



Crop Prospects and Food Situation

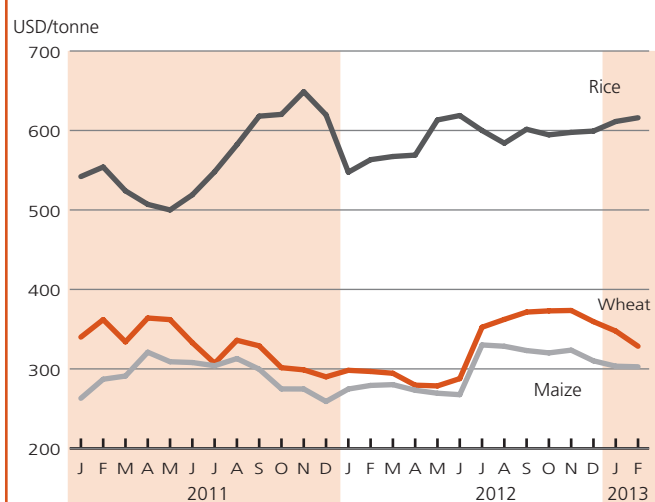
HIGHLIGHTS

- **FAO's first forecast for world wheat production in 2013 stands at 690 million tonnes, about 28 million tonnes up from 2012 and the second largest crop on record.** The increase is expected mostly in Europe, driven by an expansion in area in response to high prices, and in some countries due to an expected recovery in yields from last year's below-average levels.
- **The international cereal prices in recent months have followed mixed trends with rice prices rising and wheat declining, while maize prices remaining generally steady.**
- **Aggregate cereal import requirements of LIFDCs for 2012/13 are expected to decrease** following generally bumper local harvests in 2012 and an overall favourable outlook in 2013.
- **In the Near East, food security in the Syrian Arab Republic has further deteriorated with 4 million people (about 17 percent of the total pre-crisis population) now estimated to be food insecure.**
- **In Central Africa, the recent escalation of civil conflict in the Central African Republic has increased population displacement and resulted in disruption of agricultural and marketing activities.** A large number of people are estimated to be in need of food assistance.
- **In Western Africa, the overall food security situation has improved significantly in the Sahel following an above-average 2012 cereal harvest.** However, a large number of people are still affected by insecurity and the lingering effects of last year's food crisis.
- **In Eastern Africa, food security has generally improved as new harvests have replenished household stocks and supplied local markets.** However, concerns remain in some areas, mainly due to conflict, floods or past poor production.
- **In Southern Africa, prospects for the 2013 cereal crops are generally satisfactory.** However, flood damage, particularly in southeastern areas, and an army worm outbreak in several countries are expected to lower harvest in affected areas.
- **In the Far East, prospects for 2013 wheat crop are generally favourable** with the output expected to reach record levels in **China** and **Pakistan**. However, a slight decline is expected in **India**.
- **In South America, prospects for the 2013 maize crop currently being harvested are generally favourable in the main producing countries – Argentina and Brazil.**
- **FAO's latest estimates indicate that 36 countries around the world are in need of external assistance for food as a result of crop failures, conflict or insecurity, natural disasters, and high domestic food prices.**

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Selected international cereal prices



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

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.

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 floods affecting about 60 000 people.

Central Africa Republic

Renewed civil conflict caused the displacement of 173 000 individuals and restricted access to agricultural land and food.

Congo

Widespread floods had already occurred in August/September affecting about 54 000 people. In November and December, persistent torrential rains caused extensive flooding in the capital, Brazzaville and in Pointe-Noire, the two largest cities in the country, causing the displacement of further 13 500 persons.

Côte d'Ivoire

Conflict-related damage to agriculture in recent years and the lack of support services mainly in the northern regions. The 2011 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 November 2012.

Democratic Republic of the Congo

Escalation of conflict has displaced additional people increasing the total number of IDPs to an estimated 2.7 million. Agricultural activities were hindered, especially in eastern parts, while high food prices continue to impede food access. Nationally, a total of 6.4 million people are estimated to be in food and livelihood crisis.

Ethiopia

Although the food security conditions are improving with the commercialization of the favourable 2012 *meher* season harvest, some 3.7 million people are still estimated to be in need of humanitarian assistance.

Kenya

The number of people in need of humanitarian assistance is still estimated at 2.1 million. However, food security conditions are expected to deteriorate in some southeast and coastal zones due to below average 2012/13 short rains harvest.

Madagascar

Stable national rice prices are benefiting food security conditions, however, the passing of Cyclone Felling in January 2013 led to some flood damages and market disruptions. Further flooding remains a possibility until the end of the cyclone season in April 2013. Overall, 35 percent of households are estimated to be food insecure.

Mozambique

Heavy rains and flooding in January and February affected about 213 000 people, causing damage to cropped fields and loss of food stocks. Maize prices continue to climb across the country, negatively impacting on households' food access.

Senegal

Production shortfalls and high food prices in 2012 led to a deterioration of the food security situation in several parts of the country. Although production recovered significantly last year, assistance is still needed in parts.

Somalia

The number of people in need of emergency assistance has been halved in the past six months to 1.05 million as a consequence of continued humanitarian interventions and improved food supply due to the ongoing 2012/13 *deyr*.

South Sudan

About 1 million people are estimated to be severely food insecure, mainly in pocket areas affected by civil insecurity, trade restrictions and floods.

Sudan

About 3.5 million people are estimated to be in need of humanitarian assistance, mainly in conflict-affected areas.

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 4 million. Although, some international food assistance is provided, the Syrian refugees are putting strain on other countries in 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 reduced remittances from the Islam Republic of Iran.

Kyrgyzstan

A lower cereal production makes the country dependant on the import of staple foods and vulnerable to global food price rises, which adversely affect the purchasing power of the poorest families. Socio-political tensions still exist in Jalalabad, Osh and Batken Oblasts.

LATIN AMERICA AND THE CARIBBEAN (2 country)

Severe localized food insecurity

Cuba

Crop losses and agricultural damage due to Hurricane Sandy in October 2012. About 563 000 most vulnerable people affected by the hurricane have been targeted by WFP as beneficiaries of emergency food assistance.



Haiti

Severe damage to agriculture, housing and infrastructure caused by Tropical Storm Isaac and Hurricane Sandy in 2012.



Countries with unfavourable prospects for current crops²

AFRICA (1 country)

Namibia

Below normal rains during the 2012/13 cropping season, with dry conditions intensifying at the start of 2013, except in the far northeastern areas.



Key - Changes since last report (December 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

EARLY PROSPECTS FOR 2013 CEREAL CROPS

Overall favourable outlook for global 2013 wheat production

At this stage of the season, with the bulk of the coarse grains and paddy crops yet to be planted in the coming months it is still too early for even a preliminary forecast of global cereal output in 2013. For wheat, however, in the northern hemisphere, which accounts for the bulk of the global production, winter crops are already developing or are soon to come out of dormancy, while spring planting is underway in some countries and a preliminary picture of global prospects is already available.

FAO's first forecast for world wheat production in 2013 stands at 690 million tonnes, representing an increase of 4.3 percent from the 2012 harvest and, the second largest crop on record after that of 2011. The increase is expected mostly in Europe, driven by an expansion in area in response to high prices, and a recovery in yields from below-average levels in some parts last year, notably the Russian Federation. Aggregate plantings in the EU are estimated to be 3 percent higher and weather conditions have been generally favourable so far. Elsewhere in Europe, prospects are satisfactory in the Russian Federation: although winter plantings have decreased, this is expected to be more than offset by an increase in the spring wheat area, and assuming yields recover from last year's drought-reduced levels, output is forecast to increase sharply. Also in Ukraine, a large recovery in wheat output is forecast as the winter wheat area recovered from last year's reduced level and winter conditions have been generally satisfactory.

In North America, the outlook in the United States is less favourable than among the other major wheat producing countries: although good precipitation in February has greatly improved the outlook in previously drought-affected winter wheat areas, it is likely too late for the stressed crops to make a full recovery. Thus, despite an estimated 1 percent increase in winter wheat plantings and the likelihood that spring plantings will at least match last year's level, if not expand slightly, aggregate wheat output is tentatively forecast to decrease by about 6 percent to 58 million tonnes, below the average of the past five years.

In Asia, prospects for the 2013 wheat crop, to be harvested from April, are mostly favourable in the main producing countries. In China, higher minimum purchase prices have encouraged farmers to maintain last year's good area and favourable weather conditions have benefited

crops and early official forecasts point to a record wheat output of some 121 million tonnes in 2013. Also in Pakistan, a record wheat output is forecast reflecting larger plantings and good yield prospects. In India, plantings are around last year's good level and another bumper crop is in prospect although forecast slightly below the 2012 record because of limited rainfall in some important producing areas.

In North Africa, early prospects for the 2013 wheat crops are good. Soil moisture was reported to be ample for planting last autumn and winter conditions have favoured crop development.

In the southern hemisphere, the major wheat crops will be sown later this year. In Australia, where planting starts from April, early prospects are uncertain: tight supplies and strong prices are expected to provide incentive to farmers to increase plantings, but soil moisture reserves have been severely depleted by the summer heat wave in some major producing areas and much more precipitation is needed to ensure satisfactory planting conditions.

Table 1. Wheat production: leading producers¹
(million tonnes)

| | Average 2010-12 | 2011 | 2012 estimate | 2013 forecast | Change: 2013 over 2012 (%) |
|--------------------------|--------------------|--------------|------------------|------------------|-------------------------------|
| European Union | 135.2 | 137.6 | 132.0 | 138.0 | 4.5 |
| China (Mainland) | 117.7 | 117.4 | 120.6 | 121.4 | 0.7 |
| India | 87.5 | 86.9 | 94.9 | 92.3 | -2.7 |
| United States of America | 58.8 | 54.4 | 61.8 | 58.0 | -6.1 |
| Russian Federation | 45.2 | 56.2 | 38.0 | 53.0 | 39.5 |
| Australia | 26.5 | 29.9 | 22.1 | 23.0 | 4.1 |
| Canada | 25.3 | 25.3 | 27.2 | 28.0 | 2.9 |
| Pakistan | 23.9 | 24.3 | 24.0 | 24.7 | 2.9 |
| Turkey | 20.5 | 21.8 | 20.1 | 20.5 | 2.0 |
| Ukraine | 18.3 | 22.3 | 15.8 | 19.5 | 23.4 |
| Kazakhstan | 14.3 | 22.7 | 10.3 | 15.2 | 47.6 |
| Iran Islamic Rep. of | 14.1 | 13.5 | 13.8 | 13.5 | -2.2 |
| Argentina | 13.4 | 14.1 | 10.1 | 12.5 | 23.8 |
| Egypt | 8.1 | 8.4 | 8.7 | 8.5 | -2.3 |
| Uzbekistan | 6.6 | 6.3 | 6.7 | 6.5 | -3.0 |
| World | 672.5 | 700.2 | 661.8 | 690.0 | 4.3 |

¹ Countries ranked according to average production 2010-12.

Favourable outlook for southern hemisphere 2013 coarse grains crops

In South America, the first 2013 maize crops are already developing or, in some case, about to be harvested, and prospects are generally favourable. In Brazil, following favourable precipitation, official forecasts point to a 9 percent increase in production compared to the same season's output last year. Planting progress for the second season crop is also satisfactory under the good moisture conditions and the area is expected to increase from last year's level. In Argentina, official estimates indicate that maize plantings have fallen some 8 percent from the record high of 2012. Nevertheless, at the estimated area, a recovery of yields after last year's drought-reduced level could see production rise to a record high of 25.5 million tonnes. However, a dry spell from early January through early February may impact negatively on yields of late planted crops if more rains don't arrive soon. In Southern Africa, the 2013 cereal crops have developed satisfactorily overall in the large producing areas and current indications point to improved yields over last year's average level, except in Namibia, where rains were below normal. In South Africa, the subregion's main producer, 2013 maize production is anticipated to reach near record levels, around 13 million tonnes, if favourable weather persists. However, an army worm outbreak and flooding is expected to depress production in localized areas of the subregion.

The 2013 paddy season starts under generally favourable conditions

Several countries located along and south of the equator have already started, or are about to start, collecting their first **2013** rice crops. In Asia, Indonesia is targeting a 5 percent

increase in production in the coming season, under the Government expansionary drive. This is despite delays in the planting of the main crop, due to drought, and subsequent flood-related damage. Although also incurring losses to its main crop due to floods, Sri Lanka is heading towards a 4 percent area-based increase in output in 2013. In Southern Africa, Mozambique and Madagascar are now bearing the effects of cyclones and tropical storms, which are being associated with heavy rains and floods. In the case of Madagascar, the excessive precipitation has helped overcome the moisture deficits resulting from below average rains in December and January. Although still subject to much uncertainty, the replenishment could help foster an increase in output, especially as the Government is supporting an expansion of plantings. Likewise, Mozambique has announced an official production target of 350 000 tonnes, which would break the 2012 record by 2 percent. In South America, Argentina, which will officially open the rice harvest on 8 March, has reported a 2 percent retrenchment in plantings. However, growing conditions have been more favourable this year, which may result in a rebounding of yields to near record levels. The season is also well advanced in Brazil, where officials are predicting production to rise by 3.7 percent to about 12 million tonnes, despite a small contraction in the area. Uruguay is also estimated to have planted 5 percent less this year, which could curb the final output. In Bolivia, excessive precipitation has also prompted a contraction of the area under rice. Prospects are more buoyant in Paraguay and Peru where producer organizations have announced an increase in rice cultivation. In Oceania, despite below average rainfall and high temperatures in December and January in New South Wales where much of the Australian rice is grown, production in

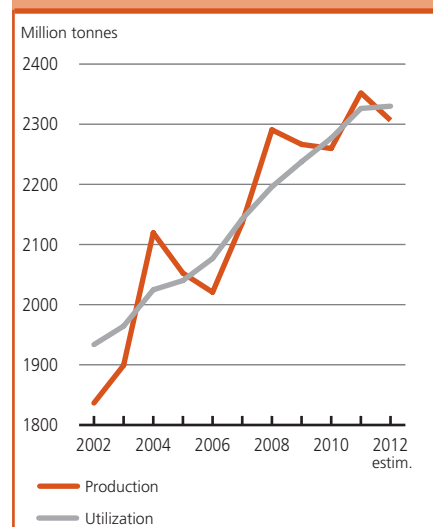
the country is expected to expand by 15 percent, to its highest level since 2002, thanks to the availability of abundant irrigation water in reservoirs.

2012/13 CEREAL SUPPLY AND DEMAND

World 2012 cereal production revised upward but remains below 2011

FAO's latest forecast for world cereal production in 2012 has been revised upward by 4 million tonnes since the February figure to 2 306 million tonnes (including rice in milled terms), but still about 2 percent down from the previous year's record. The latest revision largely reflects some upward adjustment for rice as the 2012 secondary crop harvests in some countries are still ongoing or have just been completed. At the current forecast of 489 million tonnes (milled terms), world rice production in 2012 would be 1 percent up from the previous year. The estimate of global wheat output in 2012 remains at 662 million tonnes, 5.5 percent down from 2011, while that for coarse grains also remains virtually unchanged at 1 156 million tonnes, 1 percent down from 2011.

Figure 1. World cereal production and utilization



Utilization up marginally, due to falling demand for ethanol production

The forecast for world cereal utilization in 2012/13 has been raised slightly (by about 3 million tonnes) since February to 2 330 million tonnes, reflecting small adjustments to the estimates for food and other uses. At the current forecast level, global cereal utilization would be barely 3.8 million tonnes greater than in 2011/12, sustained mainly by increases in food consumption, now predicted to expand by 14 million tonnes, or 1.3 percent. This rate is sufficient to keep per caput food availability stable at 152.8 kg per year for cereals as a whole, with a small decline in wheat to 66.9 kg offset by modest increases in rice and coarse grains to 57 kg and 28.9 kg, respectively. On the other hand, world utilization of cereals as feed is likely to be only marginally higher than in 2011/12, as a sharp reduction in wheat feed usage from the previous season's record level is expected to be fully made up by coarse grains.

The tightening of wheat supplies and resulting high prices since the middle of last year are behind the expected 2 percent contraction of total wheat utilization in 2012/13, to 683 million

tonnes. Much of this decline would be on account of an 8 percent reduction in feed utilization from the previous year's record, a drop that is expected in most countries except in the United States, where feed wheat use could double in 2012/13 and reach a record, mainly in substitution for maize. Total utilization of coarse grains is forecast to rise by 0.8 percent to 1 169.7 million tonnes. While world feed use is expected to rebound by 2.4 percent to a record 649 million tonnes, the anticipated 10 percent fall in the use of maize for production of fuel ethanol in the United States, which is forecast to fall to 114 million tonnes in 2012/13 from 127 million tonnes in 2011/12, is behind an overall 3.2 percent contraction in world usage of coarse grains other than food and feed. World rice consumption in 2012/13 is forecast at 477 million tonnes, 1.6 percent (7.4 million tonnes) higher

than the previous season, underpinned by a rise in human food consumption to 403 million tonnes, or 85 percent of the total utilization.

