







# FOODCROPS AND SHORTAGES

No.2

April 2001

	<p><b>AFRICA:</b> Despite improved harvest prospects, food supply difficulties persist in eastern Africa with about 18 million people still depending on emergency food assistance. In southern Africa, severe floods in recent months affected some 1 million people in Mozambique, Malawi, Zimbabwe and Zambia, and large numbers need food and other humanitarian assistance. Also, the sub-region's maize production in 2001 is forecast to decline 28 percent from last year. In the Sahel, the food supply situation has tightened in parts of Burkina Faso, Chad and Niger due to reduced harvests last year.</p>
	<p><b>ASIA:</b> In Afghanistan, a harsh winter has exacerbated the serious food crisis caused by two consecutive years of drought and continuing civil conflict. The food supply situation remains precarious in DPR Korea and Mongolia following a harsh winter. In the CIS, following two years of below normal precipitation, harvests in Armenia, Azerbaijan, Georgia and Tajikistan will depend crucially on good rains in the coming months. Elsewhere, winter wheat prospects are generally unfavourable due to serious drought in India and Pakistan and continued decline in planted area in China.</p>
	<p><b>LATIN AMERICA AND THE CARIBBEAN:</b> In Central America and the Caribbean, crop performance in 2001 will determine the pace of recovery from the string of natural disasters in the past 12 months which included a prolonged dry spell, Hurricane "Keith" and earthquakes. In Mexico, earlier forecasts of wheat production have been revised slightly downwards due to dry weather conditions, while in Brazil, Argentina and Uruguay, a rainy summer has favoured the development of coarse grain crops which are currently being harvested.</p>
	<p><b>EUROPE:</b> The 2001 cereal area in the EC is forecast to be down and production will decline from last year's bumper level. In several central and eastern European countries soil conditions still remain too dry for spring field operations and satisfactory crop development. In the CIS countries in Europe, the outlook for 2001 cereal crops is good, particularly in the Ukraine and the Russian Federation. Larger areas have been sown and winter crops are doing well. Good soil moisture reserves and favourable prices could result in larger spring sowings.</p>
	<p><b>NORTH AMERICA:</b> Wheat output could decline further this year in the United States as winter plantings fell to the lowest since 1971, and spring wheat area is also forecast to fall. Early indications for the coarse grain crops point to smaller maize plantings but an increase in the sorghum area. Rice area is expected to increase by about 4 percent. Wheat and coarse grain plantings could also increase over last year.</p>
	<p><b>OCEANIA:</b> In Australia, an increase is expected in the wheat and barley areas for the 2001 crops. In the Solomon Islands the humanitarian situation of the internally displaced persons due to earlier conflict remains a cause for concern. Recent rains have adversely affected crops. Cyclone Paula, which hit Tonga in early March, caused damage to property and infrastructure as well as localized crop losses.</p>



FOOD AND AGRICULTURE ORGANIZATION OF THE UNITED NATIONS

## AFFECTED COUNTRIES <sup>1/</sup>

### COUNTRIES FACING EXCEPTIONAL FOOD EMERGENCIES (Total: 36 countries)

<u>Country/Region</u>	<u>Reason for Emergency</u>	<u>Country/Region</u>	<u>Reason for Emergency</u>
<b><u>AFRICA</u> (21 countries)</b>		<b><u>ASIA</u> (11 countries)</b>	
<b>Angola*</b>	Civil strife, population displacement	<b>Afghanistan*</b>	Drought, civil strife
<b>Burkina Faso</b>	Drought	<b>Armenia*</b>	Drought, economic constraints
<b>Burundi*</b>	Civil strife and insecurity	<b>Azerbaijan</b>	Drought, economic constraints
<b>Chad</b>	Drought	<b>Cambodia</b>	Past floods
<b>Congo, Dem. Rep.*</b>	Civil strife, IDPs and refugees	<b>Georgia*</b>	Drought, economic constraints
<b>Eritrea*</b>	IDPs, returnees and drought	<b>Iraq*</b>	Sanctions, drought
<b>Ethiopia*<sup>2/</sup></b>	Drought, IDPs	<b>Jordan</b>	Drought
<b>Guinea</b>	Civil strife, population displacement	<b>Korea, DPR*</b>	Adverse weather, economic problems
<b>Kenya</b>	Drought	<b>Mongolia*</b>	Economic problems, harsh winter
<b>Liberia*</b>	Past civil strife, shortage of inputs	<b>Tajikistan*</b>	Drought
<b>Malawi</b>	Floods in parts	<b>Uzbekistan</b>	Drought in Karakalpakstan
<b>Mozambique</b>	Floods in parts		
<b>Niger</b>	Drought		
<b>Rwanda*</b>	Drought in parts		
<b>Sierra Leone*</b>	Civil strife, population displacement		
<b>Somalia*</b>	Drought, civil strife		
<b>Sudan*</b>	Civil strife in the south, drought		
<b>Tanzania</b>	Food deficits in several regions		
<b>Uganda</b>	Civil strife in parts, drought		
<b>Zambia</b>	Floods in parts		
<b>Zimbabwe*</b>	Floods in parts		
		<b><u>LATIN AMERICA</u> (2 countries)</b>	
		<b>Haiti*</b>	Structural economic problems, vulnerable groups
		<b>El Salvador</b>	Earthquakes
		<b><u>EUROPE</u> (2 countries)</b>	
		<b>Russian Federation (Chechnya)</b>	Civil strife, vulnerable groups
		<b>F.Rep. Yugoslavia* (Serbia &amp; Montenegro)</b>	Vulnerable groups and refugees

### COUNTRIES WITH UNFAVOURABLE PROSPECTS FOR CURRENT CROPS

<u>Country</u>	<u>Harvest date</u>	<u>Main contributory factors</u>
<b>Afghanistan*</b>	May/June	Adverse weather, civil strife
<b>Bolivia</b>	April/May	Floods
<b>India</b>	March/Apr.	Drought
<b>Iraq*</b>	May/June	Erratic rainfall, shortage of inputs
<b>Jordan</b>	March/Apr.	Erratic rainfall
<b>Pakistan</b>	Apr./May	Drought
<b>Tajikistan*</b>	Jun./Sept.	Shortage of seed, economic constraints
<b>F.Rep. Yugoslavia* (Serbia &amp; Montenegro)</b>	July/Oct.	Drought and shortage of inputs

<sup>1/</sup> Both here and in the text, countries with unfavourable prospects for current crop and/or uncovered shortfalls are marked in **bold** and those affected or threatened by successive poor crops or food shortages are marked with an asterisk (\*). Definitions can be found on the Contents page.

<sup>2/</sup> Country requiring external assistance for purchase and distribution of localized surpluses to deficit areas.

## CROP AND FOOD SUPPLY SITUATION

### OVERVIEW

Food supply difficulties persist in many countries around the world, notwithstanding improved harvest prospects in parts. In eastern Africa, despite generally improved weather conditions, serious food shortages have emerged in western and southern Sudan due to drought, exacerbated by the long-running civil war. Kenya, Ethiopia, Eritrea and Tanzania are yet to fully recover from the effects of a recent severe drought. In the sub-region as a whole, an estimated 18 million people continue to need food assistance. In southern Africa, a combination of prolonged dry spells and excessive rains has adversely affected the 2001 food crops and aggregate cereal production is forecast to fall sharply. Severe floods in parts have contributed to the fall in production, besides displacing a large number of households and damaging infrastructure. In western Africa, parts of Burkina Faso, Chad and Niger are facing severe food shortages due to reduced harvests last year and the Governments have appealed for donor assistance.

In Asia, the food crisis in Afghanistan, following successive droughts and harsh winters and exacerbated by persistent civil conflict, is also of utmost concern. More than 3 million people need emergency food assistance. Serious food security concerns centre on Mongolia, which has suffered two successive severe winters with loss of millions of the all important livestock, and Korea DPR following a poor harvest last year and the coldest winter in 50 years. Elsewhere, overall wheat harvest prospects are unfavourable, with large falls in India and Pakistan following a severe drought, and in China as a result of significantly reduced plantings. In the CIS countries of central Asia, following drought-reduced harvests last year, particularly in Armenia, Georgia and Tajikistan, seed shortages have limited winter wheat sowings, thus slowing down the pace of recovery. Some 4 million people continue to need food assistance.

In Latin America, favourable growing conditions in the next few months will be crucial for crops in Central America and the Caribbean, which suffered a string of disasters in the last 12 months, including Hurricane "Keith", dry spells and earthquakes. Elsewhere, harvest prospects are generally favourable.

In Europe, prospects for the winter cereal crops remain unfavourable in the Balkan and eastern European countries where soil moisture deficiencies continue to be of great concern. In the EC, indications are that aggregate cereal area has fallen appreciably, reflecting a significant contraction in winter sown soft wheat area. In the CIS countries west of the Ural Mountains, the harvest outlook is markedly better than at the corresponding time last year.

In North America, wheat production in the United States could decline further this year after winter wheat plantings fell to their lowest level since 1971. In Canada, wheat and coarse grains crops are mostly sown in May/June but early indications point to some increase in planted areas compared to last year.

### SITUATION BY REGION

#### Africa

In **eastern Africa**, favourable secondary season cereal harvests in parts and forecasts of near-normal rainfall over most of eastern Africa for the period March-May 2001, have improved the food supply outlook. However, the effects of recent devastating droughts and past or ongoing civil strife and conflicts continue to undermine the food security of an estimated 18 million people.

In Kenya, the severe drought last year seriously undermined the food security of nearly 4.4 million people. The severe scarcity of water and pasture in northern and eastern parts that resulted in large livestock losses persist following the failure of the recent "short rains" season. In Eritrea, the food situation of more than 1.8 million people affected by war with neighbouring Ethiopia and drought remains precarious. Mass displacement of farmers from the agriculturally rich regions of Gash Barka and Debub, which account for more than 70 percent of cereal production, jeopardised the 2000 cropping season. The outlook for the 2001 agricultural season, which is about to start, is bleak as farmers are unable to return to their farms so far, and large tracts of land are inaccessible due to landmines. In Sudan, serious food shortages have emerged in western and southern parts due to drought, with the long-running civil war aggravating the situation by impeding rural households from cultivation. In Ethiopia, despite a favourable "meher" season harvest, some

6.5 million people affected by successive droughts and the war with neighbouring Eritrea, depend on food assistance. In Somalia, a satisfactory secondary (“deyr”) season preceded by a favourable main (“gu”) harvest has improved overall food prospects. Consequently, the number of people in need of food assistance has declined from 750 000 to 500 000. In Tanzania, the overall food supply situation has improved following harvests of the “short rains” crop. However, successive years of poor rainfall have seriously undermined food production in the northern and central regions of the country, necessitating food assistance for some 1.3 million people across 11 regions. In Uganda, the overall food supply situation is stable. However, food supply difficulties remain in Gulu, Kitgum and Bundibugyo mainly due to insecurity. An estimated 1.1 million IDPs, refugees, and drought-affected people rely on food assistance. In Burundi the food situation is difficult for 324 000 internally displaced people and for drought affected persons in the provinces of Karuzi, Gitega, Kayanza and Muyinga. In Rwanda, despite a satisfactory harvest in the first season of 2001, food assistance is required for 267 000 drought-affected people in southeastern provinces.

In **southern Africa**, harvesting of the 2001 cereal crops is about to start. The output is anticipated to decline sharply from the good harvest last year. This reflects lower plantings and yields caused by a mid-season dry spell followed by excessive rains and floods in several parts. The main maize crop is forecast at 13.5 million tonnes, 28 percent below last year and well below average. Reductions of over one-third in cereal productions are expected in South Africa, Zimbabwe and Namibia due to adverse weather coupled with substantial declines in the areas planted. Maize outputs are also forecast to fall in Malawi and Zambia as a result of excessive precipitation during the season. In Botswana, Lesotho and Swaziland, cereal harvests are likely to decrease or to remain around the poor levels of 2000. By contrast, in Mozambique, despite severe crop losses to floods in central parts, the 2001 cereal crop is forecast at about last year’s good harvest.

Severe floods in February and March resulted in loss of life, displacement of large numbers of people, severe damage to transport infrastructure and serious crop losses in several countries. It is estimated that close to 1 million persons have been affected by the floods, including 563 000 in Mozambique, 346 000 in Malawi, 30 000 in Zimbabwe and 30 000 in Zambia. The Governments of these countries have appealed for food assistance for the worst affected populations. In Angola, the persistent civil war has resulted in 2.5 million internally displaced people and the number is on the increase. Emergency food assistance is required for 1.5 million of the displaced.

In **northern Africa**, harvest prospects are generally favourable for the 2001 cereal crops in the subregion. A strong recovery in output from last year’s drought-reduced crop is anticipated, provided normal weather prevails in the coming months. In Algeria and Tunisia, despite delayed plantings in several areas because of insufficient precipitation at the beginning of the growing season, conditions have improved with widespread rains in January and February over major growing areas. In Morocco, rainfall has generally been abundant this year in most growing areas, with the exception of the sahelian zone of the country. Crops are reported to be in good condition and water reservoirs are being replenished. In Egypt, growing conditions are satisfactory for winter grains, which are largely irrigated.

