Plan (EHAP) for Côte d'Ivoire and neighbouring countries (including Liberia), requesting about USD 33 million.

The situation in Libya Arab Jamahiriya is also having a serious impact on food security in neighbouring countries such as Niger and Chad where rising numbers of refugees and returning migrant workers place increasing demand on food. According to the International Organization for Migration (IOM), about 81 000 and 6 900 persons arrived in Niger and Chad respectively as of early June. This has eliminated the remittances and has negatively affected the food security of their original communities.

Central Africa

Good start of the 2011 cropping season

Adequate rainfall in March and April has helped land preparation for planting of the 2011 cereal crops in the subregion. Sowing of the main maize crop began in March in southern regions of Cameroon and Central African Republic, where continued government support to agriculture is expected to sustain good maize production.

Favourable rainfall resulted in production gains in 2010

Favourable weather conditions contributed to increased cereal production in 2010. The current subregional estimate, put at 3.4 million tonnes of cereals, is approximately 4 percent above the previous year's level, but nearly the same as the average of the previous five years.

In **Cameroon**, reflecting the good harvests, markets are well supplied and coarse grains prices have remained generally below their levels of the previous year. For example, in the markets of

Table 9. Central Africa cereal production
(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals ¹			Change: 2011/2010 (%)
	2009	2010 estim.	2011 f'cast	2009	2010 estim.	2011 f'cast	2009	2010 estim.	2011 f'cast	
Central Africa	2.8	2.9	3.0	0.5	0.5	0.5	3.3	3.4	3.4	0.0
Cameroon	1.3	1.4	1.4	0.1	0.1	0.1	1.5	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.

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

Garoua and Bafoussam, during February 2011, maize prices were at 32 and 5 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. Similarly, in the **Central African Republic**, after one year of stable prices, inflation picked up during the last quarter of 2010 driven by a renewed wave of violence in the north and high international commodity prices, making access to food difficult for large segments of the population.

Civil insecurity still a major cause of food insecurity

Persistent civil insecurity continues to impede agricultural recovery and restrict humanitarian efforts in the region. Civil conflict in neighbouring Democratic Republic of Congo (DRC) during the end of 2009 led to a large influx of refugees into the **Republic of Congo** from the Equateur Province during October and November 2009. The current figures from UNHCR indicate that 115 100 civilians have fled to Likouala Province (a structurally food-deficit region), in the far north of Congo. Likouala is the poorest and currently the most food insecure province in Republic of Congo. The sharp increase in population (by 89 percent in affected areas) puts pressure on natural resources, a major source of livelihood for the local population. Trading routes between the Democratic Republic of Congo and the Republic of Congo have been disrupted, further affecting food availability. 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 Prolonged dry weather conditions raise serious food security concerns

The outlook for the 2011 harvests and livestock conditions raises serious food security concerns following poor and erratic rainfall from March to May. The current lack of adequate pastures has led to a worsening of livestock body conditions and even some deaths. This

has consequently reduced good market prospects, directly impacting pastoralists' incomes and their access to staple food. In addition, the reproduction rates of livestock have suffered from dry weather conditions that prevailed for more than nine months. The 2010 short rainy season (October to December) almost totally failed and led to a depletion of grazing resources. This makes the recovery of pastoral livelihood systems more difficult and worsens the long-term food security. Pastoral and agro-pastoral areas of northern, north-eastern and eastern **Kenya**, southern and central **Somalia**, southern Sudan, inland **Djibouti**, northern **Uganda** and south and south-eastern **Ethiopia** are of particular concern. Although recent good rains have helped replenish water catchments, significant soil moisture deficits still persist.

The prolonged dry spells have also affected seasonal crop production in several countries of the subregion. In Ethiopia, unfavourable secondary "belg" season rains (March to May) have negatively affected crops, to be harvested from late June-July. This has also affected planting of long cycle "meher" crops, especially in the lowlands, while in many areas of Tigray and Amhara regions, farmers have switched to planting short cycle varieties. An early multi-agency "belg" assessment has been carried out, and although its results are not yet available, crop production is expected to be very poor as rains were late and poorly distributed. Inadequate moisture has also led to a near total failure of the sweet potato crop in the south-western parts of the country, where the crop is crucial for local food security during the lean season.

Following the late onset of seasonal rains, delayed planting of 2011 main season cereal crops is underway in Kenya ("long-rains"), Somalia ("gu"), southern Sudan and Karamoja region of Uganda. In Ethiopia, Eritrea and northern Sudan, the main cropping season is expected to start in June-July. The overall performance of 2011 cereal production will depend on the adequacy of seasonal rains until next September. A close monitoring of the rainfall situation in the remainder of the season is, therefore, warranted.

Table 10. Eastern Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Total cereals ¹			
	2009	2010 estim.	2011 f'cast	2009	2010 estim.	2011 f'cast	2009	2010 estim.	2011 f'cast	Change: 2011/2010 (%)
Eastern Africa	4.2	4.1	3.7	26.9	31.4	29.4	33.0	37.5	35.1	-6.4
Ethiopia	3.3	3.0	2.7	13.0	13.7	12.9	16.5	16.9	15.8	-6.5
Kenya	0.2	0.4	0.3	2.6	3.1	2.7	2.9	3.6	3.1	-13.9
Sudan	0.4	0.4	0.5	3.1	5.3	5.1	3.6	5.8	5.6	-3.4
Tanzania U.R.	0.1	0.1	0.1	4.3	4.7	4.3	5.7	6.2	5.7	-8.1
Uganda	-	-	-	2.6	3.2	3.0	2.8	3.4	3.3	-2.9

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

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

Cereal prices escalating across the subregion

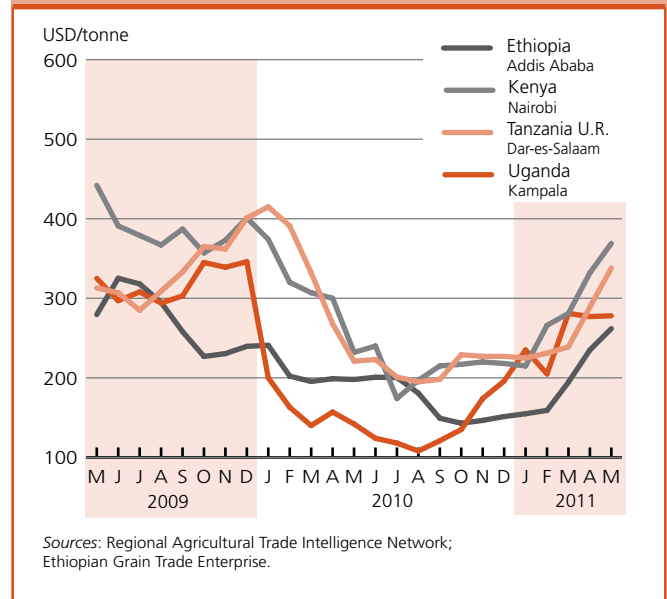
Across eastern Africa, cereal prices continued their upward trend that started in September-October 2010. Record levels have been registered in some retail markets including Somalia's Mogadishu and Marka markets, where April prices of red sorghum were between 160 and 177 percent higher than 12 months earlier. A similar situation is reported in Kenya where wholesale prices in May in the main urban markets of Nairobi and Mombasa were between 60 and 85 percent above their levels twelve months earlier. In Ethiopia, relatively low price levels were experienced from late last year into the beginning of 2011, with cereal prices rising from February; maize prices have increased between 60 and 120 percent only in the last four months from February to May. In southern Sudan, food prices are on the rise, especially in markets along the north-south border and in the capital city Juba where the influx of about 300 000 returnees has created additional demand for main staple food. A contrasting situation is reported in Khartoum, where sorghum (feterita) was traded at an average of SDG 890 per tonne in April 2011, almost 40 percent less than 12 months earlier, indicating good stock levels, following the bumper crop harvested at the end of last year and the decreasing trade flows towards the south.

The number of people in need of food assistance has risen significantly in the subregion

Food insecurity rose sharply in pastoral and agro-pastoral areas of Somalia, Kenya and Ethiopia as a consequence of the prolonged drought. The total number of food insecure people in need of humanitarian assistance in the subregion is currently estimated at about 15.5 million people (including 6 million in Sudan, 3.2 million in Ethiopia, 2.4 million each in Kenya and Somalia, 815 000 in Uganda and 120 000 in Djibouti). This is about 500 000 people more than previously reported by FAO in April 2011. These figures are likely to increase further in the coming months as food stocks gradually run out and the lean season deepens before the next main harvest in the last quarter of the year.

Civil conflicts and insecurity continue to negatively affect the food security situation in most areas of southern and central Somalia and Darfur and South Kordofan in northern Sudan, disrupting local markets and trade flows and hindering humanitarian aid distribution. In southern Sudan, food security conditions are also significantly affected by the socio-political tensions linked to the results of last January's self-determination referendum especially in the disputed area of Abyei and in urban areas of Northern Bahr el Ghazal, Warrap, Unity, Jonglei and Upper Nile states where the majority of returnees are concentrated.