Inventories higher than was projected earlier but the stock-to-use ratio still falls

The forecast for world cereal stocks at the close of crop seasons ending in 2013 has been scaled up by about 4 million tonnes compared to February, mainly reflecting upward revisions in wheat inventories. At 499 million tonnes, the new estimate of cereal carryovers would still be 2.7 percent (14 million tonnes) lower than in the previous season, reflecting an anticipated drawdown in wheat and coarse grains, while rice inventories are expected to rise further. At the current forecast level, the world cereal stock-to-use ratio would reach 20.7 percent in 2012/13, down from

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

| | 2010/11 | 2011/12 estimate | 2012/13 forecast | Change: 2012/13 over 2011/12 (%) |
|---|----------------|------------------|------------------|----------------------------------|
| PRODUCTION¹ | | | | |
| World | 2 259.6 | 2 352.1 | 2 306.4 | -1.9 |
| Developing countries | 1 318.8 | 1 350.4 | 1 400.0 | 3.7 |
| Developed countries | 940.8 | 1 001.7 | 906.4 | -9.5 |
| TRADE² | | | | |
| World | 284.9 | 317.1 | 302.9 | -4.5 |
| Developing countries | 93.7 | 98.9 | 119.6 | 20.9 |
| Developed countries | 191.2 | 218.2 | 183.4 | -16.0 |
| UTILIZATION | | | | |
| World | 2 276.7 | 2 326.1 | 2 329.9 | 0.2 |
| Developing countries | 1 424.8 | 1 468.9 | 1 495.5 | 1.8 |
| Developed countries | 851.8 | 857.2 | 834.4 | -2.7 |
| Per caput cereal food use (kg per year) | 152.3 | 152.7 | 152.8 | 0.1 |
| STOCKS³ | | | | |
| World | 492.7 | 513.4 | 499.4 | -2.7 |
| Developing countries | 343.7 | 368.2 | 388.1 | 5.4 |
| Developed countries | 149.0 | 145.2 | 111.3 | -23.4 |
| WORLD STOCK-TO-USE RATIO% | 21.2 | 22.0 | 20.7 | -6.0 |

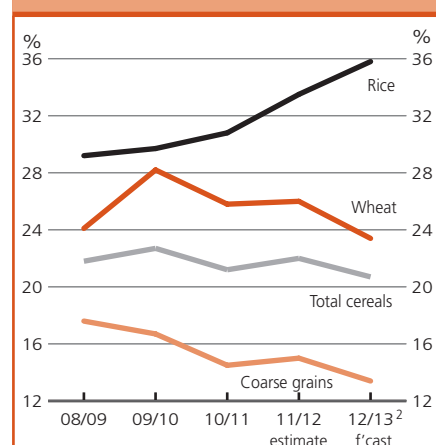
Note: Totals and percentage change computed from unrounded data.

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

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

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

Figure 2. Ratio of world cereal stocks to utilization¹



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.

22 percent in 2011/12. As much of the contraction of world cereal reserves stems from reductions in exporting countries, the ratio of major cereal exporters' closing stocks to their total disappearance (defined as domestic utilization plus exports) is estimated to slide from 17.9 percent in the previous season to 16.4 percent in 2012/13. World wheat inventories are anticipated to fall from the previous year by 9 percent (15 million tonnes) to 162.5 million tonnes, despite a 3.6 million tonnes increase from the forecast in February on higher than earlier projected stocks in the Russian Federation and Ukraine. Nonetheless, the contraction over the season would still be mainly on account of Kazakhstan, the Russian Federation and Ukraine, while lower ending stocks are also projected for Australia, the EU and the United States. The forecast for world coarse grains carryovers remains unchanged from the February level of 165 million tonnes. At this level, world inventories would have fallen by 6 percent (10 million tonnes) from their opening level, with the United States and the EU expected to draw down their reserves by almost 9 million and 4.3 million tonnes, respectively. By contrast, global rice inventories are expected to surge by 7.3 percent (11.7 million tonnes) to 172 million tonnes, sustained by a sharp accumulation in China but also in Thailand, where the Government pledging programme continues to divert supplies away from the market into public stockpiles.

Trade in 2012/13 contracts less than was anticipated earlier

World trade in cereals in 2012/13 is forecast to reach nearly 303 million tonnes, 5.4 million tonnes more than predicted in February, but 4.5 percent (14.2 million tonnes) less than the record registered in 2011/12. Compared to the previous season, more than half of the expected contraction would be on account of wheat trade (including wheat flour in wheat equivalent), which

is forecast at 139.5 million tonnes in 2012/13 (July/June), down 8 million tonnes from 2011/12. This is 3 million tonnes more than previously foreseen, with the revision reflecting higher prospects for exports by India and the EU and larger imports by the Russian Federation and Ukraine. The expected sharp retreat in wheat imports in 2012/13 reflects reduced purchases by several countries; namely, Afghanistan, Algeria, Egypt, Kenya, Saudi Arabia, Thailand, Turkey and Uzbekistan. On the exporter side, tight supplies are forecast to reduce shipments by the Russian Federation, Kazakhstan and Ukraine as well as Argentina, Australia and the EU. Against this backdrop, large wheat exports by India, currently forecast to reach 7.5 million tonnes, have helped in easing the market situation. World trade in coarse grains is now forecast to reach 126.5 million tonnes, some 2.5 million tonnes higher than was anticipated earlier but still as much as 5.5 million tonnes (4 percent) below the estimated trade volume in 2011/12. This month's upward revision is mostly on account of much higher maize imports by the EU, which could reach a five-year high of 9 million tonnes in 2012/13, up 3 million tonnes from the previous season due to lower production and reduced feed wheat supplies in domestic markets. The projected contraction in world trade in 2012/13 reflects anticipated reduced imports by a number of countries, including Brazil, Canada, Egypt, Indonesia, Saudi Arabia, South Africa and Venezuela, more than offsetting larger imports by the EU, Kenya, Ukraine and the United States. An emerging feature in 2012/13 has been the sharp decline in maize exports from the United States (by over 18 million tonnes to 24.5 million tonnes on July/June basis) because of the drought-reduced production in 2012. The decline should be largely compensated by a near three-fold increase in sales by Brazil, to a record 23 million tonnes.

World trade in rice in 2013 is forecast at 37 million tonnes, 2 percent below the record 37.8 million tonnes traded in 2011. The decline would mainly stem from lower shipments by India, which emerged as the world leading rice exporter in 2012, before Viet Nam and Thailand. In 2013, however, Thailand is foreseen to recover its primacy among exporters, provided that releasing supplies from government stocks could help restore the country's international competitiveness.

INTERNATIONAL PRICE ROUNDUP

International cereal prices in recent months have followed mixed trends with rice prices firming and wheat declining, while maize remaining generally steady

International prices of wheat weakened further in February, third month in a row, with the benchmark US wheat price (No.2 Hard Red Winter, f.o.b.) averaging USD 329 per tonne, a significant 6 percent decline from January although still 11 percent above its level in February 2012. Prices from other origins also moved down but only marginally or remained stable. The decrease in US wheat export prices reflects some improvements in prospects for the 2013 winter wheat crop, following significant precipitation last month in key growing areas affected by severe drought conditions. A stronger US dollar also put downward pressure on prices, while higher export demand prevented further declines.

Export prices of maize levelled in February, after decreasing in December and January. The benchmark US maize price (US No2, Yellow) averaged USD 303 per tonne, still some 8 percent higher than in February 2012. Slow exports during most of the month, coupled with indications of an increase in 2013 maize plantings compared to last year and a stronger US dollar, weighed on prices.

However, the downward pressure was offset by some recovery in demand in the last part of the month, particularly from the domestic industry in the United States.

International rice prices rose slightly in February, as reflected in the FAO All Rice price index, which gained 3 points to 239. Prices of all rice varieties generally firmed up. Quotations increased in most origins, supported by policy measures (government purchases in Thailand and India) and by reports of new sales in Pakistan and the United States. By contrast, prices weakened in Viet Nam and in South America where harvesting of the main crops is gaining pace. The benchmark Thai White Rice 100%B price averaged USD 616 per tonne, up from USD 611 per tonne in January, continuing the steady upward trend observed since October 2012.

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

| | 2012 | | | | | 2013 | |
|------------------------------|------|-------|------|------|------|------|------|
| | Feb. | Sept. | Oct. | Nov. | Dec. | Jan. | Feb. |
| United States | | | | | | | |
| Wheat ¹ | 297 | 371 | 373 | 373 | 360 | 348 | 329 |
| Maize ² | 279 | 323 | 320 | 324 | 310 | 303 | 303 |
| Sorghum ² | 268 | 286 | 290 | 289 | 288 | 287 | 288 |
| Argentina³ | | | | | | | |
| Wheat | 263 | 336 | 332 | 345 | 360 | 362 | 358 |
| Maize | 267 | 278 | 274 | 294 | 288 | 294 | 283 |
| Thailand⁴ | | | | | | | |
| Rice, white ⁵ | 563 | 602 | 594 | 598 | 599 | 611 | 616 |
| Rice, broken ⁶ | 530 | 540 | 544 | 545 | 546 | 558 | 562 |

*Prices refer to the monthly average.

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

² No.2 Yellow, Gulf.

³ Up river, f.o.b.

⁴ Indicative traded prices.

⁵ 100% second grade, f.o.b. Bangkok.

⁶ A1 super, f.o.b. Bangkok.

Low-Income Food-Deficit Countries food situation overview¹

Mixed prospects for the 2013 cereal crops in LIFDCs

Early prospects for the 2013 cereal production are mixed in the group of 62 LIFDCs. In the northern hemisphere, harvesting of the main winter cereal crops, primarily wheat and barley, generally

begins in April with the bulk of the crop gathered in June. Early outlook for these crops is favourable in **North Africa** (in Egypt, the only LIFDC) and **Near East**, due to good weather so far. Similarly in the **Far East**, the outlook for the 2013 mostly irrigated main wheat crop and secondary rice crop is promising in Bangladesh, Cambodia, Indonesia and the Philippines. By contrast, in India the official estimates project a reduced wheat crop production due to scanty post-monsoon rainfall over important producing states and below-average 2012/13 Rabi paddy crop as result of planting delays and localized damage caused by Cyclone Nilam, which

affected Andhra Pradesh the most. In Sri Lanka, floods during November-December 2012 have partially affected the main season (*Maha*) paddy crop. Prospects are favourable in **CIS in Asia**, particularly in Kyrgyzstan and Tajikistan, where larger plantings have been reported. In the southern hemisphere, the main summer season crops, mainly maize, is approaching maturity and harvesting is expected to start in March-April. The current prospects for the 2013 main maize crop are generally satisfactory in **Southern Africa**, following a disappointing output in 2012. However, production is expected to be compromised in localized areas of Botswana, Mozambique, Madagascar, Malawi, Zambia and Zimbabwe, due to damage caused by floods in January and early February and pest infestations. In **Eastern Africa**, below-average harvest forecasts for the secondary crops are made in Kenya, where "short-rains"

¹ **The Low-Income Food-Deficit Countries (LIFDCs)** group includes net food deficit countries with annual per caput income below the level used by World Bank to determine eligibility for IDA assistance (i.e. USD 1915 in 2010). The 2013 FAO list of LIFDCs includes 62 countries as opposed to 66 on the 2012 list. The countries that graduated from the list are Georgia, Syria Arab Republic and Timor-Leste due to income criteria, and Republic of Moldova, due to net food-exporter criteria. For full details see: <http://www.fao.org/countryprofiles/lifdc.asp>.

season performed poorly, while elsewhere in the subregion prospects for the harvest are uncertain due to erratic rainfall performance.

Record 2012 aggregate cereal harvest of the LIFDCs, but lower production in Southern Africa and Central America

With the 2012 cereal harvest almost complete, FAO's latest estimate puts the annual cereal production for the 62 LIFDCs as a group at a record level of 537.7 million tonnes (rice in milled terms), some 3.5 percent or 18.2 million tonnes above the bumper harvest in 2011. Excluding India, the largest country in this group, the aggregate cereal output of the remaining 61 LIFDCs, is estimated to expand by 5.2 percent. Most of the increase is due to the recovery from the 2011 drought-affected poor harvest of about 6 and 2.8 million tonnes in **Western** and **Eastern Africa**, respectively. Similarly, in the **Near East**, an estimated bumper production in Afghanistan has more than offset the poor harvest in Iraq, resulting in an increase of 14 percent over the 2011 below-average aggregate cereal production. In the **Far East**, the total cereal production is estimated to increase to a record level of 381.6 million tonnes, up 2.5 percent on the previous record output in 2011, with an increase in cereal harvests in Cambodia, India, Indonesia and the Philippines among others. Good harvests were obtained in the remaining countries of the subregion, mainly reflecting favourable weather, larger plantings and substantial government support with agricultural inputs. Furthermore, favourable outputs were recorded in **CIS in Asia** and in **North Africa** (Egypt), following favourable weather throughout the growing season as well as supportive measures undertaken by the respective governments. On the other hand, in **Southern Africa**,

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 production¹ | 512.2 | 519.5 | 537.7 | 3.5 |
| <i>excluding India</i> | 292.0 | 284.8 | 299.6 | 5.2 |
| Utilization | 561.7 | 572.4 | 587.3 | 2.6 |
| Food use | 446.6 | 455.9 | 466.7 | 2.4 |
| <i>excluding India</i> | 260.5 | 266.8 | 273.3 | 2.4 |
| Per caput cereal food use (kg per year) | 0.2 | 0.2 | 0.2 | 0.4 |
| <i>excluding India</i> | 0.2 | 0.2 | 0.2 | 0.7 |
| Feed | 49.6 | 51.1 | 52.6 | 3.1 |
| <i>excluding India</i> | 42.7 | 44.2 | 45.8 | 3.8 |
| End of season stocks² | 99.5 | 111.2 | 113.8 | 2.4 |
| <i>excluding India</i> | 62.5 | 66.3 | 65.9 | -0.6 |

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

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

Table 5. Cereal production¹ of LIFDCs (million tonnes)

| | 2010 | 2011 | 2012 estimate | Change: 2012 over 2011 (%) |
|--------------------------------------|--------------|--------------|---------------|----------------------------|
| Africa (39 countries) | 132.9 | 126.3 | 134.1 | 6.2 |
| North Africa | 18.2 | 20.0 | 21.0 | 4.8 |
| Eastern Africa | 40.4 | 37.5 | 40.3 | 7.4 |
| Southern Africa | 14.8 | 15.4 | 13.5 | -12.2 |
| Western Africa | 55.9 | 49.8 | 55.8 | 12.0 |
| Central Africa | 3.6 | 3.6 | 3.5 | -0.9 |
| Asia (17 countries) | 377.3 | 391.0 | 401.6 | 2.7 |
| CIS in Asia | 9.8 | 9.4 | 9.6 | 2.2 |
| Far East | 356.5 | 372.5 | 381.6 | 2.5 |
| - India | 220.2 | 234.6 | 238.1 | 1.5 |
| Near East | 11.0 | 9.1 | 10.4 | 14.3 |
| Central America (3 countries) | 2.0 | 2.2 | 1.9 | -12.0 |
| Oceania (3 countries) | 0.0 | 0.0 | 0.0 | 0.0 |
| LIFDC (62 countries) | 512.2 | 519.5 | 537.7 | 3.5 |

Note: Totals and percentage change computed from unrounded data.

¹ Includes rice in milled terms.

a considerable decrease of over 12 percent in total cereal production, from an average level in 2011, was recorded in all LIFDCs due to generally lower planting in some countries and a persistent dry spell in parts of Lesotho, Malawi, Mozambique and Zimbabwe. Similarly, in **Central America** adverse weather conditions dampened coarse grain harvests in Nicaragua, Honduras and especially Haiti, where the aggregate coarse grain harvest declined by 46 percent compared to the previous

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

Cereal import requirements for 2012/13 slightly above average but lower than 2011/12

Following bumper domestic production in 2012 and anticipated favourable output in 2013 for LIFDCs as a group, the total cereal import requirements for 2012/13 marketing year are now

forecast to decrease by about 8 million tonnes to 78.7 million tonnes, some 9 percent below the previous year's level but slightly above the average level of the preceding five years. This reflects a forecast decrease of 2.3 million tonnes in the Far East, where large importing countries such as Indonesia and the Philippines require lower cereal imports, following significant gains in domestic production. Lower import requirements are expected in North Africa and Near East, mainly on account of increased 2012 wheat production in Egypt and Afghanistan. Similarly, above average supplies from the 2012 cereal harvests are expected to decrease import requirements in all subregions of Africa except in Central Africa. Relatively good levels of carryover stocks limited higher imports in CIS in Asia and Southern Africa. In Central America and the Caribbean and Oceania, cereal imports are anticipated to remain similar to that of 2011/12. In view of the decrease in overall import volumes in 2012/13, the net cereal import bill of the LIFDC is anticipated to decrease slightly to USD 36.1 billion, about 1 percent below the 2011/12 estimated record level. The latest FAO forecast indicates a decrease in import bills by 11 percent for rice and 4 percent for coarse grains but an increase of 6 percent for wheat, due to high prices of the commodity during the year.