In **western Africa**, seasonably dry conditions prevail in the Sahel. Prospects for off-season or flood recession crops in Mauritania and Senegal are less favourable than last year due to lower water levels in the Senegal River. Latest official estimates put the aggregate 2000 cereal production in the nine CILSS member countries at 8.9 million tonnes, about 21 percent below the record production in 1999 and 8 percent below the average of the past five years. Below-average harvests are estimated for Burkina Faso, Chad and Niger, while production was close to average in Mali and Mauritania, above average in Cape Verde, Guinea Bissau and Senegal, and a record in The Gambia. Subsidized or free food distributions to seriously affected populations are underway in Burkina Faso, Chad and Niger and the Governments have appealed to donors for assistance.

In the coastal countries along the Gulf of Guinea, the rainy season has started in Côte d'Ivoire, Ghana and Togo and planting is underway. In Guinea and Sierra Leone, recent fighting has affected agricultural and marketing activities and caused new population displacements, especially in and around the Parrot’s Beak area, and has also disrupted relief programmes. In Liberia, planting of paddy starts in May with the arrival of the seasonal rains. However, the country still suffers from the effects of the past civil war. These three countries are heavily dependent on international food assistance.

In **central Africa**, the cropping season has started normally in Cameroon and Central African Republic, while above-normal rainfall was recorded in the Republic of Congo in early to mid-March. In the latter country, food production is progressively recovering following the past civil strife, and food assistance

continues to be provided to the internally displaced people and refugees mainly from the Democratic Republic of Congo, Rwanda and Angola. In the Democratic Republic of Congo, civil conflict has resulted in an estimated 2 million internally displaced people. Their food and nutrition situation is extremely serious but distribution of humanitarian assistance is hampered by insecurity. The number of internally displaced people is currently estimated at 2 million.

## **Asia**

In the Asia region, the main agricultural activities include winter season wheat production in the main producing countries of China, India and Pakistan and main season rice production in the southern hemisphere countries of Indonesia and Sri Lanka, where the crop is planted with the onset of the north east monsoon. Overall wheat prospects are unfavourable with a sharp decline expected, due to a significant fall in area planted in China and a severe drought in India and Pakistan. In China, current forecasts point to a winter wheat crop of around 92.5 million tonnes, some 500 000 tonnes below the drought-reduced crop last year, whilst output in India is expected to be some 5 to 7 million tonnes below last year's record crop of 75.5 million tonnes. Extensive drought in Pakistan will also result in a significantly lower wheat crop of around 17.5 million tonnes compared to the record 21 million tonnes produced in 2000. Elsewhere, prospects for recovery in this year's wheat crop in the Islamic Republic of Iran still remain uncertain, following two successive years of serious drought in 1999 and 2000 that saw production fall significantly. Main season rice prospects in Indonesia and Sri Lanka and dry season rice prospects in Thailand, Laos, Cambodia and Vietnam are generally satisfactory. The main food security concerns in the Asia region centre on Mongolia and Korea DPR which experienced severe winter conditions earlier in the year, exacerbating chronic food problems amongst vulnerable groups and in parts of north western and central India and Pakistan where successive drought has resulted severe food and water shortages.

In several countries of the **Near East**, a prolonged severe drought followed by a harsh winter in parts has affect the livelihood of millions of people. In Afghanistan, freezing temperatures have caused loss of life and exacerbated the very serious food crisis that has emerged following two consecutive years of drought and continuing civil conflict. The drought has seriously affected crops and livestock across the country, leaving more than 3 million people in urgent need of assistance. In Iraq, two years of drought have seriously reduced food production, while in Jordan the drought has severely affected crops and pastures, leaving thousands of herders in need of assistance.

In the eight CIS countries in Asia, the overall outlook for the 2001 cereal harvests will be influenced by prospects in Kazakhstan, the major producer, where the bulk of cereals are not sown until May. The early outlook for winter cereals is mixed. Following the drought reduced crops of 2000, seed shortages have limited the areas that could be sown with winter wheat in several countries, notably Armenia, Georgia and Tajikistan. The area sown to winter cereals increased further in Azerbaijan, but winter precipitation in the Caucasus region has been below normal and inadequate to recharge moisture reserves for sustained plant growth and irrigation water supplies. Good precipitation is needed in April-May and beyond if spring crop sown areas and yields are to develop normally, let alone compensate for reduced winter wheat areas. Elsewhere, in Asian CIS countries, heavy snowfall this winter has helped to recharge moisture supplies. In Uzbekistan the latest indications are that the area sown to winter wheat may have remained stable. In Turkmenistan, by contrast, the area sown increased further and the production target has been raised beyond last year's record output of 1.8 million tonnes.

The current outlook is for a somewhat larger aggregate cereal harvest of about 22 million tonnes, roughly 1 million tonnes more than in 2000, mainly due to expected growth in output in Turkmenistan, a recovery in Uzbekistan, and a stable output in Kazakhstan. Most of the increase would be in wheat production but rice production could recover in Uzbekistan. Cereal production in Armenia, Georgia and Tajikistan could remain below average for the second year in succession.

In the drought affected low-income food deficit countries of the CIS - notably Armenia, Georgia and Tajikistan - some 4 million people continue to require international relief assistance. Moreover, a significant recovery in food production this year will require further assistance with the provision of inputs. In Azerbaijan, despite an improved harvest, access to adequate food remains a problem for the poorest segments of the population. In northern Uzbekistan vulnerable populations in Karakalpakstan have suffered heavy crop and income losses due to drought and need relief.

## Latin America

In **Central America and the Caribbean**, planting of first season coarse grain crops is progressing under generally dry weather conditions. Favourable conditions in the next few months will be crucial for crops in Guatemala, El Salvador, Honduras and Nicaragua to recover from the damage caused by last year's natural disasters which affected not only food crops but also important export crops including coffee and sugar cane. No early signs of "El Niño" are being reported, and a normal rainy season is forecast for the subregion. In Mexico, dry weather conditions in Sonora during January and February did not favour the development of wheat crops, and the harvest, which is now underway, is now forecast to be slightly below the 3.3 million tonnes projected earlier in the year.

In **South America**, thanks to a bumper maize crop, aggregate cereal output in 2001 is forecast to increase by 4 percent relative to last year. Abundant rains throughout the summer over cereal growing areas of MERCOSUR (Brazil, Argentina, Paraguay and Uruguay) boosted the development of maize and sorghum. Scattered showers in Northeast Brazil are currently favouring the early development of second season maize crops (*zafrinha*). Harvest of first season maize crops has started in Brazil, and the forecast 34 million tonnes are expected to transform the country into a net exporter for the first time. Conversely, maize output in Argentina is expected to fall slightly due to a reduction in the area planted. Harvesting of paddy crops has also started in MERCOSUR, and total output is expected to decrease some 4 per cent from last year due to depressed prices following a fall in demand from Brazil. In Bolivia, the international community is assisting local communities affected by heavy rains that have been falling since January. Damage by localized floods and mudslides to crops, including maize, beans and potatoes, has been reported. Heavy rains are also causing localized damage to cereal crops in central Chile and coastal areas of Ecuador.

## Europe

Latest indications continue point to an overall reduction in the **EC's** cereal area for the 2001 harvest, largely reflecting a significant contraction in the winter sown soft wheat area. As a result, the 2001 cereal output is forecast to decline from the previous year's bumper level. Prospects for the winter cereal crops remain unfavourable throughout the Balkan countries where soil moisture deficit continues to be the main concern. Romania, Bulgaria and the Federal Republic of Yugoslavia (Serbia and Montenegro) remain the countries most affected with their cumulative rainfalls for the December-February period reported to be, respectively, 60 percent, 50 percent and 20 percent below normal. The dry conditions have been exacerbated by generally warmer than normal temperatures. Further north, rainfall has been more frequent and regular in Poland, the Czech Republic, Slovakia and Hungary. Although snowcover has been limited in many areas, mild temperatures have meant little risk of frost kill among the winter grains

In the CIS countries west of the Ural Mountains, (Belarus, Moldova, Russian Federation and Ukraine), the outlook is markedly better than at the corresponding time last year, particularly in Ukraine. A larger output is likely, in response to good growing conditions and soil moisture reserves to date in most areas of the Russian Federation and Ukraine and an expected increase in the aggregate area to be sown to cereals. The aggregate area sown to winter crops has increased by up to 2 million hectares and the bulk of crops are in good to satisfactory condition. At this early stage, the outlook is for aggregate 2001 cereal output to increase by 10 million tonnes to some 109 million tonnes, provided growing conditions remain normal until the completion of the harvests.

In Belarus, the 2001 cereal harvest could increase somewhat beyond the 4.4 million tonnes harvested in 2000 despite persistent economic problems. In Moldova, also some recovery from the 2000 drought reduced level of 2 million tonnes is likely, given normal weather. In the Russian Federation, the area sown to winter crops increased to 14.7 million hectares and the spring crop area is also expected to expand reflecting good demand for cereals and good soil moisture reserves. In the Ukraine, in contrast to the past two years, the early outlook for cereal crops is favourable. The area sown to winter crops has increased, for cereals by up to 1.4 million hectares and crop condition is satisfactory overall. Soil moisture reserves have been replenished in all areas except the south and spring plantings are also expected to increase. Floods in Zarkapatia have led to loss of life and shelter, but their effect on the aggregate crops is likely to be limited. Grain production could increase by 7 million tonnes to nearly 30 million tonnes.

In the Baltic countries, (Estonia, Latvia and Lithuania) overwintering conditions have been mostly satisfactory to date. The 2000 cereal harvest recovered sharply in all three countries, reaching 4.2 million tonnes compared to 3.3 million tonnes in 1999, mainly due to better yields. Output in Lithuania increased by 0.6

million tonnes to 2.6 million tonnes, while in Latvia and Estonia cereal production increased by 0.1 million tonnes to 0.9 and 0.6 million tonnes respectively. Precipitation in the Balkan countries has generally been below normal this cropping year and inadequate to recharge soil moisture reserves.

In the Federal Republic of Yugoslavia, (Serbia and Montenegro), the outlook for the 2001 cereal harvests is clouded by the effects of the persistent drought. Economic problems on farm and critical shortages of fertilizer are also likely to undermine yields. Output could recover somewhat from last year's poor 5.4 million tonnes but could remain below average. In Croatia, also, the outlook for the 2001 wheat crop is uncertain due to a reduction in the area sown to wheat and tight moisture supplies. In Bosnia Herzegovina, soil moisture supplies are also short.

In the Russian Federation, the cropping outlook in Chechnya is not good. Persons displaced and/or left homeless as a result of conflict, both in Chechnya and in surrounding republics continue to need assistance. Conditions in the winter months are particularly difficult. In the Balkans also, vulnerable populations in Yugoslavia Fed. Rep. and surrounding countries continue to need assistance.

### **North America**

Wheat output in the United States could decline further this year after winter wheat plantings fell to their lowest level since 1971. Early prospects for spring wheat plantings also point to an area reduction and overall output in 2001 is tentatively forecast at about 60 million tonnes, about 1 percent down from 2000. Early indications for spring coarse grain planting point to 4 percent reduction in maize plantings but a 2 percent increase for sorghum. Rice area is expected to expand by 4.2 percent. In Canada, wheat and coarse grains crops are mostly sown in May/June. Early indications of planting intentions point to some increase in the wheat and coarse grains areas compared to the previous year.

### **Oceania**

Planting of the main 2001 wheat and coarse grains crops in Australia is due to start in May. Early official forecasts point to an increase in the wheat and barley areas. Harvest of the minor 2001 summer coarse grains crop is underway and output is down due to dry conditions at planting time. The 2001 rice harvest has started sooner than expected due to good weather during the maturation period. In the Solomon Islands, a large number of the estimated 50 000 people that had been forced out of their homes during the civil conflict remain displaced. These internally displaced as well as returnees are striving for basic needs such as food, drinking water and shelter. In addition to the collapse of the national economy and essential services, recent heavy rains have aggravated conditions for people living on subsistence agriculture. In Tonga, cyclone "Paula" in early March caused damage to property and infrastructure and some localized damage to crops.

## COUNTRY REPORTS <sup>1/</sup>

### **AFRICA**

#### **NORTHERN AFRICA**

##### ALGERIA (27 March)

Despite delayed planting of winter grains in several areas because of insufficient precipitation at the beginning of the growing season, conditions improved at the end of 2000 and in January 2001, with abundant and widespread rains over growing areas. Little precipitation was received in February and March, except in the north-western part of the country. Prospects are uncertain for the 2001 crops, to be harvested from May. Favourable conditions in the next two months will be crucial for a recovery in cereal production from the 2000 level of about 1.1 million tonnes, which was well below average.

##### EGYPT (27 March)

Growing conditions are satisfactory for the largely irrigated wheat and barley crops planted in October/November for harvest in April/May. Good rainfall in February also provided conditions to cultivate more land for wheat and barley in Lower Egypt. Overall, the area planted to wheat and barley is estimated at about 1.1 million hectares, which is slightly above the 2000 level. Preparation has started for the planting of the 2001 rice crop. The 2000 paddy crop is estimated at about 6 million tonnes, some 3 percent over the previous year's above average level.