Figure 5. Maize prices in selected Eastern African markets



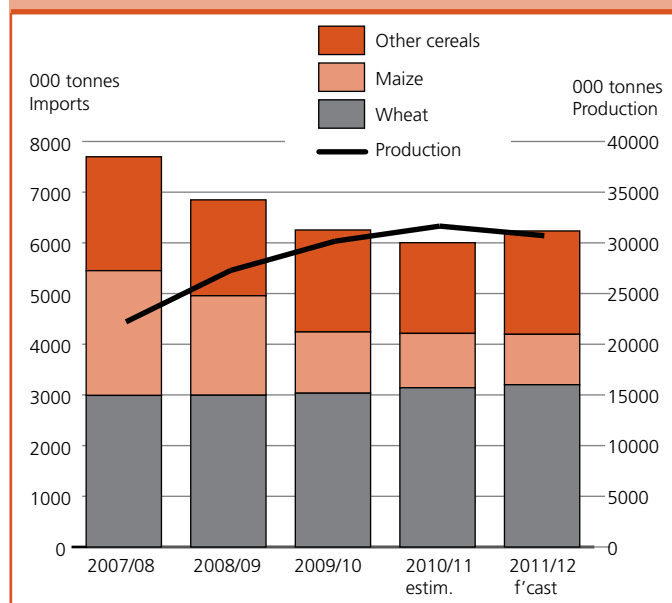
Southern Africa

Favourable prospects for current crops, being harvested, in the subregion; however, localized floods and a recent dry-spell have caused some damage

Harvesting of the main season cereal crops is nearing completion in most countries in Southern Africa. Despite irregular rainfall patterns, particularly during the second half of the main rainy season (January-March), production of maize, the main staple, is mostly favourable. However, prospects are mixed in individual countries, where some countries were affected by floods or rainfall deficits, while others experienced good weather conditions that supported record harvests.

Rainfall during the first three months of the cropping season (October-December) was generally positive, despite some early moisture deficits. 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 and crop damage. The heavy rains also affected northern regions of Namibia and Lesotho, in particular, negatively impacting crop development and dampening cereal production. During February and the beginning of March, rainfall levels dropped, with the short dry spell impacting portions of Botswana, Zimbabwe, central and southern Mozambique, southern Zambia and Malawi, as well as northern parts of South Africa's maize triangle. The rainfall deficits caused some soil moisture stress to early-planted maize, reportedly negatively impacting on yield levels in the affected areas. However, improved rains were recorded in the following months, which also caused some delays of harvesting activities

Figure 6. Southern Africa cereal import requirements and production



in some areas of South Africa. Furthermore, the continuation of input assistance by governments and partner agencies improved seed and fertilizer availability for the agricultural season, leading to increased plantings, and thus contributing to production gains.

Record maize crops are estimated for **Malawi** and **Zambia** at 3.9 and 3 million tonnes respectively, which is expected to enable the countries to retain healthy surpluses for the current 2011/12 marketing year that began in April-May. In **Zimbabwe** and **Swaziland**, despite the increase in planted area to maize, only moderate production increases are estimated, mainly on account of the irregular rains. Production of the main cereal staples in **Angola**, **Mozambique** (maize) and **Madagascar** (rice) is anticipated to be at similar levels to the previous season. By contrast, **Namibia** and, in particular, **Lesotho** are expected

to experience production shortfalls following a flood-affected cropping season. In **South Africa**, the largest maize-producing country in the subregion, a contraction in maize plantings led to lower production estimates; however, maize production, estimated at 11.6 million tonnes is still about 8 percent higher than the previous five-year average. Overall, total maize production for the subregion is estimated at just under 24 million tonnes, about 1.1 million tonnes lower than the good 2010 crop, but still 20 percent higher than the five-year average (2006-2010). Millet and sorghum production is estimated at marginally lower levels as compared to last year's output, while production of the winter wheat crop, which is currently being planted, is forecast to expand compared to 2010. Increased plantings in South Africa and Zambia are reported, and early estimates point to a crop of about 2 million tonnes for the subregion.

Import requirements remain generally low across the subregion

Preliminary forecasts for the current 2011/12 marketing year indicate that the subregion, excluding South Africa and Mauritius, will require approximately 1 million tonnes of maize, a comparable level to the previous marketing year, but below the preceding three-year average of nearly 1.4 million tonnes. However, given the flood-affected harvest in Lesotho and Namibia, these countries' import requirements are expected to be larger than last year, off-setting lower requirements for Malawi, Zambia and Zimbabwe. Wheat imports are forecast at unchanged levels in most countries, with the exception of Zambia and South Africa that are expected to import smaller quantities given favourable production projections. The increasing trend in maize production over the past four marketing years (2007/08-2010/11) resulted in a large decline in imports for the subregion as a whole, estimated at 1 million tonnes for the just ended 2010/11 marketing year (see Figure 6). With regard to wheat, the second largest imported cereal, latest import estimates for 2010/11 show little variation

Table 11. Southern Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2009	2010 estim.	2011 f'cast	2009	2010 estim.	2011 f'cast	2009	2010 estim.	2011 f'cast	2009	2010 estim.	2011 f'cast	Change: 2011/2010 (%)
Southern Africa	2.3	1.7	1.9	24.4	26.4	25.2	5.0	5.1	5.1	31.7	33.2	32.2	-3.0
- excl. South Africa	0.3	0.3	0.3	11.3	12.5	13.2	5.0	5.1	5.1	16.6	17.9	18.6	3.9
Madagascar	-	-	-	0.4	0.4	0.4	4.5	4.8	4.7	4.9	5.2	5.1	-1.9
Malawi	-	-	-	3.7	3.5	4.0	0.1	0.1	0.1	3.9	3.6	4.1	13.9
Mozambique	-	-	-	2.4	2.3	2.4	0.3	0.2	0.2	2.6	2.5	2.6	4.0
South Africa	2.0	1.4	1.7	13.1	13.9	12.0	-	-	-	15.1	15.4	13.8	-10.4
Zambia	0.2	0.2	0.2	2.0	2.9	3.1	-	0.1	-	2.2	3.1	3.3	6.5
Zimbabwe	-	-	-	1.5	1.6	1.7	-	-	-	1.6	1.6	1.7	6.3

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

from the previous three marketing years. However, in Lesotho and Swaziland, wheat imports did fall in 2010/11, attributed to higher international prices and was, thereby, compensated by larger quantities of maize imports.

Overall, aggregate cereal import requirements are forecast at 3.3 million tonnes for the 2011/12 marketing year (excluding South Africa and Mauritius), slightly larger than last year's estimates, largely on account of expected production shortfalls in Lesotho and Namibia.

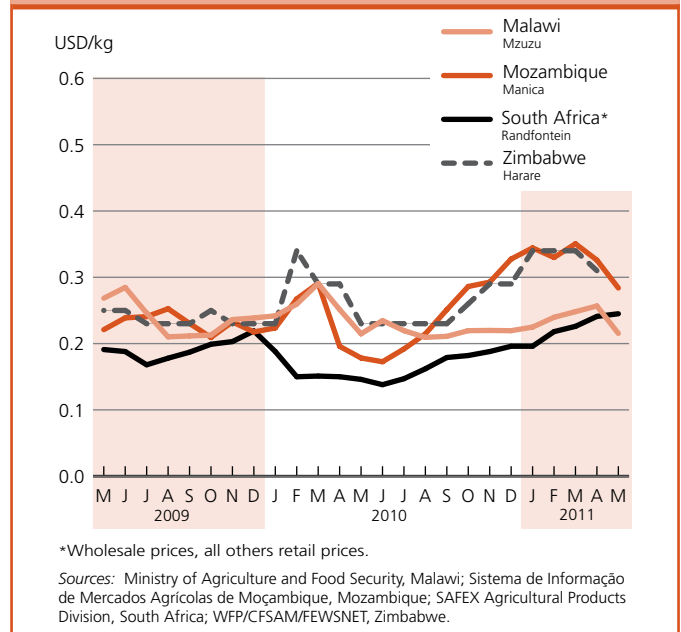
Adequate supplies and favourable production prospects keep seasonal prices low

Prices of maize have been generally falling in recent months, owing to the favourable production levels in most countries and the arrival of new supplies from the ongoing harvest (see Figure 7). However, the levels of decline vary between and within countries. Large domestic surpluses in Zambia and Malawi kept price variations to minimum levels. In Zambia, the difference between July 2010 (seasonal low) and March 2011 (seasonal high) was only 15 percent, compared to 33 percent over the same period in the previous year. Prices in April 2011, in both countries are below their levels of the same month last year. In Mozambique and Zimbabwe prices have declined since March-April, conforming to seasonal patterns with increased supplies from the new harvest. However, variations exist within the countries, reflecting, to some extent, sub-national production disparities. For example, in Mozambique maize prices in northern markets remain nearly half the level of those recorded in some southern markets. By contrast, in South Africa, the largest producing and exporting country of the subregion, prices of both white and yellow maize have been increasing since July 2010, supported by rising international prices, a weaker Rand, as well as lower production estimates for the 2011 harvest. At Rand 1 682 per tonne in May 2011, prices of white maize are approximately 50 percent higher than in May 2010. In the import dependent countries of Botswana, Namibia, Lesotho and Swaziland, maize prices follow a similar trend. Prices of rice, both local and imported varieties, in Madagascar have been falling from March onwards, as domestic market supplies are augmented by the new harvest.

Overall food security conditions are stable, but areas impacted by torrential rains are a cause for concern

New food supplies from the on-going harvest have enabled households to replenish their stocks, while increased market supplies have contributed to lower prices, benefiting net-buying households. However, despite adequate national and subregional cereal supplies as well as normal flows of trade localized food insecurity conditions exist in areas affected by erratic weather conditions in Lesotho, northern Namibia, southern and northern

Figure 7. White maize prices in selected Southern African markets



parts of Malawi, southern Zimbabwe and the semi-arid regions of Mozambique. Lesotho and northern Namibia have been most affected by the torrential rains. The extent of the damage and affected population together with the required interventions will be known once the results of the current food security assessments are finalized. Elsewhere, the generally satisfactory food security conditions that prevail across the subregion are expected to continue until the beginning of the lean season towards the end of 2011.