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

| | 2011/12 or 2012 | 2012/13 or 2013 | | | |
|--------------------------------------|--------------------|---------------------------|-------------------|------------------------------|---------------------------|
| | | Requirements ¹ | | Import position ² | |
| | Actual imports | Total imports: | of which food aid | Total imports: | of which food aid pledges |
| Africa (39 countries) | 46 341 | 42 958 | 1 961 | 6 378 | 266 |
| North Africa | 18 871 | 16 371 | 0 | 4 954 | 0 |
| Eastern Africa | 8 183 | 7 987 | 1 333 | 698 | 124 |
| Southern Africa | 2 508 | 2 346 | 193 | 606 | 112 |
| Western Africa | 14 718 | 14 145 | 287 | 113 | 23 |
| Central Africa | 2 061 | 2 109 | 148 | 6 | 6 |
| Asia (17 countries) | 37 982 | 33 592 | 694 | 9 355 | 111 |
| CIS in Asia | 4 740 | 3 587 | 0 | 1 839 | 0 |
| Far East | 22 222 | 19 893 | 528 | 6 520 | 75 |
| Near East | 11 020 | 10 112 | 166 | 996 | 36 |
| Central America (3 countries) | 1 761 | 1 735 | 179 | 266 | 5 |
| Oceania (3 countries) | 442 | 442 | 0 | 0 | 0 |
| Total (62 countries) | 86 526 | 78 727 | 2 833 | 15 998 | 382 |

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 February 2013.

Table 7. Cereal import bill in LIFDCs by region and type
(July/June, USD million)

| | 2007/08 | 2008/09 | 2009/10 | 2010/11 | 2011/12 estimate | 2012/13 f'cast |
|-----------------------------|---------------|---------------|---------------|---------------|---------------------|-------------------|
| LIFDC | 32 561 | 24 657 | 24 325 | 34 230 | 36 330 | 36 075 |
| Africa | 16 652 | 12 973 | 12 202 | 17 098 | 19 455 | 18 607 |
| Asia | 15 001 | 11 128 | 11 537 | 16 312 | 15 944 | 16 315 |
| Latin America and Caribbean | 614 | 400 | 429 | 595 | 685 | 681 |
| Oceania | 170 | 120 | 131 | 191 | 202 | 204 |
| Europe | 123 | 35 | 26 | 33 | 44 | 268 |
| Wheat | 19 201 | 16 039 | 14 149 | 18 770 | 19 562 | 20 758 |
| Coarse grains | 3 512 | 3 214 | 2 902 | 4 764 | 5 594 | 5 373 |
| Rice | 9 848 | 5 404 | 7 275 | 10 696 | 11 174 | 9 944 |

Regional reviews

Africa

North Africa

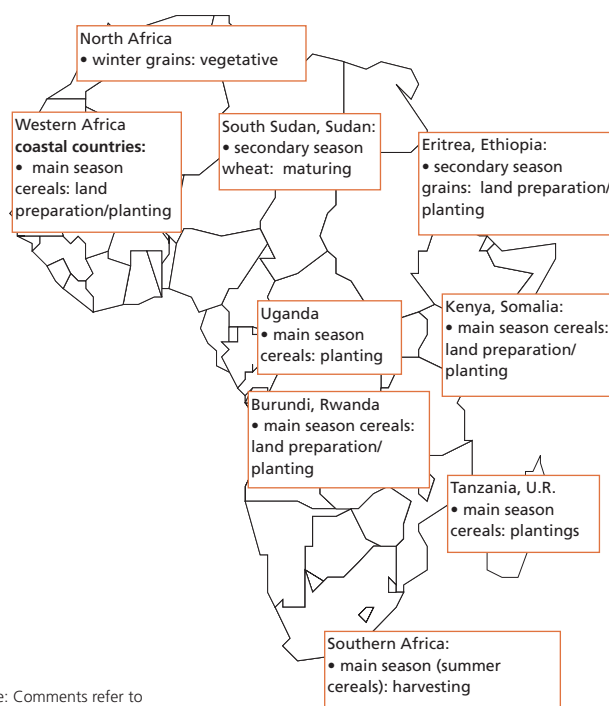
Good early prospects for the 2013 winter crops

In North Africa, early prospects for the 2013 winter wheat and coarse grains, to be harvested from May, are favourable. Although above average rains last autumn hampered field work in some areas, improved soil moisture has significantly encouraged early planting. Subsequently, the favourably wet autumn was followed by sunny weather conditions which promoted winter grain development. Preliminary reports indicate a similar level of plantings to last year.

The subregion's 2012 aggregate output of wheat (the main crop) is estimated at 17.9 million tonnes, 5 percent down from the above average harvest in 2011. The 2012 wheat harvest was uneven across the region as **Algeria** and **Egypt** recorded above average levels of production while **Morocco's** wheat harvest, due to unfavourable weather conditions, reached only 65 percent of the near record amount harvested in 2011. The subregional production of coarse grains is estimated at about 12 million tonnes, also a decrease of 5 percent over 2011. By contrast, rice (paddy) production, although small in comparison, increased by almost 15 percent to 6.6 million tonnes. Thus, the subregion's 2012 aggregate cereal production (rice in paddy terms) is estimated at 36.4 million tonnes, 2 percent down on 2011 but 4 percent up on the five-year average.

Imports expected to remain high in 2012/13

Cereal import requirements for the 2012/13 are expected to be about 5 percent lower than the previous year. Likely declines in imports by Egypt and Algeria are expected to more than offset the increased import in Morocco. However, the subregion will still import about 22.9 million tonnes of wheat in the 2012/13, about the average of the previous five years. North African countries



Note: Comments refer to situation as of March.

rely heavily on wheat imports from the international market to cover their consumption needs.

In Egypt, one of the world's largest wheat importers, the government has announced that the current wheat stocks stand at about 3 million tonnes and are sufficient to cover up to four months of consumption requirements. In a move to increase public stock levels, a 5 percent increase in procurement prices for wheat, to be harvested from April/May, to EGP 400/ardeb (150 kg) was also announced in February 2013. Increasingly more concerns are being raised on the state and stability of grain supply in the country, especially in light of slow pace in imports in the last six months.

Across the subregion the generous food subsidies have in part resulted in a relatively low level of bread inflation. While these subsidies are likely to remain, there is a serious discussion on how best to address their costs and targeting together with the food waste related to under-priced staples.

Table 8. North Africa cereal production

(million tonnes)

| | Wheat | | | Coarse grains | | | Rice (paddy) | | | Total cereals | | | |
|---------------------|-------------|-------------|-------------|---------------|-------------|-------------|--------------|------------|-------------|---------------|-------------|-------------|-----------------------|
| | 2010 | 2011 | 2012 estim. | 2010 | 2011 | 2012 estim. | 2010 | 2011 | 2012 estim. | 2010 | 2011 | 2012 estim. | Change: 2012/2011 (%) |
| North Africa | 16.1 | 18.8 | 17.9 | 12.9 | 12.6 | 11.9 | 4.4 | 5.7 | 6.6 | 33.3 | 37.2 | 36.4 | -2.2 |
| 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 | 4.3 | 5.7 | 6.5 | 19.5 | 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 | 1.8 | 0.3 | 0.7 | 0.8 | 0.0 | 0.0 | 0.0 | 1.1 | 2.3 | 2.6 | 12.8 |

Note: Totals and percentage change computed from unrounded data.

Western Africa

In Western Africa, seasonal dry conditions prevail in the Sahel, while in the coastal countries along the Gulf of Guinea land preparation for the first maize crop is underway. Planting will begin with the arrival of rains, usually from April.

Above-average harvest gathered in 2012 in most Sahelian countries

The subregion's aggregate cereal output in 2012 has been estimated at about 60.6 million tonnes, 11.5 percent up on the previous year and 14.2 percent above the previous five-year average. In the Sahel, the 2012 cereal production increased by 32.8 percent compared to the 2011 drought-affected output. An above-average crop was gathered in most Sahelian countries, including **Burkina Faso, Chad, Guinea-Bissau, Mali, Mauritania** and **Niger**. Estimates also indicate good cereal and root and tuber crops production in the coastal countries along the Gulf of Guinea, although crop production estimates in **Nigeria** are likely to be revised downwards to reflect the full impact of last year's flooding.

Prices of coarse grains dropped considerably in recent months and are generally below their levels of last year

Reflecting last year's good harvests, markets are generally well supplied and coarse grains prices have declined significantly across the region. For example, millet prices in markets in Bamako (**Mali**) and Ouagadougou (**Burkina Faso**) continued their downward movement through January 2013. Although prices increased slightly in February, they were still well below their levels a year earlier in Bamako and slightly above in Ouagadougou. In Nouakchott (**Mauritania**), sorghum prices in December 2012 were 17 percent below their levels of a year earlier. Similarly, prices of maize, the staple cereal in the coastal countries along the Gulf of Guinea, declined significantly. In **Nigeria**, maize prices in Kano, the most important city in the northern part of the country, rebounded in the past two months after falling sharply with the 2012 harvest but were still 3 percent below their levels of a year earlier. In **Benin** and **Ghana**, prices of maize in December 2012 remained generally stable after significant declines in previous months with the arrival of the new harvests. Overall, prices were well below those in December 2011.

Seasonal declines in coarse grain prices were less notable in **Chad**. Millet prices in the main market of N'Djamena, that have been following an upward trend since early 2012, declined only slightly during the harvest period. In December 2012, millet prices were 46 percent up on their levels of a year earlier. Some inter-regional restrictions on commodity movement have reduced the flow between deficit and surplus areas of the country and contributed to higher prices in the capital city and deficit areas.

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 **Senegal** prices of imported rice, the main staple in the country, have stabilized since mid-2012 following Government interventions and trends in international markets. However, in December 2012 rice prices were still above their levels in December 2011. Rice prices in Senegal had increased sharply since December 2011. In **Mauritania**, prices of imported wheat fell markedly in December 2012 and were lower than their levels at the same time a year earlier. This decline reflects the trend in international prices in recent months.

Lingering effects of drought and insecurity affect large number of people

In spite of last year's good harvests, the food outlook for 2013 remains uncertain in parts, due to insecurity and the lingering effects of last year's food crisis.

The severe food crisis that struck the Sahel in 2011/12 (similar to 2004/05 and 2009/10) has had an adverse long-term impact on household assets and savings, on levels of indebtedness, and on the health and nutritional status of the population. Despite the good crop gathered in 2012, several segments of the population still need food and non-food assistance to restore their livelihoods. Implementation of income generation and asset reconstitution activities for food insecure and vulnerable people is recommended in most countries.

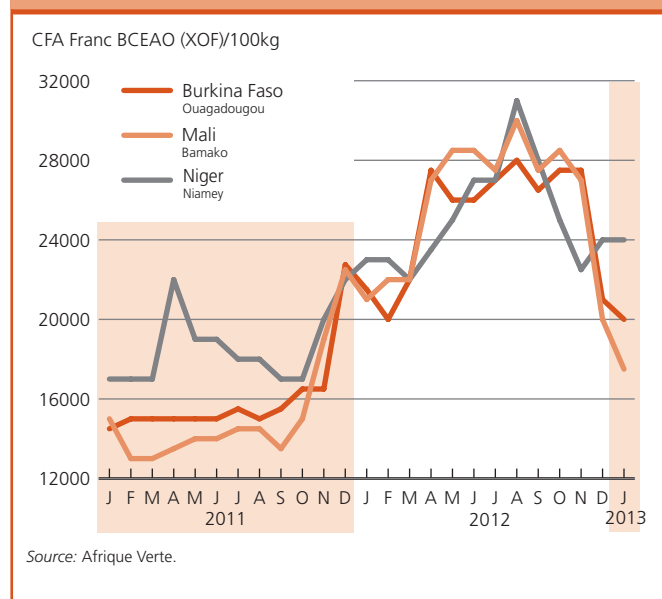
Table 9. Western Africa cereal production
(million tonnes)

| | Coarse grains | | | Rice (paddy) | | | Total cereals ¹ | | | |
|-----------------------|---------------|-------------|-------------|--------------|-------------|-------------|----------------------------|-------------|-------------|-----------------------|
| | 2010 | 2011 | 2012 estim. | 2010 | 2011 | 2012 estim. | 2010 | 2011 | 2012 estim. | Change: 2012/2011 (%) |
| Western Africa | 47.6 | 42.0 | 47.4 | 12.9 | 12.2 | 13.1 | 60.6 | 54.4 | 60.6 | 11.5 |
| 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 | 4.2 | 27.0 | 26.7 | 26.9 | 0.5 |

Note: Totals and percentage change computed from unrounded data.

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

Figure 3. Millet prices in selected Western African markets



Moreover, in **Mali**, current military operations have aggravated the disruptions to food commodity flows to northern regions leading to increasingly tight market supplies. For example, according to a recent WFP assessment supplies coming from Algeria to Kidal and Gao have fallen by 50 percent following the closure of the border with Algeria. Most traders have reportedly left the Kidal area increasing the risk of serious food shortages in that region, according to another rapid evaluation. The conflict has also resulted in large population displacements in the region. As of late January 2013, 15 208 new Malian refugees had arrived in **Burkina Faso** (5 002), **Mauritania** (8 468) and **Niger** (1 738). Over 200 000 Malian refugees were already residing in these countries as of late December 2012. There was also massive displacement of herders and livestock to neighbouring countries.

Central Africa

Good cereal production in 2012

In **Cameroon** and the **Central African Republic**, the main cereal producers in the subregion, the sowing of the 2013 main maize crop, due for harvest from July, is about to begin mostly in southern areas. Average to above-average cereal outputs were gathered in 2012 including the main season crop harvested in July-September and second season crop harvested in January 2013 following abundant rainfall in all countries of the subregion. Cereal production is limited and the bulk of the national cereal utilization requirement is imported in **Gabon** and the **Republic of the Congo**.

Food prices rise sharply in some countries of the subregion

In the **Central African Republic**, due to market disruptions caused by the civil strife and conflict in December, food prices increased significantly in several areas, including in the capital Bangui, where the cost of a food basket was calculated to be 29 percent higher in January compared to the month before. Already, the annual consumer price inflation had surged from 1.5 percent in 2011 to 7 percent in 2012. Similarly, in the **Republic of the Congo**, the average inflation rate increased from 1.8 percent in 2011 to 5.1 percent in 2012, partly due to the increased Government spending for the reconstruction efforts in the capital after the explosion in March 2012. In **Gabon**, prices of imported wheat, the main staple in the country, started to increase in January 2012, and by August 2012 were 35 percent higher reaching record levels. Subsequently, prices declined and stabilized in October at about the same level as a year earlier. The relative stabilization follows the policy measures implemented by the Government to curb food price inflation. By contrast, in **Cameroon** the average inflation rate remained stable at about 3 percent, while in **Equatorial Guinea** it declined from 6.3 percent in 2011 to 5.4 percent in 2012.

Continued civil conflict and recent floods exacerbate food insecurity

Persistent civil insecurity and recurrent natural disasters continue 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 further deteriorated in December 2012 following the civil strife in the **Central African Republic**, when an alliance of rebel groups took control of most of the east of the country. Widespread violence and looting ensued, IDPs caseload has been estimated at 65 000 by a Rapid Response Mechanism survey; however, since most of the affected populations sought refuge in the bush, OCHA estimates the number of IDPs at about 173 000. Although the security situation improved following a cease fire and the formation of a new national unity government, poor food insecurity conditions persist especially in the rebel occupied areas.

In the **Republic of the Congo**, heavy rains caused extensive flooding in November and December 2012 displacing some 13 500 persons in the capital Brazzaville and in Pointe-Noire. These areas were also affected by floods in August and September 2012. Stagnant water caused concern for waterborne diseases and some cholera cases were reported. In response, USD 490 000 have been allocated from the International Federation of Red Cross and Red Crescent (IFRC) through its Disaster Relief Emergency Fund.

Table 10. Central Africa cereal production
(million tonnes)

| | Coarse grains | | | Rice (paddy) | | | Total cereals ¹ | | | |
|-----------------------|---------------|------------|-------------|--------------|------------|-------------|----------------------------|------------|-------------|-----------------------|
| | 2010 | 2011 | 2012 estim. | 2010 | 2011 | 2012 estim. | 2010 | 2011 | 2012 estim. | 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 | 0.1 | 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).

Eastern Africa

Mixed prospects for 2012/13 secondary season crop production

Harvesting of the 2012/13 secondary season crops is underway in most countries, except in Ethiopia where planting of *belg* season crops is about to start. Given the favourable seasonal rainfall from October to December, average to above average levels of cereal production is forecast for southern and central **Somalia** and in bi-modal rainfall areas of **Uganda** and the **United Republic of Tanzania**. By contrast, below average cereal production is expected in southeastern and coastal marginal agricultural areas of **Kenya**, northern coastal lowlands of the United Republic of Tanzania, parts of eastern **Ethiopia** and in sections of Lower and Middle Juba regions in Somalia. Harvest prospects are particularly critical in Kenya where the short-rains season had performed poorly, with a series of dry spells that caused poor germination, increased replantings and wilting of crops. In East and West Hararghe zone of Oromia region of Ethiopia yields of long-cycle *meher* crops have been affected by the exceptionally short rainy season, which started late, allowing planting in June/July, and stopped at the end of August one month earlier than usual. In riverine districts of southern Somalia, the off-season crop production (mainly sesame, maize and other cash crops), which is normally harvested by the end of March, is expected to be negligible as a result of inadequate river flooding that normally facilitates recessionary cultivation.

The aggregate 2012 cereal output (main and secondary seasons) for the subregion is estimated at a near record level of 40.9 million tonnes, about 6.9 percent above the previous year and 12.4 percent above the last five-year average. This overall positive result is essentially due to the above average main season harvests in Ethiopia and the Sudan. In particular, sorghum and millet production in the Sudan, harvested at the end of last year, significantly recovered from the very poor 2011 output where dry weather and insecurity had severely limited access to land and inputs. Cereal production also increased in 2012 in South Sudan due to an increased planted area and favourable yields following abundant rains.

