No. 4 ■ December 2012

# Crop Prospects and Food Situation

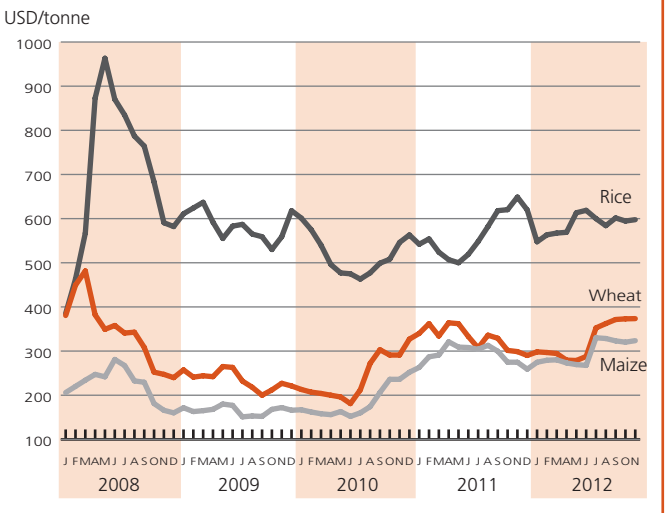
## HIGHLIGHTS

- **Firmer production estimates for 2012 confirm tightening wheat and maize supplies while the outlook for rice remains positive.** In spite of a contraction in overall cereal utilization in 2012/13, the world cereal stock-to-use ratio is projected to decline by 2 percentage points from the previous season.
- **International prices of all major cereals, except rice, remain well above last year.** For wheat and maize, while prices have stabilized in recent weeks, unfavourable weather for 2013 crops in several important regions is a concern.
- **Aggregate cereal production of LIFDCs in 2012 has been revised upwards following a recovery in Western Africa and increased output in the Far East.** Consequently, reduced imports are expected in 2012/13.
- **In the Great Lakes, the humanitarian crisis in the Democratic Republic of the Congo worsened following the recent escalation of conflict. An estimated 6.3 million people require emergency assistance, about 2 million more than a year ago.**
- **In Western Africa, the overall food security situation has started to improve in the Sahel following an above-average 2012 cereal harvest.** However, a large number of people are still affected by civil strife and the impact of last year's drought.
- **In Eastern Africa, access to food has started to improve with the arrival of the newly harvested crops and the resulting drop in prices.** However, millions of people continue to face food difficulties.
- **In Southern Africa, poor 2012 cereal harvests in some areas led to a deterioration of food security**. Planting of the 2013 crop began in November under generally favourable weather conditions.
- **In the Far East, the 2012 aggregate cereal harvest is estimated at a record level.** However, lower production is expected in India, Nepal and the Republic of Korea mainly due to dry spells and localized floods.
- **In the Near East, the deteriorating food security situation continues to be a major concern in the Syrian Arab Republic as a result of civil conflict and in Yemen due to security problems.**
- **In CIS countries, the 2012 cereal production significantly dropped from the previous year's record level.** Consequently, the price of wheat flour in some wheat import-dependent countries has reached record levels.
- **In Central America and the Caribbean, prospects for 2012 in Haiti point to a significant drop in aggregate cereal production by 35 percent due to a dry spell earlier in the season and subsequent heavy rains and floods.**
- **In South America, prospects for 2012 wheat production have deteriorated in Argentina due to a decrease in area planted and in Brazil due to dry weather conditions.** However, the outlook for the 2013 maize crop is favourable.

## CONTENTS



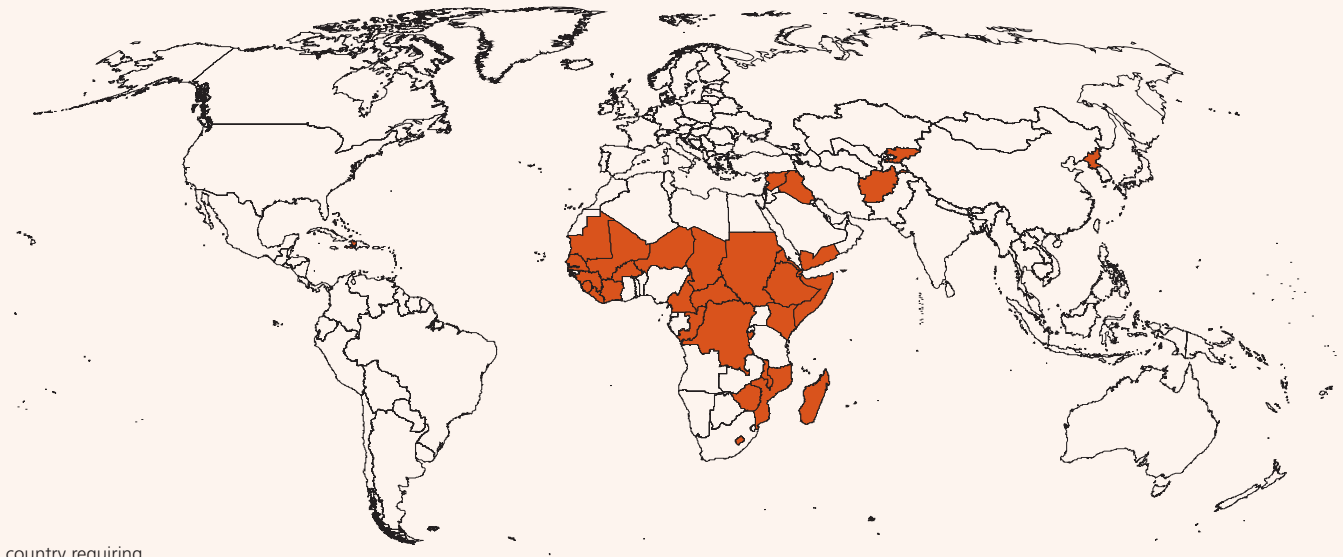
### Selected international cereal prices




*Note*: Prices refer to monthly average. See Table 2 for details

# Countries requiring external assistance for food[1]

## World: 35 countries




AFRICA (28 countries)

### Exceptional shortfall in aggregate food production/supplies

**Burkina Faso** ▲
Although production recovered significantly this year cereal prices remain at relatively high levels. Massive influx of refugees from Mali has put additional pressure on local food markets.

**Chad** ▲
Lingering effects of last year's sharp drop in production have resulted in depletion of household assets. Moreover, over 300 000 refugees are located in southern and eastern regions of Chad from the Sudan's Darfur region and the Central African Republic. Also, the return of an estimated 79 000 Chadians from Libya is putting additional pressure on the local food supply.

**Gambia** ▲
A severe drop in 2011 cereal production and rise in food prices led to a deterioration of the food security situation in several parts of the country. Assistance is still needed in parts, in spite of this year's increased production.

**Lesotho** ■
Sharp decrease in 2012 cereal output caused a severe deterioration in the food security situation. Higher food prices, in addition, continue to constrain food access. An estimated 39 percent of the population is food insecure.

**Mali** ▼
Civil strife and insecurity in northern Mali forced 209 888 people to leave the country and seek refuge in neighbouring countries, while 203 845 more were internally displaced as of early November. This has worsened the already precarious food security situation created by last year's poor harvest.

**Mauritania** ▲
Lingering effects of last year's sharp drop in production resulted in depletion of household assets. The country is also affected by high international food prices due to its high import dependency. Moreover, about 108 953 Malian refugees have been registered in Hodh Ech Chargui Region in the southeastern part of the country.

**Niger** ▲
The country has been struck by successive severe food crises in recent years that resulted in depletion of household assets and high levels of indebtedness. In addition, large numbers of refugees and returning national migrant workers from Mali and Libya placed an increasing demand on food.

**Zimbabwe** ■
Tighter maize supplies in southern regions push up prices straining food access for vulnerable households. An estimated 1.2 million people are food insecure. This number is forecast to increase in the beginning of 2013 as household and market supplies decrease as the lean season approaches.

### Widespread lack of access

**Djibouti** ■
About 180 000 people are estimated to be in need of humanitarian assistance (mainly pastoralists affected by high food prices and consecutive poor rainy seasons).

**Eritrea** ■
Vulnerability to food insecurity due to economic constraints and high international food and fuel prices

**Liberia** ■
Slow recovery from war-related damage. Inadequate social services and infrastructure, as well as high food prices and poor market access. Massive influx of refugees from Côte d'Ivoire, some 65 647 Ivorian refugees were still living in Liberia as of early November 2012.

**Malawi** ▼
Persistently high food prices, poor production prospects for the off-season crop and limited wage labour opportunities in the Southern Region, caused an increase in the number of food-insecure persons to nearly 2 million, up from 1.6 million estimated in June 2012.

**Sierra Leone** ■
Slow recovery from war-related damage. Depreciation of currency led to higher inflation negatively affecting households' purchasing power and food security conditions.

### Severe localized food insecurity

**Burundi** ■
Below-average seasonal harvests, coupled with high food prices, continue to erode purchasing power of low-income households.

**Cameroon** ▼
About 400 000 individuals in need of relief food assistance due to production shortfalls in some northern areas. The situation in the north of the country was further aggravated in August by widespread floods affecting about 60 000 people.

**Central African Republic** ▼
Civil conflict and insecurity caused displacement of more than 90 000 individuals and restricted access to agricultural land and food. The situation was further aggravated in August/September by widespread floods which affected about 20 000 people.

**Congo** ▼
Influx of more than 100 000 refugees since the end of 2009, mostly from the Democratic Republic of the Congo, has increased pressure on limited local food resources. The situation was further aggravated in August/September by widespread floods which affected about 54 000 people.

**Côte d'Ivoire** ■
Conflict-related damage to agriculture in recent years and the lack of support services mainly in the northern regions. Last year's post-election crisis forced thousands of people to leave the country and seek refuge, mostly in eastern Liberia, where over 65 000 Ivorian refugees were still living as of early November 2012.

**Democratic Republic of the Congo** ▼
Escalation of conflict has displaced additional people increasing the total number of IDPs to an estimated 2.4 million people. Agricultural activities were hindered, especially in eastern parts, while high food prices continue to impede food access. A total of 6.3 million people are estimated to be in food and livelihood crisis.

**Ethiopia** ▲
The number of people in need of humanitarian assistance is estimated at 3.7 million up half a million since earlier this year. However, food security conditions are improving with the start of the favourable 2012 *meher* season harvest.

**Guinea** ▲
Access to food is negatively affected by high food prices and general inflation.

**Kenya** ▲
The number of people in need of humanitarian assistance is estimated at 2.1 million. Overall food security conditions are improving with the arrival of the 2012 long rains harvest.

**Madagascar** ■
Cyclones in early 2012 damaged homesteads and crops, deteriorating food security conditions of the affected population, particularly in eastern districts. However, generally stable prices prevail, despite the reduced 2012 rice harvest. Overall, 35 percent of households are estimated to be food insecure.

**Mozambique** ■
An estimated 255 000 people require humanitarian assistance following reduced harvests in central and southern parts. Although recent harvests from the secondary season have augmented food supplies, humanitarian assistance is only reaching 100 000 persons following a break in the food pipeline.

**Senegal** ■
Production shortfalls and high food prices led to a deterioration of the food security situation in several parts of the country.

**Somalia** ■
About 2.1 million people are in need of emergency assistance due to the past severe drought, the ongoing civil conflict and limitations in delivering humanitarian assistance.

**South Sudan** ▲
About 850 000 people are estimated to be food insecure due to civil insecurity, trade restrictions, localized floods and increasing food demand by IDPs, returnees and refugees.

**Sudan** ▲
The estimated number of people in need of humanitarian assistance has been revised downwards from 4.3 to 3.5 million people due to the start of the improved 2012 main season harvest.

## ASIA (6 countries)

### Exceptional shortfall in aggregate food production/supplies

**Iraq** ■
Severe civil insecurity

**Syrian Arab Republic** ▼
Severe civil conflict continues. The number of people in need of urgent food and livelihood assistance is estimated to be 3 million. Syrian refugees are also putting strain on the region.

### Widespread lack of access

**Democratic People's Republic of Korea** ▲
A dry spell in May-June 2012 affected early season harvest of wheat, barley and potatoes and main season soybeans. Localized floods in July-August have damaged agricultural infrastructure, including fish ponds. Chronic food insecurity exists, despite improved cereal harvest of 2012 main season, with 2.8 million severely vulnerable people requiring food assistance during the 2012/13 marketing year (November/October).

**Yemen** ▼
The severely food-insecure population in need of emergency food assistance is estimated at over 10 million people (46 percent of the population) as a result of high levels of poverty, prolonged conflict and high prices of food and fuel.

### Severe localized food insecurity

**Afghanistan** ■
Some areas, particularly in the extreme northeast and some higher elevations of the central highlands are faced with increased food insecurity due to loss of livestock and lower remittances from the Islam Republic of Iran.

**Kyrgyzstan** ■
Socio-political tension since June 2010 in Jalalabad, Osh and Batken Oblasts, combined with a lower cereal production and increasing food prices, cause food insecurity among vulnerable groups of the population.

## LATIN AMERICA AND THE CARIBBEAN (1 country)

### Severe localized food insecurity

**Haiti** ▼
Tropical storms Isaac and Sandy caused severe damage to agriculture, housing and infrastructure.

# Countries with unfavourable prospects for current crops[2]

## AFRICA (1 country)

**Morocco** ■

Unfavourable weather conditions delayed planting prospects, followed by moisture stress resulting in a lower wheat production of 3.9 million tonnes, over 36 percent less than in 2011.

## LATIN AMERICA AND THE CARIBBEAN (1 country)

**Haiti** ▼

More recently, damages to 2012/13 autumn/winter cereal crop planting brought by hurricane Sandy.

### Key - Changes since last report (October 2012)

No change ■ Improving ▲ Deteriorating ▼ New Entry ✚

### Terminology

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

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

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

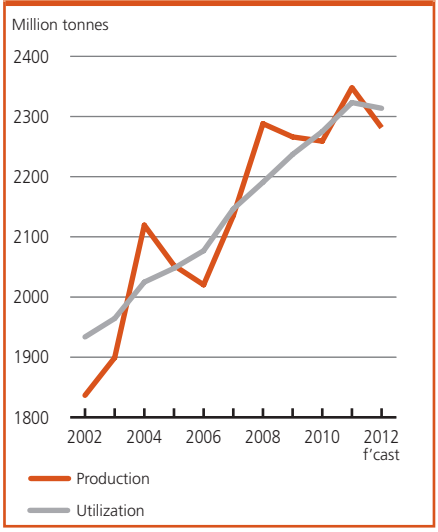
# Global overview

## GLOBAL CEREAL SUPPLY AND DEMAND SUMMARY

### World cereal production falls in 2012; early prospects for 2013 mixed

FAO's latest forecast for world **cereal production** in 2012 has been revised downward marginally (2 million tonnes) since the November figure to 2 281 million tonnes (including rice in milled terms), 2.8 percent down from the previous year's record. This month's revision mostly reflects adjustments to maize output estimates in the Russian Federation and Ukraine, where figures became firmer towards the completion of the harvests, as well as reduced wheat production prospects in Australia and Brazil where the 2012 harvests are underway. Prospects for rice production in 2012 remained virtually unchanged. Based on latest figures, the overall decrease in world cereal output this year breaks down into a 5.7 percent reduction in wheat production and a 2.6 percent decline for coarse grains, which more than outweighed the marginal 0.9 percent growth expected in the global rice output. Early indications for the winter wheat crops already planted in the northern hemisphere, to be harvested in 2013, are mixed, and somewhat less promising than one month ago. Although firm estimates are not yet available, latest information suggests that farmers generally responded to the incentive of high prices by increasing their winter wheat plantings. However, conditions remain adversely dry for emergence and crop establishment before dormancy in important producing regions of the United States and the Russian Federation, while in major producing parts of the EU, wet conditions have hampered fieldwork.

**Figure 1.** World cereal production and utilization




### Total cereal utilization in 2012/13 down slightly from 2011/12

World **cereal utilization** in 2012/13 marketing season is forecast at 2 314 million tonnes, nearly unchanged from the previous month and down slightly (0.4 percent) from the previous season. The anticipated reduction from 2011/12 would be on account of reduced feed use of wheat and industrial usage of maize. Total use of cereals for food consumption is forecast to rise by 1.3 percent in 2012/13, keeping pace with world population growth and therefore resulting in a stable per capita consumption of 152.6 kg for the world as a whole. A slight increase foreseen in rice consumption (on per caput level) is expected to offset

**Table 1. Basic facts of world cereal situation**
*(million tonnes)*

| | 2010/11 | 2011/12 estimate | 2012/13 forecast | Change: 2012/13 over 2011/12 (%) |
|---|---|---|---|---|
| **PRODUCTION** [1] | | | | |
| **World** | **2 259.0** | **2 348.1** | **2 281.5** | **-2.8** |
| Developing countries | 1 318.6 | 1 346.7 | 1 382.4 | 2.7 |
| Developed countries | 940.4 | 1 001.5 | 899.0 | -10.2 |
| **TRADE** [2] | | | | |
| **World** | **284.5** | **314.3** | **295.6** | **-6.0** |
| Developing countries | 93.7 | 97.2 | 107.2 | 10.3 |
| Developed countries | 190.8 | 217.1 | 188.4 | -13.2 |
| **UTILIZATION** | | | | |
| **World** | **2 275.0** | **2 323.2** | **2 313.7** | **-0.4** |
| Developing countries | 1 425.4 | 1 468.8 | 1 492.9 | 1.6 |
| Developed countries | 849.7 | 854.3 | 820.8 | -3.9 |
| Per caput cereal food use (kg per year) | 152.4 | 152.6 | 152.6 | 0.0 |
| **STOCKS** [3] | | | | |
| **World** | **496.7** | **519.6** | **494.6** | **-4.8** |
| Developing countries | 345.5 | 369.0 | 381.2 | 3.3 |
| Developed countries | 151.2 | 150.5 | 113.4 | -24.7 |
| **WORLD STOCK-TO-USE RATIO%** | 21.4 | 22.5 | 20.5 | -8.5 |

Note: Totals and percentage change computed from unrounded data.

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

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

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

a small decline in wheat. As for the global utilization, in the case of wheat it is forecast to contract by 1.2 percent in 2012/13 to 686 million tonnes, reflecting a 5.8 percent cut in the use for wheat for animal feed from the previous season's all-time high to 138 million tonnes. Lower feed use of wheat in China (from a record in 2011/12) and the EU is expected to more than compensate for the significant (almost 4 million tonnes) increase in feed use of wheat in the United States, which could hit a new record because of elevated maize prices. Total utilization of coarse grains is also forecast down, by 0.8 percent, from the previous season, to 1 152.2 million tonnes. While feed use of coarse grains is likely to increase slightly (0.5 percent) to 638 million tonnes, its industrial application is seen to contract sharply, mainly reflecting a significant (10 percent) reduction in demand from the ethanol industry in the United States, the world's largest maize-based ethanol producer.

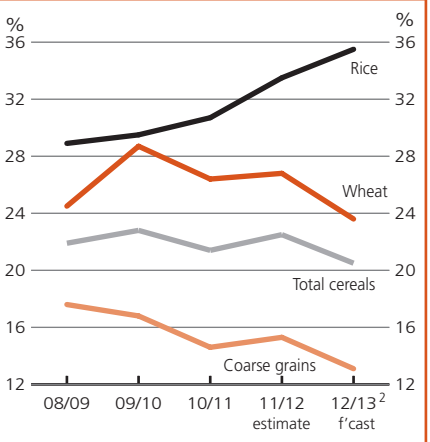
## Falling wheat and coarse grain inventories outweigh rising rice stocks

The latest forecast for world cereal **stocks** at the close of crop seasons ending in 2013 stands at around 495 million tonnes, down 5 percent (25 million tonnes) from their opening level. This forecast is slightly (0.6 percent) below the November figure, mainly because of revisions to wheat stock levels. At the current forecast level, the world cereal stock-to-use ratio is projected at 20.5 percent, down 2 percentage points from 2011/12 and only 1.7 percentage points above the 2007/08 low of 18.8 percent. World wheat inventories are expected to fall to 163 million, down 11 percent from their opening level and 2 percent (3 million tonnes) less than was reported in November. The revision since the previous month largely reflects lower anticipated inventories in China and India, more than offsetting a small increase in the United States. The sharp reduction from the previous season is mostly on account of reduced stocks in the CIS countries (because of disappointing harvests), China (driven by strong domestic use), the EU (following a decline in production) and the United States (reflecting a surge in domestic feed use). World inventories of coarse grains are forecast to exceed 161 million tonnes, 8 percent (15 million tonnes) less than their opening level and nearly unchanged from November. Most of the decline from the previous season reflects shrinking inventories in the United States, where total coarse grain inventories are projected down nearly 8.3 million tonnes while significantly lower (by 4.6 million tonnes) stocks are also forecast for the EU. By contrast, global rice inventories are expected to increase by 6.6 percent (10.5 million tonnes) to a record of nearly 170 million tonnes, unchanged from the previous month. This expansion reflects three consecutive years of record world production.