Great Lakes Region Improved rainfall levels boost prospects for 2011 B main season

In **Burundi** and **Rwanda**, harvesting of the 2011 B season is currently underway. Improved rainfall during the season has boosted production prospects in addition to the continued assistance provided to farmers in the form of seed and other agricultural inputs. However, in eastern regions of Burundi, torrential rains in March caused some damage to the bean crop. Furthermore, the occurrence of banana bacterial wilt in Burundi and the continuation of cassava mosaic disease will affect production, impacting both household food stocks and incomes. An extended period of below-average rains during the first 2011 A season (September 2010 – January 2011), attributed to the effects of *La Niña*, resulted in a reduced harvest relative to the corresponding season in 2010. Estimates indicate a 3 percent drop in food production in Burundi, while in Rwanda the minor season harvest is estimated to be similar or slightly below the

output of the year before. Consequently, the low seasonal supplies acted to constrain households' ability to replenish food stocks. In the **Democratic Republic of Congo**, harvesting of the main season's maize crop in central and southern parts will be completed in June. Although no official crop production estimates are available, satellite-based images indicate good vegetation conditions during the main agricultural season in these areas.

Food prices display mixed trends, but remain at high levels

In Burundi, following a period of decline immediately after the 2011 A harvest, prices of beans, a main food staple, remained comparatively steady in most markets during March and April, and on average, were about 10 percent below levels of last year, except in Ruyigi and Gitega markets, where prices were higher. In Kigali, Rwanda, prices have been similarly high, but remained unchanged from April to May, following a temporary decline at the beginning of 2011. Wholesale prices (in US dollar terms) of maize and beans in May 2011 were 40 and 10 percent

above their levels in 2010 respectively. 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, but the arrival of the 2011 B harvest will provide a boost to both household and market food supplies.

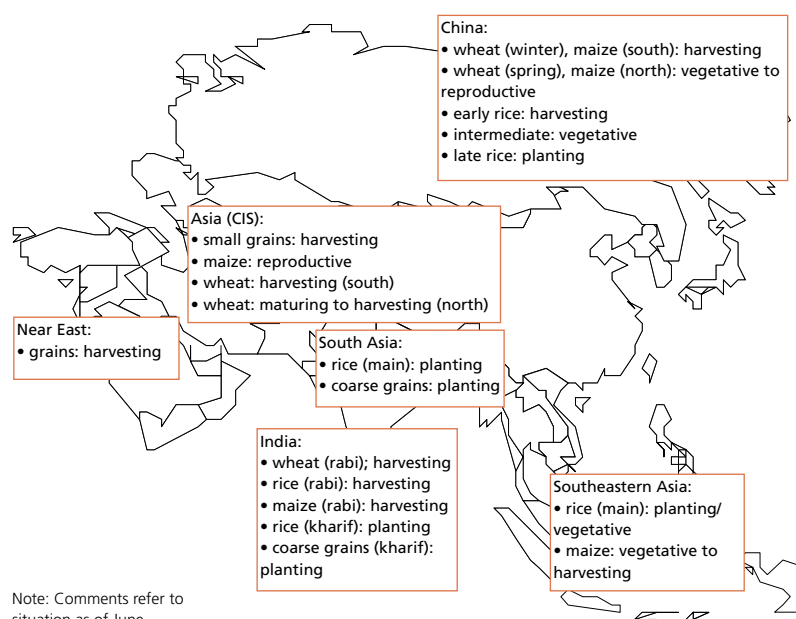
In the **Democratic Republic of Congo**, food prices exhibit mixed trends and great variability across the country, primarily reflecting the availability of food items locally. Lower maize prices were recorded in Lubumbashi on account of larger imports from neighbouring Zambia, while rice prices in the northern town of Kisangani, located in the main rice growing region, fell between November 2010 and February 2011, following the harvest, but rose marginally in March. Civil insecurity continues to constrain agricultural production and exacerbates the food insecurity conditions of vulnerable groups, particularly in north-eastern parts of the country, while limited agricultural productive capacity and the deterioration of the mining industry has severely affected food security in central provinces.

Asia

Far East

2011 winter wheat harvest estimated to be slightly higher than last year

Harvest of winter crops such as wheat and barley is almost complete in the main wheat producing countries - China, India and Pakistan. The aggregate subregional 2011 wheat harvest at 226.8 million tonnes represents an improvement of 1.6 percent over the generally poor production in 2010. The overall favourable weather, enhanced input supplies and high domestic/international prices helped boost production this year, especially in southern Asian countries such as **India, Pakistan, Nepal** and **Bangladesh**. However, winter drought has resulted in reduced harvests in eastern Asian countries including **China, Democratic People's Republic of Korea** and **Japan**. In Mainland China, the persistent drought situation continues, however, given the reported massive efforts from the Government to provide irrigation and other inputs/resources to farmers, the drought impact is expected to be mitigated somewhat. Severe flooding in eastern China recently has inundated more than 430 000 hectares of farmland and led to food price rises in some local markets.



Rice harvests of the 2011 first season are expected to be better than the previous year

Rice is also grown in the first season of the year as a secondary crop (dry season), based on the total area planted to the crop, in Bangladesh, Cambodia, India, Lao People's Democratic Republic, Myanmar, the Philippines and Thailand, and as a main crop (wet season) in the southern countries of the continent, namely, Indonesia, Sri Lanka, Timor-Leste and Viet Nam. Given the irrigation and intensive cultivation practices in most countries for the

Table 12. Far East cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2009	2010 estim.	2011 f'cast	2009	2010 estim.	2011 f'cast	2009	2010 estim.	2011 f'cast	2009	2010 estim.	2011 f'cast	Change: 2011/2010 (%)
Far East	223.4	223.2	226.8	253.8	273.6	276.4	611.2	624.0	640.0	1 088.4	1 120.7	1 143.3	2.0
Bangladesh	0.8	0.9	1.0	1.0	1.1	1.2	48.0	50.3	51.0	49.8	52.2	53.2	1.9
Cambodia	-	-	-	0.9	0.8	0.9	7.6	8.2	8.5	8.5	9.0	9.4	4.4
China	115.1	115.1	114.5	173.2	186.7	187.4	196.7	197.3	199.1	485.0	499.1	501.1	0.4
India	80.7	80.8	84.3	33.9	40.1	41.4	133.6	141.2	150.0	248.2	262.0	275.6	5.2
Indonesia	-	-	-	17.6	18.4	17.9	64.4	66.4	67.3	82.0	84.8	85.2	0.5
Japan	0.7	0.8	0.8	0.2	0.2	0.2	10.6	10.6	10.3	11.5	11.7	11.3	-3.4
Korea Rep. of	-	-	-	0.4	0.4	0.3	6.6	5.8	6.0	7.0	6.2	6.3	1.6
Korea DPR	0.1	0.1	0.2	1.8	1.8	1.8	2.3	2.4	2.5	4.3	4.3	4.4	2.3
Myanmar	0.2	0.2	0.2	1.3	1.3	1.3	31.0	30.8	31.0	32.5	32.2	32.4	0.6
Nepal	1.3	1.6	1.6	2.2	2.4	2.4	4.0	4.5	4.5	7.5	8.4	8.5	1.2
Pakistan	24.0	23.3	24.0	3.8	4.0	3.8	10.3	8.3	10.0	38.1	35.6	37.8	6.2
Philippines	-	-	-	7.0	6.4	7.3	15.5	16.8	17.3	22.5	23.2	24.6	6.0
Thailand	-	-	-	4.8	4.1	4.4	32.1	31.6	32.3	36.9	35.7	36.7	2.8
Viet Nam	-	-	-	4.4	4.7	4.8	38.9	39.9	40.7	43.3	44.6	45.5	2.0

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

dry season, per hectare productivity in this season is generally higher than in the main monsoon season that follows the dry period. The first season crop harvests are estimated at a higher level compared to the same season a year before in **Bangladesh, Indonesia, the Philippines, Thailand and Viet Nam**. High rice prices and the generally good rainfall situation have been conducive to bumper harvests. On the contrary, production from the first season paddy crop is estimated to be generally poor in **Sri Lanka**, due to severe flooding earlier in the season. Given the importance of this season, the national annual total paddy production this year is expected to be lower.

Assuming a relatively normal upcoming monsoon season and favourable weather conditions for the remainder of the year, the 2011 annual harvests are expected to improve rice production over the last year in **China, India, Pakistan** and in the above-mentioned countries that have already experienced a good first season paddy harvests. On the contrary, **Japan** was hit by a powerful earthquake and tsunami on 11 March 2011 and subsequently by radioactivity from the damaged Fukushima nuclear plant on its east coast. These events have caused an enormous devastation. FAO estimates that the disaster will result in a 43 000 hectares cut in the area cultivated to rice in 2011, equivalent to about 300 000 tonnes of paddy production. If confirmed, it would bring Japan's paddy production down by 3 percent to 10.3 million tonnes.

Early forecast of 2011 aggregate cereal harvest suggests a two percent increase over the level in 2010

Based on production estimates of the winter crops already harvested in most countries as well as a forecast of normal weather during the upcoming monsoon season, the 2011 aggregate annual cereal production for the Far East subregion, is forecast at about 1 143 million tonnes (including rice in paddy terms), some 23 million tonnes higher than the 2010 estimated production. The increase is foreseen in rice, wheat and coarse grains. This tentative forecast would represent an annual growth of about 2 percent in 2011 following the 3 percent growth in 2010 over the previous year's level when drought reduced India's crops. However, it should be noted that the bulk of the 2011 paddy and coarse grain crops are currently being planted and the situation could change as the season progresses.