Planting of the 2013 main season crops underway

Land preparation for the 2013 main season cereal crops has started in major growing areas of Central, Rift Valley and Western provinces in Kenya (long-rains cropping season), in south and central Somalia (*gu* cropping season)

and in bimodal rainfall areas of South Sudan and Uganda. In the United Republic of Tanzania, planting of the 2013 long rains *msimu* season crops, to be harvested next May/June, has just been completed in central and southern uni-modal rainfall areas. Meteorological forecasts for the 2013 March to May rainy season point to an average to above-average precipitation over Uganda, southern parts of South Sudan, southwestern and central Ethiopia, western and central Kenya as well as the western half of Tanzania, while average to below-average rains are expected in the rest of the subregion.

In Kenya, some concern is being raised about the impact of potential disruptions due to the presidential elections, scheduled for March 2013, on long-rains maize production due to possible scaling down of planted area.

Cereal prices generally decline but still remain at high levels

Prices of coarse grains declined seasonally in major growing areas with the arrival of 2012 main season harvests, but still remain above last year's level in most countries. Nevertheless, upward trends are reported in the United Republic of Tanzania, Uganda and parts of Kenya due to below average second season crops and/or strong local and export demand. In Ethiopia, wholesale cereal prices decreased significantly during the last few months following the 2012 *meher* season harvest, but still remain between 10 and 20 percent above their levels of 12 months ago. In Somalia, prices of locally produced cereals have also declined since the harvest of 2012 *gu* season crops last August/September and in major producing areas prices are currently between 20 and 60 percent below their levels of January 2012. In the Sudan, sorghum and maize prices dropped by 10 to 25 percent between July 2012 and January 2013 as the newly harvested crops increased local supply. However, despite the 2012 good production, current sorghum and millet prices are still well above last year's level, ranging between 15 and 30 percent up, with peaks of more than 50 percent for sorghum in Port Sudan. The persistence of high nominal price levels are a result of the increased costs of inputs, such as labour and chemicals and the exceptionally high inflation rates during 2012. In South Sudan, prices of locally produced

Table 11. Eastern Africa cereal production
(million tonnes)

| | Wheat | | | Coarse grains | | | Total cereals ¹ | | | |
|-----------------------|------------|------------|-------------|---------------|-------------|-------------|----------------------------|-------------|-------------|-----------------------|
| | 2010 | 2011 | 2012 estim. | 2010 | 2011 | 2012 estim. | 2010 | 2011 | 2012 estim. | Change: 2012/2011 (%) |
| Eastern Africa | 4.1 | 4.0 | 4.3 | 34.8 | 32.2 | 34.9 | 41.3 | 38.3 | 40.9 | 6.9 |
| Ethiopia | 3.1 | 3.1 | 3.5 | 16.0 | 16.7 | 17.4 | 19.2 | 20.0 | 21.1 | 5.4 |
| Kenya | 0.5 | 0.3 | 0.3 | 3.5 | 3.4 | 2.9 | 4.1 | 3.8 | 3.2 | -14.8 |
| Sudan ² | 0.3 | 0.3 | 0.3 | 5.3 | 2.5 | 5.4 | 5.6 | 2.9 | 5.7 | 98.8 |
| Tanzania U.R. | 0.1 | 0.1 | 0.1 | 5.9 | 5.5 | 5.5 | 7.7 | 7.1 | 6.7 | -5.3 |
| Uganda | 0.0 | 0.0 | 0.0 | 2.7 | 2.6 | 2.6 | 2.9 | 2.8 | 2.9 | 1.5 |

Note: Totals and percentage change computed from unrounded data.

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

² Including South Sudan.

maize and sorghum have declined in most markets since August/September 2012 following increased supplies of newly harvested crops. The sharpest declines, up to 70 percent, were recorded in Rumbek and in Aweil markets, while they were less significant in the capital Juba. However, current cereal prices are still higher than one year earlier, especially in flood-affected areas. In Kenya, prices of maize began to decline in major producing areas of the Rift Valley as the 2012 long-rains harvest became available from August.

By contrast, prices are stable or even increasing in some southeastern and coastal areas in Kenya that experienced a poor 2012/13 short-rainy season. In the United Republic of Tanzania, prices of maize have increased by 36 percent in Dar es Salaam market between August 2012 and January 2013. This is primarily due to the deepening of the lean season, in both uni-modal and bi-modal rainfall areas, the sustained demand from neighbouring countries (Rwanda, Burundi and DRC) and the poor *vuli* production prospects in some bi-modal coastal areas. By January 2013, maize prices were up to two times higher than twelve months earlier and at record levels in most monitored markets. Similarly, in Uganda, prices of maize continued to increase (+10 percent from December to January) due to strong local and export demand, in particular from Kenya, South Sudan, DRC and Rwanda. Compared to the same month last year, January maize prices were 27 percent higher in Kampala.

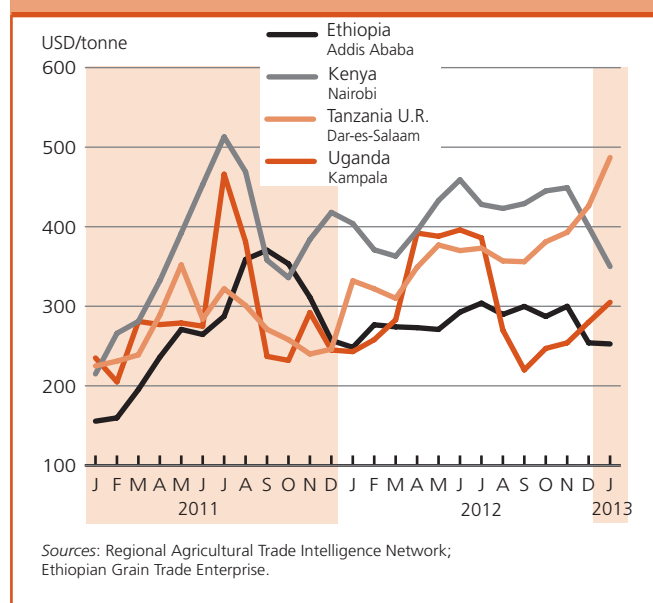
Overall food security improves, although serious concerns in some areas

Since the start of seasonal harvests last October, food security conditions in the subregion have significantly improved as new crops have replenished household stocks and supplied local markets thus improving food availability. Livestock body conditions have also improved in most pastoral areas of southern Somalia, the Sudan, South Sudan, Uganda, central and southern United Republic of Tanzania due to abundant seasonal rains that improved pasture conditions and water availability. Currently, in

the subregion, the total number of food insecure people in need of humanitarian assistance is estimated at about 11.4 million people (including 3.7 million in Ethiopia, 3.5 million in the Sudan, 2.1 million in Kenya, 1.05 million in Somalia, 1 million in South Sudan and 70 000 in Djibouti), about 1 million less than the previous FAO estimate in December 2012 and 6.6 million less than one year ago. In particular,

during the last six months the number of people in need of emergency assistance was halved in Somalia due to continued humanitarian interventions, improved food supply at household and market levels from the ongoing 2012/13 *deyr* harvest and improved milk availability in most pastoral areas.

Despite these improvements, however, severe food insecurity conditions remain in conflict-affected areas of the Sudan where massive displacements obstruct agricultural production, market access and delivery of humanitarian assistance. Similarly, parts of Jonglei state in South Sudan that were affected by floods and persistent civil insecurity (mostly inter-communal clashes related to cattle raiding that usually increase during the dry season). In Ethiopia, several areas are facing severe food insecurity due to consecutive poor rainy seasons, including East and West Hararghe Zones of Oromia, marginal *meher* cropping areas

Figure 4. Maize prices in selected Eastern African markets

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

of eastern Tigray and Amhara, and the pastoral areas of Afar in Ethiopia. As of mid-January 2013, according to UNHCR and OCHA, about 1.1 million refugees are hosted in camps in Kenya, Ethiopia and South Sudan, mainly from Somalia and the Sudan, and have precarious access to basic necessities of food, shelter, water and sanitation.

Southern Africa

Flooding in eastern parts of the subregion in January causes localized crop damage

Harvesting of the 2012/13 cereal crops is expected to commence in April. Below normal precipitation was recorded during much of first three months of the cropping season (October-December) that necessitated replantings in some southeastern areas. However, a period of intense rainfall ensued in January and early February alleviating moisture deficits but also causing flooding. In the most affected country, **Mozambique**, an estimated 166 000 hectares of crops were lost to floods, mostly in the southern provinces, as well as some in the central Zambezi Province. Although the area represents a comparatively small size at the national level, localised production losses will negatively affect food supplies in 2013. Rains subsided from mid-February, bringing relief to the flooded areas, although heavy rains in central provinces of Mozambique have increased the risk of flooding in these parts. The abundant rains also caused some flood damage and water-logging in areas of **Botswana, Malawi, Zambia** and **Zimbabwe**, but the negative impact on crops was limited. In addition, the passing of Cyclone Felling inflicted comparatively minor damage in eastern districts of **Madagascar** during January. A second Cyclone, Hurana, in February caused damage in southwestern areas, displacing population and flooding cropped fields. The potential for further flooding remains in eastern parts of the subregion until the end of the cyclone season in April 2013.

In contrast to eastern regions, water deficits have developed across much of **Namibia**, negatively impacting on both pasture

conditions and crop development. Furthermore, at the end of 2012, an outbreak of army worms across the subregion caused some damage to cereal crops, affecting parts of Botswana, Namibia, Malawi, Mozambique, Zambia and Zimbabwe. Although the outbreak was widespread, interventions by governments and partner institutions, including pesticide spraying and distribution of early maturing seeds to affected households, have contained further infestations and limited the damage. In Madagascar, locusts are threatening crop prospects in southern and western parts. The Government declared a state of emergency in November 2012, as a result of the infestation, and measures have been taken to contain the outbreak.

Overall yields expected to increase, except in areas affected by floods and dry spells

In most countries of the subregion, official estimates of the area planted for the 2012/13 crop have not yet been released. By contrast, in **South Africa**, the main producer in the subregion, early official estimates point to a 3 percent expansion in maize plantings to about 2.78 million hectares over last season's level. The increase reflects farmers' positive reaction to higher maize prices in 2012. If favourable weather conditions persist until harvesting, a crop of about 12.4 million tonnes in the commercial sector is tentatively forecast; while about 600 000 tonnes is expected from the subsistence sector. In the remaining countries of Southern Africa, despite some losses from dry spells, floods and army worms, overall, current conditions point to satisfactory crop development, particularly in the large producing areas. Assuming continued favourable weather through to end of the cropping season in March-June, higher yields than the previous season are anticipated, and an improved output over last season's reduced harvest is expected. However, following 2012's bumper harvest, cereal production in Namibia is expected to decrease as a result of the poorly distributed rains in the 2012/13 cropping season. While the floods in southern and central areas of Mozambique, as well as in Madagascar, are expected to depress production in localised areas.

Table 12. Southern Africa cereal production

(million tonnes)

| | Wheat | | | Coarse grains | | | Rice (paddy) | | | Total cereals | | | |
|-----------------------------|------------|------------|-------------|---------------|-------------|-------------|--------------|------------|-------------|---------------|-------------|-------------|-----------------------|
| | 2010 | 2011 | 2012 estim. | 2010 | 2011 | 2012 estim. | 2010 | 2011 | 2012 estim. | 2010 | 2011 | 2012 estim. | Change: 2012/2011 (%) |
| Southern Africa | 1.7 | 2.3 | 2.3 | 26.4 | 25.0 | 24.3 | 5.2 | 4.8 | 4.5 | 33.3 | 32.1 | 31.0 | -3.2 |
| - excl. South Africa | 0.3 | 0.3 | 0.3 | 12.5 | 13.5 | 11.3 | 5.2 | 4.8 | 4.5 | 17.9 | 18.6 | 16.1 | -13.2 |
| 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 | 1.9 | 13.9 | 11.5 | 13.0 | 0.0 | 0.0 | 0.0 | 15.3 | 13.5 | 14.9 | 10.5 |
| 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.

Lower exports from South Africa while exports from Zambia increase

Current maize exports from South Africa in the 2012/13 marketing year (May/April) are approximately 40 percent below the large quantities recorded in the previous year, estimated at 1.28 million tonnes. Tighter domestic supplies contributed to the decrease, while increasing domestic prices in 2012 lowered South Africa's competitiveness in the international market. Similar to last year, Mexico still remains the biggest importer of South African maize, with the neighbouring countries of Botswana, Lesotho, Mozambique, Namibia and Swaziland also importing significant quantities as in past years. Following consecutive bumper harvests in Zambia, the country has built-up significant maize stocks, far above their consumption requirements. As a result, Zambia has established itself as the second largest exporter in the subregion, with the main destination for their maize being Zimbabwe. As the end of the marketing year draws to a close, maize import requirements in the subregion (excluding South Africa), estimated at 1.13 million tonnes, similar to 2011/12, are expected to be satisfied with supplies from both South Africa and Zambia.

Maize prices reach record levels in some countries

In South Africa, the subregion's main exporting country, maize prices fell from their near record highs earlier in mid-2012, for the second consecutive month in January. The recent declines primarily reflect the positive outlook for the 2013 maize harvest, from May onwards, on the back of an increase in the area planted. The weakening international quotations also weighed on prices.

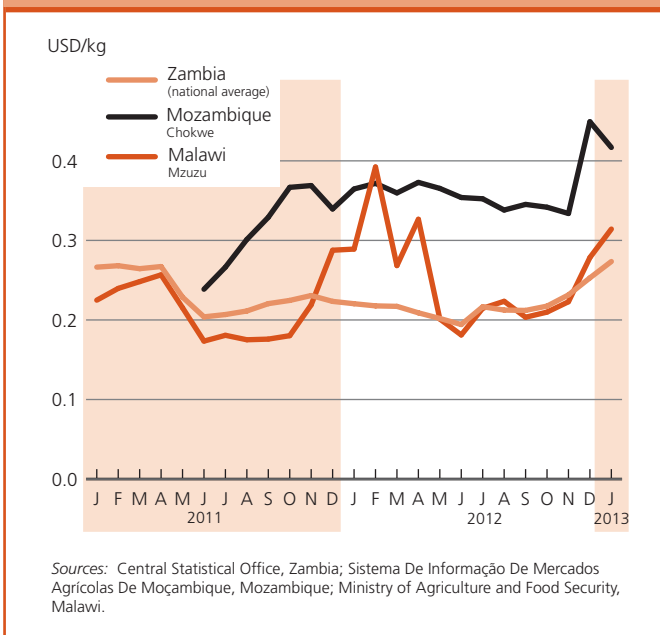
In Malawi, maize prices climbed sharply in January, continuing the steep increase since the second half of 2012, reaching new record highs. At their current levels, prices exceed those of a year earlier. In northern markets, in particular where strong demand from deficit southern parts and Tanzania has put pressure on maize supplies, prices were more than double and in some markets three times the level of January 2012. The continued depreciation of the national currency (kwacha), following the devaluation in May 2012 has maintained high inflation rates and contributed to the increasing maize prices. Tight localized supplies, as a result of production deficits in the Southern Region, also underpinned the higher prices, while heavy rains and localized floods in southern areas during January disrupted market activities. Similarly, in Mozambique, heavy rains and localized floods in January disrupted trade routes, with reduced food supplies in some markets instigating sharp price rises, particularly in Gaza Province. Mozambican maize prices are generally higher in 2012/13,

reflecting tighter supplies following reduced 2012 production. National average roller maize meal prices in Zambia rose steeply from November 2012, exceeding historical seasonable trends; between November and January prices jumped by 25 percent. In addition to the national procurement programme by the Food Reserve Agency (FRA) that has accumulated abundant stocks, strong demand from neighbouring countries together with the gradual depreciation of the Zambian kwacha, put upward pressure on prices. The staple food prices in Zimbabwe (maize) and Madagascar (rice) have remained comparatively stable, reflecting generally adequate supplies, despite lower harvests in 2012. Commercial imports have helped to stabilise supplies and contain prices at levels that are comparable to the previous year. However, in areas of Zimbabwe that experienced production short-falls in 2012 and where Cyclone Felleng disrupted trade flows in Madagascar, consequent market shortages have led to some price spikes.

Higher food prices and floods worsen food security in some areas

In 2012/13, the number of food insecure persons increased notably in the subregion, following production shocks in some areas. The sustained and rapid increase in maize prices in several countries of the subregion since mid-2012 negatively impacted on food access of vulnerable populations, as households become

Figure 5. White maize prices in selected Southern African markets



increasingly reliant on market supplies at the height of the lean season (January-March). The higher food prices in Malawi led to an upward revision of the number of food insecure people to just under 2 million from 1.6 million, in November 2012. In Zambia and Malawi, government parastatals have supplied subsidised maize to help alleviate market shortages and mitigate further price increases. Furthermore, in Zambia, a directive was issued in December 2012 by the government for maize millers to reduce prices of maize meal to ZMW 50/per 25 kg or below. Furthermore, the recent flooding in January led to the displacement of approximately 300 000 person across the subregion, as well as impeding crop development and disrupting proper market functions in localised areas. In Mozambique, where the majority of the displaced population reside, the loss of crops and food reserves are expected to severely reduce food availability of the affected population. However, ongoing humanitarian interventions have contributed to stabilizing food insecurity conditions, which are expected to improve with the supplies from the 2013 harvest in April.