##### MOROCCO (27 March)

Rainfall has been generally abundant this year in most growing areas, with the exception of the sahelian zone of the country. The wheat and barley crops are reported to be in good condition and water reservoirs are being replenished, particularly in the northern areas where precipitation continued to be received in late February and early March. The area sown to wheat and other cereals is reported to be close to the level of the previous five-years average. Production is expected to be more than double last year's poor output of about 2 million tonnes, provided favourable conditions prevail in the next two months.

##### TUNISIA (27 March)

Growing conditions have been generally favourable for winter grains this year in the northern region, the main producing area of the country. Significant rains continued to benefit crop development in March and a good harvest is in prospect. However, conditions have been less favourable in the centre and the south, where crops have been adversely affected by a prolonged dry spell. The resulting low soil moisture levels are likely to affect overall yields in these areas. The area sown to cereals in 2000/01, mainly wheat, is estimated at 1.24 million hectares, which is below the previous year's level, due to low rainfall in main growing areas at the time of planting. Overall, a recovery in production from last year's poor harvest is expected, but the size will depend on conditions during the next two months.

<sup>1/</sup> Bold print is used for countries with unfavourable crop prospects for current crops and/or uncovered shortfalls in food supplies in the current marketing year requiring exceptional and/or emergency assistance. Countries affected or threatened by successive poor crops and/or food shortages are marked with an asterisk (\*).



## **WESTERN AFRICA**

### **BENIN (27 March)**

Planting of the first maize crop is underway in the south and progressing northwards with the onset of rains. Reflecting generally adequate growing conditions, the aggregate 2000 cereal production is estimated at 905 000 tonnes, which is slightly below the 1999 record but remains well above average.

The overall food supply situation is satisfactory. Markets are well supplied and prices of cereals remain generally stable. Cereal imports for domestic use and re-exports during the 2001 marketing year are estimated at 143 000 tonnes and food aid requirements at 11 000 tonnes.

### **BURKINA FASO (9 April)**

**Seasonably dry conditions prevail. Off-season crops are being harvested. Final 2000 production figures have been released by the government and are significantly lower than the estimates of the FAO/CILSS Crop Assessment Mission in October 2000 which already indicated a below-average harvest. The aggregate output of cereals is now estimated at 1 863 000 tonnes, which is 31 percent below the 1999 record crop and 23 percent below the average of the previous five years.**

Following this reduced crop, the overall food supply situation is tight, notably in the north, the centre and the east where cereal production decreased significantly. The return of Burkinabé from Côte d'Ivoire to their villages is putting additional pressure on food supply. However, following 1998 and 1999 successive bumper crops, some household stocks are still available. Prices of cereals remained generally stable and below the 1995-99 average in January and February, except in the north where they increased significantly. In March, they increased significantly in the north, east and centre. The Government has launched a 4 000 tonnes food aid distribution programme for about 68 000 persons in 17 affected provinces.

### **CAPE VERDE (27 March)**

Seasonably dry conditions prevail. The 2000 maize production has been estimated by a joint FAO/CILSS Crop Assessment Mission at 18 500 tonnes, which is significantly below the 1999 record crop but remains well above average.

Following two successive good harvests, the overall food supply situation is satisfactory. However, local production covers only about a quarter of consumption requirement and the country relies on imports and food aid to cover its needs. With available stocks and planned commercial imports and food aid for the coming months, markets should remain well supplied with stable prices. The cereal import requirement for the 2000/01 marketing year (November/October) is estimated at 88 000 tonnes and the food aid requirement at 53 000 tonnes.

### **CHAD (9 April)**

**Seasonably dry conditions prevail. Harvesting of berbéré (flood recessional sorghum) is underway, notably in Guéra and Salamat departments. Yields are lower than last year due to shortage of water and grain-eating birds attacks. A joint FAO/CILSS Crop Assessment Mission estimated the 2000 cereal production at 890 000 tonnes, which is 28 percent below the 1999 record level and 16 percent below the previous five years' average.**

Following this reduced harvest, the food supply situation is tight in the structurally deficit areas of the Sahelian zone but some farmers' stocks are still available following 1998 and 1999 bumper crops. Unusual population movements were reported from several cantons of Lac Department to major urban centres, southern Chad or the Lake Chad area. In the

**Sudanian Zone, the food situation is also worsening in the rice producing areas, notably in Mayo-Kebbi department. The cotton harvest in the south is also anticipated to be reduced, but groundnut production is good. Prices of millet increased in February in the Sahelian zone. Prices of rice also increased sharply in the major producing areas of the Sudanian zone. By contrast, prices of onions dropped as many farmers turned to growing this crop. The migration of livestock from the Sahelian zone could trigger overgrazing and a shortage of pasture in the Sudanian zone. A locally-organized joint CILSS/FAO/WFP/FEWS-NET assessment of the food supply situation in the at-risk zones conducted in early January estimated the at-risk population at 800 000 persons for whom about 40 000 tonnes of cereals are needed. About 700 000 people are also considered moderately vulnerable. The sale of 20 000 tonnes of cereals at subsidised prices is recommended. A WFP Emergency Operation has recently been approved to provide 27 000 tonnes of food aid to 375 000 beneficiaries in eight departments of the Sahelian zone (Assonga, Bahr el Ghazal, Batha, Biltine, Guéra, Kanem, Lac and Ouaddaï).**

#### COTE D'IVOIRE (27 March)

Planting of the first maize crop is underway in the south and progressing northwards with the arrival of the rains.

Following an above-average cereal harvest in 2000, the overall food supply situation is satisfactory. However, recent civil disturbances may have affected marketing activities, exacerbating an already deteriorating economic situation. The external debt has reached about US\$1.5 billion, while GDP declined by about 2 percent in 2000. The fall in prices of cocoa, of which Côte d'Ivoire is the leading producer in the world, has been a major contributing factor. Some 86 000 Liberian refugees and 1 500 Sierra Leoneans remain in the west.

#### THE GAMBIA (27 March)

Seasonably dry conditions prevail. Final estimates for the 2000 cereal production point to a record harvest of 175 600 tonnes, representing an increase of about 16 percent compared to 1999 and 48 percent compared to the previous five years' average.

Following two successive bumper crops in 1999 and 2000, the overall food supply situation is satisfactory. However, the Central River Division (CRD) North gathered poor crops due to blister beetles and striga infestations in early millet fields. Poor germination of groundnut seed due to high pest infestations at storage level also resulted in reduced groundnut production. A total of 9 276 persons are severely affected and would need about 250 tonnes of cereals to fill the gap for the lean period.

#### GHANA (27 March)

Planting of the first maize crop is underway in the south and progressing northwards with the arrival of the rains.

Reflecting poor growing conditions in 2000, the food supply situation is tight in some areas. The government announced its plans to halve its rice imports in 2001 by developing more than one million hectares of inland valleys for rice production. About 10 000 Liberian and up to 2 500 Sierra Leoneans refugees remain in the country.

#### **GUINEA (9 April)**

Seasonably dry conditions prevail. Reflecting a good harvest in 2000 and a record crop in 1999, the overall food supply situation is satisfactory and markets are generally well supplied, except in the south-east where rebel incursions from Sierra Leone have severely affected agriculture and marketing activities. Humanitarian agencies have suspended their operations in the "Parrot's Beak" area, a strip of Guinean territory that juts into Sierra Leone near the Liberian border, where the military do not allow access. Consequently, tens of thousands of refugees are inaccessible, notably in the camp of Kolomba, which hosts about 60 000 refugees.

More than 400 000 refugees from Liberia and Sierra Leone remain in the country. UNHCR has established new refugee camps north of Kissigoudou, to relocate about 60 000 refugees from Guékédou area and the Parrot's Beak. Kountaya, the first new camp, has reached its capacity of 26 000 refugees. A second camp has been opened at Bomeah, in the Albadaria region and two others are under construction in Telikoro and Mandoukoro. A transit camp has been established in Conakry to facilitate repatriation of refugees to Sierra Leone by boat.

#### **GUINEA-BISSAU (27 March)**

Seasonably dry conditions prevail. A joint FAO/CILSS Crop Assessment Mission in mid-October estimated 2000 cereal production at 168 000 tonnes which is 21 percent above the previous year's level and close to the pre-crisis level of 1997.

The overall food supply situation is satisfactory. Markets remain well supplied countrywide and prices are stable. However, some population groups with low purchase power are facing food difficulties, notably in urban areas and in Pirada, Fulacunda, Tite, S. Domingos and Ingoré areas.

#### **LIBERIA\* (9 April)**

Seasonably dry conditions prevail. The 2000 rice paddy production is estimated at 144 000 tonnes, compared with a pre-war (1988) figure of 259 000 tonnes. The area planted to rice in the year 2000 was estimated at 135 000 hectares, suggesting an average yield of 1.1 tonnes/hectare. Small plots and poor yields would appear to be the main cause of low production per household. Lack of employment opportunities during and after the war has compelled many families to grow some rice for the first time, in order to survive. It has also caused cultivation of land which had never previously been considered for rice production, such as the coastal mangrove swamps. As a result, there are many more families in rice production than in pre-war times, albeit with smaller plots. The main constraints faced by farmers include labour shortages, shortage of rice seed, lack of any marketing organization, high levels of post-harvest losses and poor road conditions.

Eating habits have changed dramatically since the war in favour of cassava, which has increased substantially in both area and production. The Mission estimated that, taking into account likely losses, some 480 000 tonnes of cassava will be available for consumption in 2001, compared to 308 000 tonnes in 1988. Plantains are also said to be more important than before.

The cereal import requirement in 2001 is estimated at 200 000 tonnes, with commercial imports at 160 000 tonnes. Some 40 000 tonnes of food aid will be required to cover the deficit. WFP is seeking a total of 21 000 tonnes of cereals and pulses and 3 800 tonnes of other commodities to meet the food aid needs of about 145 000 refugees and other war affected people, as well as 140 000 children attending primary schools during the year 2001.

In Lofa county, one of Liberia's main rice producing areas, fighting continues. Periodic rebel incursions since August 1999 intensified in October and have disrupted farming and displaced thousands of people, notably in the towns of Gorlu, Ganglota and Selayae.

**Thousands of civilians have been fleeing Upper Lofa county to lower Lofa. Thousands of Guineans fleeing hostilities in their country have also sought refuge in border towns in Liberia. More than 15 000 have arrived in Bong county and northern Lofa county. WFP is distributing food aid to about 420 000 Liberian returnees. Food distribution to Sierra Leonean refugees in camps in Montserrado and Sinje areas in Grand Cape Mount County also continue.**

**MALI (27 March)**

Seasonably dry conditions prevail. Off-season crop production activities are underway. In Ségou area, farmers planted more areas to rice but also to vegetables (onions, tomatoes) and cassava. Tombouctou area, area planted was lower due to delays in completing the coarse grains harvest. A joint FAO/CILSS Crop Assessment Mission estimated the 2000 cereal production at 2 386 300 tonnes. This is 17.5 percent below 1999's record (2 893 600 tonnes) but is very close to the average of the previous five years. Desert Locusts were reported in March in Timetrine and the southern Adrar des Iforas between Gao and Tabankort.

Following two successive bumper crops in 1998 and 1999, farmers' stocks had been replenished. They were estimated by the national statistical service at 520 000 tonnes just before 2000 harvest. The national security stock is also at its recommended level of 35 000 tonnes (plus 25 000 tonnes in the form of "financial" security stock). Therefore, the overall food situation is satisfactory. However, some areas may be at risk of food shortages following poor harvests, notably in Mopti, Gao, Kidal, Tombouctou and northern Ségou regions. For its technical rotation, part of the national security stock could be sold by the marketing board in structurally deficit areas. The SAP (national early warning system) classified 400 000 persons as at risk of "food difficulties" in the "cercles" of Douentza, Mopti, Bandiagara and Youvarou in Mopti region; Niafunké and Gourma-Rharous in Tombouctou region; Gao, Ansongo, Bourem and Ménaka in Gao region and Kidal and Abéïbara in Kidal region. It recommended the distribution of 10 790 tonnes of millet and sorghum to these populations for 3 months.

**MAURITANIA (9 April)**

Seasonably dry conditions prevail. Production of rainfed (dieri) crops was well above average. Irrigated areas decreased in Trarza and Brakna and yields are anticipated to be reduced due to late plantings and lack of production credit. Prospects for recession (walo) crops in Brakna, Gorgol and Trarza are also less favourable than in the previous year as planted areas decreased due to reduced water levels in the Senegal River. Attacks by birds and caterpillars were also reported in several areas. A joint FAO/CILSS Crop Assessment Mission estimated the 2000 cereal production at 177 000 tonnes, which is 8 percent below the 1999 level and about average. A few Desert Locusts are present near Zouerate in the north.

The food situation improved in rural areas following good rainfed crops. Markets are well supplied. Sorghum prices increased sharply in Brakna, Gorgol and Trarza following poor recession crops. Several populations remain vulnerable, notably in various areas of the two Hodhs, Aftout and Affolé. The Government launched in February a request for 20 000 tonnes of emergency food aid.