Table 13. Far East anticipated trade in cereals in 2011/12¹
(thousand tonnes)

	Avg 5-yrs (2006/07 to 2010/11)	2010/11	2011/12	2011/12 over 2010/11 (%)	2011/12 over 5-yr avg (%)
Cereals - Exports	30 835	31 717	33 953	7.0	10.1
Cereals - Imports	78 448	84 395	82 861	-1.8	5.6
Rice-milled - Exports	23 627	24 709	24 670	-0.2	4.4
Rice-milled - Imports	8 034	8 965	8 650	-3.5	7.7
Wheat - Exports	2 521	3 080	4 310	39.9	71.0
Wheat - Imports	30 078	31 563	30 060	-4.8	-0.1
Coarse grains - Exports	4 687	3 928	4 973	26.6	6.1
Coarse grains - Imports	40 335	43 867	44 152	0.6	9.5

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

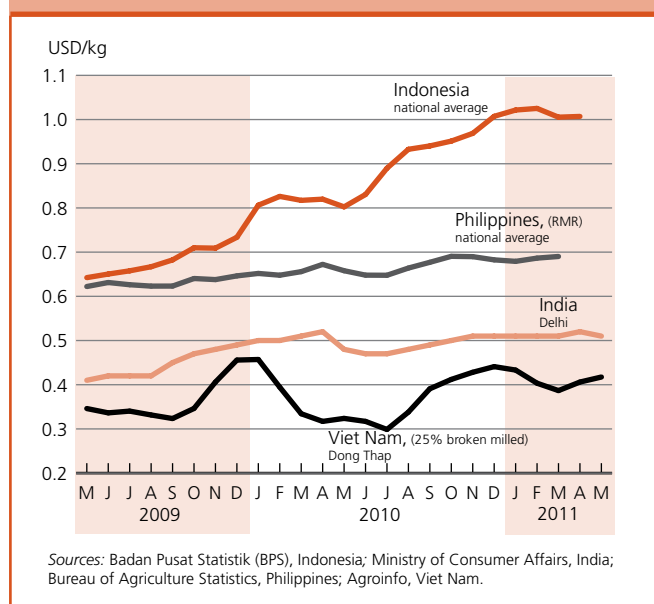
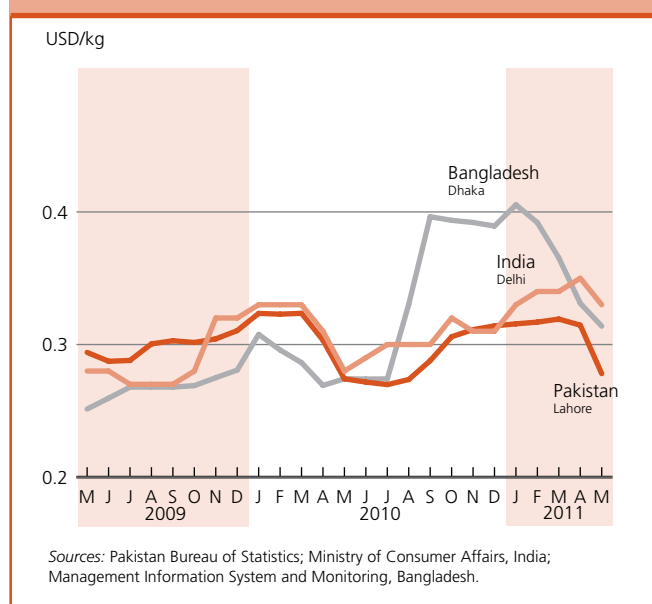
Cereal imports by countries in the subregion are expected to decrease in 2011/12 marketing year

Due to the overall anticipated cereal production increase in 2011 in most countries of the subregion, the aggregate cereal imports, particularly of wheat and rice in 2011/12, are expected to decrease. Coarse grains imports, on the contrary, are estimated to rise somewhat due to the higher forecast of import requirements in Indonesia and Malaysia. The overall trade (imports plus exports) in 2011/12, however, is seen to be increasing, especially as compared to the average of the previous five years.

Prices of rice and wheat have remained firm or have begun to fall in recent months

Retail prices of rice in local currencies have softened in recent months with the arrival of the secondary harvests of the first season crop. However, due to the general strengthening of national currencies against the US dollar, prices in USD terms have remained firm. The latest available USD monthly retail rice price in selected markets was higher than the corresponding price three months before in **China, India, Lao People's Democratic Republic, Myanmar, Nepal, Pakistan, the Philippines and Viet Nam**. Only in a few countries, such as **Bangladesh, Indonesia and Mongolia**, has the latest month's rice price come down.

Retail prices of wheat in most domestic markets, such as **India, Pakistan and Bangladesh**, have experienced some decline, both in local currencies and in US dollars since late March, with the onset of crop harvests and in some cases after government interventions to keep food prices under control. The latest available monthly prices in **Indonesia, Sri Lanka and Bhutan**, compared to those of three months ago are actually higher. Current prices in most countries are still at high levels, particularly in comparison with the pre-crisis period of mid-2008.

Figure 8. Rice retail prices in selected Far East countries**Figure 9. Wheat retail prices in selected Far East countries**

Near East

Harvesting of 2011 winter wheat and barley crops is currently underway throughout the subregion, while further north in Turkey, it is expected to start in June. The wheat crop outlook is very promising in main producing areas of **Turkey**, namely, Central Anatolia, Aegean and Cukurova regions, and the early national forecast of the 2011 crop is set at a bumper level of 20.5 million tonnes. On the contrary, in **Afghanistan** and the **Syrian Arab Republic**, prospects are unfavourable. Despite abundant rainfall in April that benefited crops at grain filling stage, wheat production is likely to be below average due to the late onset of the rainy season and persistent dry spells in the first three months of 2011. The Afghanistan wheat harvest is also expected to be much reduced from last year, mainly due to the precipitation deficits during the early months of the season, resulting in the reduction of area planted to the crop, especially in

the rainfed areas in the north and centre. In the rest of the region, winter cereal production is forecast at about average levels. In Yemen and the Syrian Arab Republic, current political and social unrest may cause disruptions in commodity distribution channels, with consequent localized food shortages in main markets and a further increase in local prices.

CIS in Asia²

Early prospects for the 2011 cereal crops generally favourable

Sowing of cereals is nearly completed in the countries of the subregion under generally satisfactory soil moisture conditions. Adding the estimated winter cereal harvest to the preliminary

² Georgia is no longer a member of CIS but its inclusion in this group is maintained temporarily.

Table 14. Near East cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2009	2010 estim.	2011 f'cast	2009	2010 estim.	2011 f'cast	2009	2010 estim.	2011 f'cast	2009	2010 estim.	2011 f'cast	Change: 2011/2010 (%)
Near East	45.1	44.8	44.4	19.1	21.1	20.6	3.8	4.2	4.2	68.0	70.1	69.3	-1.1
Afghanistan	5.1	4.5	4.0	0.8	0.8	0.8	0.6	0.6	0.6	6.5	5.9	5.4	-8.5
Iran (Islamic Rep. of)	13.0	13.5	13.5	3.5	4.7	5.0	2.3	2.5	2.5	18.8	20.7	21.0	1.4
Iraq	1.4	1.9	1.7	0.7	1.4	1.1	0.2	0.2	0.2	2.2	3.4	2.9	-14.7
Syrian Arab Republic	3.7	3.6	3.2	1.0	0.9	0.8	-	-	-	4.7	4.5	4.1	-8.9
Turkey	20.6	19.7	20.5	12.2	12.2	11.9	0.8	0.9	0.9	33.6	32.7	33.3	1.8

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

forecast of the spring season currently underway, the aggregate cereal production in 2011, mostly wheat, is estimated to increase to 31 million tonnes or some 21 percent higher than last year's level. The increase is mainly foreseen in **Kazakhstan**, which accounts for over half of the subregion's total cereal output, due to the recovery from the drought-reduced production of 2010. In **Kazakhstan**, the target for area to be planted under cereals has been set at 16.3 million hectares of cereal, which is slightly below last year's level. In spite of below-average precipitation during the first quarter of 2011, soil moisture is reported to be adequate for planting operations, due to the melting of the abundant snow cover. Assuming favourable weather during the remainder of the cropping season, cereal production is forecast at 17.5 million tonnes in 2011, a recovery from last year's drought-reduced level but still below the record level of 2009. In **Armenia**, the planted area under cereals is estimated at about the level of 2010, and an early forecast points to a normal cereal production of some 345 000 tonnes. In **Georgia**, prospects for the main spring maize crop are favourable due to adequate growing conditions, but the cultivated area to winter wheat decreased due to insufficient rains during the season. Overall, the cereal production in 2011 is forecast to increase by some 12 percent. Prospects for the 2011 cereal crops are also favourable in **Azerbaijan** and **Turkmenistan**, where the total cereal production may increase by about 11 and 7 percent, respectively. In **Uzbekistan**, the total planted area to cereals is estimated at about the same level as last year, but production is forecast to decline slightly due to drier weather during the winter. In **Tajikistan**, below-average rains from October 2010 to March 2011 might have a negative impact on plantings and the yields of the winter rainfed cereal crops. Above-average temperatures in spring have also resulted in higher than usual insect infestation. An early forecast indicates a decline in the 2011 aggregate cereal production from the bumper production of the past two years but still at about the five-year average level.