## World trade to shrink in 2012/13 despite some upward adjustments since November

World **trade** in cereals in 2012/13 is forecast to fall to nearly 296 million tonnes, down 6 percent from 2011/12. This forecast is 2 million tonnes higher than was reported in November. World wheat trade (including wheat flour in wheat equivalent) in 2012/13 (July/June) is now forecast at 136 million tonnes, down 7 percent (10 million tonnes) from 2011/12 but 1 million tonnes higher than anticipated earlier (mostly reflecting upward revisions to forecasts of wheat imports by several CIS countries). The decline from the previous season would be largely on account of reduced import demand from several wheat importing countries in North Africa and Asia because of higher domestic production. Falling import demand this season is a welcome development given the sharply reduced export supplies from the Back Sea region. World trade in coarse grains is forecast to reach 122 million tonnes in 2012/13 (July/June), down 7 percent (9 million tonnes) from the previous season but 1 million tonnes higher than was reported in November (reflecting upward revision to maize imports by the EU). The bulk of projected contraction in world trade of coarse grains this season would be mostly on account of reduced purchases of maize by China, the Islamic Republic of Iran and Mexico more than outweighing increased imports by the EU and exceptionally large imports by the United States. World rice trade in 2013 is forecast to reach 37.6 million tonnes, almost unchanged from November and slightly higher than in 2012, mostly driven by large exportable supplies in exporting countries.

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




1 Compares closing stocks with utilization in following season.
2 Utilization in 2012/13 is a trend value based on extrapolation from the 2001/02-2011/12 period.

# *INTERNATIONAL PRICE ROUNDUP*

## Except for rice, world cereal prices remain well above last year

International prices of **wheat** in November remained unchanged for the second consecutive month. Expectations of lower US wheat exports in the 2012/13 marketing year, which resulted in an upward revision of carryover stocks, weighed on prices. However, the downward pressure was

offset by tightening export supplies in the CIS and growing concerns about 2013 crops, especially the impact of continuing drought on winter wheat in parts of the United States. The benchmark US wheat price (No.2 Hard Red Winter, f.o.b.) averaged USD 373 per tonne in November, some 25 percent higher than in the corresponding month last year.

Export prices of **maize** increased slightly in November with the benchmark US maize (Yellow, No. 2, f.o.b.) averaging USD 324 per tonne, 18 percent above its level in November 2011. International prices were supported by concerns about adverse weather conditions affecting the 2013 maize crop in South America. However, weaker demand, as evidenced by slower exports from the United States, contained stronger gains.

According to the FAO All **Rice** Price Index, international rice prices declined marginally in November compared to the previous month, largely reflecting sliding quotations for the lower quality Indica, Japonica and aromatic varieties. From an origin perspective, prices firmed up in the United States and Viet Nam, while they generally weakened in Egypt, India and Pakistan. Prices in Thailand remained steady at relatively high levels, as the government pledging programme, which guarantees attractive prices to producers, was extended to cover the 2012 main crop, now at the harvest stage. The firmness of Thai prices also applied to the white rice, 100% B, f.o.b Bangkok, normally taken as the international rice benchmark, which was quoted at USD 598 per tonne in November, up from USD 594 in October, but down from 649 per tonne in November 2011.

## GLOBAL PRODUCTION ROUNDUP

### Prospects mixed for 2013 winter wheat crops

The bulk of the winter wheat crops in the Northern Hemisphere for harvest in 2013 are already in the ground. With wheat prices remaining high, and utilization expected to outstrip production for the second year in succession in 2012/13, producers had strong incentives to maintain, or increase, their plantings. However, prospects are mixed as adverse weather in some important producing regions has limited the area sown and/or impacted the emergence and establishment of crops.

In the United States, early indications suggest that the winter wheat area could be 3-4 percent above the previous year's level. However, although the rate of crop emergence was close to the five-year average as of mid-November, the condition of plants is reported to be quite poor in some areas, mostly in the Great Plains where drought conditions persist. In Europe, among the EU countries, the winter wheat crop has been sown under mixed conditions. Farmers in France and the United Kingdom have been up against excessive wet weather, which may have led to reduced plantings. By contrast, in some of the central European EU member states such as Bulgaria, Hungary and Romania, it was low soil moisture that may have limited planting and impaired germination. In the European CIS countries, planting got off to a good start in the Russian Federation with October rainfall improving soil conditions in previously dry southern regions and early indications pointing to an area increase. However, planting estimates as of mid-November, after the main planting period, indicated a significant increase had likely not been achieved. In Ukraine, plantings conditions were reported to be generally favourable and the wheat area is estimated similar to last year's. In North Africa, weather conditions are reported generally favourable for winter wheat planting in most countries with above normal rainfall ensuring good soil moisture and encouraging planting. In Far East Asia, prospects for the main winter wheat crops are satisfactory so far. In China, warm dry weather facilitated timely planting in the main wheat growing areas and the area is estimated similar to last year's good level. In India, although conditions were favourable, plantings are reported to have dropped after last year's record crop. In Pakistan, conditions were also generally favourable for the winter wheat planting but the overall area may be down slightly from last year due to the impact of floods in Sindh Province.

**Table 2. Cereal export prices***

*(USD/tonne)*

| | 2011 | 2012 | | | | | |
|---|---|---|---|---|---|---|---|
| | Nov. | June | July | August | Sept. | Oct. | Nov. |
| **United States** | | | | | | | |
| Wheat[1] | 299 | 288 | 352 | 362 | 371 | 373 | 373 |
| Maize[2] | 275 | 268 | 330 | 328 | 323 | 320 | 324 |
| Sorghum[2] | 275 | 234 | 293 | 296 | 286 | 290 | 289 |
| **Argentina[3]** | | | | | | | |
| Wheat | 239 | 263 | 314 | 335 | 336 | 332 | 345 |
| Maize | 271 | 239 | 285 | 294 | 278 | 274 | 294 |
| **Thailand[4]** | | | | | | | |
| Rice, white[5] | 649 | 619 | 600 | 584 | 602 | 594 | 598 |
| Rice, broken[6] | 553 | 545 | 537 | 532 | 540 | 544 | 545 |

*Prices refer to the monthly average.

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

[2] No.2 Yellow, Gulf.

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

[4] Indicative traded prices.

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

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

## Global coarse grains output decreases in 2012 after reversal of promising early season prospects

FAO's latest forecast for world production of coarse grains in 2012 stands at about 1 135 million tonnes, 2.6 percent below the previous year's record crop. The bulk of the reduction is attributed to the United States where, despite bumper maize plantings, severe drought cut this year's output to the lowest level since 2006. However, also in Europe, summer drought in central and eastern parts of the region reduced yield potential for maize crops as the season progressed, resulting in smaller harvests than earlier forecast. Output in the EU is estimated to have fallen by almost 22 percent from the previous year's good crop. In Asia, latest information confirms a significant increase to a record level in maize production in the Far East subregion, largely on the back of a new record high output in China. In Africa, the main coarse grains harvest in the Western Africa subregion is estimated to have recovered significantly from the reduced level last year. In Eastern Africa, above-average production is now forecast following improved weather. In Central America and the Caribbean, the aggregate 2012 coarse grains output (mostly maize) is forecast to register a sharp recovery from the drought-reduced level in 2011.

In the southern hemisphere, the main maize crops were already harvested earlier in the year. In South America, harvesting of the 2012 second season maize is virtually completed in the subregion. The aggregate production (first and second seasons) is estimated at a record high of 106 million tonnes. This mainly reflects a bumper second season maize crop in Brazil, following an increase in the area planted and favourable weather, which more than offset the drought-reduced output in Argentina. Sowing of the 2013 maize crop is currently underway. Persistent rains in Argentina and hot weather in Brazil caused planting delays in some areas. Early indications point to an expansion in the area planted in Argentina in response to attractive prices.

In Southern Africa, land preparation and planting of the main crops for harvest in 2013 is well underway across the subregion. Plantings rains have generally been adequate although slight deficits are reported have been observed in southern Malawi and Angola, as well as northern parts of Zambia, Namibia and South Africa, which may impact and delay planting.

## Limited growth in global rice production expected in 2012

The 2012 paddy season is over in all countries cultivating only one crop per year, while those growing a secondary crop are now starting to plant, for harvesting in the first half of 2013. Meanwhile, sowing of the first 2013 crop is underway in the Southern Hemisphere.

Based on the latest assessment, world rice **production in 2012** is poised to rise only marginally compared to last year, reaching 487 million tonnes in milled rice equivalent, that is, 0.9 percent more than in 2011. This new forecast is also some 900 000 tonnes higher than the one released in November, mainly reflecting improved prospects for Indonesia, which is now harvesting its secondary crop, as well as for Mali and Nigeria. Expectations of a 4.1 percent production shortfall in India and smaller harvested crops in Brazil are mostly behind the rather subdued growth in world output foreseen in 2012. The season is otherwise anticipated to end positively in a majority of countries, given the prevalence of favourable growing conditions. In Asia, paddy output is projected to reach 441 million tonnes, up 0.8 percent from 2011, underpinned by widespread gains and particularly large increases in Bangladesh, China, Indonesia, the Philippines, Thailand and Viet Nam. In addition to India where production may fall by 4.1 percent, in the region, Cambodia, the Republic of Korea, Nepal and Turkey are predicted to witness a decline. Despite localized flood problems, weather conditions have been overall positive in Africa, which has led FAO to raise the region's production forecast to 17.9 million tonnes, 8.5 percent more than in 2011. Much of this growth would be on account of Egypt, where attractive prices again prompted farmers to exceed their cultivation limits, but also of Mali, Mozambique, Sierra Leone and the United Republic of Tanzania. Even flood-stricken Nigeria could witness a sizeable increase, provided output losses are recouped over the dry season, for which the government is providing incentives. However, output in Benin, Cameroon and Madagascar may be depressed by excessive rainfall or storms. FAO's outlook for production in Latin America and the Caribbean points to a 6.1 percent contraction to 18.4 million tonnes, as insufficient irrigation water and expectations of low margins late last year depressed rice cultivation in Argentina, Brazil, Ecuador and Uruguay. In the other regions, the United States output is anticipated to be boosted by record yields, while Australia reaped its largest crop since 2006. In Europe, the Russian Federation looks set to harvest a bumper crop, while unfavourable weather curbed production in the EU.

As for the **2013 rice season**, this has already been launched in several countries located along and south of the equator. In Asia, Indonesia is stepping up efforts to achieve food self-sufficiency, which may support further production gains in 2013. Following lingering drought which impaired the 2012 crops, Sri Lanka authorities have committed to supply free seeds to rice farmers now engaging in the planting of the 2013 main ***Maha*** crop. In Southern Africa,

2013 production in Madagascar may benefit from the government intention to rehabilitate 20 000 hectares of land for paddy cultivation across three regions. As for Mozambique, which reaped a bumper crop in 2012, officials have announced plans for extending the area planted, so as to surpass the 2012 outstanding results by 2 percent. Among South American producers, prospects are still uncertain in Argentina, given a possible shift of rice producers towards more economically attractive crops. In Brazil, a rebounding of local prices and improved water supplies are expected to foster some increase in cultivation. By contrast, in Peru, falling prices look set to trigger an area contraction. In Uruguay, improved water availability has led the industry to forecast plantings at close to 2012's level, despite concerns about the profitability of the sector. In Oceania, Australia is officially forecasting to expand its rice area by 11 percent, as the sector is benefiting from ample water supplies, which is likely to boost production further.

**Table 3. World cereal production[1]**
*(million tonnes)*

| | 2010 | 2011 estimates | 2012 forecast | Change: 2012 over 2011 (%) |
|---|---|---|---|---|
| **Asia** | **1 017.8** | **1 069.9** | **1 073.7** | **0.4** |
| Far East | 921.4 | 959.7 | 977.9 | 1.9 |
| Near East | 70.4 | 69.7 | 68.3 | -2.1 |
| CIS in Asia | 25.9 | 40.5 | 27.5 | -32.0 |
| **Africa** | **164.0** | **155.8** | **161.0** | **3.4** |
| North Africa | 32.5 | 35.4 | 34.0 | -3.9 |
| Western Africa | 55.9 | 49.8 | 56.2 | 12.8 |
| Central Africa | 3.6 | 3.6 | 3.6 | -0.9 |
| Eastern Africa | 40.4 | 36.5 | 38.0 | 4.2 |
| Southern Africa | 31.6 | 30.5 | 29.2 | -4.1 |
| **Central America and Caribbean** | **41.3** | **35.1** | **40.5** | **15.2** |
| **South America** | **145.2** | **148.4** | **157.8** | **6.3** |
| **North America** | **443.8** | **431.5** | **403.7** | **-6.5** |
| **Europe** | **407.0** | **463.4** | **409.7** | **-11.6** |
| EU | 281.3 | 289.8 | 270.7 | -6.6 |
| CIS in Europe | 109.1 | 157.2 | 123.8 | -21.2 |
| **Oceania** | **39.8** | **43.9** | **35.0** | **-20.3** |
| **World** | **2 259.0** | **2 348.1** | **2 281.5** | **-2.8** |
| Developing countries | 1 318.6 | 1 346.7 | 1 382.4 | 2.7 |
| Developed countries | 940.4 | 1 001.5 | 899.0 | -10.2 |
| - wheat | 655.3 | 699.4 | 659.4 | -5.7 |
| - coarse grains | 1 135.1 | 1 166.0 | 1 135.3 | -2.6 |
| - rice (milled) | 468.5 | 482.7 | 486.8 | 0.9 |

Note: Totals and percentage change computed from unrounded data.

[1] Includes rice in milled terms.

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

## 2012 aggregate cereal production of LIFDCs revised slightly upwards to a record level

FAO has marginally increased its October estimate of the 2012 cereal production for the 66 LIFDCs to a record level of 535.1 million tonnes, some 2 percent or 10.6 million tonnes above the good harvest of 2011. The aggregate cereal output of LIFDCs, excluding India, the largest country in this group, is estimated to expand by 4.2 percent. Most of the increase is due to the anticipated recovery of about 6.4 million tonnes over the drought-affected poor harvest in 2011 in Western Africa, following beneficial weather throughout the growing season in most countries.

In the **Far East**, the aggregate cereal production is estimated to increase to a record level of 375.6 million tonnes, a modest growth of 1.2 percent above last year's previous record output. An increase in cereal harvests in Indonesia and the Philippines among others is expected to more than compensate for the decline in India and Nepal. Good harvests were obtained in almost all countries of the subregion, reflecting, in part, larger plantings and substantial government support with agricultural inputs. Similarly, favourable outputs were recorded in **North Africa** (in Egypt, the only LIFDC) following favourable weather throughout the growing season, good availability of improved seeds as well as supportive measures undertaken by the Government. Furthermore, prospects are also positive in **Eastern Africa** and **CIS in Asia**, with a significant variation in performance at country level.

On the other hand, in **Southern Africa**, a large decline in total cereal production was recorded in all LIFDCs owing to generally lower planting in some countries and a persistent dry spell in parts of Lesotho, Malawi, Mozambique and Zimbabwe. Similarly, in **Central America and the Caribbean**, latest cereal production estimates point to a decrease of almost 11.5 percent compared to the previous year's record level. Unfavourable weather has dampened coarse grains harvests in Haiti by 46 percent and in Honduras by 6 percent. In the Republic of Moldova, the only LIFDC in **Europe**, drought conditions and excessive heat during the growing period in main cereal producing areas, led to a major reduction in cereal production of over 30 percent.

Elsewhere in **Central Africa**, **Oceania** and **Near East**, the cereal production remains at a comparable level to 2011's output.

## Lower cereal import requirements estimated for 2012/13 marketing year compared to 2011/12 but they remain above the five-year average of actual imports

In view of an improvement of domestic production in 2012 for the LIFDCs group, the total cereal import requirements for 2012/13 marketing year are forecast to fall by about 5.4 million tonnes to 85.4 million tonnes, some 6 percent below the previous year's level. At this level, import requirements still remain above the proceeding five-year average. This reflects a forecast decrease of 2.4 million tonnes in the Far East, where large importing countries such as **Indonesia**

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

| | 2010/11 | 2011/12 estimate | 2012/13 forecast | Change: 2012/13 over 2011/12 *(%)* |
|---|---|---|---|---|
| **Cereal production[1]** | **519.6** | **524.5** | **535.1** | **2.0** |
| *excluding India* | 299.4 | 291.2 | 303.4 | 4.2 |
| **Utilization** | **574.5** | **582.9** | **596.5** | **2.3** |
| Food use | 453.7 | 461.7 | 471.5 | 2.1 |
| *excluding India* | 267.6 | 273.9 | 280.4 | 2.4 |
| Per caput cereal food use *(kg per year)* | 0.2 | 0.2 | 0.2 | 0.2 |
| *excluding India* | 0.2 | 0.2 | 0.2 | 0.7 |
| Feed | 54.1 | 54.8 | 56.6 | 3.2 |
| *excluding India* | 47.2 | 47.9 | 49.8 | 3.9 |
| **End of season stocks[2]** | **102.7** | **113.0** | **113.1** | **0.0** |
| *excluding India* | 65.7 | 68.2 | 66.7 | -2.1 |

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

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

[1] **The Low-Income Food-Deficit (LIFDC) group of countries** includes net food deficit countries with annual per caput income below the level used by World Bank to determine eligibility for IDA assistance (i.e. USD 1905 in 2009). The 2012 FAO list of LIFDCs includes 66 countries as opposed to 70 on the 2011 list. The countries that graduated from the list are Pakistan, due to reduced imports, Turkmenistan, Tuvalu and Vanuatu due to income criteria. For full details see: http://www.fao.org/countryprofiles/lifdc.asp.

and **the Philippines**, require considerably lower cereal imports, following significant gains in cereal production. Lower import requirements are expected in North Africa, mainly on account of increased wheat production in Egypt. Similarly, relatively good levels of carryover stocks limited higher imports in CIS Asia and Southern Africa. On the other hand, lower supplies from the 2012 cereal harvest are expected to increase import requirements in Central Africa, Near East and Europe. In the Syrian Arab Republic, the continued unrest since early 2011 is hampering normal agricultural activities and is responsible for a 25 percent contraction in the 2012 harvest. In Central America and the Caribbean, Oceania and Western Africa, cereal imports are anticipated to remain virtually unchanged from the 2011 level.

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

| | 2010 | 2011 estimate | 2012 forecast | Change: 2012 over 2011 (%) |
|---|---|---|---|---|
| **Africa** *(39 countries)* | **133.4** | **125.3** | **132.2** | **5.6** |
| North Africa | 18.8 | 20.0 | 21.0 | 4.8 |
| Eastern Africa | 40.4 | 36.5 | 38.0 | 4.2 |
| Southern Africa | 14.8 | 15.4 | 13.5 | -12.2 |
| Western Africa | 55.9 | 49.8 | 56.2 | 12.8 |
| Central Africa | 3.6 | 3.6 | 3.5 | -0.9 |
| **Asia** *(20 countries)* | **381.7** | **394.6** | **399.2** | **1.2** |
| CIS in Asia | 10.1 | 9.8 | 10.0 | 2.2 |
| Far East | 356.7 | 371.1 | 375.6 | 1.2 |
| - India | 220.2 | 233.2 | 231.7 | -0.7 |
| Near East | 14.9 | 13.7 | 13.7 | -0.5 |
| **Central America** *(3 countries)* | **2.0** | **2.1** | **1.9** | **-11.5** |
| **Oceania** *(3 countries)* | **0.0** | **0.0** | **0.0** | **0.0** |
| **Europe** *(1 country)* | **2.4** | **2.5** | **1.7** | **-30.8** |
| **LIFDC** *(66 countries)* | **519.6** | **524.5** | **535.1** | **2.0** |

Note: Totals and percentage change computed from unrounded data.
[1] Includes rice in milled terms.