**NIGER (9 April)**

**Seasonably dry conditions prevail. Off-season gardening remained limited due to insufficient water. The statistical services have released the final 2000 production figures. Cereal output is estimated at 2 143 000 tonnes, which is 25 percent below the 1999 level and about 10 percent below the average of the previous five years.**

**Following this below-average harvest, the food supply situation is tight in the traditionally food deficit areas. Markets are generally well supplied but prices of cereals increased significantly in March. Migration of men from their villages in search of jobs or food is reported in Tillabery department. The at-risk zones are mainly in Agadez and northern Diffa,**

**Tahoua, Maradi, Tillabery (notably in Ouallam and Tillabery) and Zinder departments. In late March, the Government launched an appeal for international assistance. The government and donors are selling millet and sorghum at a subsidized price (about 15-35 percent lower than the prevailing market price) in the areas that experienced production shortfalls.**

**NIGERIA (27 March)**

Rains started in the south-east in early March and progressed to the south-west in mid-March, allowing land preparation and plantings of the first maize crop. Reflecting generally favourable growing conditions during the 2000 rainy season, an average to above-average harvest is anticipated.

The overall food supply situation is satisfactory. Some population groups, however, remain vulnerable following flooding in Sokoto in the north-west.

**SENEGAL (27 March)**

Seasonably dry conditions prevail. Following the release of final production figures for rainfed crops, the aggregate output of cereals in 2000 has been revised to 1 073 000 tonnes which is about 14 percent above average.

Following two successive good harvests, the overall food situation is satisfactory. Markets are well supplied. The price of millet and sorghum decreased following harvest but increased somewhat in early 2001, while the price of rice remains stable.

**SIERRA LEONE\* (27 March)**

**Seasonably dry conditions prevail. A reduced rice crop has been harvested in 2000 as planted areas were significantly below the previous year's level due to a resurgence of civil strife in early May, the critical planting period. Due to insecurity, input distribution and relief operations were suspended or seriously disrupted, notably in the north. Fighting along the border with Guinea and Liberia intensified in late 2000, resulting in new waves of population displacement. About 3 500 refugees arrived in eastern Sierra Leone, fleeing fighting in the "Parrot's Beak" region of southwestern Guinea. The returnees from Liberia are arriving into Daru and Zimmi, while those from Guinea are arriving through Kono to Kenema. Returnees also arrived by boat from Conakry.**

**Reflecting a reduced crop and transport problems, the food supply situation will remain tight in 2001. In addition to the internally displaced persons (IDPs) already registered, new IDPs have been registered in the south and west following the upsurge of fighting in May and October. More than 400 000 Sierra Leonean refugees remain in neighbouring West African countries, mostly in Guinea and Liberia.**

**Despite the hostilities, WFP and NGOs continue food distributions. WFP plans to distribute more than 50 000 tonnes of food aid to an estimated 544 000 beneficiaries during 2001. The government launched a resettlement plan in Freetown, Port Loko, Kenema and Pejehun districts which have been declared safe for people to return to. IDPs returning to their areas of origin will receive a two-month resettlement ration. It has been estimated that up to 25 000 IDPs in the camps could be resettled, but there appears to be considerable reluctance of some IDPs to move to their places of origin due to the lack of local infrastructure there.**

**TOGO (27 March)**

Planting of the first maize crop is underway in the south and progressing northwards following the arrival of the rains.

The overall food supply situation is satisfactory. However, people affected by floods in various areas remain vulnerable.

## **CENTRAL AFRICA**

### **CAMEROON (27 March)**

Rains started in the south in March. The overall food supply situation is satisfactory. Cereal imports for domestic use and re-export during the 2001 marketing year are estimated at 300 000 tonnes (excluding wheat re-exports), mostly wheat and rice.

### **CENTRAL AFRICAN REPUBLIC (27 March)**

Precipitation was below average in January and early February. Above-average rains were received in the south and the centre in early and mid-March. Following successive good harvests, the food supply situation remains satisfactory. The cereal import requirement for the 2001 marketing year is estimated at 33 000 tonnes, mainly wheat.

### **CONGO, DEMOCRATIC REPUBLIC OF\* (27 March)**

**The food supply situation continues to deteriorate due to persistent insecurity. Intensified fighting, particularly in eastern parts, has further disrupted all economic and agricultural activities and resulted in fresh waves of population displacements. The number of IDPs is currently estimated at 2 million, whose food and nutritional situation is critical. Recent surveys conducted by non-governmental organisations indicated that up to 21 percent of the population is suffering from severe malnutrition in the eastern province of North-Kivu. The situation could deteriorate with an expected cassava crop failure in eastern parts due to pests and diseases. The food situation is also difficult in the main cities of the country, mainly Kinshasa with a population of 6-7 million. An FAO Mission last October estimated Kinshasa's food deficit in 2 000 at 1 million tonnes. In general, factors constraining food supply to Kinshasa and other cities include the extreme state of disrepair of the road infrastructure; police/military harassment of shippers, traders and farmers; the cut-off of food supply from Equateur and Eastern Provinces; and the scarcity of fuel due to a shortage of foreign exchange.**

**Distribution of humanitarian assistance remains constrained by persistent insecurity and very poor road conditions. WFP plans to increase its distributions of food aid to cover 1.2 million people, including some 70 000 Angolan refugees, and has recently appealed for US\$112 million for the relief operation.**

### **CONGO, REP OF (27 March)**

After below-average rains in January and February, precipitation increased in early March and became particularly abundant in the south in mid-March. The security and the overall food supply situation improved in 2000 following the December 1999 ceasefire agreement between the government and opposition parties. All areas are now accessible to humanitarian agencies. The bulk of the estimated 810 000 people displaced by the civil war have returned to their homes.

There are about 100 000 refugees from the Equateur province of DRC in northern areas, notably in Betou, near the border with the Central African Republic. There are also 5 000 Rwandan refugees and 8 000 Angolan refugees. WFP recently launched a new Emergency Operation to assist 50 000 refugees from the DRC over a period of 6 months. It is also providing food to some 120 000 persons in Brazzaville, Pointe Noire and other main towns.

#### EQUATORIAL GUINEA (27 March)

Abundant rains were registered countrywide in March. The staple crops are sweet potatoes, cassava and plantains. The cereal import requirement for the 2001 marketing year is estimated at 10 000 tonnes of rice and wheat.

#### GABON (27 March)

After below-average rains in January and early February, rains increased in late February and became very abundant in mid-March. The main foodcrops are cassava and plantains but some maize is also produced (around 25 000 tonnes). The country imports commercially the bulk of its cereal requirement, estimated at around 87 000 tonnes in 2001.

### **EASTERN AFRICA**

#### **BURUNDI\* (27 March)**

**After a succession of reduced crops, the output of the recently harvested 2001 A season crops is estimated to be satisfactory. A recent locally-organized FAO/WFP/UNICEF Assessment Mission estimated food production at 85 000 tonnes of cereals, 68 000 tonnes of pulses, 483 000 tonnes of roots and tubers and 465 000 tonnes of bananas and plantains, which is 15 percent, 10 percent, 4 percent and 1 percent respectively higher than in the 2000 A season. However, outputs remain below the pre-crisis (1988-1993) average levels, due to insecurity and disruption of agricultural production since 1993. The area planted increased significantly this season reflecting relatively better security in western parts, particularly in the provinces of Bubanza and Cibitoke, and the closure of regroupment camps in Bujumbura Rural Province, which allowed farmers to return to their fields. The other factor which contributed to higher plantings this season was the timely seed distribution by the Government and international agencies, mainly in Kirundo and Muyinga provinces, the areas worst affected by drought during the 2000 A season.**

Despite a late start of the rainy season, precipitation was abundant and well distributed from October to November benefiting crop development. However, excessive rains in parts resulted in floods and crop losses and, in general, reduced yields, particularly for beans. Yields of bananas and plantains are expected to increase only from March/April as trees were seriously affected by previous prolonged dry weather. The small 2000 C season harvest in the marshlands, from mid-June to September, was poor reflecting the dry weather in previous months. Food output was estimated 4 percent below the level of the 1999 C season.

The tight food situation has eased with the arrival of the new harvest. Nevertheless, following several consecutive below average harvests, persistent insecurity and population displacements, as well as a recent malaria epidemic, the food and nutrition situation of vulnerable groups remains precarious. In particular, the situation is difficult for 324 000 internally displaced people and for drought affected persons in the provinces of Karuzi, Gitega, Kayanza and Muyinga. A recent nutritional survey in 7 provinces of the country indicated a 10 percent rate of acute global malnutrition. Similarly, a recent report by MSF indicated that the number of malnourished children admitted to its therapeutic feeding centres in Karuzi province had doubled in January 2001. Emergency food aid continues to be necessary for the vulnerable sections of the population.

#### **ERITREA\* (27 March)**

The food situation continues to be tight for nearly 1.8 million people affected by the war with Ethiopia and last year's drought. The 2000 cereal crop was sharply reduced due to the displacement of hundreds of thousands of farmers from the agriculturally rich regions of Gash Barka and Debub, accounting for more than 70 percent of cereal production. The total

cereal output is provisionally estimated at 71 000 tonnes, a decrease of 66 percent from the previous five years' average. Furthermore, prospects for the 2001 agricultural season, starting in the next few weeks, remains bleak with households unable to return to their farms, so far, and large tracts of land still inaccessible due to landmines.

Cereal prices, which normally decline after harvest, were generally increasing or remained unchanged in most market centres reflecting the poor harvest. In the light of ongoing humanitarian needs in Eritrea, the Eritrean Refugee and Relief Commission (ERREC) launched an appeal on 22 February 2001, for US\$224 million to assist nearly 2 million people for a period of twelve months.

The UN Consolidated Inter-Agency Appeal, which includes project proposals from nine UN agencies, totals US\$160 million.

Food aid pledges for 2001 amount to 55 000 tonnes but no deliveries have been made as yet.

#### **ETHIOPIA\* (27 March)**

The planting of the 2001 secondary "belg" season crops has commenced in several locations. Scattered showers fell in February but substantial rains were received in March. The "belg" crop accounts for around 8 to 10 percent of annual cereal and pulses production but in some areas it is the main harvest. Harvesting of the main 2000 "meher" season crops was completed in December last year. The meher crop had recovered strongly from earlier expectations due to abundant rainfall which continued through October, benefiting late sown crops. The meher harvest is estimated at 11.61 million tonnes of cereals, about 7.3 percent higher than the 1999 post-harvest estimate, mainly due to an increase in area planted.

Livestock, particularly in the pastoralist areas, was devastated last year by a prolonged drought, which caused acute water and fodder shortages, exacerbated later by infectious diseases and parasites. The southern pastoralist areas of Somali, Borena, Bale and South Omo were worst hit and cattle losses at levels of up to 50 percent have been noted. Consequently, animal production among pastoralists and agro-pastoralists has been severely reduced and will take several years to recover. The late meher rains in 2000 helped considerably in regenerating pasture and browse and recharging water points. Animals in belg-dependant zones and woredas in the settled farming areas also suffered and draught animal numbers are reported to be lower than needed, affecting area planted and quality of land preparation.

The improved availability of cereals has resulted in falling grain prices in most markets. However, despite the good harvest, some 6.5 million people will require food assistance. The food aid requirement, including displaced and refugee needs, for 2001 marketing year (January/December) is estimated at about 640 000 tonnes. Donors are urged to support local purchases to provide some strength in the market.

The UN country team has recently launched an appeal for US\$203 million to assist the 6.5 million people affected by drought and war.

Food aid pledges for 2001 amount to about 550 000 tonnes of which 125 000 tonnes have already been delivered.

#### **KENYA (27 March)**

The 2001 main "long rains" cropping season has begun and the outlook is favourable due to forecasts of normal rainfall in major producing areas. However, the outlook in pastoral areas remains bleak with expectations of below normal rainfall.



Harvesting of the 2000/01 secondary "short rains" cereal crop, accounting for some 15 to 20 percent of annual production, is complete. The unseasonable continuation of the rains well into January helped improve yields. This crop provides the main source of food in parts of Central and Eastern provinces. The main "long rains" cereal crop, harvested last September/October, was sharply reduced by a severe drought. Official estimates indicate maize output of about 1.7 million tonnes compared to 2.4 million tonnes average over the previous five years. The aggregate 2000 cereal production is provisionally estimated at 2.1 million tonnes, 22 percent and 28 percent below the previous year's crop and average respectively.

The severe drought in 1999/2000 seriously undermined the food security of 4.4 million people and resulted in a massive relief operation. Despite some improvement, the food supply situation is still fragile, particularly in the northern, eastern and north-eastern pastoral districts. The severe scarcity of water and pasture resulted in loss of large numbers of livestock and the process of recovery is rather slow.

An revised Emergency Operation was jointly approved in January 2001 by FAO and WFP for food assistance to the 4.4 million drought affected people, worth US\$148.9 million for a period of six months.