Great Lakes Region

Below average production in Rwanda and Burundi

Harvesting of the minor 2013 A season crops is almost complete in **Burundi** and **Rwanda**, while planting of the 2013 B (main) season's crops is already underway. In both countries, the 2013 A season harvest is estimated at below average levels due to unfavourable rains that were mostly erratic, with water-logging in some areas and an early end in December coupled with above-average prevalence of crop diseases (banana bacterial wilt, cassava viruses and maize caterpillar). In some areas of Rwanda, the 2013 A season cassava production is also expected at below average level due to shortage of cuttings at planting time. In the **Democratic Republic of the Congo** (DRC), harvesting of the main 2012 maize crop in southern and central provinces is ongoing. According to satellite based monitoring, the rainfall pattern has been favourable in most areas and yields are expected to be above average.

Prices decline as supplies from new crops become available

In Rwanda, prices of beans decreased in the capital Kigali by 14 percent between December 2012 and January 2013 as the ongoing harvests increased supplies. By contrast, prices of maize, which had not yet been harvested in many areas, were stable over the same period. In Burundi, prices of beans in the capital Bujumbura peaked exceptionally at the end of January due to a fire at the city's main market that destroyed large quantities of food stocks. By contrast, prices of maize declined by 6 percent between December and January and currently are 4 percent higher than in January 2012. In DRC, prices of maize followed mixed trends in recent months due to the different stages of local harvests. If compared to twelve months earlier, current maize prices are generally 15-20 percent higher, with peaks up to two times more in southern provinces as a result of the high prices in neighbouring Zambia, where a high share of maize imports is observed. In the capital Kinshasa, prices of imported rice and wheat remained stable in recent months and in January they were at about the same levels of a year earlier.

Humanitarian situation continues to deteriorate in DRC

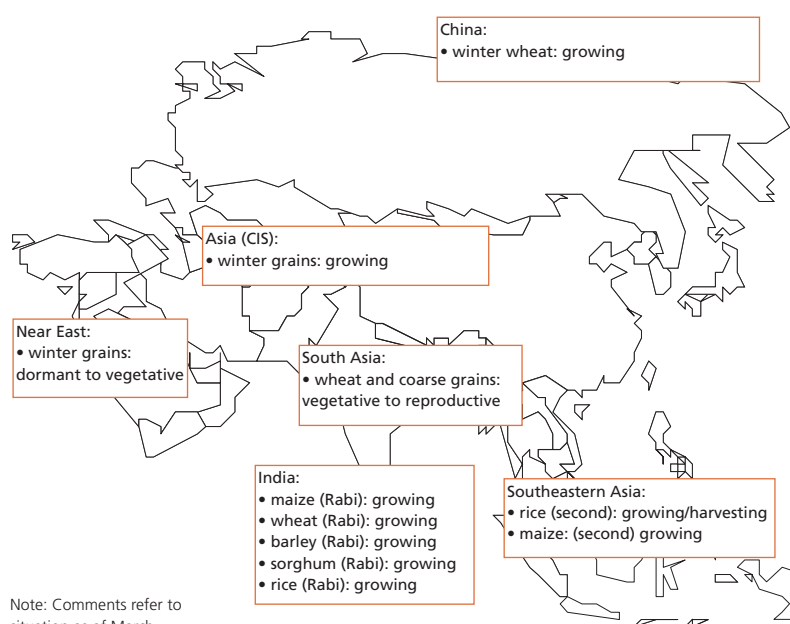
In DRC, the armed conflict escalated at the end of November 2012, increasing displacements in eastern and northeastern areas of the country. Currently, there are about 2.7 million displaced people in the country. According to the latest IPC analysis, the number of people in need of emergency assistance was estimated at about 6.4 million as of December 2012, with an increase of about 75 000 people compared to October 2012. They are mostly concentrated in the eastern provinces - North and South Kivu, Eastern, East and West Kasai, Katanga, Equateur and Bandundu. Two-thirds of them or about 4.2 million persons are considered severely food insecure. In most parts of Burundi and Rwanda, acute food security conditions are expected to be minimal. However, as the 2013 A season harvest is below average, food stocks are expected to be depleted earlier than normal and by mid-March the lean season may already start in some areas.

Asia

Far East

Overall favourable harvest prospects for the 2013 main wheat and secondary rice crops

In the Far East subregion, the 2012/13 main winter wheat and secondary rice crops, sown from October 2012 onwards, are in critical growth stage in most countries. Weather conditions since the start of the season have been generally favourable in most countries with early rains benefiting planting and crop development. In **China**, early estimates from the National Grain and Oils Information Centre point to a record 2013 aggregate national wheat output at 121.4 million tonnes. Similarly, wheat production is officially forecast to reach record level at 24.7 million tonnes in **Pakistan**, following an estimated increase in plantings and anticipated higher yields, reflecting relatively good prospects for irrigation water, provision of fertilizer and other inputs. In **India**, the "Second Advance Estimate" from the Ministry of Agriculture reports the winter wheat *Rabi* production at 92.3 million tonnes, almost 3 percent below the 2012 record harvest. The estimated decrease in production is mainly attributed to scanty post-monsoon rainfall over important producing states, such as Uttar Pradesh, Punjab and Haryana in the northwest, Bihar and West Bengal in the northeast and Karnataka in the south.



Harvesting of the early planted 2012/13 rice and other crops began in December 2012, with the bulk of harvest to commence in March-April. Prospects for the irrigated secondary rice harvests in 2013 are good in **Bangladesh, Cambodia, Indonesia, Myanmar, the Philippines, Thailand and Viet Nam**. By contrast, in **India** a combination of planting delays and localized damage caused by Cyclone Nilam, particularly impacting southern producing states including Andhra Pradesh, are expected to reduce the 2012/13 *Rabi* paddy crop to 11.1 million tonnes, 12 percent down from the previous year's dry-spell reduced output and 20 percent below the previous five-year

Table 13. Far East cereal production
(million tonnes)

| | Wheat | | | Coarse grains | | | Rice (paddy) | | | Total cereals | | | |
|-----------------|--------------|--------------|--------------|---------------|--------------|--------------|--------------|--------------|--------------|----------------|----------------|----------------|-----------------------|
| | 2010 | 2011 | 2012 estim. | 2010 | 2011 | 2012 estim. | 2010 | 2011 | 2012 estim. | 2010 | 2011 | 2012 estim. | Change: 2012/2011 (%) |
| Far East | 223.0 | 232.8 | 244.0 | 277.9 | 292.9 | 310.4 | 630.3 | 653.1 | 659.5 | 1 131.3 | 1 178.7 | 1 213.9 | 3.0 |
| Bangladesh | 1.0 | 1.0 | 1.0 | 1.3 | 1.7 | 2.1 | 50.3 | 50.7 | 50.7 | 52.6 | 53.4 | 53.9 | 0.8 |
| Cambodia | 0.0 | 0.0 | 0.0 | 0.8 | 0.7 | 0.8 | 8.2 | 8.8 | 9.3 | 9.0 | 9.5 | 10.1 | 6.4 |
| China | 115.2 | 117.4 | 120.6 | 186.6 | 201.4 | 217.0 | 197.2 | 202.5 | 205.7 | 499.0 | 521.3 | 543.3 | 4.2 |
| India | 80.8 | 86.9 | 94.9 | 43.4 | 42.5 | 41.4 | 144.0 | 158.0 | 152.7 | 268.1 | 287.3 | 289.0 | 0.6 |
| 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 | 0.9 | 0.2 | 0.2 | 0.2 | 10.6 | 10.5 | 10.6 | 11.4 | 11.4 | 11.7 | 2.2 |
| Korea Rep. of | 0.0 | 0.0 | 0.0 | 0.2 | 0.2 | 0.2 | 5.8 | 5.6 | 5.4 | 6.1 | 5.9 | 5.6 | -4.0 |
| 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 | 2.3 | 4.5 | 5.1 | 4.5 | 8.4 | 9.3 | 8.7 | -7.0 |
| 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 | -0.2 |
| Philippines | 0.0 | 0.0 | 0.0 | 6.4 | 7.0 | 7.4 | 16.7 | 17.0 | 18.0 | 23.1 | 24.0 | 25.5 | 6.2 |
| Thailand | 0.0 | 0.0 | 0.0 | 5.0 | 4.9 | 5.0 | 36.0 | 35.3 | 37.8 | 41.0 | 40.3 | 42.8 | 6.3 |
| Viet Nam | 0.0 | 0.0 | 0.0 | 4.6 | 4.8 | 4.8 | 40.0 | 42.3 | 43.7 | 44.6 | 47.2 | 48.5 | 2.8 |

Note: Totals and percentage change computed from unrounded data.

Table 14. Far East cereal production and anticipated trade in 2012/13¹
(thousand tonnes)

| | Avg 5-yr (2007/08 to 2011/12) | 2011/12 | 2012/13 | 2012/13 over 2011/12 (%) | 2012/13 over 5-yr avg (%) |
|--------------------------|-------------------------------------|---------|---------|--------------------------------|---------------------------------|
| Cereals - Exports | 33 169 | 37 185 | 43 063 | 15.8 | 29.8 |
| Cereals - Imports | 82 889 | 95 900 | 89 112 | -7.1 | 7.5 |
| Cereals - Production | 902 494 | 961 533 | 994 439 | 3.4 | 10.2 |
| Rice-milled - Exports | 25 676 | 29 265 | 28 575 | -2.4 | 11.3 |
| Rice-milled - Imports | 9 206 | 11 763 | 10 049 | -14.6 | 9.2 |
| Rice-milled - Production | 414 972 | 435 885 | 440 005 | 0.9 | 6.0 |
| Wheat - Exports | 2 646 | 2 427 | 9 610 | 296.0 | 263.2 |
| Wheat - Imports | 31 425 | 36 679 | 35 333 | -3.7 | 12.4 |
| Wheat - Production | 221 414 | 232 758 | 244 027 | 4.8 | 10.2 |

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

average. In **Sri Lanka**, floods during November-December in the North Western, Northern, Eastern and Uva provinces are forecast to reduce the main season (*Maha*) paddy crop to 2.6-2.8 million tonnes, compared to the 3 million tonnes harvested in 2012.

The 2012 aggregate regional cereal harvest estimated at a record level

Harvesting of the 2012 main season cereal crops, mostly paddy and coarse grains, was completed towards the end of the year in most countries. With most official estimates now available, FAO puts the subregion's 2012 aggregate production of cereals at a record level of 1 214 million tonnes (rice in paddy terms) or some 3 percent up from the previous year's record output, mainly reflecting larger crops in **China** (+22 million tonnes) and **Indonesia**

wheat harvest offset the dry spell affected paddy output and the total cereal production is estimated to remain close to the record level of 2011.

Cereal exports expected to reach record level, while imports to decrease in 2012/13 in response to successive good harvests

In general, the Far East subregion is a net exporter of rice and net importer of wheat. Early forecast for the 2012/13 marketing year indicate an increase in the subregional cereal exports by 5.9 million tonnes or 16 percent from the previous year, while the aggregate cereal imports to decrease by 6.8 million tonnes or 7 percent below the 2011/12 level. Much of the increase is in the form of wheat exports, largely on account of bumper harvests in

Figure 6. Rice retail prices in selected Far East countries

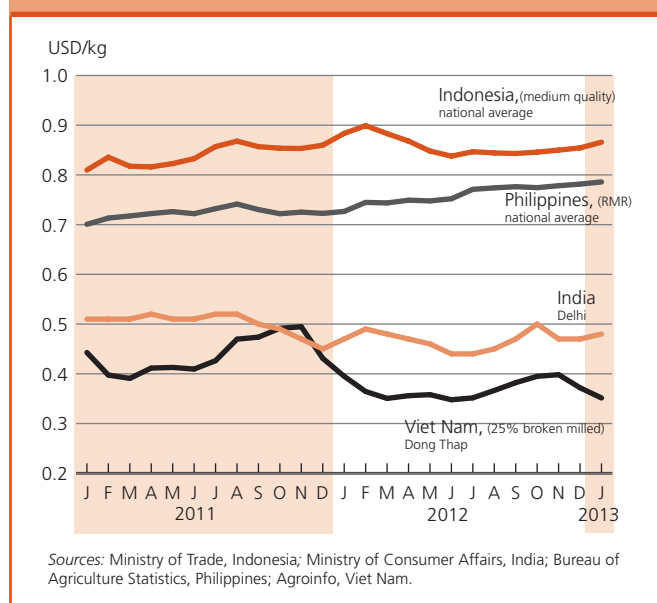
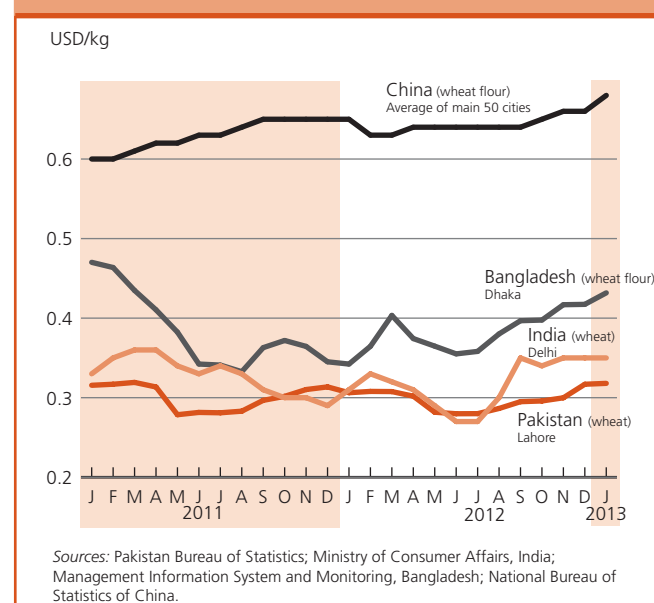


Figure 7. Wheat and wheat flour retail prices in selected Far East countries



2012 and anticipated favourable output in 2013. In **India**, given the estimated record wheat harvest and larger carryover stocks, exports are anticipated to reach all-time high at 7.5 million tonnes in 2012/13. Similarly, total wheat imports of the subregion are expected to decline by 1.3 million tonnes, 4 percent from last year's level, owing to the favourable 2012 domestic wheat production in several importing countries such as **China** and **Japan** and lower demand from the **Philippines, Sri Lanka** and **Thailand**. For rice, following good harvests in most countries combined with weak demand from some importing countries including China, Indonesia and the Philippines, the volume of 2013 trade (both exports and imports) is forecast to decrease.

Prices of rice follow mixed trends, while those of wheat up

Rice prices in recent months have generally remained stable across the subregion, but decreased in some exporting countries, namely **Cambodia, Myanmar** and **Viet Nam**. In **Bangladesh, India, Pakistan**, the **Philippines** and **Thailand**, rice prices have remained virtually unchanged in the last several months, mainly reflecting trends in regional export prices and good supplies from the recently completed 2012 main season bumper harvests. However, prices have increased in **Sri Lanka** and **China**, as well as in **Indonesia**, where the national average price reached a new record level (in nominal terms) in January, averaging IDR 8 371 (about USD 0.86) per kg, some 4 percent higher than a year earlier, following market disruptions caused by floods in early January in the main crop producing areas of Jakarta and Java. Nominal prices of wheat and wheat flour continued to move upwards in major wheat producing and consuming countries, such as **Bangladesh, China** and **Sri Lanka**. In **Pakistan**, prices of wheat and wheat flour have been steadily increasing since June 2012 reaching record levels in most markets in February 2013 underpinned by higher producer support prices. In **India**, wheat prices stabilized in most markets of the country although they continued to increase in Mumbai and in January, they reached record levels, 43 percent higher than a year earlier.

Near East

Favourable outlook for the 2013 winter crops

Wheat and barley crops, for harvest from June, are mostly in their final stages of dormancy in Turkey, Iraq, Islamic Republic of Iran and Afghanistan. Climatic conditions in the region were so far good and assuming normal weather conditions for the remainder of the season, production prospects are generally favourable.

Dry weather conditions in October assisted planting of wheat and barley crops. Subsequently, abundant rainfall and snowfall in December and especially in January when some of the heaviest snow in the last 20 years occurred in some places, increased soil moisture and improved irrigation reserves.

The subregion's cereal production in 2012 is estimated at 71 million tonnes, slightly lower than last year, but about 3.3 percent higher than the last five-year average. Large production increases in **Afghanistan** and the **Islamic Republic of Iran** partly offset declines in **Iraq** and **Turkey**. In the **Syrian Arab Republic**, civil insecurity prevented many farmers from accessing their farmland during important stages of crop development and harvest. Lack of fuel to operate irrigation pumps and other equipment, as well as shortage of harvesters have compounded the problem and resulted in large unharvested cropland.