Table 15. CIS in Asia cereal production

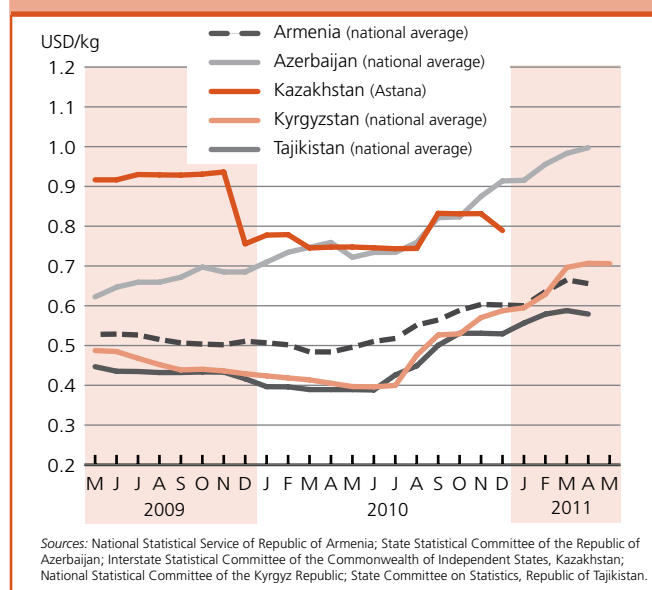
(million tonnes)

	Wheat			Coarse grains			Total cereals ¹			Change: 2011/2010 (%)
	2009	2010 estim.	2011 f'cast	2009	2010 estim.	2011 f'cast	2009	2010 estim.	2011 f'cast	
CIS in Asia	28.7	21.2	25.8	5.8	4.0	4.9	35.2	25.9	31.4	21.2
Azerbaijan	1.8	1.3	1.4	0.6	0.6	0.6	2.4	1.9	2.1	10.5
Kazakhstan	17.0	10.0	14.5	3.3	1.9	2.7	20.6	12.2	17.5	43.4
Kyrgyzstan	1.1	0.8	0.8	0.8	0.7	0.7	1.9	1.5	1.5	0.0
Tajikistan	0.9	0.9	0.9	0.2	0.2	0.2	1.1	1.1	1.1	0.0
Turkmenistan	1.1	1.3	1.4	-	0.1	0.1	1.3	1.5	1.6	6.7
Uzbekistan	6.6	6.7	6.5	0.3	0.2	0.2	7.1	7.1	6.9	-2.8

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

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

Figure 10. Retail wheat flour prices in selected CIS in Asia countries



Import requirements generally remain high across the subregion except in Kazakhstan

Among the eight countries of the subregion, five are classified as LIFDCs, which are heavily dependent on imports of cereals, mostly wheat. The total level of import requirements of the subregion for the 2010/11 marketing year (July/June) were estimated at five million tonnes, slightly higher than the year before. On the other hand, exports from Kazakhstan, the only exporter of wheat, declined significantly during the 2010/11 marketing year by over one third compared to the year before.

Prices of wheat flour at high levels

In **Kyrgyzstan**, prices of bread and wheat flour, which have been steadily increasing since June 2010, rose further in April 2011 and were at record levels. National average prices of wheat flour and bread in April 2011 were 80 percent and 33 percent, respectively, higher than in the same month of 2010. In **Tajikistan**, the price of wheat flour has stabilized at high levels in recent months, and in April was 50 percent higher than a year earlier. Prices of other foods such as sugar, beef, mutton, potatoes, and onions have also risen.

In **Armenia**, prices of wheat flour (high grade), wheat flour

(first grade) and bread in April 2011 were 26 percent, 28 percent and 15 percent, respectively, higher than a year earlier. In **Azerbaijan**, food prices have increased markedly since mid-2010. Prices of wheat flour in April 2011 were 30 percent higher

than a year earlier and those of potatoes were at record levels. In most countries of the subregion, in response to high food prices, governments have undertaken market interventions in recent months to stabilize prices of wheat products.

Latin America and the Caribbean

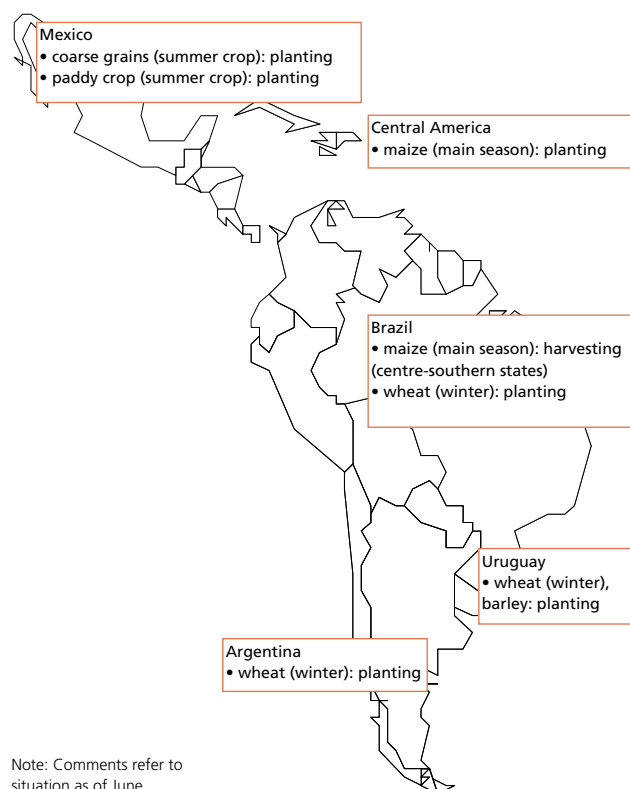
Central America and the Caribbean Increase in the 2011 wheat production

Harvesting of the 2011 main irrigated winter wheat crop is well advanced in **Mexico**, virtually the only producer in the subregion. The output is officially forecast at around 4 million tonnes, 10 percent higher than in 2010.

Planting prospects for the 2011 main coarse grain season are mixed

Planting of the 2011 main season crops, mainly coarse grains and beans, is underway in Central American countries. The *La Niña* event has been weakening in the subregion since February, and a return to near-normal conditions is expected. In the coming months, planting prospects are mixed. Beneficial rains in May favoured planting operations in **Nicaragua, Honduras, Costa Rica** and **Guatemala**, where early crop prospects are positive. In an effort to improve production, governments in several countries are providing support with agricultural inputs to farmers for the 2011 main season. By contrast, in **El Salvador** and in the largest producing country, **Mexico**, where a poor secondary maize crop is being harvested, precipitation in May has been irregular and soil moisture remains in deficit. More rain is needed in the coming weeks to avoid a reduction in plantings of the 2011 main season crops.

In **Haiti**, prospects for the 2011 main season coarse grain crops are uncertain. Following below-average rains in the past two months, planting was delayed and development of early-planted crops was negatively affected. In **Dominican Republic**, harvesting of the main irrigated rice crop has started and prospects are uncertain due to dry



weather during the season that may have resulted in yield reductions. In **Cuba**, planting of the main season rice crop is delayed due to dry weather.

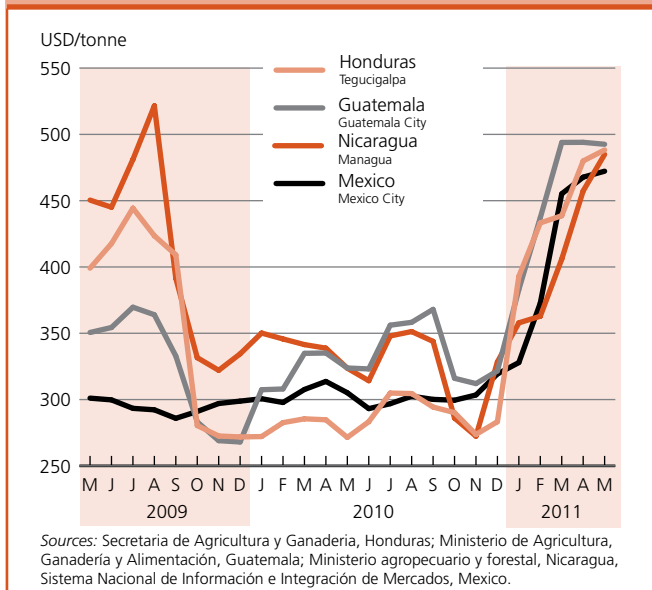
Based on the anticipated wheat crop being harvested, and assuming normal conditions for the crops being planted, the subregion's aggregate cereal production is tentatively forecast at about 40 million tonnes, some 3 percent below the level of 2010. This mainly reflects the lower coarse grain production forecast in Mexico.

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

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2009	2010 estim.	2011 f'cast	2009	2010 estim.	2011 f'cast	2009	2010 estim.	2011 f'cast	2009	2010 estim.	2011 f'cast	Change: 2011/2010 (%)
Central America & Caribbean	4.1	3.7	4.1	31.3	34.4	32.9	2.8	2.9	2.9	38.2	41.0	39.9	-2.7
El Salvador	-	-	-	1.0	0.9	1.0	-	-	-	1.0	0.9	1.0	11.1
Guatemala	-	-	-	1.3	1.3	1.3	-	-	-	1.3	1.3	1.3	0.0
Honduras	-	-	-	0.6	0.6	0.6	-	-	-	0.7	0.7	0.7	0.0
Mexico	4.1	3.7	4.0	26.9	30.2	28.5	0.3	0.2	0.2	31.3	34.1	32.8	-3.8
Nicaragua	-	-	-	0.6	0.6	0.6	0.3	0.4	0.4	0.9	1.0	1.0	0.0
South America	19.0	25.6	23.6	82.3	101.1	100.7	25.6	23.8	26.3	126.9	150.5	150.6	0.1
Argentina	8.8	14.7	14.0	16.2	30.0	27.0	1.3	1.2	1.5	26.3	46.0	42.5	-7.6
Brazil	5.0	6.0	5.0	53.7	58.4	60.2	12.6	11.7	13.5	71.2	76.1	78.7	3.4
Chile	1.5	1.6	1.6	1.8	1.8	1.8	0.1	0.1	0.1	3.4	3.5	3.5	0.0

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

Figure 11. Wholesale white maize prices in selected countries in Central America



Prices of maize at record levels in several countries

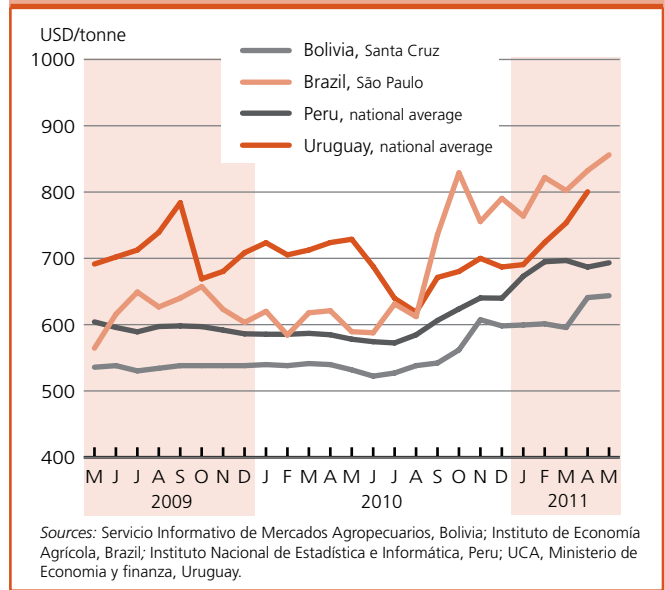
Prices of white maize in the sub region have increased in recent months, reaching record levels in **Guatemala, El Salvador, Honduras** and **Mexico**. Prices started to increase at the end of last year, following the reduced 2010 maize outputs and poor prospects for the 2011 secondary maize season in Mexico. Prices have also been supported by higher international prices of yellow maize, used as a substitute for local white maize in the feeding industry. Prices of red beans, a main staple food in the subregion, declined from the record levels reached in November 2010 as a result of a sharply reduced main season harvest. In recent months, prices have continued to increase due to tight market supplies and are in general twice their levels of a year earlier.