#### **RWANDA\* (27 March)**

Preliminary indications are that food output of the recently harvested 2001 A season crop is at around or slightly lower than the good level of last year. Despite a delay to the start of the rainy season, precipitation was abundant and well distributed from mid-October to December. Although excessive rains in November resulted in floods and crop losses in parts, mainly in Gisenyi and Butare Prefectures, they generally benefited plantings and yields, particularly of cereals and pulses. Production of roots and tubers and banana and plantains was less satisfactory reflecting shortages of planting material and prolonged dry weather. Also, despite the overall positive picture, a poor harvest was gathered in the Bugesera region of Kigali Rural Province, due to seed shortages following successive reduced crops. A locally-organized Government/FAO/WFP/EU Mission has assessed this season's food production but its findings are not yet available.

The tight food supply situation has eased with the new harvest. Prices of maize, beans and Irish potatoes have decreased from their levels of a year ago. However, despite the overall improvement in the food situation, emergency food assistance is anticipated to be needed until the next harvest for people in the Bugesera region, particularly in Kanzenze and Gashora districts. WFP plans to distribute 13 000 tonnes of emergency food assistance for three months to 267 000 drought-affected people in southeast Rwanda.

#### **SOMALIA\* (27 March)**

The output of the recently harvested secondary "deyr" season cereal crop, normally accounting for some 25-30 percent of annual cereal production, is estimated at 96 000 tonnes, significantly above the post-war average of 78 000 tonnes. Furthermore, the main "gu" season harvest was an above-average 224 000 tonnes. The aggregate 2000 cereal production is thus estimated at about 320 000 tonnes, about 31 percent above the previous year.

The overall food supply situation in parts of southern Somalia has improved with the better "gu" and "deyr" harvests. However, recent nutrition surveys indicate continuing high malnutrition rates, reflecting slow household recovery from the succession of droughts and long-term effects of years of insecurity. Moreover, recent injections of new currency into the market with the attendant depreciation of the Somali Shilling have caused a sharp increase in prices of food items and essential goods.

Elsewhere, in north-western Somalia (Somaliland) and north-eastern Somalia (Puntland), pasture and livestock conditions remain stable. However, the ban of livestock imports from eastern Africa by countries along the Arabian Peninsula due to a Rift Valley fever has caused substantial loss of income and is threatening the livelihoods of a large number of pastoral households.

Reflecting improved food supply, the estimated number of people in need of food assistance declined from 750 000 in 2000 to 500 000 this year. A UN inter-agency appeal was launched on 12 March for US \$130 million, to support livelihoods and assist the country's recovery.

#### **SUDAN\* (27 March)**

Prospects for the 2001 wheat crop, now being harvested, are promising, but total cereal production in 2000, estimated at 3.3 million tonnes, is about 23 percent below the previous five years' average, due to a below-average coarse grain harvest late last year following late rains and prolonged dry spells.

Serious food shortages have emerged in several parts of the country due to the reduced harvests and depletion of stocks, leading to a sharp rise in cereal prices. The population most affected by the current poor season are found mainly in Darfur, Kordofan, North Bahr el Ghazal, Bahr el Jebel, East Equatoria, Jonglei, Juba and Butana province in Gezira State. About 600 000 of the affected people are in dire need of food assistance. In addition, some 2.4 million people affected by the ongoing civil strife in the south will need continued assistance. With few resources left and coping mechanisms stretched to the limit, farmers and other vulnerable groups have already started to migrate in search of work and food. Consumption of seed grains will reduce their productive capacity and ability to sustain themselves in the coming agricultural season. A timely and targeted intervention is essential to prevent further human suffering.

The erratic rainfall also had a devastating effect on range vegetation, as well as on the availability of feed from grain and crop residues, especially in rainfed areas. The drastic fall in feed is expected to lead to widespread under-nutrition in livestock. Market supply of livestock has increased substantially, depressing prices and thus household incomes.

A revised Emergency Operation was jointly approved in January 2001 by FAO and WFP for food assistance to 2.4 million people affected by war, drought and floods, worth an additional US\$50.2 million for a period of 4 months.

#### **TANZANIA (27 March)**

Prospects for the main season coarse grains in the southern highlands are favourable due to abundant rains. In the bi-modal areas the main season maize crop is now being planted.

Aggregate 2000 cereal production, mainly maize, is estimated at about 3.7 million tonnes, about 13 percent below the previous five years average. The decline is attributed to drought conditions in several parts of the country. However, the overall food supply situation has improved due to increased on-farm stocks and market supplies following harvests of the "short rains" crop. This has helped to relieve pockets of food insecurity in the northern and central regions of the country resulting from successive seasons of poor harvests.

In December 2000 an Emergency Operation was jointly approved by FAO and WFP for food assistance to 1.3 million people affected by drought across 11 regions, worth US\$15.8 million for a period of 5 months.

#### **UGANDA (27 March)**

Harvesting of the 2000/01 second season cereal crops is completed. The output is expected to be above average, reflecting well distributed rains during the season. Rains in February have allowed land preparation and planting of the 2001 main season crop in most areas. The medium term forecast for March to May 2001 predicts an above-normal rainfall over southern Uganda but a near-normal to below-normal rainfall over northern parts.

The output of the main season crop, harvested from the middle of 2000, was below average due to drought and erratic rains in various parts of the country. Cereal production in 2000 is estimated to be about 12 percent below average at 1.6 million tonnes.

The overall food supply situation is satisfactory. However, the situation remains precarious in districts of Gulu, Kitgum, Bundibugyo, and parts of Kasese and Kabarole, mainly due to last year's poor harvest and/or insecurity. WFP's food assistance benefits an estimated 1.1 million IDPs, refugees, and drought-affected people in the country.

### **SOUTHERN AFRICA**

#### **ANGOLA\* (27 March)**

Abundant rains in February and March, particularly in southern parts previously affected by a severe dry spell, have improved prospects for the 2001 foodcrops. Good yields of cassava, the main staple in northern areas, are expected. However, the rains may have arrived too late to prevent yield reductions of maize and bean crops. The total area planted is expected to have been reduced by the intensification of the civil conflict at sowing time, which could result in another below-average harvest. An FAO/WFP Crop and Food Supply Assessment Mission is scheduled to visit the country in early May to evaluate the 2001 foodcrops and estimate import requirements for marketing year 2001/02 (April/March), including food aid

The food supply situation continues to deteriorate with the persistent civil conflict. The security situation in the interior of the country remains unstable with violent incidents reported in various parts. The number of internally displaced persons (IDPs), estimated at 2.5 million people last June, has continued to increase. Fresh waves of population displacement have been reported in Benguela in the west, Huila and Kuando Kubango in the south, Malange in the north and Moxico in the east. The food situation of the IDPs is extremely critical, but food aid distribution continues to be hampered by insecurity and shortfalls in food aid pledges. By mid-March WFP had received pledges for only 60 percent of its current operation in Angola. This has led to a one-third reduction in the number of beneficiaries, from 1.5 million to 1 million and to cuts in the rations. Additional pledges are urgently needed.

#### **BOTSWANA (27 March)**

Abundant rains in the third dekad of February arrived too late to prevent yield reduction in maize and sorghum crops stressed by dry weather since January. The output is anticipated to decline, or remain around the poor level of last year.

Following two consecutive reduced cereal harvests, the country has an import requirement of 250 000 tonnes of cereals in marketing year 2000/01 (April/March), all of which is expected to be imported commercially.

#### **LESOTHO (27 March)**

Prospects for the 2001 coarse grain crops are poor. Good rains in the second dekad of February arrived too late for the recovery of crops, stressed by a dry spell since January. Dry weather

resumed in late February and March, further worsening crop conditions. The output is anticipated to decline from the below average level of last year.

Following a reduced 2000 cereal crop, the import requirement in marketing year 2000/01 (April/March) is estimated at 248 000 tonnes, most of which is expected to be covered commercially.

#### MADAGASCAR (27 March)

Below-average rains in northern and central parts during February and first dekad of March, which followed abundant rains in previous months, affected growing conditions for the 2001 rice crop. The overall prospects for the paddy harvest, starting from April, are uncertain; yield reductions are anticipated in parts. By contrast, in the southern maize growing areas abundant precipitation since the second dekad of February improved prospects for the maize crop which had been affected by dry weather. However, the rains may have arrived too late to prevent yield reductions and the harvest could be reduced for the second consecutive year. Last year, the southern areas were affected by a severe drought that caused a one-quarter decline in the maize output.

The overall food supply situation is tight following the poor 2000 rice crop. In southern parts, food assistance is required for 240 000 vulnerable people who obtained a poor harvest last season.

#### MALAWI (27 March)

**Continuous heavy rains in February and March resulted in serious floods in 13 of the country's 27 districts, particularly in southern areas along the Shire River. Official reports indicate that 200 000 people are displaced due to the floods and 346 000 have been affected in varying degrees. It is estimated that 50 000 hectares of crops have been lost to the floods. The Government has appealed for international assistance to cope with the disaster. WFP plans to distribute emergency food aid to 275 000 people. However, persistent rains are hampering distributions. Many areas are inaccessible as a result of damage to roads and bridges**

**Prospects for the 2001 cereal crops have deteriorated with the excessive rains of the past months that are likely to have reduced yields. A dry spell and high temperatures in January in some southern districts, mainly Balaka, Zomba and Mwanza, also negatively affected yields in these areas. Latest forecast point to a maize crop of 2.15 million tonnes, 14 percent below the bumper harvest of last year, but still above average.**

**The overall food supply situation is satisfactory reflecting last year's good harvest and adequate stocks. Also at household level the food security situation is reported to be generally satisfactory.**

#### MOZAMBIQUE (27 March)

**High water levels in the Zambezi and other rivers, due to torrential rains in neighbouring countries, as well as continuing heavy rains in central provinces since the last dekad of January, have resulted in floods in the central provinces of Zambezia, Sofala, Manica and Tete. About 200 000 people are displaced and up to 563 000 are affected by the disaster. Severe damage to transport infrastructure is also reported. Preliminary assessments of the agricultural damage carried out by the Government indicate that 42 000 hectares of cash crops and foodcrops have been lost to the floods, affecting 55 000 farming families. Last year, 48 000 hectares of foodcrops were lost to floods in these central provinces, while the area lost at national level reached 167 000 hectares, mainly in southern provinces.**

**More floods are threatening central parts as the level of the Chaora Bassa dam, the country's largest along the Zambezi River, is rising and it is likely that floodgates will be opened. There is also concern over more floods due to the still high levels of the Pungue and Zambezi rivers. The Government has appealed for US\$30 million to cope with the emergency in central areas. Emergency food assistance is currently being provided to 180 000 affected people.**

However, distributions are hampered by the destruction of several bridges and roads. Agricultural tools and seeds required to allow affected farmers to plant a second season crop are valued at US\$2.3 million.

In southern provinces, the worst affected by the severe floods of last year, the outlook for this year's cereal harvest has deteriorated as a result of well below average precipitation in January. Rains resumed from the second dekad of February, but arrived too late to prevent serious yield reductions. In the main cereal growing areas of the north, good rains since the beginning of the season have favoured crop development.

Despite serious localized damage caused by the floods, the overall outlook for this year's cereal crop is still satisfactory, as the crop losses to floods are not significant at national level. Early forecast point to a maize crop around or higher than last year's good level, reflecting also increased plantings.

The food supply situation remains satisfactory at national level. Maize prices are below their level of a year ago. Nevertheless, a total of 165 000 food insecure people in 37 districts are estimated to be in need of food assistance until the next harvest.

#### NAMIBIA (27 March)

The outlook for this year's cereal crop is poor as a result of severe dry weather during January and early February in the northern growing areas. The dry weather followed late and erratic rains since the beginning of the season. Abundant precipitation from the second dekad of February arrived late to prevent serious yield reductions of the maize and sorghum crops. The 2001 maize production is forecast to decline 35 percent from the good level of last year.

The food supply situation remains satisfactory as a result of the good cereal harvest of last season and the country's commercial import capacity.

#### SOUTH AFRICA (27 March)

Prospects for the 2001 maize crop are unfavourable. Well below-average rains and high temperatures in January and early February, particularly in western growing areas, stressed developing crops. Rains in mid-February provided relief to the affected areas but arrived too late to prevent yield reductions. Dry weather resumed in late February and March, worsening growing conditions. Preliminary forecasts point to a maize output of 7.2 million tonnes, 34 percent below last year's good level. This reflects the insufficient precipitation but also a decrease of 17 percent in the area sown, due to low domestic prices at planting time.

Production estimates of the 2000 wheat crop have been revised upwards to 2.1 million tonnes, one-third above the poor harvest of the previous year and above average.

#### SWAZILAND (27 March)

Prospects for the 2001 cereal crop are poor. Prolonged dry weather during most of January and early February stressed the developing maize crop. Abundant rains in the second dekad of February were too late to prevent reductions in yields. Dry weather resumed from late February worsening growing conditions. Early forecast point to maize output around the well below average level of last year.

The overall food supply situation is tight reflecting the flood-reduced cereal harvest of last year and inadequate commercial imports so far. Serious food difficulties are particularly being experienced by 14 000 people who lost crops last season and need of food assistance until the next harvest. The Government has appealed for international assistance to meet their needs.