Increased food insecurity due to civil conflict and high food prices

Civil unrest and conflict in several areas of the subregion have disrupted agricultural production, trade and humanitarian aid distribution, thus negatively affecting the food security situation of large number of people, especially of the most vulnerable. An increasingly complex humanitarian crisis has 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 now estimated to be food insecure. According to the Joint Food Security Rapid Need Assessment conducted in December 2012 (full report to be released soon), in the Syrian Arab Republic, the number of people in need

Table 15. Near East cereal production
(million tonnes)

| | Wheat | | | Coarse grains | | | Rice (paddy) | | | Total cereals | | | |
|------------------------|-------------|-------------|-------------|---------------|-------------|-------------|--------------|------------|-------------|---------------|-------------|-------------|-----------------------|
| | 2010 | 2011 | 2012 estim. | 2010 | 2011 | 2012 estim. | 2010 | 2011 | 2012 estim. | 2010 | 2011 | 2012 estim. | Change: 2012/2011 (%) |
| Near East | 46.8 | 46.4 | 45.0 | 21.8 | 21.2 | 21.4 | 4.0 | 4.1 | 4.3 | 72.6 | 71.7 | 70.7 | -1.4 |
| Afghanistan | 4.5 | 3.3 | 5.0 | 0.7 | 0.6 | 0.7 | 0.7 | 0.7 | 0.7 | 5.9 | 4.6 | 6.4 | 40.8 |
| Iran (Islamic Rep. of) | 15.0 | 13.5 | 13.8 | 5.2 | 4.7 | 5.0 | 2.3 | 2.3 | 2.4 | 22.5 | 20.5 | 21.2 | 3.4 |
| Iraq | 2.7 | 2.4 | 2.1 | 1.4 | 1.4 | 1.1 | 0.2 | 0.2 | 0.2 | 4.3 | 4.0 | 3.4 | -15.5 |
| 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.

of urgent food and livelihood assistance is estimated at about 4 million. As of mid-February 2013, the total number of registered refugees from the Syrian Arab Republic and individuals awaiting registration in **Jordan, Lebanon, Turkey, Iraq** and **Egypt** was close to 863 000. Although WFP continues providing food assistance to vulnerable Syrian populations in Jordan, Lebanon, Iraq, and Turkey, resources in host communities remain under strain.

Table 16. CIS in Asia cereal production

(million tonnes)

| | Wheat | | | Coarse grains | | | Total cereals ¹ | | | |
|--------------------|-------------|-------------|-------------|---------------|------------|-------------|----------------------------|-------------|-------------|-----------------------|
| | 2010 | 2011 | 2012 estim. | 2010 | 2011 | 2012 estim. | 2010 | 2011 | 2012 estim. | Change: 2012/2011 (%) |
| CIS in Asia | 21.1 | 33.9 | 21.9 | 4.3 | 6.2 | 5.1 | 26.2 | 41.0 | 27.8 | -32.1 |
| 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 | 2.0 | 0.6 | 0.8 | 0.8 | 1.9 | 2.4 | 2.8 | 13.9 |
| Georgia | 0.0 | 0.1 | 0.1 | 0.2 | 0.4 | 0.4 | 0.3 | 0.5 | 0.5 | 2.0 |
| Kazakhstan | 9.9 | 22.7 | 10.3 | 2.0 | 3.5 | 2.2 | 12.3 | 26.6 | 12.9 | -51.3 |
| Kyrgyzstan | 0.8 | 0.9 | 0.6 | 0.7 | 0.7 | 0.7 | 1.5 | 1.6 | 1.3 | -14.3 |
| Tajikistan | 0.8 | 0.7 | 0.8 | 0.2 | 0.2 | 0.2 | 1.2 | 1.0 | 1.1 | 5.0 |
| 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 | 0.4 | 0.4 | 7.2 | 7.0 | 7.3 | 5.6 |

Note: Totals and percentage change computed from unrounded data.

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

CIS in Asia¹

Uncertain prospects for the 2013 winter cereal crops

Planting of the 2013 winter crops has been completed satisfactorily. The total area under cereals is slightly above that of last year mainly reflecting larger plantings in Azerbaijan, Kyrgyzstan and Tajikistan. Official reports indicate that dormant winter wheat crops are in satisfactory condition; but more rains would be needed in coming weeks for further development of the crops. However, the subregion's aggregate 2013 cereal production will depend on the outcome in Kazakhstan, the main producer, where the bulk of the crop will be sown only in spring. Assuming normal weather conditions, the potential cereal production of Kazakhstan is forecast around 20 million tonnes including 15 million tonnes of wheat.

Significant decline in 2012 cereal production

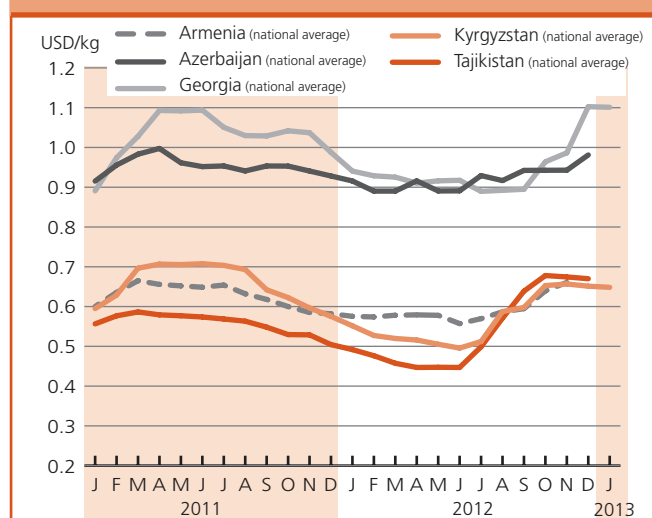
The results of the 2012 cereal harvest vary from country to country, though at subregional level it has dropped significantly by comparison with the previous years. The 2012 aggregate cereal output is estimated at 27.8 million tonnes, of which some 22 million tonnes is wheat. This figure is 32 and 16 percent below the 2011 record level and the previous five-year average, respectively. The decline is mainly attributed to a sharp contraction of production in **Kazakhstan**, due to a severe drought experienced during summer months. As a result, exports of wheat in the 2012/13 marketing year (July/June) are expected to decline, but the reduction will be partially offset, by large carryover stocks. In **Kyrgyzstan**, 2012 wheat production was affected by adverse weather during the season and latest estimates indicate a decline of 14 percent in cereal production to 1.3 million tonnes, which is well below average. By contrast, normal cropping conditions

and government production support measures in **Armenia, Azerbaijan, Georgia** and, in particular, **Uzbekistan**, resulted in higher cereal productions in 2012. In **Tajikistan** and **Turkmenistan**, 2012 cereal outputs were virtually unchanged from the previous year and close to the last five-year average.

Prices of wheat flour remain firm at near record levels

In most wheat import dependent countries of the subregion, prices of wheat flour have increased for the last three months and remain at near record levels mirroring price patterns in the export markets of the subregion. In **Kyrgyzstan** prices of wheat flour remained at high levels in January, reflecting the country's reduced wheat production and trends in the neighbouring

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



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

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

export markets. However, imports of wheat and wheat flour on concessional basis from Russia in late 2012 contributed to limiting upward price pressure and led to marginal declines in some markets. These imports are expected to continue during early-2013. In **Tajikistan**, a country which generally imports about half of its wheat consumption needs, prices of wheat flour remained stable or showed some declines at the end of 2012 reflecting large imports from Kazakhstan, the country's main supplier.

In **Georgia**, wheat flour prices remained virtually unchanged at record levels in January, after rising steeply in the last three

months of 2012. Prices were supported by high quotations in neighbouring export markets, as the country imports some 90 percent of wheat to satisfy its consumption needs.

In **Azerbaijan**, despite normally importing about 40 percent of its wheat consumption requirements, price increases have been moderate compared to other countries of the subregion. This is due to the good 2012 domestic wheat output, high levels of state reserves and the Government's decision in September to exempt imported wheat and wheat flour from value added tax.

Latin America and the Caribbean

Central America and the Caribbean Lower plantings for the 2012/13 secondary maize season in Mexico

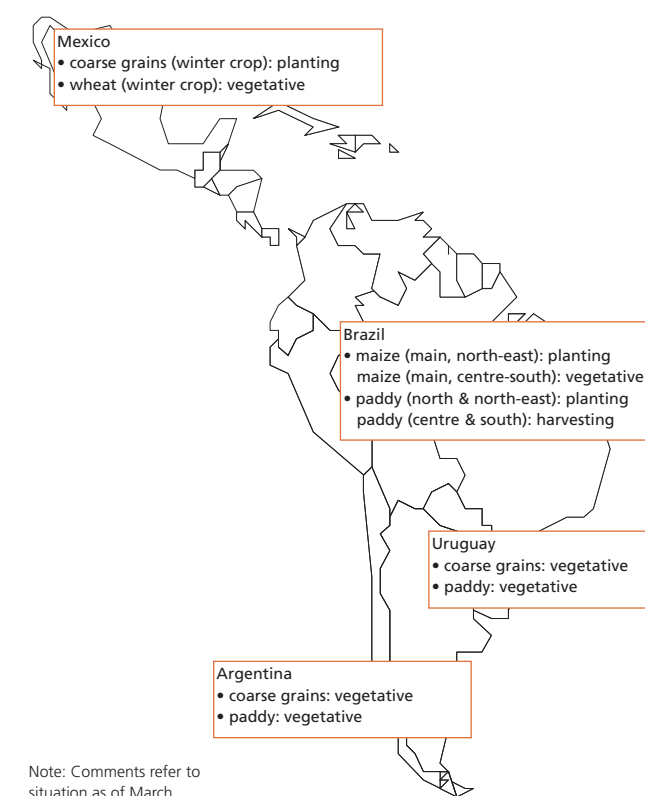
In **Mexico**, the main producer of the subregion, planting of the 2012/13 autumn-winter season maize crop, which represents about 30 percent of the aggregate annual production, is virtually complete. Early estimates indicate that the area planted is 7 percent down from last year's level and below the average of the past five years, mainly due to low water supplies in irrigation reservoirs. Early forecast put production at 4.8 million tonnes, 13 percent lower than the relatively good level of the same season in 2012. Frosts in mid-January negatively affected crops in the main growing areas of Sinaloa, with a preliminary assessment indicating a loss of about 20 percent of the total area planted to maize. Sowing of the 2013 irrigated autumn-winter wheat crop, which accounts for 90 percent of the annual cereal production, is complete and the area planted is estimated to have recovered from last year's reduced level. This season's wheat output is preliminarily forecast to increase by 15 percent compared to last year's corresponding season and close to the average of the past five years.

Mixed start of the 2013 first season in the Caribbean

In **Haiti**, sowing of the 2013 spring season cereal crops, mainly maize, which normally starts in February/March was delayed in the main valleys due to below average rains during January and first half of February. By contrast, in the **Dominican Republic**, favourable rains in the past months in key central growing areas benefited planting activities of the 2013 main season paddy crops, currently underway.

Higher cereal production in 2012

Harvesting of the 2012/13 second season maize crops is virtually complete in **Nicaragua**, **Guatemala**, **Honduras** and



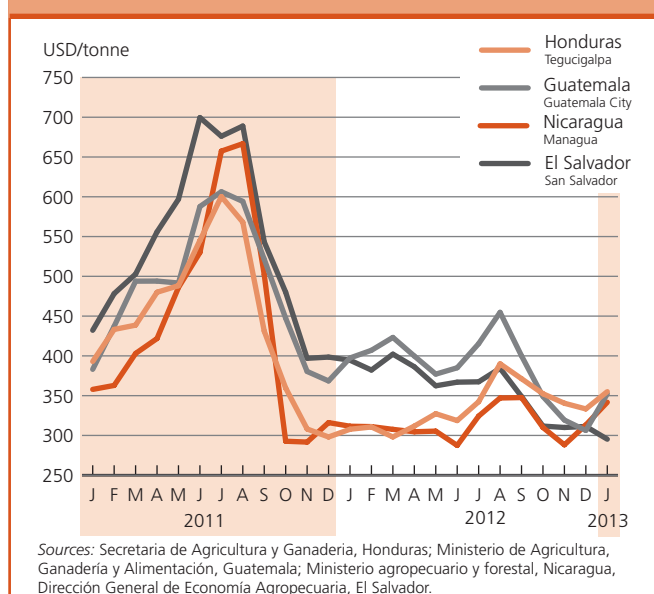
El Salvador, and outputs are estimated to be generally good, while harvesting of the third season (*de apante*) crops is about to start. The 2012 aggregate cereal production (including a forecast for the 2012/13 third season harvests) of the subregion is estimated by FAO at 41.5 million tonnes, some 15 percent above last year's reduced level and above the average of the past five years. This mainly reflects a recovery in 2012 coarse grains production in **Mexico**, where the harvest of the main spring-summer season is nearly complete, coupled with a good cereal output anticipated elsewhere. However, in the Caribbean, in **Haiti** the 2012 cereal production was sharply reduced by adverse weather conditions throughout the 2012/13 agricultural season.

Prices of white maize generally up in January

Prices of the main staple, white maize, rose seasonally in most countries of the subregion in January, after declining substantially in the last months of 2012 with the good harvests. However, despite the recent increases, prices remained at relatively low levels. The sharpest increase in maize prices was recorded in **Guatemala**; however, prices there were lower than in January 2012. By contrast, in **Nicaragua** and **Honduras** prices were higher than their low levels of a year earlier, despite less pronounced increases in January. In **El Salvador**, maize prices in January continued to decline and were well below their levels a year earlier. This reflects steady import flows from neighbouring countries, Honduras and Nicaragua. In **Mexico**, prices of white

maize declined for the third consecutive month in January with progress of the 2012 main season harvest and were below their high levels at the same time last year. Prices of staple beans dropped in most countries of the subregion in January with the harvest of the second season, the most important for bean production, and were generally below their levels of January 2012. In **Haiti**, prices of imported rice were virtually unchanged in January mirroring recent trends in rice export prices from the United States, the country's main supplier. However, prices remained at high levels. Prices of domestically produced maize showed mixed trends in January, but were also generally high as a result of reduced 2012 harvests. In the **Dominican Republic**, prices of the domestically produced staple, rice, increased in December following seasonal trends ahead of the arrival of the new 2012 second season harvest.

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



South America

Favourable prospects for 2013 maize crops

In the main producing countries of South America, prospects for the 2013 maize crops are generally favourable. In **Brazil**, harvesting of the 2013 first season is about to start, and official forecasts point to an output of 36 million tonnes, 9 percent higher than in the same season last year. This reflects a 7 percent increase in the area harvested and a slight recovery in yields from last year's drought reduced level. Sowing of the 2013 second season maize crops is ongoing under generally favourable weather conditions. The area planted is anticipated to be larger than last year's high level. Assuming good growing conditions in the coming months, the 2013 aggregate maize production is preliminarily forecast at a record high of 74 million tonnes. In **Argentina**, official estimates indicate that the area planted to maize is about 4.6 million hectares, some 8 percent lower than the record high of 2012. Severe dry and warm weather from early January to the first dekad of February, following abundant precipitation in December, is raising

Table 17. Latin America and Caribbean cereal production (million tonnes)

| | Wheat | | | Coarse grains | | | Rice (paddy) | | | Total cereals | | | |
|--|-------------|-------------|-------------|---------------|--------------|--------------|--------------|-------------|-------------|---------------|--------------|--------------|-----------------------|
| | 2010 | 2011 | 2012 estim. | 2010 | 2011 | 2012 estim. | 2010 | 2011 | 2012 estim. | 2010 | 2011 | 2012 estim. | Change: 2012/2011 (%) |
| Central America & Caribbean | 3.7 | 3.6 | 3.3 | 35.8 | 29.6 | 35.4 | 2.8 | 2.8 | 2.8 | 42.3 | 36.1 | 41.5 | 15.1 |
| El Salvador | 0.0 | 0.0 | 0.0 | 0.9 | 0.9 | 1.1 | 0.0 | 0.0 | 0.0 | 0.9 | 0.9 | 1.1 | 19.6 |
| 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 | 0.1 | 0.6 | 0.7 | 0.7 | -2.5 |
| 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 | 0.6 | 0.4 | 0.4 | 0.4 | 1.0 | 1.1 | 1.1 | -0.1 |
| South America | 26.7 | 24.7 | 19.0 | 102.8 | 106.4 | 120.6 | 23.4 | 26.4 | 24.5 | 153.0 | 157.5 | 164.2 | 4.2 |
| Argentina | 15.9 | 14.1 | 10.1 | 30.0 | 32.8 | 30.2 | 1.2 | 1.7 | 1.6 | 47.2 | 48.6 | 41.9 | -13.8 |
| Brazil | 6.0 | 5.7 | 4.4 | 58.3 | 59.0 | 74.3 | 11.7 | 13.6 | 11.6 | 76.0 | 78.3 | 90.3 | 15.3 |

Note: Totals and percentage change computed from unrounded data.

concerns on yield potential of the late planted crops. More rains are urgently needed. However, assuming higher yields compared to last year's drought reduced level, the 2013 maize production is tentatively forecast by FAO at a record high of 25.5 million tonnes. In **Paraguay**, planting of the 2013 main season maize crop is currently underway with some concerns about below average precipitation since mid-January that delayed field operations. By contrast, in **Bolivia**, favourable rains in the past few months have benefited planting and early development of the 2013 maize crops, to be harvested from April.

Planting of the 2013 rice crops is complete or underway in most countries of the subregion and early estimates point to limited or no changes in the area planted compared to the reduced levels of last year, mainly on account of high production costs. In Brazil, the main producer of the subregion, early production forecasts point to an output of about 12 million tonnes, 5 percent higher than in 2011, mainly due to better yields.