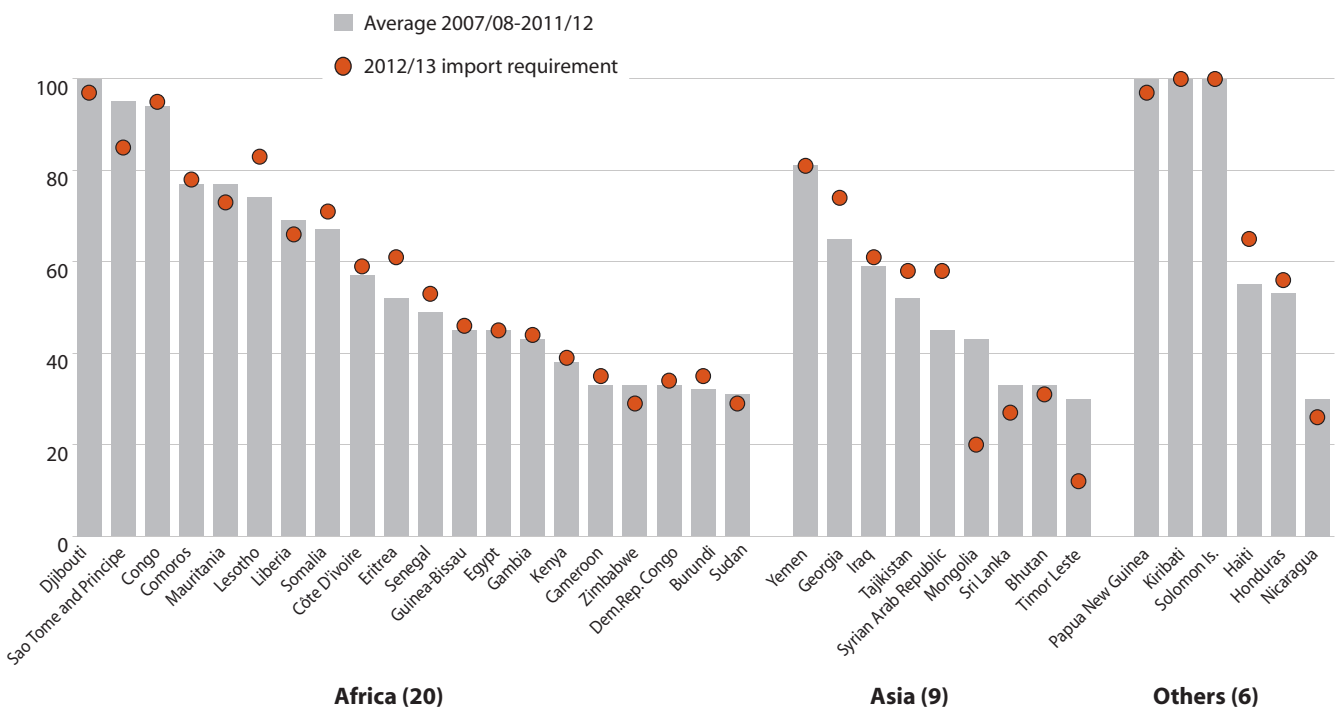
**Table 6. Cereal import position of LIFDCs**
*(thousand tonnes)*

| | 2010/11 or 2011 | 2011/12 or 2012 | | | | 2012/13 or 2013 | |
|---|---|---|---|---|---|---|---|
| | | Requirements[1] | | Import position[2] | | Requirements[1] | |
| | Actual imports | Total imports: | *of which food aid* | Total imports: | *of which food aid pledges* | Total imports: | *of which food aid* |
| **Africa** *(39 countries)* | **42 059** | **46 458** | **2 179** | **36 368** | **1 987** | **43 920** | **2 108** |
| North Africa | 16 511 | 18 871 | 0 | 18 871 | 0 | 16 571 | 0 |
| Eastern Africa | 7 893 | 8 431 | 1 318 | 6 253 | 1 215 | 8 239 | 1 468 |
| Southern Africa | 1 758 | 2 504 | 230 | 2 504 | 230 | 2 415 | 202 |
| Western Africa | 13 865 | 14 670 | 487 | 7 635 | 416 | 14 624 | 294 |
| Central Africa | 2 033 | 1 982 | 144 | 1 105 | 126 | 2 072 | 144 |
| **Asia** *(20 countries)* | **37 840** | **42 024** | **1 014** | **40 050** | **974** | **39 100** | **802** |
| CIS in Asia | 3 827 | 5 587 | 0 | 5 587 | 0 | 4 200 | 0 |
| Far East | 21 345 | 21 906 | 715 | 21 234 | 675 | 19 518 | 637 |
| Near East | 12 668 | 14 530 | 299 | 13 230 | 299 | 15 382 | 165 |
| **Central America** *(3 countries)* | **1 835** | **1 781** | **130** | **1 781** | **130** | **1 775** | **134** |
| **Oceania** *(3 countries)* | **434** | **442** | **0** | **150** | **0** | **442** | **0** |
| **Europe** *(1 country)* | **81** | **111** | **0** | **111** | **0** | **169** | **0** |
| **Total** *(66 countries)* | **82 249** | **90 816** | **3 323** | **78 460** | **3 091** | **85 406** | **3 044** |

Note: Totals computed from unrounded data.
[1] The import requirement is the difference between utilization (food, feed, other uses, export plus closing stocks) and domestic availability (production plus opening stocks).
[2] Estimates based on information available as of early November 2012.

Disaggregated by crop, the aggregate LIFDC imports of rice, wheat and coarse grains are forecast to decrease in 2013 by 7, 3 and 13 percent respectively, over last year's level. As shown in Figure 3, some 35 countries of the LIFDC group which have a very high cereal import dependency as measured by the share of imports in total domestic utilization over the past five years, averaging at 30 percent or higher. Of these, the bulk of the countries are in Africa (20), the rest in Asia (9) and elsewhere (6). Of the 35 high import dependent countries, some 13 are expected to see their import requirements rise in 2012/13 and the rest to see decrease. The high import countries are especially vulnerable to food insecurity caused by high international food prices and thus require constant monitoring.

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



# Regional reviews

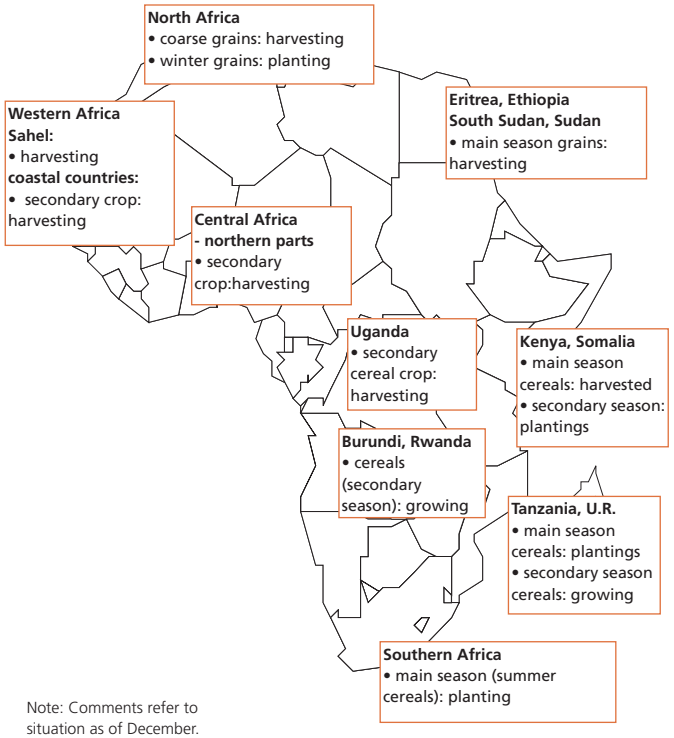
## Africa

### North Africa

#### Mixed cereal harvest in 2012 in the subregion

Planting of the 2012/13 winter wheat and coarse grains is underway throughout the subregion. Weather conditions so far have been generally favourable for planting in most countries with above normal rainfall improving soil moisture and encouraging planting. In some localised areas excessive precipitation impeded sowing but no major difficulties are observed.

Harvesting of the 2012 summer coarse grain and paddy crops is complete. FAO's latest estimates put the aggregate cereal output (including paddy) for the subregion at 36 million tonnes, a decrease of 3 percent on last year's bumper output, but an increase of 2.6 percent on the five-year average. Wheat production in the subregion is estimated at 17.6 million tonnes, a 7 percent decline on last year, but a 7.5 percent increase compared to the five-year average. Wheat production increased in **Algeria** (the second highest harvest on record at 3.4 million tonnes) and **Egypt** (at 8.7 million tonnes) following favourable weather conditions, availability of improved seeds and supportive policy measures. By contrast, wheat production in **Tunisia**, at 1.5 million tonnes, decreased by about 5 percent compared to last year's crop but still remained above the five-year average. In **Morocco**, however, a lower wheat production of 3.9 million tonnes, over 35 percent less than in 2011, was gathered due to unfavourable weather conditions that delayed planting, followed by moisture stress during the typical growing period in March. The coarse grains harvest for the subregion is provisionally estimated at 11.9 million tonnes, about 6 percent lower than last year and the five-year average.




Note: Comments refer to situation as of December.

#### Imports expected to remain high in 2012/13

Following the above-average aggregate harvest in the subregion, cereal import requirements for the 2012/13 marketing year (July/June) are estimated to be about the same level as in the previous year at 38.5 million tonnes. Wheat accounts for over 60 percent of total imports. Cereal import requirements for **Egypt** and **Algeria**, estimated at about 16.6 and 8.2 million tonnes respectively, are 12 and 10 percent lower than in 2011/12 given the bumper harvests in both countries. **Tunisia's** cereal imports are forecast to be similar to the level of last year of 2.7 million tonnes while an increase of 6 percent is forecast for **Libya**, reaching 2.6 million tonnes. On the other hand, reflecting a poor harvest, **Morocco's** import requirements are provisionally forecast to reach 8.4 million tonnes of cereals, a 35 percent increase compared to 2011/12, and 46 percent up on the previous five-year average.

**Table 7. North Africa cereal production**
*(million tonnes)*

| | Wheat | | | Coarse grains | | | Rice (paddy) | | | Total cereals | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2011 estim. | 2012 f'cast | 2010 | 2011 estim. | 2012 f'cast | 2010 | 2011 estim. | 2012 f'cast | 2010 | 2011 estim. | 2012 f'cast | Change: 2012/2011 (%) |
| **North Africa** | **16.1** | **18.8** | **17.6** | **12.9** | **12.6** | **11.9** | **5.2** | **5.7** | **6.6** | **34.2** | **37.2** | **36.0** | **-3.0** |
| Algeria | 3.1 | 2.8 | 3.4 | 1.6 | 1.5 | 1.8 | 0.0 | 0.0 | 0.0 | 4.7 | 4.2 | 5.2 | 22.8 |
| Egypt | 7.2 | 8.4 | 8.7 | 8.0 | 7.8 | 7.8 | 5.2 | 5.7 | 6.5 | 20.4 | 21.8 | 23.0 | 5.6 |
| Morocco | 4.9 | 6.0 | 3.9 | 2.8 | 2.6 | 1.4 | 0.1 | 0.1 | 0.1 | 7.7 | 8.6 | 5.3 | -38.4 |
| Tunisia | 0.8 | 1.6 | 1.5 | 0.3 | 0.7 | 0.8 | 0.0 | 0.0 | 0.0 | 1.1 | 2.3 | 2.3 | -1.4 |

Note: Totals and percentage change computed from unrounded data.

An increase in international grain prices, especially those of wheat, is estimated to weigh heavily on the national food import bills. North African countries rely heavily on cereal imports from the international market to cover their consumption needs, with **Egypt** being the world's largest wheat importer. On average, in the last five years, 45 percent of the total domestic cereal requirements (including food and feed) in **Egypt** and **Morocco** were met through imports. The share of imports is even higher in Tunisia (an average of 65 percent), **Algeria** (68 percent) and **Libya** (90 percent). Large importers in the region are tendering in international markets and moving away from supplies originating from the Black Sea Region which in the past dominated the subregion's purchases. Facing large import requirements, **Morocco** has suspended duties on wheat imports for a period of 1 October to 31 December 2012, and a wheat import restitution scheme whereby the Government reimburses wheat importers for the difference between a government-set price and the prices in the international market was expanded from 1 October to 31 December 2012.

### Food price inflation is generally stable primarily due to government subsidies for key staples

The rise in international food prices has not, so far, directly transmitted to domestic prices due mostly to government interventions aimed at maintaining subsidies on basic food items. Nevertheless, the rise in international prices weighs heavily on the import bill of the countries in the subregion as well as their budgetary outlays for subsidy programs. This has prompted governments to reconsider some of their subsidy policies although no major reforms were carried out in the food sector so far. On the other hand, prices of unregulated items (such as meat and vegetables) have been rising sharply in many cases. In **Tunisia**, food price inflation in 2012 remained generally stable at around 7 percent annually but while the inflation rate for bread and cereals was around 3 percent, meat and vegetable prices increased by more than 10 percent. In **Morocco**, food prices increased by 1.5 percent in September 2012 over the 12-month period. Higher increases were reported for **Egypt** (9 percent in October 2012) and **Algeria** (12.5 percent in September 2012).

### In Libya longer term activities replacing emergency programmes

A regional Emergency Operation (EMOP) implemented by WFP, initially envisaged for a three-month period (March-May 2011), has been extended several times, the last one being from September 2012 to November 2012, to allow for continued food assistance. While food is mostly available in markets throughout the country, vulnerable households, such as displaced people still face limited access to food due to high food prices. The general food distribution was phased out while voucher-based assistance continues. In total, the EMOP has reached over 1.5 million people, and more than 5 000 families received vouchers.

## Western Africa

The 2012 coarse grains harvest is nearly complete in the Sahel while in the coastal countries along the Gulf of Guinea harvesting of the second season cereal crops is in progress. Joint inter-agency Crop Assessment Missions to the nine Sahelian countries (Burkina Faso, Cape Verde, Chad, the Gambia, Guinea Bissau, Mali, Mauritania, Niger and Senegal) and eight coastal countries (Benin, Côte d'Ivoire, Ghana, Guinea, Liberia, Nigeria, Sierra Leone and Togo) have recently been completed. The Missions reviewed the evolution of the 2012 cropping season and preliminary cereal production estimates prepared by the national agricultural statistics services. FAO participated in several of these missions.

### Above-average cereal harvests anticipated

According to preliminary findings, a good 2012 aggregate cereal output is anticipated in the subregion following beneficial rains throughout the growing season. Various productivity enhancing safety net programmes provided by respective governments have also contributed to the production increase. Average to above-average harvests are expected in most Sahel countries including **Burkina Faso, Chad, the Gambia, Guinea-Bissau, Mali, Niger** and **Senegal**. Harvest prospects are also good in the coastal countries along the Gulf of Guinea. However heavy rains and severe floods from August through October are likely to dampen the final outcome, notably in Nigeria, the largest producer in the subregion, whose harvest outcome can strongly affect the food

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

| | Coarse grains | | | Rice (paddy) | | | Total cereals [1] | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2011 estim. | 2012 f'cast | 2010 | 2011 estim. | 2012 f'cast | 2010 | 2011 estim. | 2012 f'cast | Change: 2012/2011 (%) |
| **Western Africa** | **47.6** | **42.0** | **47.4** | **12.9** | **12.3** | **13.8** | **60.6** | **54.4** | **61.3** | **12.8** |
| Burkina Faso | 4.3 | 3.4 | 4.0 | 0.3 | 0.2 | 0.3 | 4.6 | 3.7 | 4.2 | 15.3 |
| Chad | 3.0 | 1.5 | 3.5 | 0.2 | 0.2 | 0.2 | 3.2 | 1.7 | 3.7 | 124.0 |
| Ghana | 2.4 | 2.2 | 2.2 | 0.5 | 0.5 | 0.5 | 2.9 | 2.6 | 2.7 | 4.4 |
| Mali | 4.1 | 4.0 | 3.9 | 2.3 | 1.7 | 2.4 | 6.4 | 5.8 | 6.3 | 8.8 |
| Niger | 5.5 | 3.5 | 5.1 | 0.1 | 0.1 | 0.1 | 5.6 | 3.6 | 5.2 | 42.1 |
| Nigeria | 22.4 | 22.1 | 22.6 | 4.5 | 4.6 | 5.3 | 27.0 | 26.7 | 27.9 | 4.5 |

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

supply position of its neighbouring Sahel nations. A recent inter-agency assessment in 14 most affected Nigerian states estimated that about 5.7 million animals have been killed and over 2 million hectares of crop land (rice, sorghum, maize, cassava and yam) lost, which may have a significant impact on the final crop production estimates in Nigeria and the subregion's food supply. Rice and maize crops have been most affected. Overall, FAO forecasts the subregion's aggregate cereal output in 2012 at about 61.3 million tonnes, 12.8 percent up on last year's crop and 15.6 percent above the previous five-year average.

## Food prices decline but remain high in parts

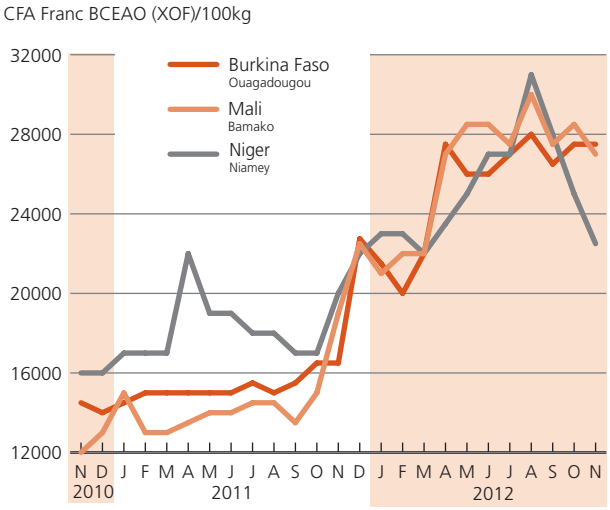
Reflecting the improved harvest positions, prices of staple coarse grains continued to decline, particularly in coastal countries. However, the rate of price declines remain low in Sahelian countries, due to the disruption of harvesting and marketing activities caused by recent heavy rains and floods, as well as by higher demand due to the celebration of Tabaski (Eid-al-Adha) in October. As a result, prices remain at relatively high levels in most monitored markets in spite of recent declines. Millet prices in the capital cities Ouagadougou (**Burkina Faso**), Bamako (**Mali**) and Niamey (**Niger**) in early November, were still respectively 67, 42 and 13 percent up on November 2011. In **Chad**, prices of millet and sorghum declined moderately in September and in the capital N'Djamena were respectively 30 and 48 percent higher than in September 2011.

Price declines have been more pronounced in the coastal countries. In **Nigeria**, in the Dawanau international market in Kano, the most important in the subregion, prices of maize decreased sharply in September and were below their levels of a year earlier. Prices of sorghum, for harvest later in the year, eased somewhat but still remained higher than at the same time last year. Similarly, prices of maize declined markedly in September in most markets of **Ghana** and **Côte d'Ivoire** (-24 percent in Tamale, -29 percent in Bouake), as well as in **Benin** and **Togo**, although in all these countries they were still 10 to 18 percent higher than in September 2011.

Prices of imported rice, mainly consumed in urban centres, have remained relatively stable in recent months in most countries of the subregion, both in the Sahel and in coastal countries. In **Mauritania**, where imported wheat is the main staple, prices remained unchanged in recent months and in September were 7 percent below their relatively high levels of September 2011.

In view of this year's good output, regional trade is expected to follow the normal market pattern, which in the eastern part of the subregion allows traders to move grains from central and northern Nigeria to Niger and southern Nigeria, reflecting the relative supply/demand positions in each zone. However, the recent floods in Nigeria may limit coarse grains exports to Niger.

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




*Source:* Afrique Verte.

## Malian civil strife and lingering effects of floods this year and past droughts affect large number of people in the subregion

Substantial localized flooding has been reported across the subregion in the past few months with considerable human casualties and damage to crops and livestock, notably in **Nigeria**, the most affected country, where over 7.7 million people are estimated to be affected. In **Niger**, over 478 700 people have been affected, while thousands of people have also been displaced in several other Western African countries including **Benin**, **Burkina Faso**, **Chad**, **the Gambia** and **Senegal**.

Moreover, the severe food crisis that struck the Sahel countries in 2011/12 has had serious income, livelihoods and nutritional effects. In these countries, in spite of this year's good crop and favourable food supply prospects, implementation of income generating and asset reconstitution activities is recommended to protect the livelihoods of food insecure and vulnerable people.

Similarly, the ongoing civil conflict in **Mali** resulted in large displacement of people leading to serious disruption in commodity movement and cross-border trade flow. According to the United Nations High Commissioner for Refugees (UNHCR), about 209 900 people were forced to flee to neighbouring **Burkina Faso** (about 35 859), **Mauritania** (108 953) and **Niger** (65 012), while over 203 845 people were internally displaced as of early November.

# Central Africa

## Prospects for the 2012 cereal crops are mixed

In **Cameroon** and **the Central African Republic**, harvesting of the 2012 maize crop is underway in the unimodal-rainfall northern

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

| | Coarse grains | | | Rice (paddy) | | | Total cereals [1] | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2011 estim. | 2012 f'cast | 2010 | 2011 estim. | 2012 f'cast | 2010 | 2011 estim. | 2012 f'cast | Change: 2012/2011 (%) |
| **Central Africa** | **3.3** | **3.2** | **3.2** | **0.5** | **0.5** | **0.5** | **3.8** | **3.8** | **3.7** | **-1.3** |
| Cameroon | 1.8 | 1.7 | 1.7 | 0.1 | 0.2 | 0.1 | 1.9 | 1.8 | 1.8 | 0.0 |
| Central Africa Rep. | 0.2 | 0.2 | 0.2 | 0.0 | 0.0 | 0.0 | 0.2 | 0.2 | 0.2 | 0.0 |

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

parts of both countries while harvesting of the second maize crop, planted from August-September, is about to start in southern parts. Overall crop prospects remain mixed following a rainfall pattern characterised by erratic to near normal in Cameroon while consistently above average in the Central African Republic.