South America

Above-average maize output estimated in 2011

Harvesting of the 2011 main season coarse grain and rice crops is about to be completed. Preliminary estimates put the subregion's aggregate coarse grain output at 100.7 million tonnes, slightly lower than last year's near-record production but still above the average of the previous five years. By contrast rice production is estimated at 26 million tonnes, 10 percent higher than in 2010. In **Brazil**, the largest producer of the subregion, where harvesting of the main season crops is well advanced, the 2011 aggregate maize output is forecast at nearly 58 million tonnes, 3 percent up from the good level of last year. An increase of 4 percent in the area planted is expected to be partially negated

Figure 12. Wholesale wheat flour prices in selected countries in South America



by lower yields during the second season affected by excessive rains in January. Harvesting of the irrigated rice crop is about to be completed and production is forecast at 13.5 million tonnes, 15 percent up from 2010. In **Argentina**, 2011 maize production is forecast at 21 million tonnes, 8 percent below last season's output, mainly due to rainfall deficits during the growing season. The total sorghum harvest is also forecast to decline this year.

Early prospects for the 2011 wheat crop are mixed

Good rains in the past two months in the main growing areas of **Argentina** have improved soil conditions for planting of the 2011/12 wheat crop currently underway; early prospects are positive. In **Brazil**, weather conditions have been also generally favourable but the area planted is forecast to decline.

Prices of wheat flour and maize at high levels

Prices of wheat flour continue to increase or remain firm in recent months following trends in the international market, while those of maize have declined slightly with the arrival of the main season harvest in the subregion. In **Brazil**, prices of yellow maize and wheat flour in May 2011 were 75 percent and 21 percent higher, respectively, than at the same time last year. In **Uruguay**, prices of wheat flour increased by 11 percent between January and April 2011. In **Peru**, prices of wheat flour and maize have risen since August 2010 and in May were about 17 percent above their levels of a year earlier.

North America, Europe and Oceania

North America

Outlook for United States 2011 cereal harvest deteriorates with persisting drought in wheat areas and excessive moisture for maize planting

Persisting severe drought in the central and southern plains of the **United States** has caused further deterioration of crop conditions over the past weeks. Although winter plantings increased significantly, abandonment in drought-affected areas is expected to be well above average and the final area harvested may not be significantly higher than that of the previous year. In addition, yield potential has been reduced by the adverse dry conditions. The country's 2011 wheat output is officially forecast at 56 million tonnes, 7 percent down from last year. Regarding coarse grains, maize sowing has been seriously hampered in the east of the Corn Belt and in the Northern Plains because of adversely wet weather. The area planted in these parts is likely to be lower than last year, offsetting increases reported in the western Corn Belt and Central Plains. Furthermore, significant flooding in May in the vicinity of the Ohio, Mississippi and Missouri rivers has damaged some crops that had already been planted. Thus the latest official forecast for the country's maize output in 2011 has been reduced to 335 million tonnes, significantly down from earlier expectations but still a new record, just above the previous high in 2009. In **Canada**, this year's wheat area is forecast to rebound sharply by some 12 percent from last year's low level in response to high prices. Although cool and wet weather has delayed planting this spring, there is still time up until about mid-June for crops to be planted successfully. Output is forecast to increase by some 10 percent compared to last year to reach 25.5 million tonnes.

European Union

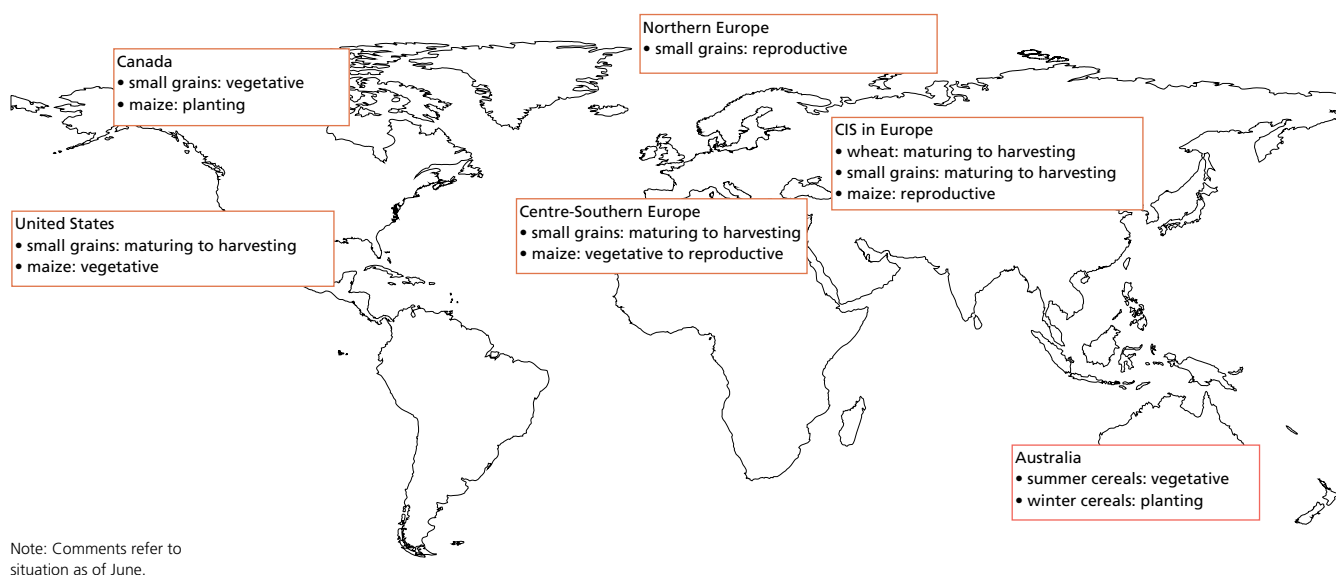
Prospects for EU cereal crops deteriorate with persisting dry conditions in parts

In the **EU**, the world's largest wheat producing region, prospects for the 2011 cereal harvest have deteriorated in recent weeks as exceptionally dry conditions have persisted in some major producing areas. The dry weather has covered an area from the United Kingdom through France and Germany and into Poland, and has significantly dampened yield prospects in these parts. Based on indications up to early June, FAO forecasts the EU 2011 wheat crop at 134 million tonnes, marginally below the 2010 harvest, despite a significant increase in plantings last autumn in response to high prices. However, this forecast assumes a return to more normal weather conditions for the remainder of the season, and if the dry conditions persist further, yield reductions will be inevitable. The situation is similar for the other small winter grains such as barley. After good early prospects, the outlook for crops in affected parts has deteriorated sharply, and below-normal yields will be likely, unless significant rains arrive soon.

CIS in Europe

Production of cereals to recover in 2011

In all European CIS countries (Belarus, Republic of Moldova, Russian Federation and Ukraine) sowing of the 2011 spring crops is underway though it started with delays. Winter wheat crops survived the winter this season and, overall, are reported in good condition. Provided that weather conditions are favourable in the remainder of the agricultural season, a normal harvest is anticipated. The aggregate cereal output of the subregion is forecast to increase by 28 percent, compared with last year's drought-reduced production, to a level of over 138 million tonnes, including 78 million tonnes of wheat. In the **Russian Federation**,



winter crops are reported to be in generally good condition. The target area for spring cereals in 2011 has been set at an above-normal level of 30 million hectares, to compensate for reductions in the area under 2011 winter cereals, which decreased to 15 million hectares due to insufficient soil moisture following severe drought last year. Early forecasts of the 2011 aggregate cereal production (winter and spring crops) indicate a cereal harvest of 83.5 million tonnes, 39 percent higher than last year's drought-reduced crop. This forecast assumes normal weather during the remainder of the cropping season. The Government has just announced that as of 1 July 2011 the ban on the cereal exports imposed in August 2010 will be lifted.

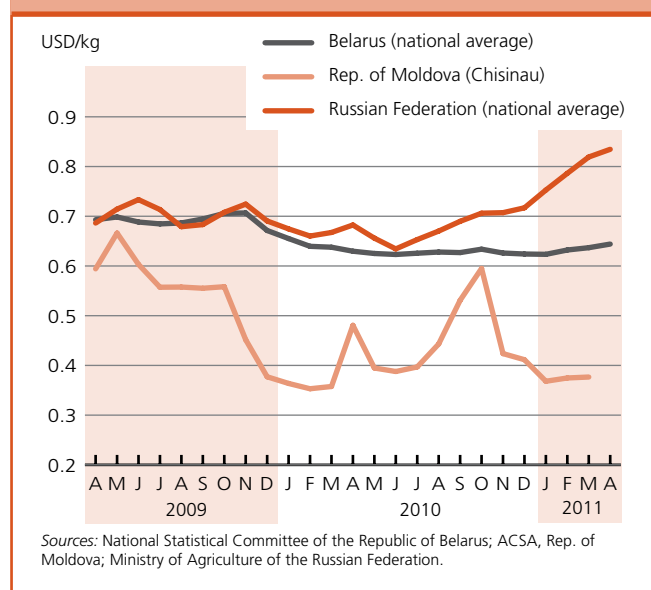
In **Ukraine**, growing conditions for the winter and the recently planted spring crops, much improved in May due to favourable rains. The 2011 cereal crops production is expected to recover from the reduced level of last year affected by dry weather during summer. Early forecasts indicate a 2011 aggregate cereal production (winter and spring crops) of 44 million tonnes including 20.2 million tonnes of wheat. Grain export quotas will be replaced with export duties of 9 percent for wheat, 14 percent for barley and 12 percent for maize. The duties will be effective from June to December 2011.