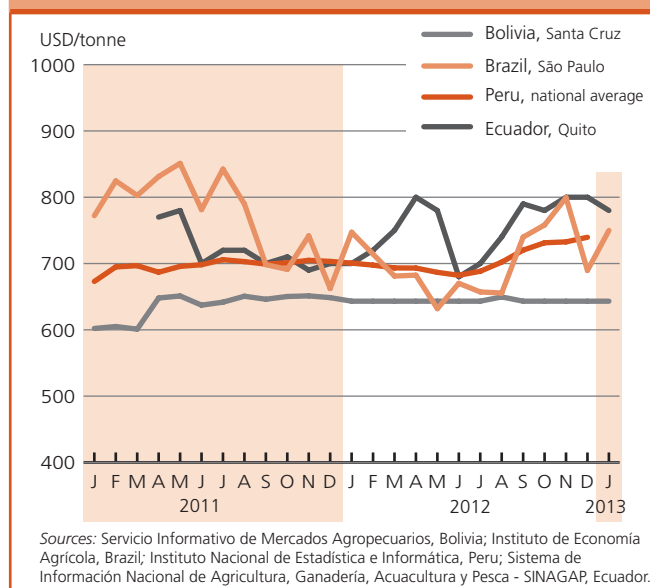
Larger cereal production in 2012

The 2012 cereal production in the subregion is estimated at a record level of 164 million tonnes, 4 percent above the 2011 level. The increase was mainly driven by the record maize production in Brazil which more than offset general decline in wheat and paddy outputs.

Prices of wheat flour increased in January and remain high

In several wheat importing countries of the subregion, prices of wheat flour rose in January exceeding their levels of a year earlier. Domestic prices were supported by increasing wheat export quotations in Argentina, a main exporter in the subregion, where prices have strengthened in recent months – unlike the US benchmark prices. Maize prices followed mixed trends in January, while those of rice declined but remained at relatively high levels. In **Brazil**, prices of wheat flour recorded the sharpest increase in January underpinned by a reduced domestic output in 2012 and higher import prices. In an attempt to ease upward pressure on prices of wheat and wheat products, the Government announced in early February the exemption from the 10 percent import tariff of 1 million tonnes

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



of wheat imports from outside the Mercosur area between April and July. This exemption may be extended to an additional 1 million tonnes. In **Bolivia**, which imports about 70 percent of its wheat consumption requirements, mainly from Argentina, prices of wheat flour increased in January and were at record or near record levels. In **Ecuador**, prices were also at near record levels despite some easing in January. Prices of yellow maize, used as feed, showed mixed trends in January. In Brazil, prices declined slightly from the record highs reached in December (in local currency) after sharp increases in the second half of 2012. Prices also declined in Bolivia but were at low levels as a result of adequate domestic availability. By contrast, in Ecuador prices continued their steady rise in the past month on account of strong domestic demand from the feed industry, and reached new record levels. Prices of domestically produced rice showed declines in most countries of the subregion although remaining generally at high levels. In Brazil, where prices had reached record highs in late 2012, they declined in January following the government release of paddy from state reserves.

North America, Europe and Oceania

North America

Winter wheat area slightly up in the United States and good rains bring relief from drought

The area sown to winter wheat in the United States, which normally accounts for about 70 percent of the total wheat plantings nationally, is officially estimated at about 17 million hectares, 1 percent up from the previous year's level and the largest area since 2009 (17.5 million hectares). Farmers were encouraged to increase winter wheat plantings further, for the fourth year in succession, by the continuing high price prospects. Early indications also point to a larger area of spring wheat, but the extent of the increase will depend largely on the outlook for competing crops this spring. Regarding the winter crop, this year's abandonment rate and yield prospects remain very uncertain. Crops in the southern Plains suffered from severe dryness virtually from planting until late January but significant precipitation from winter storms in February has improved the outlook. However, given the extent of the previous dryness and the resulting poor condition of crops, it is likely that in the affected areas, the rate of abandonment will be above average and yield potential will not fully recover. Thus, at this early stage, bearing in mind the above but assuming a slight increase in spring plantings, the country's aggregate wheat output in 2013 is tentatively forecast at 58 million tonnes. Plantings of the 2013 maize crop starts in the southern states this month. Early indications point to an increase in area compared to last year, driven by tight stocks and strong maize price prospects. However, the final outcome will depend crucially on the amount of spring precipitation in drought-affected areas in the northern Great Plains and the Corn Belt and on the expected level of returns for maize relative to competing crops such as spring wheat come planting time.

In **Canada**, the bulk of the wheat is spring planted during March and April. Farmers are expected to be encouraged again this year by good price prospects, which would result in more land being shifted into wheat production from alternative crops such as oilseeds. At this early stage, the overall 2013 wheat area is forecast to increase by 10 percent, which assuming normal weather throughout the growing season, should result in a crop of about 28 million tonnes.

Europe European Union

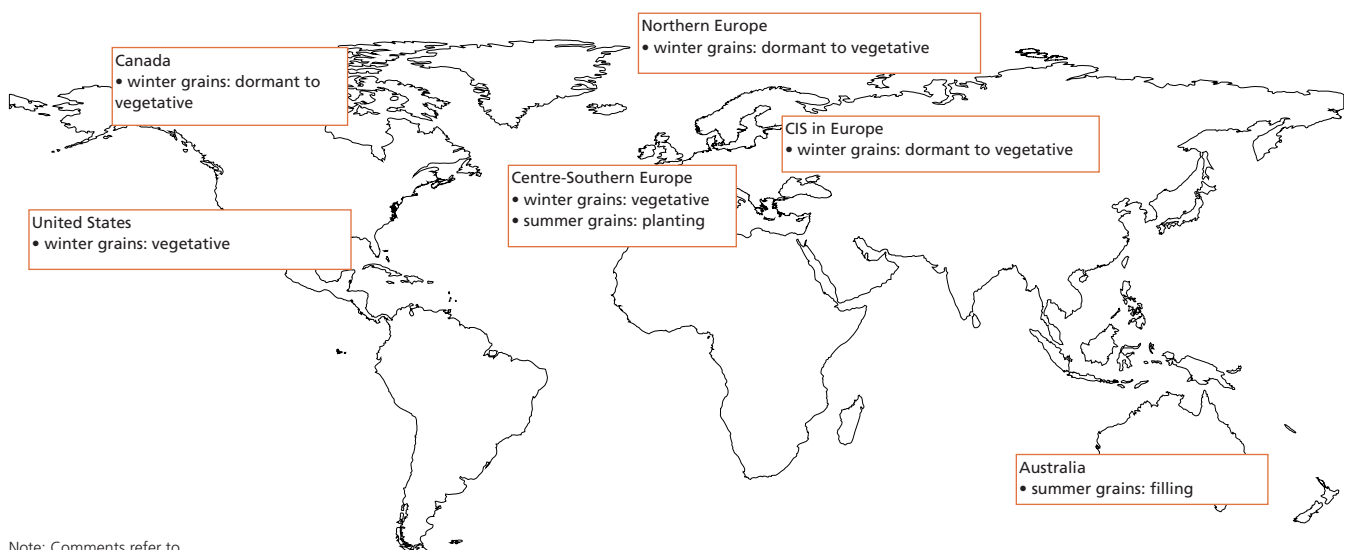
Wheat area up and growing conditions mostly favourable

In the **EU**, early estimations of winter wheat planting point to an increase of about 2.8 percent in the overall 2013 wheat area. Most of the increase is expected to be accounted for by France, Germany, Italy, Poland and Spain. Plantings in the United Kingdom were limited by excessively wet conditions. Overall, the condition of the winter crops is reported to be generally good. Winter weather conditions have posed little threat to dormant crops from winterkill and widespread precipitation has assured abundant moisture reserves for spring growth. Based on the current area estimate and assuming yields around the recent average, the EU's total wheat output in 2013 is tentatively forecast at 138 million tonnes.

CIS in Europe

Early prospects for the 2013 winter cereal crops favourable

In the **Russian Federation** and **Ukraine**, the two main exporters of the subregion, winter cereal crops are reported to be generally in satisfactory condition, after good rains in autumn provided adequate soil moisture, and sufficient snow coverage in winter



Note: Comments refer to situation as of March.

Table 18. North America, Europe and Oceania cereal production
(million tonnes)

| | Wheat | | | Coarse grains | | | Rice (paddy) | | | Total cereals | | | |
|----------------------|--------------|--------------|--------------|---------------|--------------|--------------|--------------|------------|-------------|---------------|--------------|--------------|-----------------------|
| | 2010 | 2011 | 2012 estim. | 2010 | 2011 | 2012 estim. | 2010 | 2011 | 2012 estim. | 2010 | 2011 | 2012 estim. | Change: 2012/2011 (%) |
| North America | 83.4 | 79.7 | 89.0 | 353.3 | 347.0 | 310.7 | 11.0 | 8.4 | 9.0 | 447.7 | 435.1 | 408.7 | -6.1 |
| Canada | 23.3 | 25.3 | 27.2 | 22.7 | 23.0 | 24.4 | 0.0 | 0.0 | 0.0 | 46.0 | 48.2 | 51.6 | 6.9 |
| United States | 60.1 | 54.4 | 61.8 | 330.6 | 324.0 | 286.3 | 11.0 | 8.4 | 9.0 | 401.7 | 386.9 | 357.1 | -7.7 |
| Europe | 200.9 | 223.6 | 192.7 | 203.3 | 236.1 | 218.9 | 4.4 | 4.4 | 4.3 | 408.6 | 464.1 | 415.9 | -10.4 |
| Belarus | 1.7 | 2.1 | 2.0 | 4.9 | 5.7 | 6.7 | 0.0 | 0.0 | 0.0 | 6.6 | 7.7 | 8.7 | 12.4 |
| EU | 136.1 | 137.6 | 132.0 | 143.2 | 149.0 | 141.4 | 3.1 | 3.2 | 3.1 | 282.5 | 289.8 | 276.4 | -4.6 |
| Russian Federation | 41.5 | 56.2 | 38.0 | 19.9 | 34.2 | 30.6 | 1.1 | 1.1 | 1.1 | 62.4 | 91.5 | 69.7 | -23.8 |
| Serbia | 1.7 | 2.1 | 1.9 | 7.6 | 7.0 | 4.5 | 0.0 | 0.0 | 0.0 | 9.2 | 9.0 | 6.4 | -29.6 |
| Ukraine | 16.8 | 22.3 | 15.8 | 21.0 | 33.4 | 29.9 | 0.2 | 0.2 | 0.2 | 38.0 | 55.9 | 45.9 | -17.9 |
| Oceania | 27.7 | 30.2 | 22.4 | 11.9 | 13.1 | 11.8 | 0.2 | 0.7 | 1.0 | 39.9 | 44.1 | 35.2 | -20.3 |
| Australia | 27.4 | 29.9 | 22.1 | 11.4 | 12.6 | 11.3 | 0.2 | 0.7 | 0.9 | 39.0 | 43.2 | 34.3 | -20.7 |

Note: Totals and percentage change computed from unrounded data.

protected crops from cold temperatures. In the Russian Federation, official estimates indicated winter cereal plantings of 15.7 million hectares, 0.5 million hectares less than in 2012, while plans for spring plantings put the area at 30.2 million hectares. Tentative forecasts point to a cereal production of 86-87 million tonnes, around the last five-year average. Early forecast for 2013 wheat production is around 53 million tonnes. In Ukraine, according to official information, winter grains for 2013 harvest were planted on 8.1 million hectares, which is close to the previous year results. It includes some 6.7 million hectares of winter wheat and 1.1 million hectares of winter barley. Taking into account the current conditions of winter crops in the country as well as further favourable spring cropping season, early forecast of Ukrainian's 2013 cereal production points to about 46 million tonnes including 19.5 million tonnes of wheat. In Moldova, where the planting area for winter crops increased by 8 percent, as well as in Belarus, crops are also reported in generally good conditions.

Sharp reduction in 2012 cereal output

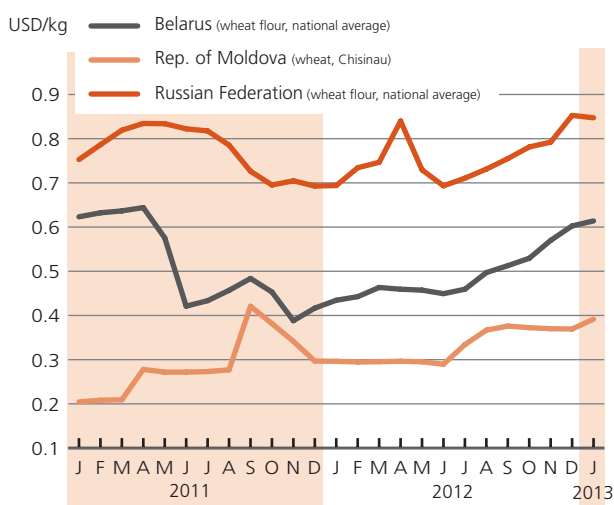
In the European CIS countries, the 2012 cereal outputs were reduced due to severe drought and extremely hot temperatures during the summer months. In aggregate, the subregion's output is estimated at 126 million tonnes, 20 percent below last year's level and 11 percent lower than the five-year average. In **the Russian Federation**, the 2012 cereal output is put at 69.7 million tonnes or 24 percent down on 2011. Production of wheat,

the most affected crop, is estimated 32 percent lower than the previous year. The Government has confirmed that in spite of the poor harvest there is no intention to introduce restrictions on grain exports. The total cereal exportable surplus of the country is foreseen to drop from some 28 million tonnes in marketing year 2011/12 (July/June) to about 16 million tonnes in 2012/13. In **Ukraine**, cereal production is estimated at 18 percent below last year's level, although it still remains close to the five-year average. However, due to ample carryover stocks, it is expected that cereal exports which will be around 22.5 million tonnes, slightly above the previous year's volume. In **the Republic of Moldova** cold winter and severe drought conditions in summer resulted in a poor cereal production in 2012 and import requirements are expected to increase sharply. The country has been exporting maize in recent years but official statements indicate a suspension of exports in marketing year 2012/13 (July/June). By contrast, a bumper cereal harvest was gathered in **Belarus**, mainly reflecting a record coarse grains production.

Wheat flour prices increasing

Wheat export prices in the **Russian Federation** and **Ukraine** in January were 40 to 70 percent above their levels a year earlier, after the sharply reduced 2012 wheat outputs. In these countries, domestic prices of wheat strengthened further in January continuing the sustained upward trend started in mid-2012 and they were by 90 and 35 percent higher in Russia and Ukraine,

Figure 11. 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.

respectively. In the Russian Federation, where state reserves have been released in the previous months to limit domestic price increases, the Government is now considering the possibility to eliminate the current 5 percent duty on wheat imports. In January, in Belarus the retail prices on wheat flour and bread were 45 and 69 percent higher respectively than a year earlier reflecting liberalization of the country's domestic price policy as well as international price trend. By contrast, due to state price regulation and interventions, wheat flour retail prices in Moldova have increased only slightly from a year earlier (by 7 percent in Chisinau and by 9 percent in Causeni).

Oceania

Australia 2012 winter grain crop sharply down from past two bumper years

The recently completed 2012 wheat harvest in **Australia**, which accounts for the bulk of the annual grain production, is officially estimated at 22 million tonnes, about 26 percent down from the bumper 2011 crop, while barley production is estimated to have fallen by 15 percent to 7.1 million tonnes. Severe drought in Western Australia and some eastern and southeastern growing regions impacted negatively on yields. The outlook for the 2013 summer cereals (mainly sorghum and maize) has deteriorated

with the heat-wave conditions in January and generally below-average rainfall across the major summer cropping regions. Sorghum production is forecast to decrease by 23 percent to 1.7 million tonnes. Early indications for the 2013 wheat crop, which will be planted from April to June, are uncertain: given the reduction in 2012 production and strong price prospects, farmers are expected to respond by increasing plantings. However, with the summer heat wave reducing soil moisture reserves in some major producing areas, much will depend on the level of precipitation before and during the planting period.

Statistical appendix

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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 | 25.2 | 24.1 | 28.2 | 25.8 | 26.0 | 23.4 |
| Coarse grains | 16.4 | 17.6 | 16.7 | 14.5 | 15.0 | 13.4 |
| Rice | 26.8 | 29.2 | 29.7 | 30.8 | 33.5 | 35.8 |
| Total cereals | 21.1 | 21.8 | 22.7 | 21.2 | 22.0 | 20.7 |
| 2. Ratio of major grain exporters' supplies to normal market requirements (%) | | | | | | |
| | 125.1 | 129.2 | 124.2 | 115.5 | 117.5 | 107.8 |
| 3. Ratio of major exporters' stocks to their total disappearance (%) | | | | | | |
| Wheat | 17.3 | 17.9 | 21.6 | 20.1 | 17.8 | 13.7 |
| Coarse grains | 14.4 | 15.6 | 15.1 | 10.3 | 10.2 | 7.7 |
| Rice | 17.9 | 23.5 | 21.6 | 21.2 | 25.6 | 27.9 |
| Total cereals | 16.5 | 19.0 | 19.5 | 17.2 | 17.9 | 16.4 |
| | Annual trend growth rate 2002-2011 | 2008 | Change from previous year | | | 2012 |
| | | | 2009 | 2010 | 2011 | |
| 4. Changes in world cereal production (%) | | | | | | |
| | 2.8 | 7.2 | -1.1 | -0.3 | 4.1 | -1.9 |
| 5. Changes in cereal production in the LIFDCs (%) | | | | | | |
| | 3.6 | 4.0 | -0.5 | 7.3 | 1.6 | 3.1 |
| 6. Changes in cereal production in the LIFDCs less India (%) | | | | | | |
| | 3.6 | 5.8 | 4.2 | 6.7 | -2.1 | 4.4 |
| | Average 2006-2010 | 2009 | Change from previous year (%) | | | 2013* |
| | | | 2010 | 2011 | 2012 | |
| 7. Selected cereal price indices: | | | | | | |
| Wheat | 171.5 | -34.6 | 9.6 | 31.5 | -5.5 | 13.6 |
| Maize | 162.5 | -25.5 | 12.0 | 57.6 | 2.2 | 9.4 |
| Rice | 215.0 | -14.0 | -9.4 | 9.5 | -5.2 | 2.5 |

Notes:

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

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

Major 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-February average.