## Continued civil conflict and recent floods exacerbate food insecurity

Persistent civil insecurity continues to impede agricultural recovery and restrict humanitarian efforts in the subregion, depriving households of their means of livelihood and creating additional difficulties to access food. The situation has further deteriorated in recent months due to widespread floods in the subregion.

Large numbers of internally displaced persons (IDPs) and refugees are present in the subregion, although, the refugee numbers have significantly decreased in recent months in **the Republic of the Congo** (from 123 000 in May to 91 000 in November) due to a voluntary repatriation to the Democratic Republic of the Congo (DRC) facilitated by the UNHCR. By contrast, in **the Central African Republic** the number of refugees from the Sudan and DRC declined only marginally from 19 900 to 18 900 between late April and mid October. Similarly, the number of IDPs decreased marginally from 105 000 to 92 000 over the same period with more than 26 000 people having been displaced since the beginning of 2012 in southeastern parts of the country following internal conflicts, banditry and attacks by the Lord's Resistance Army. In addition, the number of returnees to the Central African Republic from neighbouring countries increased from 10 300 to 11 700.

According to a recent Integrated Food Security Phase Classification (IPC), completed in May 2012, the entire population of **the Central African Republic** is food insecure, while more than 776 000 people, close to 20 percent of the total population, outside the capital, Bangui are in food crisis. About 40 percent of children under the age of five are classified as malnourished while 10 percent are underweight. The global acute malnutrition (GAM) rate is estimated at 7.4 percent at the national level, but in four prefectures (Lobaye, Vakaga, Bangui and Ouham) the rates have exceeded the emergency threshold of 10 percent set by the World Health Organization. Overall, 1.92 million people are estimated to be in need of humanitarian assistance. A joint appeal was launched by the government, the United Nations and the humanitarian community in February 2012 to raise funds to assist the affected population. By mid November 2012 about 61 percent of the requested funding of USD 134 million, was resourced. In **Cameroon**, the chronic food insecurity situation in the northern regions has been aggravated by the recent crop failure in the Logone and Chari Division in the Extreme North Region, affecting about 400 000 people. An Emergency Operation (EMOP) was initiated by WFP aiming to deliver 19 000 tonnes of food assistance to 258 000 most-affected people for a nine-month period (April-December 2012).

In addition, heavy rains and floods, since the end of August 2012, caused heavy damage and led to loss of property and livelihoods. By mid-October, an estimated 60 000 individuals in **Cameroon**, 54 000 in **the Republic of the Congo**, 20 000 in **the Central African Republic** were affected by he floods. In response, some USD 600 000 have been allocated from the Disaster Relief Emergency Fund (DREF) of the International Federation of the Red Cross and Red Crescent Societies.

# Eastern Africa

## Above-average cereal production estimated following improved weather

Harvesting of the 2012 main season cereal crops is underway in **Eritrea, Ethiopia, the Sudan, South Sudan**, western **Kenya**, the Karamoja region in **Uganda**, and will continue through to January 2013. FAO's preliminary estimates of the subregion's aggregate output of cereals, including the forecast for the secondary season harvest to be gathered early next year, is set at 38.8 million tonnes, about 4 percent above 2011 and 8 percent above the last five year average.

Despite the favourable overall subregional outlook, prospects are mixed in individual countries. In Ethiopia, the outlook for the 2012 *meher* production is put at a slightly above average level with western surplus-producing areas faring decisively better following abundant and well-distributed main season *kiremt* rains coupled with an improved availability of fertilizers and seeds. By contrast, rains were erratic in parts of the eastern marginal *meher* producing areas and in Southern Nations, Nationalities, and Peoples' Region and the local harvest is expected to be below average. In the Sudan and South Sudan, cereal production is expected at above-average levels, where,

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

| | Wheat | | | Coarse grains | | | Total cereals [1] | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2011 estim. | 2012 f'cast | 2010 | 2011 estim. | 2012 f'cast | 2010 | 2011 estim. | 2012 f'cast | Change: 2012/2011 (%) |
| **Eastern Africa** | **4.1** | **4.2** | **4.4** | **34.8** | **31.0** | **32.3** | **41.2** | **37.2** | **38.8** | **4.2** |
| Ethiopia | 3.1 | 3.4 | 3.3 | 16.0 | 16.9 | 16.3 | 19.2 | 20.4 | 19.7 | -3.6 |
| Kenya | 0.5 | 0.2 | 0.3 | 3.5 | 3.0 | 2.7 | 4.1 | 3.2 | 3.0 | -5.4 |
| Sudan [2] | 0.3 | 0.3 | 0.5 | 5.3 | 2.3 | 4.6 | 5.6 | 2.7 | 5.2 | 95.4 |
| Tanzania U.R. | 0.1 | 0.1 | 0.1 | 5.9 | 4.7 | 4.9 | 7.7 | 6.3 | 6.5 | 3.4 |
| Uganda | 0.0 | 0.0 | 0.0 | 2.7 | 2.6 | 2.7 | 2.9 | 2.8 | 3.0 | 4.3 |

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

despite some crop losses due to localized floods, abundant rains have generally favoured crops in key growing areas. By contrast, in Kenya, a below average crop is expected following late and erratic rains in Nyanza, parts of western and southern Rift Valley and parts of Central and Eastern Provinces. The outbreak of the highly contagious Maize Lethal Necrosis Disease (MLND) in parts of southern Rift Valley and Nyanza Provinces has affected about 60 000 hectares resulting in a 60-80 percent drop in production. Production is expected to be near average in most agro-pastoral areas of the Karamoja region in Uganda, with some exceptions for Kotido, Kaabong and Moroto districts where yields were affected by localized dry spells as well as pests and diseases.

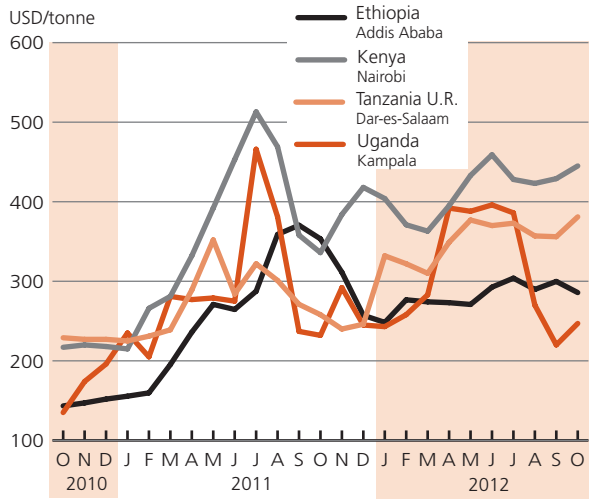
In **Somalia**, eastern **Kenya**, **the United Republic of Tanzania** and **Uganda**, the 2012 main season cereal harvest was completed in September. A good harvest was gathered in Uganda, especially in eastern districts, following abundant rains benefitting crops, By contrast, production is estimated to be below average in southern Somalia and in bimodal southeastern and coastal marginal agricultural areas in Kenya as the rainy season was short and erratic. In particular, the 2012 *gu* season harvest in southern Somalia was the fourth lowest since 1995 and less than half of the average of the past five years.

The 2012 short rains cropping season (October-December) in East Africa started favourably with abundant rains in southern coastal lowlands of Kenya, southeastern Ethiopia, southern Somalia and in bimodal areas of Uganda. Some flooding caused localized crop losses and disrupted road and transportation networks. Few areas in northern Tanzania experienced erratic rains. Rainfall forecast for the remainder of the season are generally favourable, with likely positive effects on crops for harvest from early next year.

## Prices of main cereals continue to drop across the subregion, with some exceptions

With some exceptions, prices of coarse grains have seasonally declined in most markets in the subregion with the arrival of the 2012 main season harvests in the markets. In **Ethiopia**, wholesale prices of maize, red sorghum and wheat declined moderately in October with the start of the 2012 main season harvest and, as of October 2012, were between 8 and 15 percent below their levels of a year earlier. By contrast, underpinned by an increasing demand by local consumers as well as informal trade with neighbouring countries, prices of teff continue to rise reaching a new record high in October at ETB 1 400 per 100 kg in Addis Ababa market. A similar increase was registered for the price of white sorghum, a good substitute for teff in local diet, and remains at near record level of about ETB 1 000 per 100 kg. In **Kenya**, prices of maize continue to decline as the bulk of the 2012 long rains harvest is being marketed. In main producing areas, maize prices in October were between 15 and 30 percent lower than the seasonal peak recorded in June. In **Somalia**, prices of locally produced maize and sorghum declined significantly in October and were between 20 and 50 percent below the level a year earlier. Despite a poor 2012 main *gu* season production, available stocks from the previous bumper secondary *deyr* season harvest as well as a substantial inflow of food assistance helped maintaining good market supplies. Prices

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




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

of other imported food staples, such as rice, wheat flour and pasta, also declined in October reflecting a significant increase in cereal imports during the first half of 2012 and the recent appreciation of the national currency. In **the Sudan**, prices of domestically produced cereals declined seasonally in recent months from their record levels in June/July. Although in some cases the reduction has been substantial, such as in Al Fashir market where sorghum prices were halved between June and October, current prices in general are still well above the levels of the same month last year. Similarly, in **South Sudan**, cereal prices have declined since August as the new harvest began in the main cropping areas. However, higher prices are still reported in some flood affected areas and in several markets along the northern border where trade has not yet resumed.

By contrast, maize prices have recently risen in main markets of **the United Republic of Tanzania** and **Uganda**. In the United Republic of Tanzania, maize prices have increased in October by 5 to 10 percent in main wholesale markets of the country, reaching near record levels in Dar es Salaam and Arusha. The recent increase in prices reflects the deepening of the lean season as household food stocks are diminishing, coupled with sustained import demand from neighbouring countries and high transportation costs. Similarly, in Uganda, prices of maize, which is also an important export crop, rose significantly in October, after having declined sharply in previous months due to the good production of the 2012 first season. Prices were underpinned by strong regional import demand, high transportation costs as well as recent trade disruptions caused by heavy rains in some areas. Prices of one of the main staples, banana (*matooke*), continued to strengthen seasonally and were supported by the high domestic demand during national festivities in October. By contrast, prices of beans, an important staple food in the local diet, declined sharply in most locations as the bulk of 2012 main season harvest has started to reach main markets.

### Food security generally improving with the arrival of the new harvest

The overall food security situation has started to improve with the beginning of the harvest season in September/October. New crops have begun to replenish household stocks and supply local markets thus improving food availability. Severe food insecurity remains in conflict affected areas of southern Somalia, along the border between the Sudan and South Sudan (especially around the disputed Abyei area), in areas affected by recent floods in Jonglei state in South Sudan, and in the Afar regions and *belg*-dependent areas of SNNPR in Ethiopia. Currently, the total estimated number of food-insecure people in need of humanitarian assistance is set at about 12.4 million people (including 3.5 million in the Sudan, 3.7 million in Ethiopia, 2.1 million in both Kenya and Somalia, 850 000 in South Sudan and 180 000 in Djibouti), about 1 million less than last September. Livestock condition is expected to improve in pastoral areas of South Sudan, southern Somalia, eastern Kenya and southeastern Ethiopia due to abundant seasonal rains that improved pasture conditions and water availability. In general, staple food prices are expected to continue to decline, with some exceptions in southern Somalia where food stocks are quickly depleting following the poor 2012 *gu* season production harvested in August and the failed off-season harvest in September.

## Southern Africa

### Planting for the 2012/13 main cropping season is well underway with some early rainfall deficits

Land preparation and planting for the 2012/13 cropping season (October-June) are well underway across the subregion, while harvesting of the 2011/12 winter wheat crop is expected to be finalised by the end of the year. Rains at the start of the current cropping season have generally been adequate; however, some slight early seasonal deficits have been observed in southern **Malawi** and **Angola**, as well as northern parts of **Zambia**,

**Table 11. Southern Africa cereal production**
*(million tonnes)*

| | Wheat | | | Coarse grains | | | Rice (paddy) | | | Total cereals | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2011 estim. | 2012 f'cast | 2010 | 2011 estim. | 2012 f'cast | 2010 | 2011 estim. | 2012 f'cast | 2010 | 2011 estim. | 2012 f'cast | Change: 2012/2011 (%) |
| **Southern Africa** | **1.7** | **2.3** | **2.1** | **26.4** | **25.0** | **24.1** | **5.2** | **4.8** | **4.5** | **33.3** | **32.1** | **30.7** | **-4.1** |
| **- excl. South Africa** | **0.3** | **0.3** | **0.3** | **12.5** | **13.5** | **11.5** | **5.2** | **4.8** | **4.5** | **17.9** | **18.6** | **16.3** | **-12.3** |
| Madagascar | 0.0 | 0.0 | 0.0 | 0.4 | 0.4 | 0.4 | 4.8 | 4.3 | 4.0 | 5.2 | 4.7 | 4.4 | -7.0 |
| Malawi | 0.0 | 0.0 | 0.0 | 3.5 | 4.0 | 3.7 | 0.1 | 0.1 | 0.1 | 3.6 | 4.1 | 3.8 | -7.1 |
| Mozambique | 0.0 | 0.0 | 0.0 | 2.5 | 2.6 | 2.0 | 0.3 | 0.3 | 0.3 | 2.8 | 2.9 | 2.4 | -18.8 |
| South Africa | 1.4 | 2.0 | 1.8 | 13.9 | 11.5 | 12.6 | 0.0 | 0.0 | 0.0 | 15.3 | 13.5 | 14.4 | 7.1 |
| Zambia | 0.2 | 0.2 | 0.3 | 2.9 | 3.1 | 2.9 | 0.1 | 0.0 | 0.0 | 3.1 | 3.4 | 3.2 | -5.0 |
| Zimbabwe | 0.0 | 0.0 | 0.0 | 1.6 | 1.6 | 1.1 | 0.0 | 0.0 | 0.0 | 1.6 | 1.7 | 1.1 | -32.0 |

Note: Totals and percentage change computed from unrounded data.

**Namibia** and **South Africa**, which may impact and delay planting activities. Seasonal forecasts indicate normal to above-normal rainfall for the months ahead across large parts of the subregion, with the exception of northern Angola and southeastern areas of the subregion including **Swaziland**, southern **Mozambique**, southern and western **Zimbabwe**, eastern **Botswana**, north/central **South Africa** and **Lesotho**, where normal to below-normal rainfall is expected. In **Madagascar**, weather predictions also point to the likelihood of above-normal to average precipitation, increasing the probability of flooding.

As in previous seasons, governments and partner institutions have pledged to continue agricultural input subsidies to maintain production gains. Many of the programmes are attempting to diversify away from a focus on maize and encourage production of other cereal crops. In some cases, for example Lesotho, subsidies have been expanded to mechanical inputs, such as tractors and ploughs. Although the estimates for the cultivated area will not be available for most countries until early next year, maize planting intentions in South Africa indicate a marginal increase to 2.73 million hectares, mainly as a response to the high domestic maize prices.

## Lower plantings and dry spell contribute to reduced 2012 cereal output

Estimates for the subregion's 2012 aggregate wheat crop are put at 2.1 million tonnes, which is below 2011 but comparable to the previous five-year average. The decrease is on account of the expected reduction in South Africa, estimated at about 1.8 million tonnes in 2012, a decline of 11 percent on last year. Normally South Africa accounts for roughly 90 percent of the subregion's aggregate output. Wheat production in Zambia, the only other significant producer in the subregion although at a much smaller level compared to South Africa, increased by 7 percent to approximately 254 000 tonnes in 2012.

The subregion's 2012 maize crop, harvested between April and June, declined for the second year running (-2.6 percent), due to a general contraction in plantings and a persistent dry spell that suppressed yields. Estimated at 22.8 million tonnes, the total output is, however, slightly above the short-term average.

Sorghum and millet production in 2012 are also estimated at levels below 2011's crop. Similarly, the aggregate rice output registered a drop of 5 percent to 4.5 million tonnes (paddy), largely due to cyclone damage in eastern districts of Madagascar. Overall, aggregate cereal production in 2012 is estimated at 30.7 million tonnes, 3.2 percent above the previous five-year average.

## Increased import requirements estimated in 2012/13 marketing year

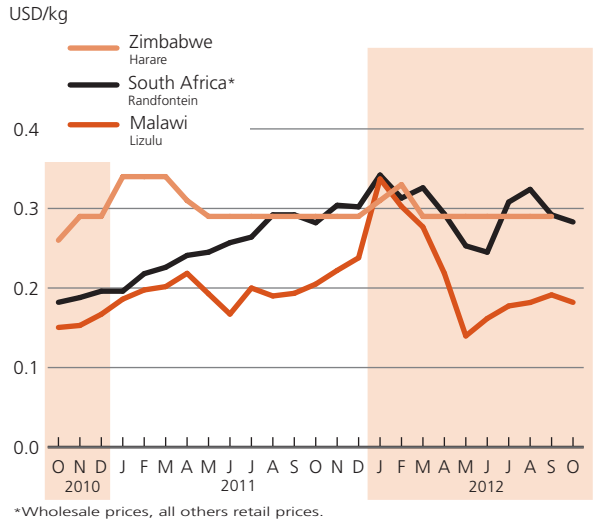
The lower 2012 maize harvests in several countries resulted in slightly higher import requirements for the current 2012/13 marketing year (April-May/March-April), estimated at about 1.2 million tonnes (excluding South Africa). At this level, imports are 2 percent higher than last year.

Despite recording a bumper maize harvest in 2012, Malawi maintained the export ban to mitigate further upward pressure on domestic prices. Similarly, Zambia has centralised the issuance of export licences and increased its domestic procurement programme for their national strategic reserves, which, in effect, lowers the country's exportable surplus. This follows concerns over potential price rises and the need to improve monitoring of domestic maize supplies. However, in South Africa, despite a forecast of a smaller export quantity this year, sufficient supplies are available to adequately cater for the requirements of the structurally deficit countries of Botswana, Lesotho, Namibia and Swaziland, estimated at about 480 000 tonnes. As of October, approximately 250 000 tonnes had been exported to these countries.

## High and seasonably increasing maize prices in most markets

Prices of maize, following seasonal trends, continued to increase in recent months and generally persisted at levels above those of last year. Areas with reduced cereal harvests in 2012 together with normally deficit production regions experienced the largest price rises, including some abnormally rapid increases, most notably in southern Malawi. In South Africa, however, following a sharp increase in August, prices declined considerably in September and remained stable in October and early November. The good harvest

**Figure 6**. White maize prices in selected Southern African markets




*Wholesale prices, all others retail prices.

*Sources:* FEWSNET, Zimbabwe; SAFEX Agricultural Products Division, South Africa; Ministry of Agriculture and Food Security, Malawi.
*Note*: Malawi data from Dec.10 to Jan.11 are missing.

in 2012 together with favourable planting intentions in 2013 have contributed to the decline in prices. However, high international prices continue to counteract these factors, maintaining relatively elevated domestic prices. Quotations in October, at Rand 2 452 (white maize) and Rand 2 490 (yellow maize) per tonne were, respectively, 9 and 13 percent above their levels of one year earlier. The net-importing countries of Botswana, Lesotho, Namibia and Swaziland are expected to face the brunt of this price tightening. In Malawi and Mozambique prices remain generally higher in 2012 than in 2011. In southern Malawi, low supplies, increased transportation costs and high inflation rates have pushed prices up in excess of MWK 70 per kg. In response, the Government retained the maize export ban to curtail further upward pressure. Prices of other food commodities have similarly increased. The food inflation rate in Malawi reached 28 percent in September 2012 compared to 3 percent a year earlier. Similarly, maize prices in Mozambique continued to strengthen in 2012 following a decrease in total maize production. By contrast, rice prices in the capital Maputo are stable and marginally below their levels of the previous year, given adequate supplies, while the stable exchange rate has also contributed. Despite an estimated reduction in 2012 rice production in Madagascar, prices of domestic rice varieties have also remained comparatively stable and are only slightly above their levels of 2011.

### Food insecurity conditions aggravated by higher maize prices

Reduced cereal harvests together with higher maize prices have resulted in poor food security prospects. The situation is expected to deteriorate with the onset of lean season, from November, as households become increasingly reliant on market supplies. In Malawi, the number of food insecure people increased to just under 2 million, up from 1.6 million in November, following increased food prices and unfavourable prospects for the off-season crops, harvested from October. Other areas of concern include southern Zimbabwe, central and southern parts of Mozambique and Lesotho. In addition, an estimated 1.83 million persons in Angola were affected by the dry conditions and the consequent reduction in agricultural production. In Madagascar, a drop in rice production, particularly in eastern districts hit by cyclones in early 2012, has negatively impacted on food security conditions, resulting in an earlier than normal start of the lean season. Furthermore, the country's protracted political instability and poor economic conditions, coupled with the generally unfavourable agricultural production in southern areas, have resulted in an estimated increase in the number of undernourished people to approximately one third of the population.