In the other two European CIS countries, **Belarus** and the **Republic of Moldova**, crop conditions are reported to be satisfactory and early forecasts indicate above average production this year.

High cereal and potato prices

A steady increase of staple food prices has been observed in countries of the subregion since July 2010, reflecting the sharp decline in production in the major exporting countries. In the **Russian Federation**, national average prices of wheat

Figure 13. Retail wheat flour prices in Belarus, Russian Federation and Republic of Moldova



flour and bread in April 2011 were 20 and 31 percent, respectively, higher compared with the same period a year ago and those of potatoes were 112 percent higher than in April 2010 because low supplies of potatoes forced the country to import large quantities of the commodity. In **Ukraine**, from December 2010 until April, wholesale prices on wheat and wheat flour increased by 14 and 10 percent, respectively, pushing up retail prices of bread. In **Belarus**, potato prices in April were up by 77 percent from a year earlier. In the **Republic of Moldova**, prices of bread rose by 11 percent from July 2010 to April 2011.

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

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2009	2010 estim.	2011 f'cast	2009	2010 estim.	2011 f'cast	2009	2010 estim.	2011 f'cast	2009	2010 estim.	2011 f'cast	Change: 2011/2010 (%)
North America	87.2	83.3	81.5	371.7	352.7	372.3	10.0	11.0	9.0	468.9	447.0	462.9	3.6
Canada	26.8	23.2	25.5	22.6	22.2	23.5	-	-	-	49.5	45.3	49.0	8.2
United States	60.4	60.1	56.0	349.0	330.6	348.8	10.0	11.0	9.0	419.4	401.7	413.8	3.0
Europe	228.1	202.2	215.9	232.4	198.7	217.0	4.3	4.4	4.5	464.8	405.3	437.3	7.9
Belarus	1.6	1.7	1.8	5.7	5.2	6.4	-	-	-	7.3	6.9	8.2	18.8
EU	138.5	136.8	134.0	155.9	140.3	145.1	3.2	3.1	3.2	297.7	280.2	282.3	0.7
Russian Federation	61.7	41.5	55.0	33.4	17.5	27.4	0.9	1.1	1.1	96.1	60.1	83.5	38.9
Serbia	2.1	1.6	1.6	6.9	7.6	7.6	-	-	-	9.0	9.2	9.2	0.0
Ukraine	20.8	17.2	20.2	24.2	21.5	23.7	0.1	0.2	0.2	45.1	38.9	44.0	13.1
Oceania	22.2	26.6	24.6	13.3	14.1	12.9	0.1	0.2	0.8	35.6	41.0	38.3	-6.6
Australia	21.9	26.3	24.3	12.8	13.5	12.3	0.1	0.2	0.8	34.8	40.1	37.4	-6.7

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

Oceania

Favourable prospects for 2011 winter grain crops in Australia

In **Australia**, planting of the 2011 winter grain prospects was well underway as of late May and favourable early prospects continue to point to another good crop. High price prospects are an incentive to producers to keep a relatively large area of land in wheat this year and favourable planting weather should allow intentions to be realized. However, the harvest outcome will still depend greatly on weather for the remainder of the season. This is especially true in the west of the country where some recent rainfall has been beneficial for planting but soils remain very dry after last year's drought so good follow-up rains will be essential to ensure a satisfactory crop. In eastern areas, the situation is less critical as high subsoil moisture levels following substantial rains last year, offer a buffer against drier weather later in the season.

Statistical appendix

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Table A1. Global cereal supply and demand indicators

	Average 2004/05 - 2008/09	2007/08	2008/09	2009/10	2010/11	2011/12
1. Ratio of world stocks to utilization (%)						
Wheat	27.0	22.6	27.7	30.9	27.6	26.8
Coarse grains	16.9	14.9	17.5	16.9	14.3	13.4
Rice	25.2	25.2	28.2	28.8	29.1	30.6
Total cereals	21.6	19.3	22.7	23.4	21.2	20.7
2. Ratio of major grain exporters' supplies to normal market requirements (%)						
	126.3	119.9	124.3	120.8	118.6	113.2
3. Ratio of major exporters' stocks to their total disappearance (%)						
Wheat	18.5	12.3	17.7	21.8	18.5	17.9
Coarse grains	15.0	12.1	14.6	14.7	8.4	7.6
Rice	16.8	17.5	21.7	19.4	18.6	19.7
Total cereals	16.8	14.0	18.0	18.6	15.2	15.0
	Annual trend growth rate 2001-2010	2007	Change from previous year			2011
			2008	2009	2010	
4. Changes in world cereal production (%)						
	1.8	5.5	7.2	-1.0	-1.1	2.9
5. Changes in cereal production in the LIFDCs (%)						
	2.6	4.3	3.5	0.0	4.7	1.9
6. Changes in cereal production in the LIFDCs less India (%)						
	3.8	1.3	4.7	4.6	4.2	-0.1
	Average 2004-2008	2007	Change from previous year (%)			2011*
			2008	2009	2010	
7. Selected cereal price indices:						
Wheat	148.3	49.1	31.5	-34.6	9.6	72.2
Maize	135.9	34.1	36.5	-25.5	12.0	82.4
Rice	166.9	17.3	83.7	-14.1	-9.5	11.7

Notes:

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

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

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-May average.

Table A2. World cereal stocks¹
(million tonnes)

	2007	2008	2009	2010	2011 estimate	2012 forecast
TOTAL CEREALS	429.5	422.7	506.4	533.6	489.1	486.2
Wheat	164.8	146.1	182.5	206.9	187.0	181.3
held by:						
- main exporters ²	40.0	30.3	47.9	55.9	50.8	47.7
- others	124.8	115.8	134.6	151.0	136.2	133.6
Coarse grains	159.4	164.6	197.3	194.4	165.4	161.8
held by:						
- main exporters ²	60.0	69.8	81.3	82.6	49.0	43.3
- others	99.4	94.8	116.0	111.8	116.4	118.5
Rice (milled basis)	105.2	111.9	126.6	132.3	136.7	143.1
held by:						
- main exporters ²	23.1	26.5	33.4	30.1	29.2	31.6
- others	82.1	85.4	93.2	102.2	107.5	111.5
Developed countries	130.8	123.3	168.3	182.2	125.5	117.2
Australia	6.3	5.4	5.9	5.9	9.2	8.8
Canada	10.5	8.5	13.0	13.6	9.2	8.8
European Union ³	30.0	25.8	41.9	43.5	31.3	28.0
Japan	5.3	4.8	4.6	4.8	4.9	4.9
Russian Federation	6.5	7.3	16.7	16.1	3.5	4.1
South Africa	2.7	1.8	2.5	3.2	3.9	3.2
Ukraine	4.2	4.5	3.9	3.4	5.5	6.2
United States	49.9	54.3	65.9	75.9	46.1	40.8
Developing countries	298.7	299.3	338.1	351.4	363.6	369.1
Asia	249.2	253.5	284.0	298.6	307.1	313.8
China	158.0	155.8	172.1	183.5	193.7	198.2
India	28.5	37.0	45.4	40.3	40.7	43.2
Indonesia	5.2	6.1	7.4	8.8	10.6	11.1
Iran (Islamic Republic of)	3.5	3.0	5.5	5.4	4.0	3.0
Korea, Republic of	2.2	3.0	2.9	4.1	4.1	4.4
Pakistan	2.4	3.2	3.4	4.0	2.9	2.8
Philippines	2.7	3.2	4.2	4.7	3.8	3.8
Syrian Arab Republic	3.0	1.9	1.6	2.4	1.9	1.6
Turkey	7.1	5.2	4.1	4.5	4.3	4.5
Africa	29.1	24.1	27.3	31.8	33.2	31.1
Algeria	3.8	3.6	3.0	3.9	3.6	3.2
Egypt	4.3	3.3	5.6	7.1	6.7	6.3
Ethiopia	0.7	1.0	1.4	1.9	1.8	1.2
Morocco	4.0	2.1	1.6	3.0	3.4	3.7
Nigeria	2.1	1.0	1.5	1.6	1.6	1.6
Tunisia	1.2	2.0	1.6	1.8	1.3	1.1
Central America	5.2	5.4	5.9	4.5	5.5	5.0
Mexico	3.0	3.2	4.1	2.7	3.7	3.3
South America	14.7	16.0	20.6	16.2	17.4	18.8
Argentina	5.3	7.7	4.2	1.6	6.3	6.7
Brazil	3.6	2.3	9.9	8.5	5.2	6.2

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

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

² 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.

³ 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. ¹	US Soft Red Winter No.2 ²	Argentina Trigo Pan ³	US No.2 Yellow ²	Argentina ³	US No.2 Yellow ²
Annual (July/June)						
2003/04	161	149	154	115	109	118
2004/05	154	138	123	97	90	99
2005/06	175	138	138	104	101	108
2006/07	212	176	188	150	145	155
2007/08	361	311	318	200	192	206
2008/09	270	201	234	188	180	170
2009/10	209	185	224	160	168	165
Monthly						
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	243	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	262
2011 - February	362	336	347	287	288	276
2011 - March	334	302	348	291	288	279
2011 - April	364	318	352	321	314	302
2011 - May	362	309	351	309	303	277
2011 - June (two weeks average)	348	296	348	318	315	287

Sources: International Grains Council and USDA.

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

² Delivered United States Gulf.

³ Up River f.o.b.