#### **ZAMBIA (27 March)**

Heavy rains in February and March over most parts of the country, except in the extreme south, resulted in localized floods along the Zambezi and Luangwa rivers. Localized floods affected areas in Western, Luapula, Northern and Central Provinces. Other affected areas are the Luangwa Valley (including areas in the districts of Serenje, Mpika, Mambwe, Lundazi, Katete, Chipata, Nyimba and Luangwa). By contrast, prolonged dry weather in Southern (Livingstone and the Gwembe Valley) and Western (Sesheke, Shangombo and Senanga) Provinces is anticipated to result in sharply reduced yields in these areas.

Overall, prospects for the 2001 maize crop have deteriorated with the widespread excessive rains. Production is forecast to decline from last year's bumper crop, reflecting also decline in the area planted because of low prices at planting time and large carryover stocks from the previous season. Imports of maize will be necessary in 2001/02 (May/April).

#### **ZIMBABWE\* (27 March)**

Widespread above-average rains in February and early March resulted in flooding in several parts. Severe damage to transport infrastructure, housing and crops is reported. Worst affected are the north eastern Mashonaland Central province, in particular Muzarabani in the Centenary District, where 15 000 people have lost their homes, and, in general, areas around the Zambezi river system. Foodcrops lost to the floods are reported to be significant in these parts but a detailed assessment of the extent of the agricultural damage is still underway. Overall, it is estimated that 30 000 people have been affected by the floods. The Government has launched an appeal for US\$2.34 million in emergency assistance and is currently airlifting food and non-food items to inaccessible area.

Prospects for the current foodcrops are unfavourable. Severe dry weather in January, followed by excessive rains negatively affected yields of the 2001 maize and other foodcrops. In the worst affected southern areas, below average precipitation since mid-November resulted in significant reductions in plantings and yields, with plantings in most districts estimated to be less than 50 percent of normal levels and a poor harvest anticipated. Provisional forecasts indicate an aggregate maize harvest as low as 1.2 million tonnes, 41 percent below last year's level. This reflects the adverse weather but also a sharp reduction in the area planted as a result of the current programme to resettle large-scale commercial farms and shortages of fuel. At the current production forecast and projected carryover stocks, the import requirement in marketing year 2001/02 would increase sharply at a time the country faces a severe foreign exchange shortage.

Currently, the overall food supply position remains satisfactory, reflecting the good maize crop of last year and large carryover stocks. However, the food situation is difficult for poor urban households and those in communal areas that rely on purchased maize. Prices of maize and other staple foods have increased sharply in recent months due to high levels of inflation, fuel shortages and continued depreciation of the national currency. An FAO/WFP Crop and Food Supply Assessment Mission will visit the country in late April to evaluate the 2001 food production and import requirements in 2001/02 marketing year (April/March).

### **ASIA**

#### **AFGHANISTAN\* (27 March)**

Prospects for the 2001 winter grains, for harvest in May/June, remain poor mainly due to adverse weather and persistent insecurity that resulted in yield losses and large population displacements.

The 2000 drought devastated crops and livestock across the country. Total cereal production was an estimated 1.82 million tonnes (with rice in paddy form), about 44 percent and 53

percent below the 1999 and 1998 crops respectively. An FAO/WFP Crop and Food Supply Assessment Mission is planned to visit the country from end-April to assess overall food supply conditions and estimate cereal import requirements in 2001/02 (July/June), including food aid.

The food situation is tight for a large number of displaced people. In 2000, WFP distributed some 161 000 tonnes of food to 3.3 million worst affected people, compared to 82 631 tonnes in the previous year. An Emergency Operation was jointly approved in February 2001 by FAO and WFP for food assistance to 3.8 million drought affected people, worth US\$76.6 million for a period of one year (April 2001/March 2002).

#### ARMENIA\* (9 April)

The outlook for the 2001 cereal harvest has improved with good rains in March, which helped replenish soil moisture and irrigation reserves. However, rains in the coming months remain crucial if a good harvest is to be achieved. Persistent drought in 2000 reduced grain production by 25 percent to 225 000 tonnes and has resulted in a shortage of seed. As a result the area sown to winter crops (mainly wheat) for harvest in 2001 has fallen by 30 percent to 70 000 hectares. It is hoped to increase the areas sown to spring cereals to 115 000 hectares. Snowfall this winter has been well below normal but rains have now started to fall. Satellite imagery indicates limited areas of better crop development than last year (in parts of Kotaik, Vayots Dzor and southern Siunik). The food supply outlook in 2001 will depend crucially on increasing the areas sown to lower-yielding spring grains, and the mobilization of seed potato to enable farmers to plant this staple crop. Animal feed and pastures were also affected by the drought. Aggregate meat and egg production has increased by nearly a fifth in 2000 while milk production declined marginally.

The cereal import requirement in 2000/01 (July/June) is estimated at 515 000 tonnes including 458 000 tonnes of wheat, and 44 000 tonnes of feedgrains to provide survival rations for livestock, a major source of protein and income for rural households. The import requirement is well above average and includes 146 000 tonnes of food aid. Cereal imports in the first 8 months of the marketing year amount to some 239 000 tonnes of cereals and include 78 000 tonnes of food aid.

Up to 68 percent of the population are destitute, poor or close to the poverty line. This finding is based on survey data including the systematic study of households undertaken with World Bank sponsorship. The survey found that 55 percent of the population is either poor or destitute. Poor households are defined as having a per capita level of consumption below the poverty line (a minimum basket of food and consumer goods), and destitute households as having a per capita level of consumption below the food line (a minimum basket of food goods), with the two lines set at 11 735 drams (US\$21.5) and 7 194 drams. Some 32.14 percent of the population are in poverty and 22.91 percent are destitute; the corresponding figures for households are 30.53 percent and 19.14 percent respectively. Moreover, some households are regarded as potentially poor, as their incomes are in the range 12 000-12 500 drams, only narrowly exceeding the poverty line. As a result, up to 68 percent of the population could need some form of poverty-related social protection. The survey also revealed that the real level of unemployment is 27.3 percent, well above the official estimate of 10.0-11.5 percent. The average monthly salary is 20 157 drams, or less than twice the poverty level, and some 17 percent of the workforce earn too little to secure an income above the food line. However, wages are not the main source of monetary income: they comprise only 24.6 percent of incomes, whereas sales of agricultural production account for 32.1 percent, revenues from self-employment for 10.6 percent, and state pensions and allowances for 9.3 percent. Some 19.3 percent of incomes are transfers from relatives, including 12.8 percent from relatives living abroad (this item alone is more significant than state pensions and allowances). Only 0.1 percent of incomes are related to property (i.e., leases, interest, dividends etc), highlighting the limited impact of privatisation on earning patterns. There is a high degree of income inequality. The income level among the wealthiest 20 percent of the

population is 32.2 times that of the poorest 20 percent. The survey also confirmed that at least 620 000 Armenians (and possibly up to 1 million), out of an official population of 3.8 million, are currently abroad seeking alternative sources of income. Most of those abroad are of working age, and two-thirds are men.

Debilitating political, economic and social problems over the past decade have resulted in widespread un- and under-employment and food insecurity. Some 15 percent of rural children face chronic malnutrition even under normal circumstances. WFP plans to provide targeted emergency food assistance to an estimated 297 000 subsistence farmers and other vulnerable households with 22 480 tonnes of iron-fortified wheat, vegetable oil and pulses from 1 November 2000 until 1 July 2001. The proposed Emergency Operation (EMOP) will be fully integrated with the ongoing Protracted Relief and Rehabilitation Operation (PRRO), also effective until June 2001, which targets another 170 000 beneficiaries. The combined outstanding tonnage of the planned EMOP and the ongoing PRRO amounts to more than 28 000 tonnes up to mid-2001.

#### **AZERBAIJAN (21 March)**

The outlook for the 2001 cereal harvest is somewhat uncertain, as winter precipitation has ranged from 30-80 percent of normal over the country and is also below normal in the catchment areas of the neighbouring countries. Following last years summer drought, irrigation water reserves are low and the final outcome of this year's harvest will depend crucially on rains in the coming months and snowmelt. Emergency works carried out this winter (deepening irrigation canals etc.) could help to maintain production levels of remunerative crops. Satellite imagery indicates more robust crop development, better than at the corresponding stage last year, so far.

The area sown to winter crops has increased further to 650 000 hectares, including 523 000 hectares sown to wheat and 122 000 hectares to winter barley. The first stage of land privatization has virtually been completed. The areas sown to winter cereals in the last two years have increased sharply as farmers switch to winter grains which mature in June, before the summer heat and peak water needs. The shift also reflects difficulties in marketing cash crops such as grapes and cotton.

The final official estimate of the 2000 grain harvest is 1.5 million tonnes, including 1.148 million tonnes of wheat, 209 000 tonnes of barley, 104 000 tonnes of maize. Rice production, which is being expanded, increased sharply to 22 000 tonnes and pulse output was 13 000 tonnes. The 2000 winter grain crop by and large escaped drought damage but the yield of spring-sown crops (potatoes, vegetables, cotton, fodder and fruit trees) was affected.

Following the well above average harvest, the cereal import requirement is expected to decline somewhat. However, grainfeed for animals is likely to rise, as fodder supplies are low and domestic farmers face import competition. The bulk of the cereal import requirements will be covered commercially, though vulnerable groups, including the internally displaced, still need targeted food assistance. WFP continues to support 485 000 beneficiaries through a 3-year Protracted Relief and Recovery Operation which started in July 1999. Total food commodities committed for the life of the project amount to 47 880 tonnes of food aid.

#### **BANGLADESH (21 March)**

Rabi (winter) wheat and irrigated Boro rice are currently the main crops in the ground. Wheat is planted in November/December for harvest from late March, whilst the boro crop is planted from November through January for harvesting from April. This year's wheat crop is forecast at 2 million tonnes, up from last year's 1.84 million tonnes. The country produced a record wheat crop of around 2 million tonnes in 1999 and has averaged around 1.68 million tonnes in the last five years.



Rice is the most important cereal crop accounting for 73 percent of total cropped area. Boro rice production is expected to reach last years record production of 11 million tonnes. If this level materialises, 2000/01 milled rice production is projected at a around 24 million tonnes, a record. Boro rice accounts for approximately 45 percent of aggregate rice production annually, the monsoon (Aman) a further 45 percent, whilst roughly 10 percent comes from the third Aus crop.

Following devastating monsoon floods in 1998, the food supply situation in has improved considerably, due largely to consecutive record grain crops. At the end of February, there was a total of 1.06 million tonnes of grain in stocks including some 733 000 tonnes of rice and 322 000 tonnes of wheat in the Public Food Grain Distribution System.

#### **CAMBODIA (21 March)**

**During the 2000 wet season, the country was affected by one of the worst floods in recent history, resulting in large scale destruction of crops, principally rice, infrastructure, property and lines of communication. An estimated 3 million people were affected, half a million displaced from homes and almost four hundred died.**

**An assessment of the food supply situation in the aftermath of the floods by an FAO/WFP mission found that the floods reduced overall wet season rice production on some 400 000 hectares. Notwithstanding the loss due to floods, however, rainfall was generally above average, as a result of which the overall season was favourable and yields were above 1999, which was a bumper year. Harvesting of wet season and flood recession rice has been completed. Latest estimates from the Ministry of Agriculture of 2000 wet season paddy production is 3.2 million tonnes, around 100 000 tonnes lower than official estimates for wet season output in 1999. Dry season production is forecast at 800 000 tonnes, bringing overall production for 2000/01 to around 4 million tonnes.**

**Despite a satisfactory rice supply/demand situation from a national perspective, last year's floods made a large number of people, who are normally on the borderline of subsistence and food insecurity, more vulnerable to food shortages. In general, there are three broad categories of "food insecure" people in the country. The largest group currently are the chronically food insecure, comprising approximately 2 million people. The second group are the "vulnerable groups" (handicapped, disease victims, orphans, etc.), which accounts for a further 500-600 000 people. The third group are the "transitory food insecure", due to factors such as fires, floods, and droughts, and would normally account for some 50 000 people. This year, however, due to the exceptional flooding, the number classified as transient food insecure is estimated at 3 million people. Of these, vulnerability analysis indicates that some 500 000 people would be classified as the most food insecure. Given the magnitude of the problem, this group could become chronically food insecure, if they have to resort to extreme coping strategies such as sale of land, incurring high interest debt, etc, to meet the household food deficit resulting from flood damage. However, if targeted food assistance is provided, almost all this group can be expected to recover by the next harvest. To cover the food needs of the half a million people who are most at risk, the mission advocates additional food assistance for four months. Part of the requirement (one and half months) will be met through a current Emergency Operation (EMOP 6296.00), whilst an additional 16 000 tonnes will be required to meet the remainder of food needs.**

#### **CHINA (21 March)**

During the first half of March, in eastern parts, temperatures 2-3 degrees Celsius above normal favoured developing winter wheat, whilst showers along the Yangtze river basin increased moisture supplies for winter crops. Although seasonably light rain was received in southern parts of the country, overall rainfall has been below normal.