Emergency response plans in the affected countries are being implemented to bridge food gaps in the immediate period; however, some programmes are currently facing funding shortages. Medium-term interventions, to restore and strengthen the agricultural productive capacity of vulnerable households, are being implemented through the provision of inputs and technical support. In 2013, food security conditions may deteriorate further if forecasts of normal to below normal rainfall in southeastern areas are realised.

## Great Lakes Region

### Favourable prospects for current crops in Rwanda and Burundi

Planting of the 2013 A season crops, to be harvested early next year, was completed in October. The A season represents about 30-40 percent of the total annual crop production in **Rwanda** and **Burundi**. Following an early onset of the short rainy season (September-January), precipitation became erratic in September, negatively impacting on crops and leading to widespread re-plantings, especially of beans. Normal rains resumed in October improving the crop outlook slightly. Rainfall levels are forecast at average to above average levels for the remainder of the season, with risk of floods along riverbanks and in lowland areas. Overall, production of the 2013 A season crops is tentatively forecast at near average levels in both countries. In **the Democratic Republic of the Congo (DRC),** harvesting of the main 2012 maize crop in northern areas is underway, while crops in southern regions are still at vegetative stage and will be harvested early next year. According to satellite based rainfall estimates, several areas in northern regions received below-average amounts during the cereal cropping season (June-August) with likely negative effects on yields. In most southern areas, the rainfall pattern so far has been more favourable benefitting the recently planted crops.

### High food prices despite some decline in parts

In **DRC**, retail food prices are at record or near record levels in most markets in northern provinces, while in central and southern provinces major staple crops are traded at more affordable prices following the arrival of the new harvest. In **Rwanda**, prices of beans and maize declined during the last three months by about 15-18 percent in Kigali's wholesale food market as a consequence of the good output of the 2012 B season, harvested in August/September. By contrast, the price of rice has remained steady at record high levels since the beginning of the year. In September/October 2012, a record level price of USD 1 300 per tonne, about 37 percent more than the previous year, was reached. In **Burundi**, current staple food prices are between 10 and 40 percent higher than last year and are still increasing in areas such as the Dépressions de l'Est and the Hauts Plateaux Humides, which experienced a below-average B season harvest.

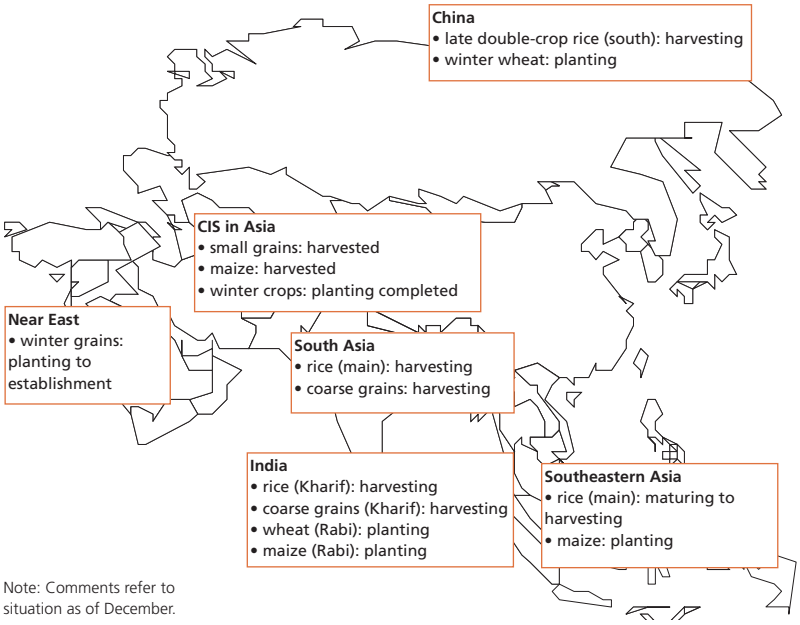
## Humanitarian crisis escalates in DRC

In **DRC**, the recent escalation of conflict has aggravated the ever continuing disruptions to agricultural activities, mainly in eastern and northeastern areas of the country. Between July and September 2012 alone about 285 000 people have been displaced in these areas. Heavy fighting resumed in mid-November in North Kivu, where about 60 000 people have been forced to flee again from their IDP camps. Currently, there are about 2.4 million displaced people in the country. According to the latest IPC analysis, , the number of people in need of emergency assistance was estimated at about 6.3 million as of October 2012, an increase of 17 percent compared to June 2012. About 60 percent of the IDPs are concentrated in conflict-affected eastern provinces of Orientale, North Kivu, South Kivu, Katanga and Maniema. Two-thirds or about 4.2 million persons are considered severely food insecure. In **Burundi** and **Rwanda**, general food security conditions are expected to worsen as the main lean season deepens until the start of the next harvest in early January. Of particular concern are the subsistence farming households in the highlands along the Mwongo River in Rwanda, as well as most poor households in the Dépressions de l'Est and the Hauts Plateaux Humides in Burundi where last season's stocks have been depleted earlier than usual.

# Asia

## Far East

### Record 2012 crop overall, but dry spells and localized floods affect cereal harvest in some countries




Note: Comments refer to situation as of December.

Harvesting of the 2012 main season cereal crops, mostly rice and coarse grains, is nearing completion, while preparation and planting for the 2012/13 winter wheat, barley and secondary rice crops is underway in most areas across Far East. Based on latest information available, FAO estimates the 2012 subregional aggregate cereal harvest, including rice in paddy terms equivalent, at a record level of about 1.196 billion tonnes some 2 percent above the 2011 output. Most of the growth is on account of a strong increase in maize production (+10.1 million tonnes), followed by wheat (+7.6 million tonnes) and rice (+5.3 million tonnes) this year. Despite poor monsoon rains in some areas, particularly in **India**, and heavy rains in several other countries, a record rice and maize production is anticipated. Larger plantings and higher yields due to the availability of subsidized inputs supported the bumper harvests. Significant gains in national total cereal production are anticipated in **Bangladesh**, **China**, **Indonesia**, **the Philippines**, **Thailand** and **Viet Nam**. On the other hand, the most affected countries by the adverse weather are **India**, **Nepal,** and **the Republic of Korea**, with an estimated decrease in 2012 cereal production of 1.3, 2.3 and 3.3 percent, respectively. The remaining countries, namely **Cambodia**, **Japan** and **Myanmar** are expecting a total cereal output more or less similar to that of the year before.

In aggregate, the subregion's 2012 rice harvest in paddy terms is forecast at about 656 million tonnes, slightly above last year's record, reflecting good harvests in China, Indonesia, the Philippines, Thailand and Viet Nam. In spite of reported localized drought conditions and concerns over pest attacks, the largest increase is expected in China, reflecting the strong public support provided to the cereal sector. On the other hand, India is currently expected to harvest a reduced rice crop this year due to the late onset of the monsoon and a prolonged dry spell in June and July. Similarly, a poor paddy harvest is estimated in the Republic of Korea due to several typhoons in August-September and the continued decline in plantings as a result of the ongoing government rice reduction program, while unfavourable weather and crop diseases

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

| | Wheat | | | Coarse grains | | | Rice (paddy) | | | Total cereals | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2011 estim. | 2012 f'cast | 2010 | 2011 estim. | 2012 f'cast | 2010 | 2011 estim. | 2012 f'cast | 2010 | 2011 estim. | 2012 f'cast | Change: 2012/2011 (%) |
| **Far East** | **223.0** | **232.8** | **240.4** | **277.9** | **292.6** | **299.9** | **630.2** | **650.6** | **655.9** | **1 131.2** | **1 176.0** | **1 196.2** | **1.7** |
| Bangladesh | 1.0 | 1.0 | 1.0 | 1.3 | 1.7 | 2.1 | 50.3 | 50.7 | 51.3 | 52.6 | 53.4 | 54.5 | 1.9 |
| Cambodia | 0.0 | 0.0 | 0.0 | 0.8 | 0.7 | 0.8 | 8.2 | 8.8 | 8.7 | 9.0 | 9.5 | 9.5 | -0.1 |
| China | 115.2 | 117.4 | 118.0 | 186.6 | 201.4 | 209.9 | 197.2 | 202.5 | 206.5 | 499.0 | 521.3 | 534.4 | 2.5 |
| India | 80.8 | 86.9 | 93.9 | 43.4 | 42.1 | 37.8 | 144.0 | 156.5 | 150.0 | 268.1 | 285.4 | 281.7 | -1.3 |
| Indonesia | 0.0 | 0.0 | 0.0 | 18.3 | 17.6 | 19.0 | 66.5 | 65.8 | 69.0 | 84.8 | 83.4 | 87.9 | 5.4 |
| Japan | 0.6 | 0.7 | 0.7 | 0.2 | 0.2 | 0.2 | 10.6 | 10.5 | 10.5 | 11.4 | 11.4 | 11.5 | 0.4 |
| Korea Rep. of | 0.0 | 0.0 | 0.0 | 0.2 | 0.2 | 0.2 | 5.8 | 5.6 | 5.5 | 6.1 | 5.9 | 5.7 | -2.3 |
| Myanmar | 0.2 | 0.2 | 0.2 | 1.4 | 1.5 | 1.7 | 30.8 | 30.0 | 30.0 | 32.4 | 31.7 | 31.9 | 0.6 |
| Nepal | 1.6 | 1.8 | 1.9 | 2.4 | 2.5 | 2.4 | 4.5 | 5.1 | 4.8 | 8.4 | 9.4 | 9.0 | -3.3 |
| Pakistan | 23.3 | 24.3 | 24.0 | 3.9 | 4.1 | 4.1 | 7.2 | 9.2 | 9.4 | 34.4 | 37.7 | 37.6 | -0.3 |
| Philippines | 0.0 | 0.0 | 0.0 | 6.4 | 7.0 | 7.4 | 16.7 | 17.0 | 18.0 | 23.1 | 24.0 | 25.4 | 6.0 |
| Thailand | 0.0 | 0.0 | 0.0 | 5.0 | 4.9 | 5.0 | 35.9 | 34.5 | 36.0 | 40.9 | 39.5 | 41.0 | 3.8 |
| Viet Nam | 0.0 | 0.0 | 0.0 | 4.6 | 5.0 | 5.3 | 40.0 | 42.3 | 43.4 | 44.6 | 47.3 | 48.7 | 3.0 |

Note: Totals and percentage change computed from unrounded data.

have damaged the crop in Nepal this year. Overall, gains in rice production in several countries of the subregion have more than offset the loss in the remaining countries.

For wheat, already harvested by mid-year, the 2012 crop is a record production for the subregion. Significant increase was observed in India, one of the largest wheat producers in the region, following favourable weather, good availability of irrigation water, fertilizer and other inputs, as well as increased government procurement prices. In contrast, smaller wheat crop was recorded in Pakistan, due to unfavourable weather, reduced availability of fertilizers and irrigation water. Overall, total winter and spring wheat production for the subregion is estimated at 240.4 million tonnes, about 7.6 million tonnes higher than the bumper crop in 2011.

Weather conditions at the start of the 2012/13 season have been generally favourable for planting of winter wheat, barley and secondary rice crop. In India, early official forecast for the 2013 wheat crop is set at a near average level of about 86 million tonnes. In Pakistan, although the timely rains in October provided adequate soil moisture, floods across southern Punjab, northern Sindh and northeastern Balochistan in September may reduce the area planted to wheat since many areas were under water by mid-November. In China, the total area planted to wheat is expected to remain virtually unchanged from last year, at 24.4 million hectares.

## Cereal exports projected to reach all-time high, while imports to decline considerably in 2012/13 marketing year

Preliminary forecast for the 2012/13 marketing year (or 2013 in case of January/December marketing year) indicate that the subregional cereal imports are expected to decline by 9.9 million tonnes or 10 percent below the 2011/12 level, while the aggregate cereal exports are forecast to increase by 4.7 million tonnes or 13 percent from the previous year, largely on account of expected increases in cereal production in 2012 in most countries. In general, the Far East subregion is a net importer of cereals while being a net exporter of rice and net importer of wheat. With regards to rice, exports are expected to increase in 2012/13 mostly due to an estimated increase in production from the leading rice exporters of the region, namely Thailand and Pakistan despite the anticipated decline in rice exports from India, one of the main paddy exporters of the subregion in the last few years, given the dry spell affected harvest this year. Aggregate rice imports by all Far East countries in 2012/13 are expected to decrease considerably from the previous year, on account of lower import requirements, particularly in China and Indonesia.

Total wheat imports are expected to decrease by 7 percent from last year's level, attributed to favourable 2012 domestic wheat production in most producing countries, except Pakistan. In India, given the estimated bumper wheat harvest and larger carryover stocks, exports are anticipated to reach a record level of 5 million tonnes in 2012/13.

**Table 13. Far East cereal production and anticipated trade in 2012/13** [1]
*(thousand tonnes)*

| | Avg 5-yrs (2007/08 to 2011/12) | 2011/12 | 2012/13 | 2012/13 over 2011/12 (%) | 2012/13 over 5-yr avg (%) |
|---|---|---|---|---|---|
| Cereals - Exports | 32 491 | 36 249 | 40 958 | 13.0 | 26.1 |
| Cereals - Imports | 83 057 | 95 785 | 85 906 | -10.3 | 3.4 |
| Cereals - Production | 902 104 | 959 663 | 977 932 | 1.9 | 8.4 |
| Rice-millled - Exports | 25 586 | 28 810 | 29 375 | 2.0 | 14.8 |
| Rice-millled - Imports | 9 129 | 11 387 | 9 544 | -16.2 | 4.5 |
| Rice-millled - Production | 414 633 | 434 284 | 437 669 | 0.8 | 5.6 |
| Wheat - Exports | 2 208 | 2 042 | 6 810 | 233.5 | 208.4 |
| Wheat - Imports | 31 498 | 36 744 | 34 190 | -7.0 | 8.5 |
| Wheat - Production | 221 414 | 232 757 | 240 364 | 3.3 | 8.6 |

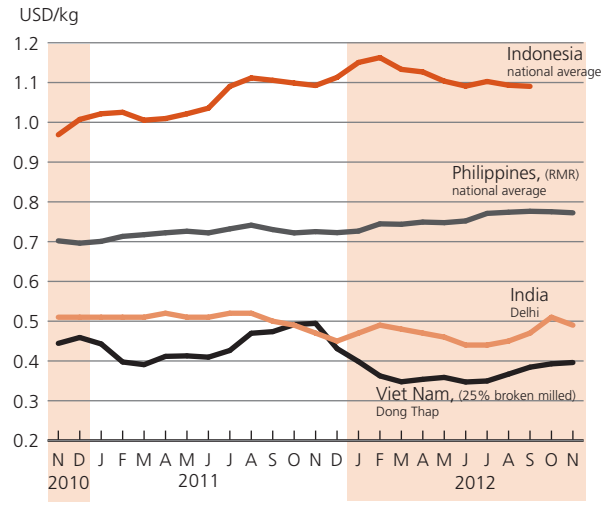
[1] Marketing year July/June for most countries. Rice trade figures are for the second year shown.

## Prices of rice follow a mixed trend, while those of wheat increase considerably in most countries

Rice prices in recent months have increased in some exporting countries of the subregion, namely **China** and **Viet Nam**. In **India**, rice prices in local currency have been generally increasing since March-April 2012, reaching new record levels (in nominal terms) in early November in some markets. The price increase in India was underpinned by several factors, such as a 16 percent hike in the government rice procurement price, larger procurement target for 2012/13 (October/September) and lower production forecasts. In **Pakistan**, rice prices have been increasing since June/July 2012 due to strong export demand, but stabilized recently in most markets, mainly reflecting adequate supplies from this year's rice production. In other countries, namely **Bangladesh**, **Cambodia**, **Indonesia** and **the Philippines**, rice prices have remained virtually unchanged in the last several months, mainly reflecting adequate supplies.

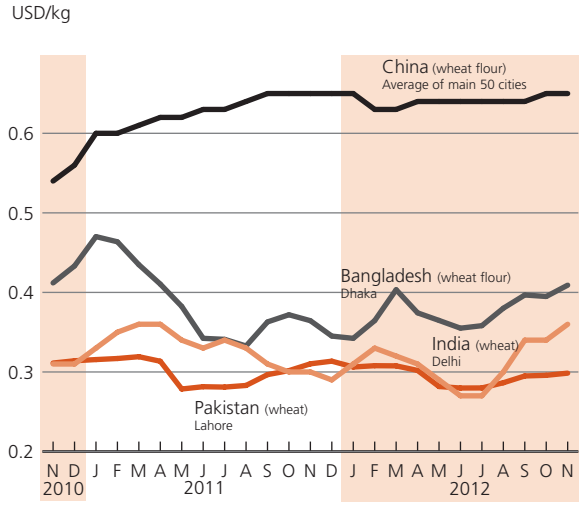
Nominal prices of wheat and wheat flour have stabilized in major wheat consuming countries, such as Bangladesh and **Sri Lanka**. However, in **India** and **Pakistan**, the main wheat exporting countries, commodity prices have been increasing in recent months. In early November, in the Delhi market, the retail and wholesale prices reached record levels and were 26 and 34 percent, respectively, above their

**Figure 7.** Rice retail prices in selected Far East countries




*Sources:* Badan Pusat Statistik (BPS), Indonesia; Ministry of Consumer Affairs, India; Bureau of Agriculture Statistics, Philippines; Agroinfo, Viet Nam.

**Figure 8.** Wheat and wheat flour retail prices in selected Far East countries




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

levels a year earlier. Similarly, in Pakistan in the first two weeks of November, prices of wheat and wheat flour in Karachi, reached record levels of PKR 32 (about USD 0.34) and PKR 37.5 (about USD 0.40) per kg, respectively. Similarly, nominal wheat flour increased in **China**, driven by the proposed increase in the minimum purchase price for 2013.

# Near East

## Planting of 2013 winter crops has started under normal conditions

Land preparation and planting of the 2012/13 winter cereal crops is underway in the subregion. Rains in October caused localized delays but boosted soil moisture for winter grain planting and establishment over much of the region. Above-normal temperatures have also assisted crop growth prior to winter's arrival.

The subregions aggregate cereal output in 2012 is provisionally estimated at 69.8 million tonnes (rice in paddy equivalent), a decrease of 2 percent on last year, but 3 percent higher than the five-year average. An above average wheat harvest of 5 million tonnes was gathered in **Afghanistan** (over 50 percent more than in 2011), while wheat production in the **Islamic Republic of Iran** remained stable. By contrast, **Turkey** and **Iraq** produced less wheat than last year due to insufficient moisture. In **the Syrian Arab Republic**, no new information is available on the size of the 2012 crop production. The escalation of the civil conflict, displacement of large numbers of people and fuel shortages have hampered agricultural activities. Consequently, the total subregional wheat imports could reach almost 24 million tonnes, about 8.5 percent more than last year.

**Table 14. Near East cereal production**
*(million tonnes)*

| | Wheat | | | Coarse grains | | | Rice (paddy) | | | Total cereals | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2011 estim. | 2012 f'cast. | 2010 | 2011 estim. | 2012 f'cast. | 2010 | 2011 estim. | 2012 f'cast. | 2010 | 2011 estim. | 2012 f'cast. | Change: 2012/2011 (%) |
| **Near East** | **46.8** | **46.4** | **45.0** | **21.0** | **20.8** | **20.7** | **4.0** | **4.1** | **4.2** | **71.9** | **71.2** | **69.8** | **-2.0** |
| Afghanistan | 4.5 | 3.3 | 5.0 | 0.7 | 0.6 | 0.7 | 0.7 | 0.7 | 0.7 | 6.0 | 4.6 | 6.4 | 39.8 |
| Iran (Islamic Rep. of) | 15.0 | 13.5 | 13.8 | 4.5 | 4.3 | 4.4 | 2.3 | 2.3 | 2.4 | 21.8 | 20.1 | 20.6 | 2.6 |
| Iraq | 2.7 | 2.4 | 2.1 | 1.4 | 1.4 | 1.1 | 0.2 | 0.2 | 0.2 | 4.3 | 4.0 | 3.3 | -15.9 |
| Syrian Arab Republic | 3.1 | 3.9 | 2.5 | 0.8 | 0.8 | 1.0 | 0.0 | 0.0 | 0.0 | 3.9 | 4.7 | 3.5 | -25.2 |
| Turkey | 19.7 | 21.8 | 20.1 | 12.2 | 12.5 | 12.4 | 0.9 | 0.9 | 0.9 | 32.8 | 35.2 | 33.4 | -5.2 |

Note: Totals and percentage change computed from unrounded data.

### Increased food insecurity following civil unrest in parts and high food prices

In several countries of the subregion, prolonged civil unrest and conflict have disrupted trade and humanitarian aid distribution channels, negatively affecting the food security situation, especially of the most vulnerable population. In **the Syrian Arab Republic**, the number of people in need of urgent food and livelihood assistance is estimated at about 3 million. Syrian refugees, estimated to reach 710 000 in Jordan, Iraq, Lebanon and Turkey by the end of 2012, are also putting severe strains on available resources in the region. WFP is assisting refugees through a mix of food vouchers and the in-kind food distributions and is expected to cover some 490 000 refugees by December 2012. An increasingly complex humanitarian crisis has also been under way in **Yemen** with conflict in the north, secessionist movements in the south and other religious movements in various parts of the country. Some 45 percent of the population is estimated to be food insecure.