Table A4a. Cereal import requirements of Low-Income Food-Deficit Countries¹, 2010/11 or 2011 estimates
(thousand tonnes)

	2009/10 or 2010				2010/11 or 2011			
	Marketing year	Commercial purchases	Food aid	Total commercial and aid	Total import requirements (excl. re-exports)	Total commercial and aid	Food aid allocated, committed or shipped	Commercial purchases
AFRICA		37 320.4	3 429.6	40 750.0	38 043.7	17 092.5	791.7	16 300.8
North Africa		15 652.0	0.0	15 652.0	15 971.0	11 605.6	0.0	11 605.6
Egypt	July/June	15 652.0	0.0	15 652.0	15 971.0	11 605.6	0.0	11 605.6
Eastern Africa		6 191.1	2 366.9	8 558.0	6 304.0	1 582.0	349.8	1 232.2
Burundi	Jan./Dec.	103.5	31.7	135.2	147.0	13.7	1.1	12.6
Comoros	Jan./Dec.	53.2	0.0	53.2	53.0	7.6	0.0	7.6
Djibouti	Jan./Dec.	80.8	10.3	91.1	92.0	21.2	1.8	19.4
Eritrea	Jan./Dec.	322.0	0.0	322.0	337.0	0.0	0.0	0.0
Ethiopia	Jan./Dec.	262.0	1 313.3	1 575.3	831.0	100.3	100.3	0.0
Kenya	Oct./Sept.	2 401.3	169.4	2 570.7	1 558.0	402.1	65.8	336.3
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	9.0	9.0	0.0
Sudan	Nov./Oct.	1 711.3	612.4	2 323.7	2 020.0	533.5	135.6	397.9
Uganda	Jan./Dec.	148.7	38.3	187.0	265.0	7.7	7.7	0.0
United Rep. of Tanzania	June/May	740.0	14.8	754.8	610.0	481.3	22.9	458.4
Southern Africa		1 781.4	393.0	2 174.4	1 707.0	1 410.9	233.9	1 177.0
Lesotho	April/March	228.3	3.1	231.4	209.0	209.0	0.5	208.5
Madagascar	April/March	214.9	20.5	235.4	143.0	97.0	16.2	80.8
Malawi	April/March	93.9	44.8	138.7	107.0	81.6	24.4	57.2
Mozambique	April/March	814.2	137.8	952.0	852.0	663.7	149.5	514.2
Zambia	May/April	39.0	1.6	40.6	30.0	18.8	2.0	16.8
Zimbabwe	April/March	391.1	185.2	576.3	366.0	340.8	41.3	299.5
Western Africa		12 125.1	464.5	12 589.6	12 245.7	2 114.5	165.0	1 949.5
Coastal Countries		9 215.8	89.5	9 305.3	9 189.4	1 482.1	28.0	1 454.1
Benin	Jan./Dec.	80.7	12.6	93.3	86.0	30.0	1.6	28.4
Côte d'Ivoire	Jan./Dec.	1 461.4	21.3	1 482.7	1 340.0	240.6	1.9	238.7
Ghana	Jan./Dec.	739.2	1.0	740.2	780.2	143.0	17.0	126.0
Guinea	Jan./Dec.	471.9	4.1	476.0	487.0	83.4	1.4	82.0
Liberia	Jan./Dec.	311.3	27.5	338.8	345.7	32.6	4.3	28.3
Nigeria	Jan./Dec.	5 920.0	0.0	5 920.0	5 920.0	924.5	0.0	924.5
Sierra Leone	Jan./Dec.	144.8	21.2	166.0	129.0	9.3	1.8	7.5
Togo	Jan./Dec.	86.5	1.8	88.3	101.5	18.7	0.0	18.7
Sahelian Countries		2 909.3	375.0	3 284.3	3 056.3	632.4	137.0	495.4
Burkina faso	Nov./Oct.	346.3	35.3	381.6	330.0	9.8	4.8	5.0
Chad	Nov./Oct.	136.9	103.9	240.8	203.5	106.1	79.4	26.7
Gambia	Nov./Oct.	160.7	18.3	179.0	164.0	28.8	0.4	28.4
Guinea-Bissau	Nov./Oct.	116.5	7.3	123.8	124.0	10.4	2.8	7.6
Mali	Nov./Oct.	211.3	13.9	225.2	207.1	30.6	0.0	30.6
Mauritania	Nov./Oct.	449.1	39.1	488.2	504.0	163.1	14.9	148.2
Niger	Nov./Oct.	355.0	136.5	491.5	377.7	42.6	31.6	11.0
Senegal	Nov./Oct.	1 133.5	20.7	1 154.2	1 146.0	241.0	3.1	237.9
Central Africa		1 570.8	205.2	1 776.0	1 816.0	379.5	43.0	336.5
Cameroon	Jan./Dec.	614.5	10.0	624.5	672.0	199.3	3.0	196.3
Cent.Afr.Rep.	Jan./Dec.	47.1	8.3	55.4	62.0	8.7	5.1	3.6
Congo	Jan./Dec.	342.0	7.2	349.2	349.0	32.8	3.6	29.2
Dem.Rep.of the Congo	Jan./Dec.	552.4	176.4	728.8	715.0	137.8	31.3	106.5
Sao Tome and Principe	Jan./Dec.	14.8	3.3	18.1	18.0	0.9	0.0	0.9

Table A4b. Cereal import requirements of Low-Income Food-Deficit Countries¹, 2010/11 or 2011 estimates
(thousand tonnes)

	Marketing year	2009/10 or 2010 Actual imports			2010/11 or 2011 Import position ²			
		Commercial purchases	Food aid	Total commercial and aid	Total import requirements (excl. re-exports)	Total commercial and aid	Food aid allocated, committed or shipped	Commercial purchases
ASIA		38 772.1	687.3	39 459.4	38 086.8	23 808.0	537.9	23 270.1
Cis in Asia		3 793.9	47.3	3 841.2	3 702.0	2 746.9	53.1	2 693.8
Georgia 3/	July/June	774.9	4.0	778.9	708.0	510.5	0.4	510.1
Kyrgyzstan	July/June	351.8	13.0	364.8	437.0	324.4	44.7	279.7
Tajikistan	July/June	868.7	30.3	899.0	1 014.0	754.4	8.0	746.4
Turkmenistan	July/June	95.1	0.0	95.1	82.0	60.4	0.0	60.4
Uzbekistan	July/June	1 703.4	0.0	1 703.4	1 461.0	1 097.2	0.0	1 097.2
Far East		19 116.7	373.1	19 489.8	21 536.8	16 247.2	376.5	15 870.7
Bangladesh	July/June	4 085.7	56.3	4 142.0	4 650.1	4 546.2	152.3	4 393.9
Bhutan	July/June	88.7	0.0	88.7	58.5	0.0	0.0	0.0
Cambodia	Jan./Dec.	52.1	4.6	56.7	40.0	9.9	0.0	9.9
D.P.R. of Korea	Nov./Oct.	319.1	54.5	373.6	1 086.0	134.5	84.5	50.0
India	April/March	401.7	7.2	408.9	453.7	442.5	0.0	442.5
Indonesia	April/March	6 742.6	0.0	6 742.6	8 060.8	7 227.3	1.1	7 226.2
Lao, P.D.R.	Jan./Dec.	31.6	11.8	43.4	42.9	9.7	0.4	9.3
Mongolia	Oct./Sept.	187.3	0.0	187.3	213.0	36.3	0.0	36.3
Nepal	July/June	359.5	45.6	405.1	462.0	81.3	4.7	76.6
Pakistan	May/April	138.3	95.3	233.6	263.4	149.4	127.0	22.4
Philippines	July/June	5 503.8	50.3	5 554.1	4 790.4	3 326.0	0.0	3 326.0
Sri Lanka	Jan./Dec.	1 135.3	46.7	1 182.0	1 285.0	263.7	6.5	257.2
Timor-Leste	July/June	71.0	0.8	71.8	131.0	20.4	0.0	20.4
Near East		15 861.5	266.9	16 128.4	12 848.0	4 813.9	108.3	4 705.6
Afghanistan	July/June	2 341.4	199.4	2 540.8	1 099.0	863.6	102.3	761.3
Iraq	July/June	5 209.7	17.2	5 226.9	4 725.0	1 436.5	0.1	1 436.4
Syrian Arab Republic	July/June	4 836.2	30.2	4 866.4	3 964.0	1 930.0	4.1	1 925.9
Yemen	Jan./Dec.	3 474.2	20.1	3 494.3	3 060.0	583.8	1.8	582.0
CENTRAL AMERICA		1 474.5	194.0	1 668.5	1 716.0	802.8	121.2	681.6
Haiti	July/June	441.0	192.5	633.5	636.0	236.9	121.2	115.7
Honduras	July/June	699.0	1.0	700.0	730.0	349.7	0.0	349.7
Nicaragua	July/June	334.5	0.5	335.0	350.0	216.2	0.0	216.2
OCEANIA		434.9	0.0	434.9	452.1	43.7	0.0	43.7
Kiribati	Jan./Dec.	11.3	0.0	11.3	11.5	0.3	0.0	0.3
Papua New Guinea	Jan./Dec.	365.0	0.0	365.0	382.0	41.9	0.0	41.9
Solomon Islands	Jan./Dec.	40.5	0.0	40.5	40.5	1.3	0.0	1.3
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	0.2	0.0	0.2
EUROPE		75.0	0.0	75.0	61.0	49.0	0.0	49.0
Republic of Moldova	July/June	75.0	0.0	75.0	61.0	49.0	0.0	49.0
TOTAL		78 076.9	4 310.9	82 387.8	78 359.6	41 796.0	1 450.8	40 345.2

Source: FAO

¹ 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>.² Estimates based on information as of mid-May 2011.³ Georgia is no longer a member of CIS but its inclusion in this group is maintained temporarily.

GIEWS

The Global Information and Early Warning System on Food and Agriculture

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