Winter snow in January/February benefited soil moisture levels, favouring the winter wheat crop in main producing areas. Winter wheat production in 2001 is forecast at around 92.5 million tonnes,

over a million tonnes higher than earlier forecast. Total winter and spring wheat production this year is currently projected at around 100.5 million tonnes, some 500 000 tonnes below last year's reduced crop. Winter wheat accounts for most of the country's wheat produced annually. Due to declining support prices for staples, the area under wheat declined further for the 2000/01 season as farmers continue to switch to other more lucrative crops. The area planted is estimated at around 23 million hectares, 1.17 million hectares or almost 5 percent below 1999.

#### CYPRUS (27 March)

Prospects for the 2001 wheat and barley crops, to be harvested from May/June, seem to be about average. The aggregate area sown was about 61 000 hectares, similar to the previous year. Production of cereals in 2000, mainly barley, is estimated at 101 000 tonnes, about 1 percent below the average for the previous five years.

Imports of wheat in 2000/01 (May/April) are forecast at 95 000 tonnes, while aggregate imports of barley and maize are forecast at some 540 000 tonnes, unchanged from last year.

#### EAST TIMOR (21 March)

Harvesting of the main rice and maize crops, planted in November/December will commence shortly. Despite disruption to the agriculture sector due to civil disturbances in 1999, agriculture recovery continues with improvements in access and marketing. Last year, rice and maize production were estimated by FAO at around 30 500 tonnes (milled) and 94 000 tonnes respectively.

#### GEORGIA\* (9 April)

The outlook for the 2001 harvest has improved with good rains in March which helped to replenish soil moisture and irrigation reserves. However, as precipitation during the winter months has again been well below average, rainfall in the coming months will be the determining factor in this year's harvest. There are indications that the area sown to winter wheat may not have been fallen as sharply as originally reported. However, many plantings were delayed and many farmers used whatever seed they could mobilize. It is hoped to mobilize enough seed to increase the area sown in the spring to potatoes and maize, to offset any potential reduction in wheat output. Dividing the country in two halves lengthwise, satellite imagery indicates that crop development to date is satisfactory in the cropped areas of southern half, and importantly, better in parts of Khakheti, a major wheat producing area.

The aggregate 2000 cereal harvest is less than 400 000 tonnes, nearly half that achieved in 1999 and 40 percent below average due to drought and the poor state of the irrigation system. Output of potatoes, other basic foodcrops and fodder is also down, negatively affecting livestock production.

With a minimum national cereal consumption requirement (including food, feed seed, losses) estimated at 1.1 million tonnes, Georgia's cereal import requirement in 2000/01 is estimated at 748 000 tonnes (620 000 tonnes of wheat, 88 000 tonnes of maize, 35 000 tonnes of barley and 5 000 tonnes of rice). Registered cereal imports between July and December 2000 have amounted to 104 000 tonnes, but substantial volumes enter informally. Against the estimated food aid requirement of 311 000 tonnes, confirmed pledges to date amount to 85 400 tonnes. Food aid deliveries of wheat are proving difficult to market as cheaper supplies are being sourced in the CIS.

WFP appealed last year for almost 66 000 tonnes to cover the basic needs of 696 000 most vulnerable drought-affected victims until the next main harvest, for a period of eight months (November-June). Response to this appeal has been slow and limited; the first commodity consignments only reached Georgia in January. Distributions started late in February and by the end of March 270 000 beneficiaries received a two-month ration. Based on the confirmed pledges and quantities received and expected to date, WFP plans to complete the first round

of distribution to some 270 000 additional beneficiaries early in April and to start a second one to some 540 000 beneficiaries by mid-April. By the end of March pledges covered only 35 percent of the total amount requested (23 000 tonnes against 66 000 tonnes in the appeal) and only 6 650 tonnes had reached the country.

#### INDIA (21 March)

Due to drought in some of the country's main wheat producing states, the wheat crop, to be harvested in the next few weeks, is expected to be considerably down, some 5 to 7 million tonnes from last year's record crop of 75.5 million tonnes. The area under wheat is reported to have declined by some three million hectares, from 27.4 million hectares in 2000, principally in rain fed states like Madhya Pradesh, Gujarat, Rajasthan and parts of Maharashtra. However, the crop in large surplus wheat growing states of Punjab, Haryana and Uttar Pradesh is generally satisfactory, though unlikely to match last year's record output. While the season has been generally free from pests and diseases, fertilizer consumption has declined marginally due to drought conditions. As a result of this decline, overall Rabi grain production is likely to fall to around 95-96 million tonnes this year, compared to 104 million tonnes in 1999/2000. The overall food grain production target for the 2000/01 marketing year is 212 million tonnes.

Earlier, the worst earthquake in fifty years ravaged the western state of Gujarat exacerbating existing food and water problems due to the second drought in succession. Ground water tables had already fallen appreciably, whilst many people had started to migrate. The country has had to endure a succession of natural disasters last year, including earlier drought and severe flooding in a number of states during the last monsoon season, which left many dead and thousands homeless.

At the end of the current marketing year, wheat stocks are projected at more than 20 million tonnes, some 40 percent above last year and five times the desired level. This is attributed to increases in farm support price (resulting in higher procurement), higher sales prices of wheat and rice through the PDS (resulting in low offtake) and weak world prices (limiting export opportunities). Government rice stocks have also increased significantly due to good harvests in recent years and increasing procurement.

#### INDONESIA\* (21 March)

Seasonal rain in March further improved soil moisture for main season rice in the main producing province of Java, but resulted in localized flooding in parts. The main rice crop is planted in the period November to January for harvest from April.

Paddy production for the 2000 calendar year was around 51 million tonnes, some 2 percent above last year and some 4 percent above the five-year average. Higher production is attributed to a long wet season and only minor incidences of pests and disease. The area harvested remained around an average 11.5 million hectares.

The overall food situation in the country continues to stabilise, following the economic crisis in 1997/1998, which was also compounded by a poor agricultural year due to El Niño. As a result of good domestic production and ample stocks, Indonesia, the world's leading rice importer, has announced that it would not import rice in 2001. However, concerns persist for the food and humanitarian situation in parts of the country affected by violent civil disturbances.

#### IRAN, ISLAMIC REPUBLIC OF (21 March)

Light rain was received in the main winter wheat growing areas in the western and north-eastern parts of the country during the first two dekads of March. Wheat is normally planted in September/October and harvested in April/May. Rain fed barley which is essential for livestock feed is also planted from September onward for harvest in March.

In 2000 the affect of two successive years of drought seriously affected agriculture and livestock production. The drought was the worst since 1964 and affected an estimated 37 million people or over 50 percent of the population. Consequently 2000 wheat production is estimated to have fallen to around 8 million tonnes, some 700 000 tonnes lower than the already drought reduced crop in 1999 and almost 2 million tonnes below the five year average.

#### **IRAQ\* (27 March)**

**Prospects for the 2001 cereal harvest in May/June remain uncertain. Lingering effects of two consecutive years of severe drought and inadequate availability of essential agricultural inputs are constraining production.**

**An FAO/WFP/WHO Food Supply and Nutrition Assessment Mission in May 2000 found that in the most affected centre/south areas, not only were the plantings reduced, but also some 75 percent of the cropped area under wheat and barley was heavily damaged and mostly used as grazing for livestock. Cereal yields were reduced to all time low levels. As a result, total cereal production in 2000, estimated at some 796 000 tonnes, is about 47 percent below 1999 and 64 percent below the average of the past 5 years.**

**In December 2000, the UN Security Council approved the ninth phase of the SCR 986 "Oil-for-food" programme, from January to June, to buy food, medicine and health supplies, and for emergency repairs to infrastructure. In March 2000, the oil spare parts allocation was doubled from US\$300 million to US\$600 million to help the replacement of ageing equipment. Cereal imports under the oil-for-food deal have led to significant improvements in the food supply situation. However, long delays in the flow of food imports continue to be reported. Also, despite significant increases in the food ration since SCR 986, child malnutrition rates in the centre/south of the country do not appear to have improved significantly and nutritional problems remain serious and widespread. The existing food rations do not provide a nutritionally adequate and varied diet which is lacking in vegetables, fruit, and animal products and is therefore deficient in micro-nutrients.**

#### **ISRAEL (27 March)**

The prospects for the 2001 wheat and barley crops, to be harvested from April/May, are favourable, reflecting favourable rains during the growing season. Domestic production of wheat in normal years covers less than one-fifth of total requirement, the rest being imported commercially.

Production of the wheat crop in 2000 was estimated at 80 000 tonnes, more than double the previous year's drought affected crop, but below average. Imports of cereals in 2000/01 (July/June) are forecast at some 2.9 million tonnes.

#### **JAPAN (21 March)**

Since 1995, as part of the country rice area adjustment programme, area has declined by some 16 percent. As a consequence domestic (milled) rice production has declined from some 11 million tonnes in 1994 to an average of around 9 million tonnes in the last five years.

#### **JORDAN (27 March)**

**The prospects for the 2001 wheat and barley crops, for harvest in May/June, remain uncertain due to the lingering effects of two consecutive years of severe drought and erratic rainfall during the current season. In 2000, aggregate output of wheat and barley, estimated at 42 000 tonnes, was more than double the previous year's output, but still about 54 percent below average. The livestock sector was also seriously affected, particularly small scale sheep herders.**

However, despite the serious impact of the drought on rainfed crops and livestock, vegetable production from the irrigated Jordan Valley has increased substantially. As a result, vegetable prices plummeted affecting farmers incomes. Lack of adequate processing facilities and export markets are major constraints.

An FAO Mission which visited the country in September 2000 identified priority needs for assistance to mitigate the impact of drought on agricultural production. Accordingly, an appeal for US\$ 13.5 million was launched, on 21 December 2000, to provide seeds and other inputs for the 2001 cropping season, to assist in the distribution of animal feed and health services, and to support forest and range land reserves.

#### KAZAKHSTAN (22 March)

The bulk of cereals are sown as of May, with winter crops accounting for only 0.5 million hectares. The spring planting target is 11.7 million hectares to be sown to cereals and output is targeted at 11.6 million tonnes.

The 2000 official estimate of the 2000 harvest is 11.6 million tonnes of cereals and pulses, in cleaned weight, including 9.1 million tonnes of wheat. This is less than the previous year's bumper harvest of 14 million tonnes but will still allow the country to cover domestic requirements and export between 4-5 million tonnes of cereals. Cereal exports have totalled 2.3 million tonnes in the first six months of the 2000/01 marketing year.

The country exported nearly 7 million tonnes of cereals in 1999/2000 including 6 million tonnes of wheat, mainly to other CIS countries.

#### KOREA, DEMOCRATIC PEOPLE'S REPUBLIC OF\* (23 March)

There are renewed concerns regarding the food supply situation in the county following the widespread effects of the coldest winter in decades. In mid-January temperatures are reported to have fallen to the lowest levels recorded in 50 years. The cold weather conditions continued almost to the last dekad of February, after which temperatures increased to allow land preparations for double cropping. The earlier start to the season is in contrast to 2000 when cold temperatures prevented agricultural operations till mid-March. Due to the very cold conditions this year, the incidence of pests is likely to be lower. However, given erratic climatic conditions generally in the Asia region the situation still remains uncertain.

The food supply situation for the majority of the population still remains extremely difficult, especially as they have already had to endure years of serious food shortages. Cereal provision through domestic resources is reported to have ceased in January with supplies currently only through bilateral food assistance.

Last November, an FAO/WFP Crop and Food Supply Assessment Mission, assessed domestic grain availability, in cereal equivalent, for the 2000/01 marketing year at 2.92 million tonnes compared to grain demand for food and other utilisation needs of 4.79 million tonnes. The cereal import requirement, therefore, was estimated at 1.87 million tonnes, of which commercial imports were anticipated to cover 200 000 tonnes, whilst a further 810 000 tonnes of the import requirement has been pledged as food assistance through WFP and 500 000 tonnes more through bilateral concessional imports. Taking these into account, the uncovered import requirement is estimated at 360 000 tonnes, which needs to be covered by additional food assistance in order for the country to meet minimum food needs until end-October 2001.

KOREA, REPUBLIC OF (23 March)

Prospects of economic recovery and growth, in the aftermath of the financial crisis in Asia, continue to improve signalling stronger demand for grains for food and feed. Wheat and maize are almost entirely imported, whilst the country on average produces around 5 million tonnes of rice (milled) per annum, during the main season which extends from around May to October. In general, the number of productive farms and rice acreage is declining in the country as more land is made available to infrastructure and urban development. Any future expansion will come mainly from marginal and reclaimed land, including land subject to flooding.

KYRGYZ REPUBLIC (22 February)

The 2001 grain production target is 1.7 million tonnes. Greened crops in the lower reaches of the SyrDarya valley (Osh, Djalabad) are in a better condition than at the corresponding time last year, but satellite imagery indicates that much of the country is still covered by snow or crops have not yet come out of dormancy. A cold winter and heavy snows are helping to recharge irrigation water supplies. The 2000 grain harvest is now officially estimated at 1.57 million tonnes including 1.04 million tonnes of wheat. This is somewhat less than the previous year's harvest (1.63 million tonnes) and below target, reflecting crop losses due to dry weather and early snows.