**Table 15. CIS in Asia cereal production**

*(million tonnes)*

| | Wheat | | | Coarse grains | | | Total cereals [1] | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2011 estim. | 2012 f'cast | 2010 | 2011 estim. | 2012 f'cast | 2010 | 2011 estim. | 2012 f'cast | Change: 2012/2011 (%) |
| **CIS in Asia** | **21.1** | **33.9** | **22.1** | **4.3** | **6.0** | **4.9** | **26.2** | **40.8** | **27.8** | **-31.8** |
| Armenia | 0.2 | 0.2 | 0.2 | 0.1 | 0.2 | 0.2 | 0.3 | 0.4 | 0.4 | 3.8 |
| Azerbaijan | 1.3 | 1.6 | 1.9 | 0.6 | 0.8 | 0.8 | 1.9 | 2.4 | 2.7 | 9.9 |
| Georgia | 0.0 | 0.1 | 0.1 | 0.2 | 0.3 | 0.4 | 0.3 | 0.4 | 0.4 | 7.0 |
| Kazakhstan | 9.9 | 22.7 | 10.6 | 2.0 | 3.5 | 2.2 | 12.3 | 26.6 | 13.2 | -50.2 |
| Kyrgyzstan | 0.8 | 0.9 | 0.6 | 0.7 | 0.7 | 0.7 | 1.5 | 1.6 | 1.3 | -18.9 |
| Tajikistan | 0.8 | 0.7 | 0.7 | 0.2 | 0.2 | 0.2 | 1.2 | 1.0 | 1.0 | 0.0 |
| Turkmenistan | 1.3 | 1.3 | 1.2 | 0.1 | 0.1 | 0.1 | 1.5 | 1.5 | 1.4 | -6.4 |
| Uzbekistan | 6.7 | 6.3 | 6.7 | 0.3 | 0.3 | 0.4 | 7.2 | 6.9 | 7.3 | 7.1 |

Note: Totals and percentage change computed from unrounded data.

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

## CIS in Asia[1]

### Planting of 2013 winter crops nearly completed under normal conditions

In the Asian CIS countries, planting of winter cereals to be harvested in 2013 has been almost completed under overall normal weather conditions. Early estimates indicate that the total area planted so far is close to the previous year's level except in **Azerbaijan** where a slight increase from last year is expected. However, prospects for the annual 2013 subregional cereal crop will depend on plantings in **Kazakhstan**, accounting for some 60 percent of the subregional total cereal production, where the bulk of the crop will be sown in the spring.

### Significant drop in 2012 cereal production from the previous year's record level

The 2012 aggregate cereal output is now revised at 28 million tonnes, about 32 and 16 percent below the 2011 record level and the previous five-year average respectively. The decline mostly reflects a sharp contraction of production in **Kazakhstan** due to the severe drought there during summer months. As a result, exports of wheat in the 2012/13 marketing year are expected to decline, but the reduction will be minimized due to large wheat carryover stocks from the previous year. In **Kyrgyzstan**, 2012 wheat production was affected by delayed planting due to a long cold winter, followed by a hot summer. The latest estimate puts cereal production at about 1.3 million tonnes, which is some 19 percent lower than last year's level. In **Tajikistan** and **Turkmenistan**, 2012 cereal outputs were virtually unchanged from the previous year and close to the last five-year average. On the contrary, the normal cropping conditions and some government support measures to farmers in **Armenia**, **Azerbaijan** and **Georgia** have resulted in the 2012 cereal production higher than 2011 and significantly above the five-year-average. In **Uzbekistan**, the 2012 cereal production increased by 7 compared to the previous year reaching a record level of about 7.3 million tonnes. Despite the generally good harvests this year, all countries of the subregion except **Kazakhstan** will continue to heavily depend on wheat imports to cover their consumption requirements.

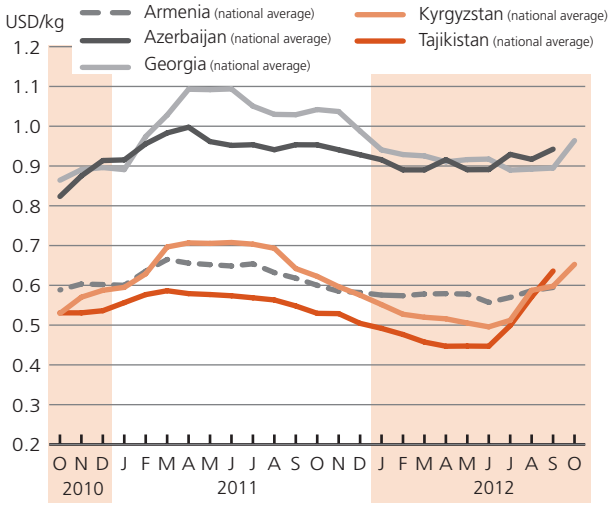
### Wheat flour prices at record levels in some countries of the subregion

In the wheat import-dependent countries of the subregion, prices of wheat flour strengthened further in October, reaching record levels in some countries. The increase mainly reflects higher quotations of milling wheat in the neighbouring exporting countries, particularly **Kazakhstan**, **the Russian Federation** and **Ukraine** where prices strengthened in October averaging nearly 90 percent higher than their levels a year earlier. The price surge is mainly the result of dwindling export availabilities following the 2012 drought-reduced wheat harvest. In **Kyrgyzstan**,

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

prices of main staple wheat flour continued to increase in October reaching all time highs and pushing bread prices to record levels in most markets. In **Tajikistan**, which normally imports about half of its wheat consumption requirements, prices of wheat flour increased to record high in October also supported by high oil and transport costs. In **Georgia**, where imports represent some 90 percent of wheat consumption requirements, prices of wheat flour and bread that remained stable in previous months, rose markedly in October. In **Armenia** and **Azerbaijan**, which also heavily rely on wheat imports, prices of wheat flour strengthened in October. In **Uzbekistan**, in late September the Government increased the regulated price of social or subsidized bread, mainly consumed by the low-income population, by 10 percent.

**Figure 9.** Retail wheat flour prices in selected CIS in Asia countries




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

# Latin America and the Caribbean

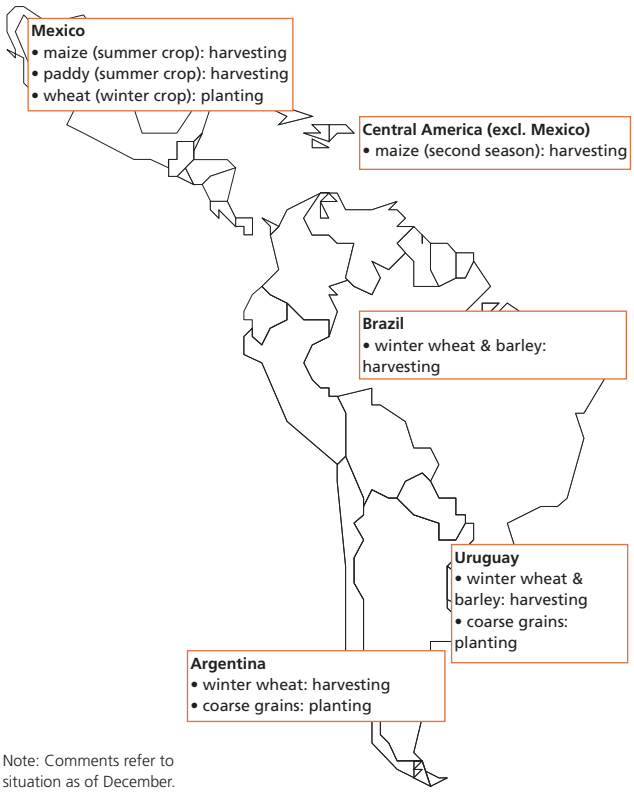
## Central America and the Caribbean

### Good 2012 cereal production is estimated

The 2012 aggregate cereal output of Central American and Caribbean countries is forecast by FAO at 41 million tonnes, about 15 percent above last year's level and above the average of the last five years. Most of this increase results from maize production recovery in the largest producer, **Mexico**, where autumn-winter season already harvested and the largest spring-summer season underway. The maize harvest is estimated to increase by 27 percent to 22.2 million tonnes. On average Mexico accounts for about 82 percent of the subregion's aggregate cereal production, with maize accounting for 55 percent. Similarly, maize production, already gathered, has increased in **El Salvador**. On the other hand, in the other major maize consuming and producing countries, such as **Guatemala** and **Nicaragua**, maize production is expected to remain relatively unchanged in 2012/13 with respect to 2011/12, except in **Honduras** where the harvest decreased slightly this year.

The 2012 aggregate paddy rice production is estimated at 2.7 million tonnes, close to the average production in 2011. In all main rice producing countries 2012 production increased with respect to 2011 with the exception of **Costa Rica** and **Panama**. While in **Dominican Republic**, the largest producer in the subregion and where the rice crop is currently being harvested, production is estimated slightly higher than in 2011.

In **Haiti**, the preliminary forecast points to a 2012 aggregate cereal crop of 350 000 tonnes, some 38.5 percent lower than in the previous year and below the average of the past five years. This reflects a poor output of the 2012 main "spring season" coarse grain crops (harvested during June-August), due to rainfall deficits between May and June. Subsequent heavy rains and floods due to tropical storm Isaac adversely affected the 2012 "summer season" crops (harvested in September and October), mostly rice. More recently, the severe flooding and heavy winds brought by hurricane Sandy resulted in losses of the third season recently planted maize crop.




Note: Comments refer to situation as of December.

### Prices exhibit normal seasonal behaviour

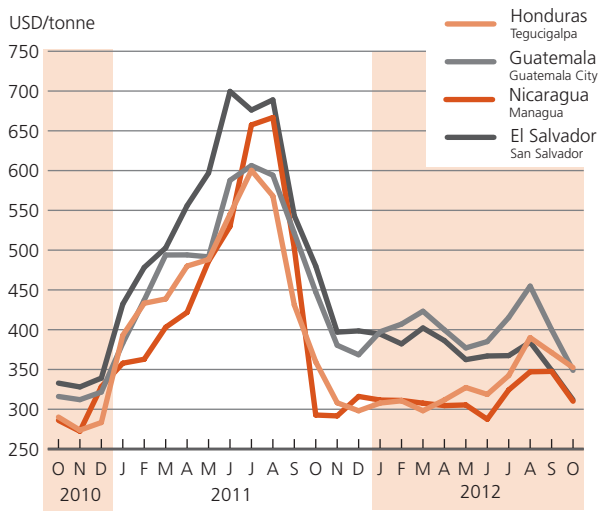
Prices of main staple white maize dropped for the second consecutive month in October in most countries of the subregion, showing a normal seasonal behaviour following the recent completion of the good 2012 main season maize harvests. By contrast, in **Mexico**, maize prices in October

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

| | Wheat | | | Coarse grains | | | Rice (paddy) | | | Total cereals | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2011 estim. | 2012 f'cast | 2010 | 2011 estim. | 2012 f'cast | 2010 | 2011 estim. | 2012 f'cast | 2010 | 2011 estim. | 2012 f'cast | Change: 2012/2011 (%) |
| **Central America & Caribbean** | **3.7** | **3.6** | **3.3** | **35.8** | **29.7** | **35.4** | **2.8** | **2.8** | **2.7** | **42.3** | **36.1** | **41.4** | **14.8** |
| El Salvador | 0.0 | 0.0 | 0.0 | 0.9 | 0.9 | 1.0 | 0.0 | 0.0 | 0.0 | 0.9 | 0.9 | 1.0 | 8.9 |
| Guatemala | 0.0 | 0.0 | 0.0 | 1.7 | 1.7 | 1.7 | 0.0 | 0.0 | 0.0 | 1.7 | 1.7 | 1.8 | 1.1 |
| Honduras | 0.0 | 0.0 | 0.0 | 0.5 | 0.6 | 0.6 | 0.0 | 0.0 | 0.0 | 0.6 | 0.7 | 0.6 | -5.6 |
| Mexico | 3.7 | 3.6 | 3.3 | 31.1 | 24.7 | 30.6 | 0.2 | 0.2 | 0.2 | 35.0 | 28.5 | 34.1 | 19.6 |
| Nicaragua | 0.0 | 0.0 | 0.0 | 0.6 | 0.7 | 0.7 | 0.4 | 0.4 | 0.4 | 1.0 | 1.1 | 1.1 | 1.5 |
| **South America** | **26.7** | **24.3** | **20.9** | **102.8** | **106.4** | **120.4** | **23.5** | **26.5** | **24.7** | **153.1** | **157.2** | **166.0** | **5.6** |
| Argentina | 15.9 | 13.7 | 11.5 | 30.0 | 32.8 | 29.9 | 1.2 | 1.7 | 1.6 | 47.2 | 48.2 | 43.0 | -10.8 |
| Brazil | 6.0 | 5.7 | 4.8 | 58.3 | 59.0 | 74.4 | 11.7 | 13.6 | 11.6 | 76.0 | 78.3 | 90.8 | 16.0 |

Note: Totals and percentage change computed from unrounded data.

**Figure 10.** Wholesale white maize prices in selected countries in Central America




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

remained nearly unchanged compared to the previous month and were only slightly below their high levels of October 2011, reflecting sharply reduced production last year and high levels in the international market. Maize prices are expected to decline seasonally with the progress of the new harvest, which has just started. Prices of staple tortilla, made from maize, also remained stable but at near record levels. Prices of red beans, another key staple in **El Salvador**, **Honduras** and **Nicaragua**, continued their downward trend in October following improved supplies from the 2012 first season harvests. In **Guatemala**, however, prices of staple black beans further strengthened in October after the depletion of supplies from the first 2012 season harvest, although the increase was contained by the availability of imported supplies. Prices are expected to decline this month with the start of the new harvest. In **El Salvador**, where bread is an important component of the urban diet, wholesale prices of wheat flour rose by 25 percent in October compared to September. At their current level, flour prices are 83 percent higher than in June, before the sustained increases of the past four months. The country depends entirely on wheat imports to satisfy its consumption requirements. In **Haiti**, prices of main staple imported rice in October remained unchanged in most markets after rising in the past three months and were around their relatively high levels a year earlier. Prices of domestically produced maize and beans continued to rise in October in several markets, following the sharply reduced 2012 outputs, adversely affected by drought and by tropical storm Isaac and most recently by the tropical storm Sandy in late October.

# South America

## Reduced 2012 wheat production but early prospects for the 2013 maize crop favourable

Harvesting of the 2012 wheat crop is ongoing in southern producing countries in the subregion. The region's aggregate wheat output is forecast at almost 21 million tonnes, 14 percent below last year's level which itself was 9 percent below the level of 2010. This decrease mainly reflects deteriorated prospects in the main producing countries, **Argentina** and **Brazil**, attributed to a 17 percent decline in the area planted. In Argentina, an estimated 88 percent of the planted area is reportedly in good condition while 12 percent is under stress. Whereas in Brazil the crop has been affected by dry weather conditions in the main producing areas.

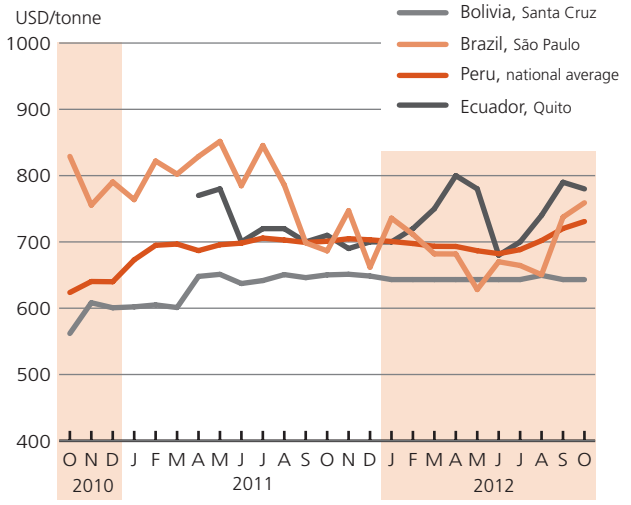
Planting of the 2012/13 main season maize crop is underway in most countries of the region. Early indications point to an expansion in the area planted in **Argentina**, in response to attractive prices, to a level of 5 million hectares this year. However, there are indications that yields may decline as less than half of the intended maize had been sown by early November, later than usual, at the time that heavy rains occurred leading to prolonged wetness. Overall production could remain below the level of the two previous years. By contrast, in **Brazil**, adequate precipitation in October improved growing conditions for the maize crop following previous dry and hot weather in Rio Grande do Sul and southern Parana. Maize production is forecast to increase over the bumper 2011/12 crop.

**Brazil**, a large producer and consumer of rice, has seen its 2012 output reduced by 15 percent as a consequence of a drop in both planting area and yields driven by less attractive prices and lower water availability for irrigation in the reservoirs. **Argentina**, and **Uruguay**, other important producers and exporters also experienced significant reductions in this year's output as compared to the above-average 2011 level. In **Colombia** and **Peru**, rice production rose by 1.4 and 11 percent respectively over the reduced levels in 2011, whereas **Ecuador** experienced a slight reduction with respect to 2011 and a much more remarkable drop of 12 percent from the five-year average. This low production performance is connected to losses caused by pest attacks and heavy rains that severely affected the main growing areas earlier in the season.

## Wheat flour prices on the rise

In most countries of the subregion, prices of wheat flour strengthened mainly on account of high quotations in the international markets, while those of rice are high in several countries reflecting a contraction in 2012 national outputs. However, in several countries the domestic price increases

**Figure 11.** Wholesale wheat flower prices in selected countries in South America




*Sources:* Servicio Informativo de Mercados Agropecuarios, Bolivia; Instituto de Economía Agrícola, Brazil; Instituto Nacional de Estadística e Informática, Peru; Sistema de Información Nacional de Agricultura, Ganadería, Acuacultura y Pesca - SINAGAP, Ecuador.

have been mitigated by the appreciation of national currencies against the US dollar. Prices of yellow maize, used as feed, remained firm in October after sharp increases in the past three months, although were still lower than a year earlier reflecting generally good 2012 harvests. In importing countries, prices have been supported by higher international prices. In **Brazil**, an important exporter, despite a record crop this year, high domestic and export demand is sustaining prices. In **Bolivia**, maize prices were supported by the Government's announcement of an increase in the quota of maize exports. Prices of domestically produced rice have increased in several countries in recent months. The Government of Brazil released a further 81 200 tonnes of paddy stocks in early November in an attempt to ease domestic prices. This is part of a reportedly planned release of 500 000 tonnes of paddy, through auctions, until the next harvest from March.

# North America, Europe and Oceania

## North America

### Winter wheat area expected to rise in the United States but much of the crop in poor conditions

In the **United States**, winter wheat planting for the **2013** harvest was virtually complete by mid-November and the level of crop emergence was overall close to the five-year average, reported at 86 percent on 18 November. Although final estimates are not available yet, early indications suggest that the area sown to winter wheat, which accounts for over 80 percent of the country's total wheat area, could be about 3-4 percent above the previous year's level in response to high prices. However, the condition of newly emerged plants in some areas is reported to be quite poor. This is true mostly for the Great Plains hard red wheat producing states, where severe drought since June persists. Hard red wheat normally accounts for about 55 percent of the total winter wheat crop. By contrast, adequate rainfall is reported in the soft winter wheat areas where crop stands are evidently in much better condition. The latest official estimate of the United States **2012** wheat crop remains at 61.8 million tonnes, 13.5 percent up from the reduced 2011 crop. The increase is attributed to an increase in planted area, less abandonment and a recovery of yields in southern areas after severe drought in 2011. As for coarse grains, production in 2012 is now estimated at 285.2 million tonnes, 12 percent down from the previous year's good crop, well below the average of the past five years and the smallest crop since 2006. After a promising start to the season with significant expansion of planted area, a widespread severe drought devastated crops. Maize accounts for about 272.4 million tonnes of this total, 13.2 percent down from 2011. In **Canada**, the bulk of the wheat is spring planted and the 2013 crop will not be sown until March-April next year. Latest information regarding the 2012 cereal harvest mostly confirms earlier expectations: output of wheat rose to 26.7 million tonnes, up 5.8 percent from 2011, while production of coarse grains (mainly barley, maize and oats) rose 7.9 percent to 23.7 million tonnes. In most cases, the larger crops reflect increased plantings, which more than offset yield reductions.