Table A2. World cereal stocks¹
(million tonnes)

| | 2008 | 2009 | 2010 | 2011 | 2012 estimate | 2013 forecast |
|-------------------------------|--------------|--------------|--------------|--------------|------------------|------------------|
| TOTAL CEREALS | 409.8 | 488.6 | 516.0 | 492.7 | 513.4 | 499.4 |
| Wheat | 130.0 | 158.1 | 186.4 | 179.8 | 177.9 | 162.5 |
| held by: | | | | | | |
| - main exporters ² | 32.6 | 49.3 | 54.9 | 50.9 | 44.7 | 36.8 |
| - others | 97.4 | 108.8 | 131.5 | 128.9 | 133.2 | 125.7 |
| Coarse grains | 164.5 | 199.7 | 193.0 | 168.4 | 175.5 | 165.3 |
| held by: | | | | | | |
| - main exporters ² | 71.8 | 84.8 | 85.7 | 60.7 | 57.2 | 41.4 |
| - others | 92.7 | 114.9 | 107.3 | 107.7 | 118.3 | 123.9 |
| Rice (milled basis) | 115.3 | 130.8 | 136.7 | 144.5 | 160.0 | 171.6 |
| held by: | | | | | | |
| - main exporters ² | 28.6 | 36.1 | 33.4 | 34.0 | 41.8 | 46.3 |
| - others | 86.7 | 94.7 | 103.3 | 110.5 | 118.2 | 125.3 |
| Developed countries | 126.4 | 175.8 | 188.5 | 149.0 | 145.2 | 111.3 |
| Australia | 5.5 | 6.2 | 6.8 | 8.8 | 8.4 | 5.1 |
| Canada | 8.5 | 13.0 | 13.6 | 11.2 | 9.4 | 8.6 |
| European Union | 30.3 | 46.9 | 44.0 | 31.1 | 31.1 | 24.4 |
| Japan | 4.8 | 4.6 | 4.8 | 4.8 | 5.0 | 4.9 |
| Russian Federation | 5.2 | 17.7 | 20.4 | 16.6 | 13.2 | 6.1 |
| South Africa | 1.8 | 2.5 | 3.1 | 4.0 | 2.5 | 3.2 |
| Ukraine | 4.9 | 8.0 | 6.7 | 4.5 | 8.4 | 5.6 |
| United States | 54.3 | 65.9 | 75.9 | 57.3 | 49.3 | 38.7 |
| Developing countries | 283.4 | 312.7 | 327.5 | 343.7 | 368.2 | 388.1 |
| Asia | 235.3 | 256.2 | 270.8 | 280.6 | 304.6 | 330.9 |
| China | 141.6 | 154.9 | 163.7 | 167.1 | 175.6 | 192.7 |
| India | 31.7 | 37.5 | 33.7 | 37.0 | 44.9 | 47.9 |
| Indonesia | 5.4 | 6.0 | 7.2 | 8.8 | 11.0 | 11.8 |
| Iran (Islamic Republic of) | 3.5 | 3.9 | 6.2 | 6.4 | 5.3 | 9.3 |
| Korea, Republic of | 2.9 | 2.8 | 3.8 | 4.0 | 4.3 | 4.3 |
| Pakistan | 3.2 | 3.6 | 4.2 | 2.2 | 3.0 | 2.6 |
| Philippines | 3.2 | 4.2 | 4.9 | 4.1 | 3.6 | 3.3 |
| Syrian Arab Republic | 4.0 | 2.9 | 3.6 | 2.4 | 1.7 | 1.1 |
| Turkey | 5.2 | 4.1 | 4.2 | 4.2 | 5.2 | 4.2 |
| Africa | 23.9 | 25.8 | 30.0 | 34.4 | 35.5 | 33.1 |
| Algeria | 3.4 | 2.7 | 3.6 | 3.9 | 3.8 | 3.5 |
| Egypt | 3.3 | 5.6 | 6.6 | 5.9 | 8.1 | 7.9 |
| Ethiopia | 0.7 | 0.8 | 1.5 | 2.0 | 1.8 | 1.9 |
| Morocco | 1.9 | 1.3 | 2.9 | 3.4 | 3.6 | 2.6 |
| Nigeria | 1.2 | 1.3 | 1.2 | 1.4 | 1.3 | 1.0 |
| Tunisia | 1.9 | 1.5 | 1.5 | 1.0 | 1.1 | 1.3 |
| Central America | 5.9 | 5.9 | 4.3 | 5.6 | 3.8 | 4.4 |
| Mexico | 3.7 | 4.1 | 2.5 | 3.7 | 2.0 | 2.6 |
| South America | 17.9 | 24.5 | 22.1 | 22.8 | 23.9 | 19.3 |
| Argentina | 7.3 | 3.7 | 2.2 | 5.4 | 5.5 | 2.9 |
| Brazil | 3.5 | 12.5 | 11.6 | 8.1 | 8.1 | 7.2 |

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

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

² 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 | | | | | | |
| 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 |
| 2012 - December | 359 | 325 | 360 | 310 | 288 | 288 |
| 2013 - January | 348 | 311 | 362 | 303 | 294 | 287 |
| 2013 - February | 329 | 297 | 358 | 303 | 283 | 288 |

Sources: International Grains Council and USDA.

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

² Delivered United States Gulf.

³ Up River f.o.b.

Table A4a. Cereal import requirements of Low-Income Food-Deficit Countries¹, 2012/13 or 2013 estimates
(thousand tonnes)

| | 2011/12 or 2012 | | | | 2012/13 or 2013 | | | |
|---------------------------|-----------------|----------------------|----------------|--------------------------|--|--------------------------|--|----------------------|
| | 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 | | 44 211.1 | 2 129.7 | 46 340.8 | 42 958.2 | 6 378.1 | 265.9 | 6 112.2 |
| North Africa | | 18 871.0 | 0.0 | 18 871.0 | 16 371.0 | 4 954.0 | 0.0 | 4 954.0 |
| Egypt | July/June | 18 871.0 | 0.0 | 18 871.0 | 16 371.0 | 4 954.0 | 0.0 | 4 954.0 |
| Eastern Africa | | 6 974.7 | 1 207.8 | 8 182.5 | 7 986.5 | 698.0 | 124.4 | 573.6 |
| Burundi | Jan./Dec. | 100.0 | 22.1 | 122.1 | 150.0 | 0.2 | 0.2 | 0.0 |
| Comoros | Jan./Dec. | 58.8 | 0.0 | 58.8 | 59.5 | 0.0 | 0.0 | 0.0 |
| Djibouti | Jan./Dec. | 90.5 | 2.0 | 92.5 | 96.0 | 2.1 | 2.1 | 0.0 |
| Eritrea | Jan./Dec. | 376.0 | 7.0 | 383.0 | 406.0 | 0.0 | 0.0 | 0.0 |
| Ethiopia | Jan./Dec. | 394.7 | 465.5 | 860.2 | 866.0 | 52.6 | 52.6 | 0.0 |
| Kenya | Oct./Sept. | 2 142.6 | 195.0 | 2 337.6 | 2 285.0 | 73.9 | 7.1 | 66.8 |
| Rwanda | Jan./Dec. | 64.0 | 13.0 | 77.0 | 121.0 | 0.0 | 0.0 | 0.0 |
| Somalia | Aug./July | 245.0 | 183.0 | 428.0 | 480.0 | 3.9 | 3.9 | 0.0 |
| Sudan ³ | Nov./Oct. | 2 300.1 | 296.5 | 2 596.6 | 2 170.0 | 240.3 | 54.7 | 185.6 |
| Uganda | Jan./Dec. | 445.1 | 6.1 | 451.2 | 450.0 | 0.0 | 0.0 | 0.0 |
| United Rep. of Tanzania | June/May | 757.9 | 17.6 | 775.5 | 903.0 | 325.0 | 3.8 | 321.2 |
| Southern Africa | | 2 274.0 | 233.8 | 2 507.8 | 2 346.4 | 606.3 | 112.0 | 494.3 |
| Lesotho | April/March | 244.0 | 5.0 | 249.0 | 263.0 | 171.8 | 0.0 | 171.8 |
| Madagascar | April/March | 315.0 | 25.0 | 340.0 | 443.0 | 35.4 | 20.4 | 15.0 |
| Malawi | April/March | 135.1 | 29.0 | 164.1 | 115.0 | 22.1 | 22.1 | 0.0 |
| Mozambique | April/March | 950.9 | 118.8 | 1 069.7 | 891.4 | 354.4 | 64.2 | 290.2 |
| 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 | 19.7 | 5.3 | 14.4 |
| Western Africa | | 14 202.5 | 515.9 | 14 718.4 | 14 145.3 | 113.4 | 23.1 | 90.3 |
| Coastal Countries | | 10 906.1 | 120.0 | 11 026.1 | 10 707.5 | 2.6 | 2.6 | 0.0 |
| Benin | Jan./Dec. | 385.4 | 11.6 | 397.0 | 447.0 | 0.0 | 0.0 | 0.0 |
| Côte d'Ivoire | Jan./Dec. | 1 733.9 | 14.6 | 1 748.5 | 1 775.0 | 1.4 | 1.4 | 0.0 |
| Ghana | Jan./Dec. | 989.0 | 31.0 | 1 020.0 | 945.0 | 0.5 | 0.5 | 0.0 |
| Guinea | Jan./Dec. | 515.2 | 21.8 | 537.0 | 477.0 | 0.0 | 0.0 | 0.0 |
| Liberia | Jan./Dec. | 350.6 | 27.7 | 378.3 | 384.0 | 0.0 | 0.0 | 0.0 |
| Nigeria | Jan./Dec. | 6 587.0 | 0.0 | 6 587.0 | 6 320.0 | 0.0 | 0.0 | 0.0 |
| Sierra Leone | Jan./Dec. | 120.0 | 12.8 | 132.8 | 114.0 | 0.7 | 0.7 | 0.0 |
| Togo | Jan./Dec. | 225.0 | 0.5 | 225.5 | 245.5 | 0.0 | 0.0 | 0.0 |
| Sahelian Countries | | 3 296.4 | 395.9 | 3 692.3 | 3 437.8 | 110.8 | 20.5 | 90.3 |
| Burkina Faso | Nov./Oct. | 354.4 | 30.1 | 384.5 | 390.0 | 8.5 | 4.4 | 4.1 |
| Chad | Nov./Oct. | 108.9 | 75.0 | 183.9 | 177.8 | 21.3 | 5.9 | 15.4 |
| Gambia | Nov./Oct. | 169.5 | 25.5 | 195.0 | 190.5 | 0.4 | 0.4 | 0.0 |
| Guinea-Bissau | Nov./Oct. | 147.5 | 6.8 | 154.3 | 154.3 | 0.0 | 0.0 | 0.0 |
| Mali | Nov./Oct. | 337.7 | 38.8 | 376.5 | 221.2 | 14.8 | 2.5 | 12.3 |
| Mauritania | Nov./Oct. | 401.5 | 39.6 | 441.1 | 469.0 | 48.5 | 0.0 | 48.5 |
| Niger | Nov./Oct. | 353.4 | 127.3 | 480.7 | 460.0 | 17.2 | 7.3 | 9.9 |
| Senegal | Nov./Oct. | 1 423.5 | 52.8 | 1 476.3 | 1 375.0 | 0.1 | 0.0 | 0.1 |
| Central Africa | | 1 888.9 | 172.2 | 2 061.1 | 2 109.0 | 6.4 | 6.4 | 0.0 |
| Cameroon | Jan./Dec. | 920.6 | 3.5 | 924.1 | 932.0 | 1.7 | 1.7 | 0.0 |
| Cent.Afr.Rep. | Jan./Dec. | 53.0 | 10.0 | 63.0 | 63.0 | 3.5 | 3.5 | 0.0 |
| Congo | Jan./Dec. | 323.0 | 4.0 | 327.0 | 347.0 | 0.9 | 0.9 | 0.0 |
| Dem.Rep. of the Congo | Jan./Dec. | 575.3 | 154.7 | 730.0 | 750.0 | 0.3 | 0.3 | 0.0 |
| Sao Tome and Principe | Jan./Dec. | 17.0 | 0.0 | 17.0 | 17.0 | 0.0 | 0.0 | 0.0 |

Table A4b. Cereal import requirements of Low-Income Food-Deficit Countries¹, 2012/13 or 2013 estimates
(thousand tonnes)

| | Marketing year | 2011/12 or 2012 Actual imports | | | 2012/13 or 2013 Import position ² | | | |
|------------------------|----------------|-----------------------------------|----------------|--------------------------|---|--------------------------|--|----------------------|
| | | Commercial purchases | Food aid | Total commercial and aid | Total import requirements (excl. re-exports) | Total commercial and aid | Food aid allocated, committed or shipped | Commercial purchases |
| ASIA | | 36 868.4 | 1 114.0 | 37 982.4 | 33 592.2 | 9 354.9 | 110.8 | 9 244.1 |
| Cis in Asia | | 4 740.3 | 0.0 | 4 740.3 | 3 587.3 | 1 838.9 | 0.0 | 1 838.9 |
| Kyrgyzstan | July/June | 648.3 | 0.0 | 648.3 | 515.3 | 264.7 | 0.0 | 264.7 |
| Tajikistan | July/June | 1 168.0 | 0.0 | 1 168.0 | 1 208.0 | 643.9 | 0.0 | 643.9 |
| Uzbekistan | July/June | 2 924.0 | 0.0 | 2 924.0 | 1 864.0 | 930.3 | 0.0 | 930.3 |
| Far East | | 21 385.6 | 836.1 | 22 221.7 | 19 892.9 | 6 520.0 | 75.2 | 6 444.8 |
| Bangladesh | July/June | 2 041.6 | 161.0 | 2 202.6 | 3 350.0 | 230.5 | 64.2 | 166.3 |
| Bhutan | July/June | 64.9 | 0.0 | 64.9 | 74.9 | 0.0 | 0.0 | 0.0 |
| Cambodia | Jan./Dec. | 37.2 | 4.2 | 41.4 | 37.0 | 0.0 | 0.0 | 0.0 |
| D.P.R. of Korea | Nov./Oct. | 357.4 | 602.3 | 959.7 | 657.0 | 6.8 | 6.8 | 0.0 |
| India | April/March | 106.2 | 0.1 | 106.3 | 108.3 | 6.3 | 0.0 | 6.3 |
| Indonesia | April/March | 11 758.1 | 3.1 | 11 761.2 | 9 504.1 | 4 730.6 | 0.0 | 4 730.6 |
| Lao, P.D.R. | Jan./Dec. | 40.7 | 4.2 | 44.9 | 44.9 | 0.0 | 0.0 | 0.0 |
| Mongolia | Oct./Sept. | 136.0 | 0.0 | 136.0 | 116.8 | 1.0 | 0.0 | 1.0 |
| Nepal | July/June | 227.3 | 24.5 | 251.8 | 386.8 | 0.0 | 0.0 | 0.0 |
| Philippines | July/June | 5 260.7 | 6.7 | 5 267.4 | 4 437.0 | 1 544.8 | 4.2 | 1 540.6 |
| Sri Lanka | Jan./Dec. | 1 355.5 | 30.0 | 1 385.5 | 1 176.1 | 0.0 | 0.0 | 0.0 |
| Near East | | 10 742.5 | 277.9 | 11 020.4 | 10 112.0 | 996.0 | 35.6 | 960.4 |
| Afghanistan | July/June | 2 037.5 | 212.9 | 2 250.4 | 1 252.0 | 187.6 | 35.6 | 152.0 |
| Iraq | July/June | 5 295.0 | 15.0 | 5 310.0 | 5 360.0 | 808.4 | 0.0 | 808.4 |
| Yemen | Jan./Dec. | 3 410.0 | 50.0 | 3 460.0 | 3 500.0 | 0.0 | 0.0 | 0.0 |
| CENTRAL AMERICA | | 1 615.5 | 145.0 | 1 760.5 | 1 735.1 | 265.5 | 5.3 | 260.2 |
| Haiti | July/June | 529.4 | 126.1 | 655.5 | 660.1 | 9.8 | 4.8 | 5.0 |
| Honduras | July/June | 759.1 | 15.9 | 775.0 | 755.0 | 180.3 | 0.3 | 180.0 |
| Nicaragua | July/June | 327.0 | 3.0 | 330.0 | 320.0 | 75.4 | 0.2 | 75.2 |
| OCEANIA | | 441.9 | 0.0 | 441.9 | 441.9 | 0.0 | 0.0 | 0.0 |
| Kiribati | Jan./Dec. | 8.7 | 0.0 | 8.7 | 8.7 | 0.0 | 0.0 | 0.0 |
| Papua New Guinea | Jan./Dec. | 390.2 | 0.0 | 390.2 | 390.2 | 0.0 | 0.0 | 0.0 |
| Solomon Islands | Jan./Dec. | 43.0 | 0.0 | 43.0 | 43.0 | 0.0 | 0.0 | 0.0 |
| TOTAL | | 83 136.9 | 3 388.7 | 86 525.6 | 78 727.4 | 15 998.5 | 382.0 | 15 616.5 |

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 1 915 in 2010); for full details see <http://www.fao.org/countryprofiles/lifdc.asp>.

² Estimates based on information as of early February 2013.

³ Including South Sudan.

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