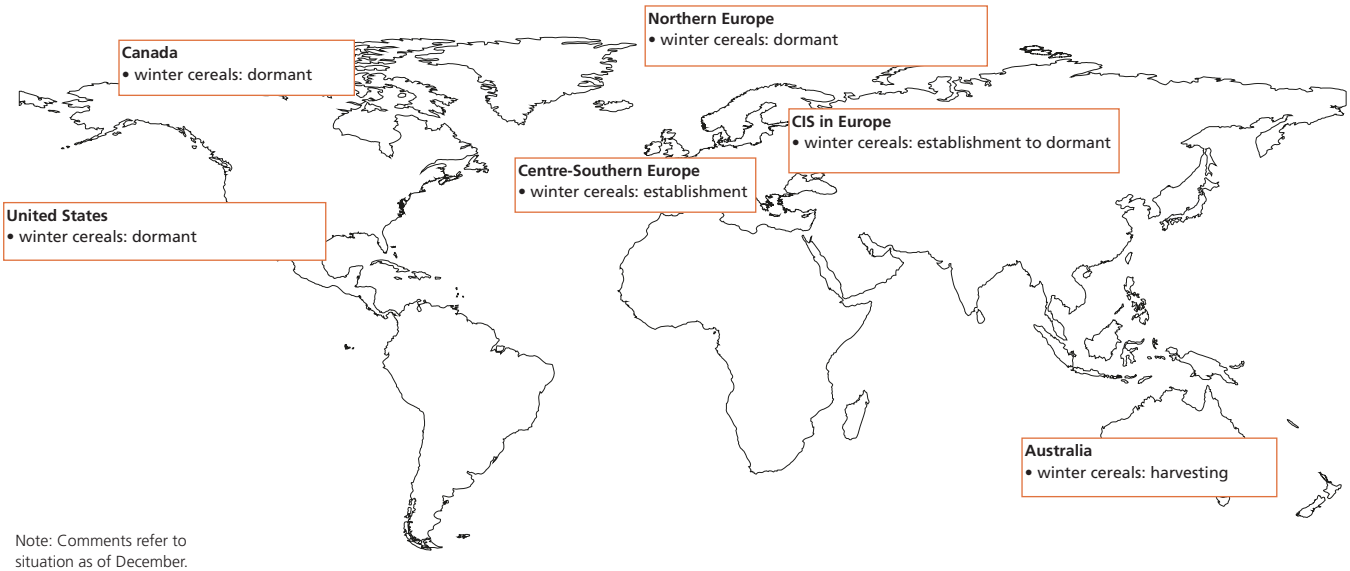
## Europe

### *European Union*

### Adverse weather hampers winter grain planting

The bulk of the winter grain crops for harvest in **2013** have now been sown throughout the **European Union** under mixed conditions. Although the early outlook pointed to increased plantings in response to strong price prospects, farmers in some major producing countries have been up against adverse weather and initial planting intentions have not been achieved. In some central European countries such as **Bulgaria**, **Hungary** and **Romania**, low soil moisture limited planting and impaired germination. By contrast, excessive rainfall in some western parts, namely **France** and the **United Kingdom**, disrupted fieldwork and latest information suggests the final winter grain area may be down in these countries.

The EU's aggregate cereal output in **2012** is now estimated at 271.8 million tonnes, 6.6 percent down from 2011 and the smallest crop since 2007. Of the total, wheat accounts for an estimated 130.8 million tonnes, 4.9 percent down from last year's about-average level, despite a similar area of plantings. The reduction largely reflects the impact of adverse winter conditions on crops in several western and northern countries namely, **France**, **Germany**, **Poland**, as well as exceptionally high spring temperatures in some central parts, particularly




Note: Comments refer to situation as of December.

in **Hungary** and **Slovakia**. The aggregate output of coarse grains is estimated at about 138 million tonnes, 8.1 percent down from last year's level. Most of the reduction reflects the impact of hot, dry weather on the maize crops in the central and southeastern parts of the region, **Hungary**, **Italy** and **Romania** in particular, although the impact of dry weather led to a slight reduction of yields also in **France**, the EU's major producing country.

## *CIS in Europe*

### Early prospects for the 2013 winter cereals generally favourable

In European CIS (**Belarus**, **Republic of Moldova**, **the Russian Federation** and **Ukraine**), planting of winter cereals is now almost completed. In **the Russian Federation** the target area planted to winter wheat has been set to increase by 4 percent from last year. However, this level may not be realized as by mid-November only 15.6 million hectares, out of 16.8 million hectares planned, have been planted. Assuming normal weather conditions in the reminder of the season, an average production is forecast. In **Ukraine**, winter cereal planting is completed; official reports indicate an area planted of 8.1 million hectares (wheat 6.7 million hectares and barley 1.1 million hectares), similar to that of last year. Some 90 percent of the crops are reported in good conditions and the early outlook is positive.

In **Belarus**, the area planted to winter cereals is officially estimated to be 2.8 percent higher than last year. Similarly, in the **Republic of Moldova**, official forecasts indicate an 18 percent increase in plantings following the reduced wheat production this year.

### Sharply reduced 2012 cereal production

The 2012 aggregate cereal production in the European CIS countries fell to about 124 million tonnes, some 21 percent below the previous year and around 12 percent below the five-year average. This mainly reflected drought and extremely hot temperatures during summer in most countries of the subregion, with the exception of Belarus, where cereal production increased in 2012.

Because of the reduced production in 2012, exports of both wheat and coarse grains from **the Russian Federation** and **Ukraine** are expected to decline by about one-third in the 2012/13 marketing year (July/June), as compared to 2011/12. As a result, the Government of Ukraine announced export restrictions based on a voluntary agreement between the Ministry of Agrarian Policy and the private sector. The ceiling of wheat exports has been raised from 4.5 million to 5.5 million tonnes. In the main producer and exporter in the subregion, the Russian Federation, the 2012 cereal output is revised to 70 million tonnes, 24 percent down on 2011. The most affected crop is wheat, estimated at about 39.6 million tonnes, 30 percent lower than last year.

### Near record wheat export prices in the subregion

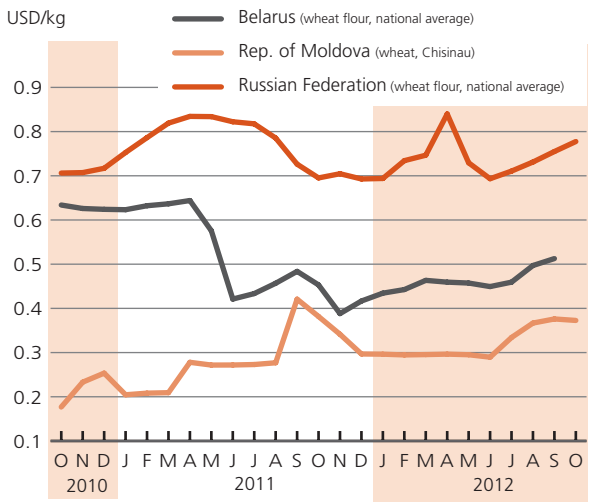
In the European CIS countries food prices have been on the increase since July, following the reduced wheat harvests in the region. In exporting countries, **Ukraine** and **the Russian Federation**, export prices of wheat rose for the fourth consecutive month in October and were at near record levels, some 30 percent above those in June this year before the start of the rising trend. In the

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

| | Wheat | | | Coarse grains | | | Rice (paddy) | | | Total cereals | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2011 estim. | 2012 f'cast | 2010 | 2011 estim. | 2012 f'cast | 2010 | 2011 estim. | 2012 f'cast | 2010 | 2011 estim. | 2012 f'cast | Change: 2012/2011 (%) |
| **North America** | **83.2** | **79.7** | **88.5** | **353.0** | **346.0** | **308.8** | **11.0** | **8.4** | **9.0** | **447.2** | **434.0** | **406.3** | **-6.4** |
| Canada | 23.2 | 25.3 | 26.7 | 22.4 | 22.0 | 23.7 | 0.0 | 0.0 | 0.0 | 45.6 | 47.2 | 50.4 | 6.8 |
| United States | 60.1 | 54.4 | 61.8 | 330.6 | 324.0 | 285.2 | 11.0 | 8.4 | 9.0 | 401.7 | 386.8 | 355.9 | -8.0 |
| **Europe** | **201.0** | **223.4** | **192.7** | **203.3** | **237.2** | **214.4** | **4.4** | **4.5** | **4.3** | **408.7** | **465.1** | **411.4** | **-11.6** |
| Belarus | 1.7 | 2.0 | 2.0 | 4.9 | 5.7 | 6.7 | 0.0 | 0.0 | 0.0 | 6.6 | 7.7 | 8.7 | 13.3 |
| EU | 136.2 | 137.5 | 130.8 | 143.2 | 150.3 | 138.2 | 3.1 | 3.1 | 2.9 | 282.5 | 291.0 | 271.8 | -6.6 |
| Russian Federation | 41.5 | 56.2 | 39.6 | 19.9 | 34.2 | 28.9 | 1.1 | 1.2 | 1.2 | 62.4 | 91.6 | 69.7 | -23.9 |
| Serbia | 1.7 | 2.1 | 1.9 | 7.6 | 7.0 | 6.5 | 0.0 | 0.0 | 0.0 | 9.2 | 9.0 | 8.4 | -7.5 |
| Ukraine | 16.9 | 22.3 | 15.5 | 21.0 | 33.4 | 28.5 | 0.2 | 0.2 | 0.2 | 38.0 | 55.9 | 44.1 | -21.1 |
| **Oceania** | **27.7** | **29.8** | **22.3** | **11.9** | **13.6** | **12.0** | **0.2** | **0.7** | **1.0** | **39.9** | **44.1** | **35.3** | **-20.0** |
| Australia | 27.4 | 29.5 | 22.0 | 11.4 | 13.0 | 11.5 | 0.2 | 0.7 | 1.0 | 39.0 | 43.3 | 34.4 | -20.4 |

Note: Totals and percentage change computed from unrounded data.

**Figure 12.** Retail wheat and wheat flour prices in Belarus, Russian Federation and Republic of Moldova




*Sources:* National Statistical Committee of the Republic of Belarus; ACSA, Rep. of Moldova; Ministry of Agriculture of the Russian Federation.

**Republic of Moldova**, prices of wheat and maize remained relatively firm in October, although some 30 percent higher than in June reflecting expectations of the drought reduced 2012 cereal output.

# Oceania

## Winter grain harvest underway with output expected sharply down on past two bumper crops

Prospects for the winter grain harvest (mostly wheat) deteriorated over the latter part of the growing season due to severe drought in Western **Australia** and some eastern and southeastern growing regions, which has impacted negatively on yields. Heavy rains in some eastern parts in November probably came too late to make any significant improvement to prospects of all but the latest maturing crops. FAO's latest estimate puts the country's total wheat output in 2012 at 22 million tonnes, some 25 percent down from last year's record harvest. The latest official forecast of 22.5 million tonnes was released in mid-September and given the persisting drought conditions is expected to be revised downward in the next official report in early December. The early outlook for the minor summer grain crop for harvest in 2013 (mainly sorghum and maize), to be planted in the coming weeks, points to an increase in area. Soil moisture conditions in key growing regions of New South Wales and southern Queensland are favourable for planting, and irrigation supplies for the growing season are plentiful.

# Statistical appendix

## Table A1. Global cereal supply and demand indicators

| | Average 2005/06 - 2009/10 | 2008/09 | 2009/10 | 2010/11 | 2011/12 | 2012/13 |
|---|---|---|---|---|---|---|
| **1. Ratio of world stocks to utilization (%)** | | | | | | |
| Wheat | 25.5 | 24.5 | 28.7 | 26.4 | 26.8 | 23.6 |
| Coarse grains | 16.4 | 17.6 | 16.8 | 14.6 | 15.3 | 13.1 |
| Rice | 26.6 | 28.9 | 29.5 | 30.7 | 33.5 | 35.5 |
| Total cereals | 21.1 | 21.9 | 22.8 | 21.4 | 22.5 | 20.5 |
| **2. Ratio of major grain exporters' supplies to normal market requirements (%)** | 125.0 | 128.5 | 124.2 | 115.5 | 117.7 | 107.5 |
| **3. Ratio of major exporters' stocks to their total disappearance (%)** | | | | | | |
| Wheat | 17.3 | 17.9 | 21.6 | 20.2 | 18.7 | 14.1 |
| Coarse grains | 14.3 | 15.7 | 15.1 | 10.5 | 10.3 | 8.5 |
| Rice | 17.9 | 23.5 | 21.6 | 21.2 | 26.0 | 27.1 |
| Total cereals | 16.5 | 19.1 | 19.4 | 17.3 | 18.3 | 16.6 |
| | **Annual trend growth rate 2002-2011** | **Change from previous year** | | | | |
| | | **2008** | **2009** | **2010** | **2011** | **2012** |
| **4. Changes in world cereal production (%)** | 2.8 | 7.2 | -1.0 | -0.3 | 3.9 | -2.8 |
| **5. Changes in cereal production in the LIFDCs (%)** | 3.6 | 3.6 | -0.1 | 7.4 | 0.9 | 2.1 |
| **6. Changes in cereal production in the LIFDCs less India (%)** | 3.6 | 5.1 | 4.9 | 6.9 | -2.7 | 4.3 |
| | **Average 2005-2009** | **Change from previous year (%)** | | | | |
| | | **2008** | **2009** | **2010** | **2011** | **2012*** |
| **7. Selected cereal price indices:** | | | | | | |
| Wheat | 158.3 | 31.5 | -34.6 | 9.6 | 31.5 | -7.3 |
| Maize | 146.0 | 36.5 | -25.5 | 12.0 | 57.6 | 0.8 |
| Rice | 194.2 | 82.9 | -14.0 | -9.4 | 9.5 | -5.4 |

Notes:

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

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

Major Wheat Exporters are Argentina, Australia, Canada, the EU, Kazakhstan, Russian Fed., Ukraine and the United States; Major Coarse Grain Exporters are Argentina, Australia, Brazil, Canada, the EU, Russian Fed., Ukraine 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-November average.

## Table A2. World cereal stocks[1]

*(million tonnes)*

| | 2008 | 2009 | 2010 | 2011 | 2012 estimate | 2013 forecast |
|---|---|---|---|---|---|---|
| **TOTAL CEREALS** | **411.4** | **489.8** | **518.5** | **496.7** | **519.6** | **494.6** |
| **Wheat** | **132.7** | **161.1** | **189.3** | **183.6** | **183.9** | **163.3** |
| held by: | | | | | | |
| - main exporters[2] | 32.6 | 49.3 | 54.9 | 50.6 | 44.8 | 38.0 |
| - others | 100.1 | 111.8 | 134.4 | 133.0 | 139.1 | 125.3 |
| **Coarse grains** | **164.6** | **199.4** | **193.4** | **169.4** | **176.3** | **161.4** |
| held by: | | | | | | |
| - main exporters[2] | 71.8 | 84.8 | 85.7 | 61.9 | 59.0 | 44.3 |
| - others | 92.8 | 114.6 | 107.7 | 107.5 | 117.3 | 117.1 |
| **Rice (milled basis)** | **114.1** | **129.3** | **135.8** | **143.7** | **159.3** | **169.8** |
| held by: | | | | | | |
| - main exporters[2] | 28.6 | 36.1 | 33.4 | 34.0 | 42.0 | 44.6 |
| - others | 85.5 | 93.2 | 102.4 | 109.7 | 117.3 | 125.2 |
| **Developed countries** | **126.4** | **176.0** | **189.0** | **151.2** | **150.5** | **113.4** |
| Australia | 5.5 | 6.2 | 6.8 | 8.8 | 8.2 | 4.7 |
| Canada | 8.5 | 13.0 | 13.6 | 10.8 | 9.3 | 9.0 |
| European Union | 30.3 | 46.9 | 44.0 | 32.5 | 33.4 | 27.4 |
| Japan | 4.8 | 4.6 | 4.8 | 4.8 | 5.0 | 4.8 |
| Russian Federation | 5.2 | 17.7 | 20.4 | 16.6 | 12.8 | 6.5 |
| South Africa | 1.8 | 2.7 | 3.6 | 4.5 | 3.2 | 2.4 |
| Ukraine | 4.9 | 8.0 | 6.7 | 5.2 | 11.4 | 5.8 |
| United States | 54.3 | 65.9 | 75.9 | 57.3 | 49.3 | 39.7 |
| **Developing countries** | **285.0** | **313.8** | **329.5** | **345.5** | **369.0** | **381.2** |
| **Asia** | **238.5** | **259.6** | **274.8** | **285.1** | **309.7** | **323.3** |
| China | 145.1 | 158.5 | 168.0 | 171.8 | 180.3 | 189.7 |
| India | 31.7 | 37.5 | 33.7 | 37.0 | 44.9 | 46.3 |
| Indonesia | 5.4 | 6.0 | 7.2 | 8.8 | 11.0 | 11.9 |
| Iran (Islamic Republic of) | 3.2 | 3.6 | 5.8 | 6.0 | 5.0 | 7.2 |
| Korea, Republic of | 2.9 | 2.8 | 3.8 | 4.0 | 4.4 | 3.7 |
| Pakistan | 3.2 | 3.6 | 4.2 | 2.2 | 2.9 | 2.6 |
| Philippines | 3.2 | 4.2 | 4.8 | 3.9 | 3.5 | 3.1 |
| Syrian Arab Republic | 4.0 | 2.9 | 3.6 | 2.4 | 1.7 | 1.5 |
| Turkey | 5.2 | 4.1 | 4.2 | 4.2 | 5.2 | 4.3 |
| **Africa** | **23.9** | **25.3** | **29.8** | **34.4** | **34.8** | **32.9** |
| Algeria | 3.4 | 2.7 | 3.6 | 3.9 | 3.8 | 3.5 |
| Egypt | 3.3 | 5.6 | 6.9 | 6.6 | 8.8 | 8.5 |
| Ethiopia | 0.7 | 0.8 | 1.5 | 1.6 | 2.2 | 2.1 |
| Morocco | 1.9 | 1.3 | 2.9 | 3.4 | 3.6 | 3.2 |
| Nigeria | 1.2 | 1.3 | 1.2 | 1.4 | 1.2 | 1.2 |
| Tunisia | 1.9 | 1.5 | 1.5 | 1.0 | 1.1 | 1.0 |
| **Central America** | **5.9** | **5.9** | **4.4** | **5.5** | **3.9** | **4.5** |
| Mexico | 3.7 | 4.1 | 2.7 | 3.6 | 2.1 | 2.7 |
| **South America** | **16.5** | **22.7** | **20.1** | **20.1** | **20.2** | **20.1** |
| Argentina | 7.3 | 3.7 | 2.2 | 5.3 | 5.4 | 3.1 |
| Brazil | 2.3 | 10.9 | 10.3 | 6.7 | 6.3 | 8.5 |

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

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

[2] Major Wheat Exporters are Argentina, Australia, Canada, the EU, Kazakhstan, Russian Fed., Ukraine and the United States; Major Coarse Grain Exporters are Argentina, Australia, Brazil, Canada, the EU, Russian Fed., Ukraine and the United States; Major Rice Exporters are India, Pakistan, Thailand, the United States, and Viet Nam.

## Table A3. Selected international prices of wheat and coarse grains

*(USD/tonne)*

| | Wheat | | | Maize | | Sorghum |
|---|---|---|---|---|---|---|
| | US No.2 Hard Red Winter Ord. Prot.[1] | US Soft Red Winter No.2 [2] | Argentina Trigo Pan[3] | US No.2 Yellow[2] | Argentina[3] | US No.2 Yellow[2] |
| **Annual (July/June)** | | | | | | |
| 2003/04 | 161 | 149 | 154 | 115 | 109 | 118 |
| 2004/05 | 154 | 138 | 123 | 97 | 90 | 99 |
| 2005/06 | 175 | 138 | 138 | 104 | 101 | 108 |
| 2006/07 | 212 | 176 | 188 | 150 | 145 | 155 |
| 2007/08 | 361 | 311 | 318 | 200 | 192 | 206 |
| 2008/09 | 270 | 201 | 234 | 188 | 180 | 170 |
| 2009/10 | 209 | 185 | 224 | 160 | 168 | 165 |
| 2010/11 | 316 | 289 | 311 | 254 | 260 | 248 |
| 2011/12 | 300 | 256 | 264 | 281 | 269 | 264 |
| **Monthly** | | | | | | |
| 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 | 333 | 282 | 341 | 308 | 306 | 285 |
| 2011 - July | 307 | 264 | 310 | 304 | 300 | 279 |
| 2011 - August | 336 | 280 | 292 | 313 | 312 | 304 |
| 2011 - September | 329 | 270 | 300 | 300 | 294 | 285 |
| 2011 - October | 301 | 255 | 260 | 275 | 276 | 265 |
| 2011 - November | 299 | 256 | 239 | 275 | 271 | 275 |
| 2011 - December | 290 | 246 | 224 | 259 | 242 | 261 |
| 2012 - January | 298 | 258 | 249 | 275 | 258 | 271 |
| 2012 - February | 297 | 262 | 263 | 279 | 267 | 268 |
| 2012 - March | 294 | 259 | 260 | 280 | 270 | 266 |
| 2012 - April | 279 | 255 | 252 | 273 | 256 | 242 |
| 2012 - May | 279 | 252 | 251 | 269 | 246 | 219 |
| 2012 - June | 288 | 250 | 263 | 268 | 238 | 234 |
| 2012 - July | 352 | 318 | 314 | 330 | 285 | 293 |
| 2012 - August | 362 | 332 | 335 | 328 | 294 | 296 |
| 2012 - September | 371 | 341 | 336 | 323 | 278 | 286 |
| 2012 - October | 373 | 339 | 332 | 320 | 274 | 290 |
| 2012 - November | 373 | 346 | 345 | 324 | 294 | 289 |

Sources: International Grains Council and USDA.

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

[2] Delivered United States Gulf.

[3] Up River f.o.b.

## Table A4a. Cereal import requirements of Low-Income Food-Deficit Countries[1], 2011/12 or 2012 estimates

*(thousand tonnes)*

| | | 2010/11 or 2011 Actual imports | | | 2011/12 or 2012 Import position[2] | | | |
|---|---|---|---|---|---|---|---|---|
| | Marketing year | Commercial purchases | Food aid | Total commercial and aid | Total import requirements *(excl. re-exports)* | Total commercial and aid | Food aid allocated, committed or shipped | Commercial purchases |
| **AFRICA** | | **40 348.0** | **1 711.3** | **42 059.3** | **46 458.0** | **36 368.3** | **1 986.7** | **34 381.6** |
| **North Africa** | | **16 511.0** | **0.0** | **16 511.0** | **18 871.0** | **18 871.0** | **0.0** | **18 871.0** |
| Egypt | July/June | 16 511.0 | 0.0 | 16 511.0 | 18 871.0 | 18 871.0 | 0.0 | 18 871.0 |
| **Eastern Africa** | | **6 877.6** | **1 015.3** | **7 892.9** | **8 431.3** | **6 253.3** | **1 215.4** | **5 037.9** |
| Burundi | Jan./Dec. | 104.6 | 28.5 | 133.1 | 135.0 | 20.1 | 16.3 | 3.8 |
| Comoros | Jan./Dec. | 54.1 | 0.0 | 54.1 | 57.0 | 32.2 | 0.0 | 32.2 |
| Djibouti | Jan./Dec. | 106.2 | 9.0 | 115.2 | 92.5 | 165.6 | 14.0 | 151.6 |
| Eritrea | Jan./Dec. | 361.0 | 6.0 | 367.0 | 383.0 | 0.0 | 0.0 | 0.0 |
| Ethiopia | Jan./Dec. | 515.0 | 534.1 | 1 049.1 | 1 123.7 | 733.2 | 470.3 | 262.9 |
| Kenya | Oct./Sept. | 1 699.7 | 125.2 | 1 824.9 | 1 993.9 | 1 993.9 | 195.0 | 1 798.9 |
| Rwanda | Jan./Dec. | 209.0 | 8.1 | 217.1 | 77.0 | 8.9 | 1.7 | 7.2 |
| Somalia | Aug./July | 420.4 | 28.3 | 448.7 | 505.0 | 505.0 | 255.0 | 250.0 |
| Sudan[3] | Nov./Oct. | 1 874.9 | 208.7 | 2 083.6 | 2 840.0 | 1 919.1 | 226.6 | 1 692.5 |
| Uganda | Jan./Dec. | 367.9 | 34.5 | 402.4 | 451.2 | 102.3 | 27.0 | 75.3 |
| United Rep. of Tanzania | June/May | 1 164.8 | 32.9 | 1 197.7 | 773.0 | 773.0 | 9.5 | 763.5 |
| **Southern Africa** | | **1 532.3** | **225.3** | **1 757.6** | **2 504.0** | **2 504.0** | **230.0** | **2 274.0** |
| Lesotho | April/March | 208.5 | 0.5 | 209.0 | 249.0 | 249.0 | 5.0 | 244.0 |
| Madagascar | April/March | 166.8 | 19.9 | 186.7 | 340.0 | 340.0 | 25.0 | 315.0 |
| Malawi | April/March | 82.2 | 24.4 | 106.6 | 164.1 | 164.1 | 29.0 | 135.1 |
| Mozambique | April/March | 721.6 | 137.2 | 858.8 | 1 065.9 | 1 065.9 | 115.0 | 950.9 |
| Zambia | May/April | 28.9 | 2.0 | 30.9 | 47.0 | 47.0 | 1.0 | 46.0 |
| Zimbabwe | April/March | 324.3 | 41.3 | 365.6 | 638.0 | 638.0 | 55.0 | 583.0 |
| **Western Africa** | | **13 509.4** | **355.4** | **13 864.8** | **14 669.7** | **7 634.7** | **415.5** | **7 219.2** |
| ***Coastal Countries*** | | ***10 619.5*** | ***122.4*** | ***10 741.9*** | ***11 074.5*** | ***5 784.9*** | ***81.1*** | ***5 703.8*** |
| Benin | Jan./Dec. | 438.8 | 17.2 | 456.0 | 397.0 | 380.3 | 6.6 | 373.7 |
| Côte d'Ivoire | Jan./Dec. | 1 505.0 | 15.0 | 1 520.0 | 1 635.0 | 1 059.4 | 9.6 | 1 049.8 |
| Ghana | Jan./Dec. | 893.2 | 25.0 | 918.2 | 950.0 | 623.7 | 27.4 | 596.3 |
| Guinea | Jan./Dec. | 517.0 | 30.0 | 547.0 | 547.0 | 85.2 | 1.8 | 83.4 |
| Liberia | Jan./Dec. | 350.0 | 15.7 | 365.7 | 381.0 | 82.4 | 23.1 | 59.3 |
| Nigeria | Jan./Dec. | 6 520.0 | 0.0 | 6 520.0 | 6 820.0 | 3 372.0 | 0.0 | 3 372.0 |
| Sierra Leone | Jan./Dec. | 150.0 | 19.0 | 169.0 | 119.0 | 56.2 | 12.6 | 43.6 |
| Togo | Jan./Dec. | 245.5 | 0.5 | 246.0 | 225.5 | 125.7 | 0.0 | 125.7 |
| ***Sahelian Countries*** | | ***2 889.9*** | ***233.0*** | ***3 122.9*** | ***3 595.2*** | ***1 849.8*** | ***334.4*** | ***1 515.4*** |
| Burkina Faso | Nov./Oct. | 350.0 | 10.0 | 360.0 | 395.2 | 76.6 | 30.2 | 46.4 |
| Chad | Nov./Oct. | 113.0 | 95.5 | 208.5 | 193.0 | 132.4 | 57.8 | 74.6 |
| Gambia | Nov./Oct. | 165.0 | 0.0 | 165.0 | 195.0 | 51.1 | 25.5 | 25.6 |
| Guinea-Bissau | Nov./Oct. | 142.0 | 7.0 | 149.0 | 154.3 | 29.7 | 2.5 | 27.2 |
| Mali | Nov./Oct. | 119.2 | 2.6 | 121.8 | 316.2 | 162.7 | 37.1 | 125.6 |
| Mauritania | Nov./Oct. | 471.0 | 43.0 | 514.0 | 504.0 | 241.7 | 37.2 | 204.5 |
| Niger | Nov./Oct. | 323.8 | 53.9 | 377.7 | 400.0 | 134.4 | 101.6 | 32.8 |
| Senegal | Nov./Oct. | 1 205.9 | 21.0 | 1 226.9 | 1 437.5 | 1 021.2 | 42.5 | 978.7 |
| **Central Africa** | | **1 917.7** | **115.3** | **2 033.0** | **1 982.0** | **1 105.3** | **125.8** | **979.5** |
| Cameroon | Jan./Dec. | 889.0 | 0.0 | 889.0 | 845.0 | 480.7 | 5.7 | 475.0 |
| Cent.Afr.Rep. | Jan./Dec. | 53.0 | 10.0 | 63.0 | 63.0 | 42.7 | 5.5 | 37.2 |
| Congo | Jan./Dec. | 342.7 | 5.3 | 348.0 | 327.0 | 200.3 | 5.8 | 194.5 |
| Dem.Rep.of the Congo | Jan./Dec. | 615.0 | 100.0 | 715.0 | 730.0 | 372.0 | 108.1 | 263.9 |
| Sao Tome and Principe | Jan./Dec. | 18.0 | 0.0 | 18.0 | 17.0 | 9.6 | 0.7 | 8.9 |

## Table A4b. Cereal import requirements of Low-Income Food-Deficit Countries[1], 2011/12 or 2012 estimates

*(thousand tonnes)*

| | | 2010/11 or 2011 Actual imports | | | 2011/12 or 2012 Import position[2] | | | |
|---|---|---|---|---|---|---|---|---|
| | Marketing year | Commercial purchases | Food aid | Total commercial and aid | Total import requirements *(excl. re-exports)* | Total commercial and aid | Food aid allocated, committed or shipped | Commercial purchases |
| **ASIA** | | **37 236.2** | **603.4** | **37 839.6** | **42 023.7** | **40 050.3** | **973.7** | **39 076.6** |
| **Cis in Asia** | | **3 802.0** | **24.5** | **3 826.5** | **5 587.3** | **5 587.3** | **0.0** | **5 587.3** |
| Georgia [4] | July/June | 692.2 | 0.4 | 692.6 | 847.0 | 847.0 | 0.0 | 847.0 |
| Kyrgyzstan | July/June | 374.0 | 24.1 | 398.1 | 648.3 | 648.3 | 0.0 | 648.3 |
| Tajikistan | July/June | 961.8 | 0.0 | 961.8 | 1 168.0 | 1 168.0 | 0.0 | 1 168.0 |
| Uzbekistan | July/June | 1 774.0 | 0.0 | 1 774.0 | 2 924.0 | 2 924.0 | 0.0 | 2 924.0 |
| **Far East** | | **20 916.6** | **428.1** | **21 344.7** | **21 906.0** | **21 233.5** | **674.7** | **20 558.8** |
| Bangladesh | July/June | 5 307.6 | 168.0 | 5 475.6 | 2 202.6 | 2 202.6 | 161.0 | 2 041.6 |
| Bhutan | July/June | 66.3 | 0.0 | 66.3 | 62.2 | 62.2 | 0.0 | 62.2 |
| Cambodia | Jan./Dec. | 35.6 | 6.4 | 42.0 | 41.4 | 16.6 | 2.8 | 13.8 |
| D.P.R. of Korea | Nov./Oct. | 390.5 | 144.5 | 535.0 | 711.0 | 711.0 | 408.0 | 303.0 |
| India | April/March | 306.0 | 0.0 | 306.0 | 103.9 | 103.9 | 0.0 | 103.9 |
| Indonesia | April/March | 8 062.9 | 2.0 | 8 064.9 | 11 661.2 | 11 661.2 | 3.0 | 11 658.2 |
| Lao, P.D.R. | Jan./Dec. | 35.5 | 8.2 | 43.7 | 44.9 | 10.2 | 1.6 | 8.6 |
| Mongolia | Oct./Sept. | 138.0 | 5.0 | 143.0 | 125.3 | 125.3 | 16.2 | 109.1 |
| Nepal | July/June | 427.0 | 10.0 | 437.0 | 281.8 | 281.8 | 24.5 | 257.3 |
| Philippines | July/June | 4 683.7 | 50.0 | 4 733.7 | 5 400.4 | 5 400.4 | 43.4 | 5 357.0 |
| Sri Lanka | Jan./Dec. | 1 414.3 | 30.0 | 1 444.3 | 1 191.8 | 578.8 | 12.2 | 566.6 |
| Timor-Leste | July/June | 49.2 | 4.0 | 53.2 | 79.5 | 79.5 | 2.0 | 77.5 |
| **Near East** | | **12 517.6** | **150.8** | **12 668.4** | **14 530.4** | **13 229.5** | **299.0** | **12 930.5** |
| Afghanistan | July/June | 1 010.4 | 96.9 | 1 107.3 | 2 250.4 | 2 250.4 | 212.0 | 2 038.4 |
| Iraq | July/June | 4 659.9 | 0.1 | 4 660.0 | 5 310.0 | 5 310.0 | 15.0 | 5 295.0 |
| Syrian Arab Republic | July/June | 3 737.3 | 3.8 | 3 741.1 | 3 510.0 | 3 510.0 | 22.0 | 3 488.0 |
| Yemen | Jan./Dec. | 3 110.0 | 50.0 | 3 160.0 | 3 460.0 | 2 159.1 | 50.0 | 2 109.1 |
| **CENTRAL AMERICA** | | **1 723.0** | **112.0** | **1 835.0** | **1 780.5** | **1 780.5** | **130.1** | **1 650.4** |
| Haiti | July/June | 525.0 | 108.0 | 633.0 | 655.5 | 655.5 | 110.5 | 545.0 |
| Honduras | July/June | 794.0 | 1.0 | 795.0 | 795.0 | 795.0 | 16.0 | 779.0 |
| Nicaragua | July/June | 404.0 | 3.0 | 407.0 | 330.0 | 330.0 | 3.6 | 326.4 |
| **OCEANIA** | | **433.7** | **0.0** | **433.7** | **441.9** | **149.9** | **0.0** | **149.9** |
| Kiribati | Jan./Dec. | 8.7 | 0.0 | 8.7 | 8.7 | 2.8 | 0.0 | 2.8 |
| Papua New Guinea | Jan./Dec. | 382.2 | 0.0 | 382.2 | 390.2 | 140.6 | 0.0 | 140.6 |
| Solomon Islands | Jan./Dec. | 42.8 | 0.0 | 42.8 | 43.0 | 6.5 | 0.0 | 6.5 |
| **EUROPE** | | **81.2** | **0.0** | **81.2** | **111.4** | **111.4** | **0.0** | **111.4** |
| Republic of Moldova | July/June | 81.2 | 0.0 | 81.2 | 111.4 | 111.4 | 0.0 | 111.4 |
| **TOTAL** | | **79 822.1** | **2 426.7** | **82 248.8** | **90 815.5** | **78 460.4** | **3 090.5** | **75 369.9** |

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 1 905 in 2009); for full details see http://www.fao.org/countryprofiles/lifdc.asp.

[2] Estimates based on information as of early November 2012.

[3] Including South Sudan.

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

## Table A5. Cereal import requirements of Low-Income Food-Deficit Countries[1], 2012/13 estimates

*(thousand tonnes)*

| | | 2011/12 | | | 2012/13 | | | |
|---|---|---|---|---|---|---|---|---|
| | | Actual imports | | | Import position[2] | | | |
| | Marketing year | Commercial purchases | Food aid | Total commercial and aid | Total import requirements (excl. re-exports) | Total commercial and aid | Food aid allocated, committed or shipped | Commercial purchases |
| **AFRICA** | | **23 957.4** | **689.5** | **24 646.9** | **22 656.0** | **1 709.0** | **109.9** | **1 599.1** |
| **Northern Africa** | | **18 871.0** | **0.0** | **18 871.0** | **16 571.0** | **1 072.6** | **0.0** | **1 072.6** |
| Egypt | July/June | 18 871.0 | 0.0 | 18 871.0 | 16 571.0 | 1 072.6 | 0.0 | 1 072.6 |
| **Eastern Africa** | | **2 812.4** | **459.5** | **3 271.9** | **3 670.0** | **181.6** | **7.0** | **174.6** |
| Kenya | Oct./Sept. | 1 798.9 | 195.0 | 1 993.9 | 2 250.0 | 0.4 | 0.4 | 0.0 |
| Somalia | Aug./July | 250.0 | 255.0 | 505.0 | 550.0 | 3.4 | 3.4 | 0.0 |
| United Rep. of Tanzania | June/May | 763.5 | 9.5 | 773.0 | 870.0 | 177.8 | 3.2 | 174.6 |
| **Southern Africa** | | **2 274.0** | **230.0** | **2 504.0** | **2 415.0** | **454.8** | **102.9** | **351.9** |
| Lesotho | April/March | 244.0 | 5.0 | 249.0 | 263.0 | 149.1 | 0.0 | 149.1 |
| Madagascar | April/March | 315.0 | 25.0 | 340.0 | 443.0 | 22.6 | 15.6 | 7.0 |
| Malawi | April/March | 135.1 | 29.0 | 164.1 | 115.0 | 22.1 | 22.1 | 0.0 |
| Mozambique | April/March | 950.9 | 115.0 | 1 065.9 | 960.0 | 214.2 | 61.2 | 153.0 |
| Zambia | May/April | 46.0 | 1.0 | 47.0 | 29.0 | 2.9 | 0.0 | 2.9 |
| Zimbabwe | April/March | 583.0 | 55.0 | 638.0 | 605.0 | 43.9 | 4.0 | 39.9 |
| **ASIA** | | **36 075.5** | **499.1** | **36 574.6** | **33 599.6** | **4 645.1** | **114.2** | **4 530.9** |
| **CIS in Asia** | | **5 587.3** | **0.0** | **5 587.3** | **4 200.3** | **1 235.9** | **0.0** | **1 235.9** |
| Georgia [3] | July/June | 847.0 | 0.0 | 847.0 | 827.0 | 378.9 | 0.0 | 378.9 |
| Kyrgyzstan | July/June | 648.3 | 0.0 | 648.3 | 465.3 | 127.8 | 0.0 | 127.8 |
| Tajikistan | July/June | 1 168.0 | 0.0 | 1 168.0 | 1 213.0 | 317.8 | 0.0 | 317.8 |
| Uzbekistan | July/June | 2 924.0 | 0.0 | 2 924.0 | 1 695.0 | 411.4 | 0.0 | 411.4 |
| **Far East** | | **19 666.8** | **250.1** | **19 916.9** | **17 567.3** | **2 824.4** | **64.2** | **2 760.2** |
| Bangladesh | July/June | 2 041.6 | 161.0 | 2 202.6 | 3 200.0 | 64.2 | 64.2 | 0.0 |
| Bhutan | July/June | 62.2 | 0.0 | 62.2 | 64.2 | 0.0 | 0.0 | 0.0 |
| India | April/March | 103.9 | 0.0 | 103.9 | 103.9 | 4.2 | 0.0 | 4.2 |
| Indonesia | April/March | 11 658.2 | 3.0 | 11 661.2 | 9 404.1 | 2 485.4 | 0.0 | 2 485.4 |
| Mongolia | Oct./Sept. | 109.1 | 16.2 | 125.3 | 120.8 | 0.0 | 0.0 | 0.0 |
| Nepal | July/June | 257.3 | 24.5 | 281.8 | 356.8 | 0.0 | 0.0 | 0.0 |
| Philippines | July/June | 5 357.0 | 43.4 | 5 400.4 | 4 287.0 | 270.6 | 0.0 | 270.6 |
| Timor-Leste | July/June | 77.5 | 2.0 | 79.5 | 30.5 | 0.0 | 0.0 | 0.0 |
| **Near East** | | **10 821.4** | **249.0** | **11 070.4** | **11 832.0** | **584.8** | **50.0** | **534.8** |
| Afghanistan | July/June | 2 038.4 | 212.0 | 2 250.4 | 1 262.0 | 109.0 | 35.6 | 73.4 |
| Iraq | July/June | 5 295.0 | 15.0 | 5 310.0 | 5 360.0 | 340.3 | 0.0 | 340.3 |
| Syrian Arab Republic | July/June | 3 488.0 | 22.0 | 3 510.0 | 5 210.0 | 135.5 | 14.4 | 121.1 |
| **CENTRAL AMERICA** | | **1 650.4** | **130.1** | **1 780.5** | **1 775.1** | **55.5** | **4.8** | **50.7** |
| Haiti | July/June | 545.0 | 110.5 | 655.5 | 660.1 | 5.2 | 4.8 | 0.4 |
| Honduras | July/June | 779.0 | 16.0 | 795.0 | 795.0 | 41.4 | 0.0 | 41.4 |
| Nicaragua | July/June | 326.4 | 3.6 | 330.0 | 320.0 | 8.9 | 0.0 | 8.9 |
| **EUROPE** | | **111.4** | **0.0** | **111.4** | **169.0** | **25.6** | **0.0** | **25.6** |
| Republic of Moldova | July/June | 111.4 | 0.0 | 111.4 | 169.0 | 25.6 | 0.0 | 25.6 |
| **TOTAL** | | **61 794.7** | **1 318.7** | **63 113.4** | **58 199.7** | **6 435.2** | **228.9** | **6 206.3** |

Source: FAO

[1] Includes food deficit countries with per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. USD 1 905 in 2009), which is in accordance with the guidelines and criteria agreed to by the CFA should be given priority in the allocation of food aid.

[2] Estimates based on information as of early November 2012.

[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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***Crop Prospects and Food Situation*** is published by the Trade and Markets Division of FAO under the Global Information and Early Warning System (GIEWS). It is published four times a year and focuses on developments affecting the food situation of developing countries and the Low-Income Food-Deficit Countries (LIFDCs) in particular. The report provides a review of the food situation by geographic region, a section dedicated to the LIFDCs and a list of countries requiring external assistance for food. It also includes a global cereal supply and demand overview to complement the biannual analysis in the ***Food Outlook*** publication. ***Crop Prospects and Food Situation*** is available in English, French, Spanish and Chinese in print as well as electronic format.

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