The overall food supply situation remains satisfactory and indeed the country exports cereals to neighbouring Tajikistan and Afghanistan. However, a significant proportion of the population is poor, and access to adequate food is a problem for the large number of poor. The country also imports wheat in part due to the demand for quality wheat, to supplement the State Security Reserve (via food aid deliveries), and due to poor internal communications.

LAOS\* (23 March)

In September 2000, flooding which also affected neighbouring Cambodia and Vietnam devastated monsoon rice crops in central and southern parts of Lao PDR. The worst affected provinces were in the country's rice basket and included Bolikhamsay, Khammuan and Savannakhet. In addition, rice production was also seriously damaged in Attapeau and Champassak, which are relatively more food insecure. In view of flood damage and concerns over developing food shortages, an FAO/WFP Crop and Food Supply Assessment Mission was requested by the Government and fielded to the country from 10 to 24 February. The main objectives of the Mission were to assess the overall rice supply situation and possible need for food aid for the 2001 marketing year (January/December). The findings of the Mission are based on discussion with Government and UN agencies and on field visits to affected rice producing provinces including Bolikhamsay, Khammuan, Savannakhet and Attapeau. In view of the growing commercial and trading importance of Vientiane Municipality and Vientiane Province, the Mission also visited these areas to assess any impact on markets.

The Mission found that in keeping with the Government's strong emphasis on agricultural development in recent years, there has been appreciable growth in rice output due to increased adoption of high yielding varieties and an increase in the area under irrigated dry season farming. In addition, in spite of the floods during the last wet season, rainfall overall was satisfactory, resulting in generally favourable production. Although precipitation was slightly lower than in 1999, it was normal in most of the main rice producing provinces. Moreover, relative to flood losses in other countries, especially in Cambodia and Vietnam, and to the devastating floods in Lao PDR in 1991 and 1996, the extent of damage to agriculture in 2000 was lower. Based on official data for 2000 wet season production and a tentative forecast for the 2001 dry season, the Mission projects milled rice production for the current marketing year at some 1.28 million tonnes. In addition there are around 22 000 tonnes of bilateral programme and emergency rice aid pledged or delivered for 2001. Total rice availability will amount to approximately 1.30 million tonnes which would entirely cover estimated utilisation needs.

However the Mission notes that the area under dry season cropping may not entirely materialise due to flood damage to irrigation pumps and structures and high pump and other input costs which may

deter producers. As the extent of dry season output would have a significant bearing on total rice availability and, possibly, needs, it is recommended that a subsequent assessment be undertaken at the time of the dry season harvest to verify the overall food supply situation.

Although based on current projections Lao PDR will have a generally satisfactory rice situation in 2001, poorer sections of the population are unlikely to benefit as the level of market integration and development remains low due to enormous problems of transport and access, inadequate market information and because rice production remains largely for subsistence and agricultural incomes are low. Moreover, these factors, together with the precariousness of farming systems and the lack of adequate coping strategies, will mean that in areas where the entire rice crop was lost to the floods last year, households in 2001 will be exposed to serious food shortages. Such households, therefore, will need external assistance to bridge the gap between now and the next harvest. In addressing their needs, the Mission used ongoing WFP vulnerability analysis undertaken in collaboration with the Government and other partners. Based on this analysis, it is estimated that approximately 450 000 people were most affected by the floods last year, of whom an estimated 390 000 do not have access to dry season cropping. Based on village baseline data, an estimated 170 000 are transitory food insecure due to the floods. These people will on average have food deficits of six months on average, and 52 percent of these will have more than eight months deficit. To cover the food needs of these vulnerable groups, the Mission advocates a total of 15 000 tonnes of rice, of which 8 680 has already been covered under EMOP6300 and 6311. Up to mid-February almost 3 000 tonnes of glutinous rice have been delivered to 111 000 beneficiaries in 266 villages.

#### LEBANON (27 March)

The prospects for the 2001 winter harvest in June/July remain favourable. Aggregate production of wheat and barley crops in 2000 is estimated at 62 000 tonnes, about the same as the previous year.

Imports of wheat in 2000/01 (July/June) are forecast at some 0.51 million tonnes, similar to last year.

#### MALAYSIA (23 March)

Annual paddy production is around 2 million tonnes, with 60 percent from the main and 40 percent from the off season crop. Normally a third of domestic consumption requirements of rice are imported into the country, whilst wheat and maize are almost entirely imported. To enhance production, the Government has announced various strategies to enable sustainable food production and reduce dependency on imports. These include improving efficiency and productivity, introducing food production zones, strengthening marketing systems and food processing industries, developing infrastructure and human resources. The priority areas will be on rice, fruit, vegetables, fisheries and poultry farming.

#### MONGOLIA\* (23 March)

**Following the worst winter in decades last year, which seriously undermined the food security of large numbers of people especially nomadic herders, this year again the country faces a devastating winter which will greatly exacerbate food supply problems. Thick snow continues to disrupt transport and communications, whilst an estimated 114 000 nomadic families in 20 provinces remain stranded. Already the conditions have killed an estimated 850 000 animals, on which a third of the population rely entirely for their livelihood and income. Livestock losses are projected to reach 1 million by the end of the winter. Due to the conditions, there are also considerable problems in transporting food and medical supplies to areas where the population is particularly vulnerable to food shortages. The cold winter also comes on top of a summer drought which reduced the fodder crop for animals. The conditions are expected to deteriorate further as the winter progresses.**

**The impact of another cold winter and reduced fodder supplies on livestock will be of immense importance. The sector plays an extremely important part in the economy providing the main source of household income and contributing a major source of foreign**

exchange. The heavy loss of livestock and the consequent reduction in meat supplies, have also meant that there has been a large increase (up to 40 percent) in livestock prices. This in turn has had a knock-on effect on inflation and the cost of living further exacerbating the food security of the poor and vulnerable groups. In addition to meat, there is also a serious shortage of milk, especially in rural areas, further restricting an important source of protein and nutrients in the diet. It has also been very difficult for nomadic herd families to find alternative sources of income, as most are poorly educated and trained for alternative employment. Nonetheless, many have migrated to towns and urban centres compounding existing problems of un-employment and vulnerability to food shortages.

Current food shortages follow several years in which nutritional standards in the country have been falling due to significant changes in economic circumstance of large sectors of the population as the economy has been reoriented from one which was centrally planned to one which is market driven. This in particular has left many groups who were formally dependent on state employment and welfare exposed to economic uncertainties due to limited alternative earning opportunities. Various reports in the mid 1990s indicated that those most affected by poverty and food insecurity included the unemployed, the elderly, female headed households, children, pensioners and small herders. Recent studies by Save the Children Fund and ADRA report high levels of chronic malnutrition in a number of nomadic areas, with many families living in extreme poverty with almost no resources.

A UN/Government appeal for international assistance was launched at the end of January. The appeal was for vulnerable populations in the most severely affected provinces and on building the disaster management and co-ordination capacity of the State Emergency Commission (SEC) and other relevant national partners to enhance preparedness and future response. The appeal covers a period of four months, from 1 February to 31 May 2001 and is for US\$7 million in cash and US\$4.7 million in kind to assist beneficiaries in 73 affected counties.

#### MYANMAR (26 March)

Harvesting of the second, dry season paddy crop will commence from April and continue into May. The dry season crop accounts for around 15 percent of aggregate production the bulk coming from the main monsoon crop. Paddy production in 2000/01 marketing year is estimated at around 20 million tonnes.

#### NEPAL (26 March)

The main crop currently in the ground is winter wheat, harvesting of which will commence from next month. Average wheat production in the last five years has been around one million tonnes. The government is considering ways to assist farmers affected by falling agricultural prices, by introducing fixed support prices. Last year, the price of paddy fell sharply, due to imports. The cost of production has also risen as various subsidies have been removed on inputs, like fertilizers and irrigation

#### PAKISTAN (26 March)

The main crop currently in the ground is winter wheat which is planted in October/November for harvest in April/May. Due to severe drought and reduction in irrigation supplies production this year is forecast to decline from around 21 million tonnes last year to 17.5 million tonnes. The decline is attributed to both a reduction in area and yield. The shortage in irrigation supplies is reported to be the worst since completion of extensive irrigation network in the 1970s. The main reasons for the shortage are two consecutive weak monsoons and inadequate glacier and snow melt due to below normal snowfall and cooler than normal temperatures. In addition to production problems in irrigated areas, the rain-fed crop, which is less than 10 percent of total production, is in poor condition, particularly in



**the southern province of Sindh, where water shortages are most acute and where harvest will begin shortly.**

**In view of successive poor rainfall years, concerns of food and water shortages are mounting in Baluchistan in the North West and Sindh in the south. Reports indicate that the situation for vulnerable groups is becoming critical. Rice farmers are reportedly being urged to switch to less water-intensive crops.**

#### PHILIPPINES (26 March)

Planting of main season maize and rice, for harvest from August/September and September/October respectively, will commence from April and extend into May. In the first two dekads of March, however, heavy rains in east, central and southern parts of the country disrupted field work.

Paddy production for the 2000 calendar year was put at a record 12.45 million tonnes, up 4 percent from the previous year's harvest, whilst maize output was 4.5 million tonnes, some 2 percent lower than 1999. The increased availability of water in traditional maize producing areas led farmers to switch from maize to rice, which accounted for the reduction in maize production. The target for the current calendar year is 13 million tonnes, which the country aims to achieve through intensive agricultural extension; use of modern certified rice varieties and irrigation.

Despite considerable increases in domestic rice production, the country still does not produce sufficient quantities to meet demand. For the half of the current year, the National Food Authority (NFA) will import 450 000 tonnes of rice, which will be used to replenish stocks to provide a 90-day national buffer for the lean period between July and September. Of targeted imports 200 000 tonnes are expected by March and the balance by June.

#### SAUDI ARABIA (27 March)

Prospects for the 2001 wheat crop, for harvest in April/May, are favourable following some good rains at the beginning of the season. Production of wheat in 2000 is estimated at 1.5 million tonnes, similar to the previous year but about 9 percent below the average.

No desert locusts were reported in January and February, but the good rains in late January are expected to have created suitable conditions for breeding.

Import of cereals in 2000/01 (July/June) is currently forecast at about 6.8 million tonnes, slightly lower than last year.

#### SRI LANKA (26 March)

The main crop in the ground is currently the main Maha rice crop, which is planted in October to December for harvest from March. The crop is grown during the country's main rainy season; the north east monsoon. The main crop accounts for two thirds of annual production the rest coming from the dry season (Yala) crop. In the last five years from 1995 to 1999, paddy production has averaged around 2.5 million tonnes. In addition to rice, the country's main staple, some 850 000-900 000 tonnes of wheat are imported annually to meet demand for bread and other wheat based products.

#### SYRIA (27 March)

Despite late start of rains, prospects for the 2001 cereal crop to be harvested in April/May have somewhat improved with good rains received as the season progressed.

In 1999 and 2000 severe drought have decimated cereal crops and led to a significant increase in sheep mortality rates that seriously affected household incomes. Latest reports put the 2000 wheat

production at 2.7 million tonnes, about 4 percent above the previous year's well below average crop but 25 percent below average. Barley production, which is almost entirely rainfed, is estimated at 130 000 tonnes, about 88 percent below the previous five-year average.

#### **TAJIKISTAN\* (22 March)**

The outlook for the 2001 cereal harvest remains a cause for concern because of shortages of seed after last year's drought-reduced crop, the poor state of the irrigation/water management system and inadequate drainage which is causing salination. Satellite imagery indicates that crops have come out of dormancy only in southern areas (Khatlon), where, however, early crop development is less than at the corresponding time last year. A severe drought has reduced the 2000 cereal harvest to 236 000 tonnes, down by 47 percent compared to 1999. Output of all other crops, including potatoes, vegetables and cotton have also been affected.

The severe drought last year has rendered almost half of the 6.2 million people in the country vulnerable to food shortages and donor response to the appeals for food aid have been slow. The cereal import requirement in the 2000/01 marketing year (July/June) is estimated at 792 000 tonnes. After taking into account a projected commercial import of some 403 000 tonnes and pledged food aid of 138 500 tonnes, the uncovered food aid requirement remains at 250 500 tonnes. A shortfall of this magnitude for this impoverished country, if not addressed by the international community, could have serious implications for the population. Many households are already in dire conditions and will find it difficult to bridge the lean season. An estimated 3 million people fall in this category, with about 2 million facing a very difficult situation. The evolving critical food supply, production and access situations need to be monitored carefully with a view to making adjustments to the ongoing assistance programmes and/or designing appropriate new ones.

WFP has launched an appeal for 126 000 tonnes of food aid worth \$62 million to implement an emergency operation to assist over one million people who are in serious need of food assistance. The first large scale distributions started in December 2000 and are planned to be ongoing until June 2001. Without adequate assistance, about 1.2 million people will face a very difficult situation with virtually no employment opportunities or other sources of income to purchase food from the market.

#### **THAILAND (26 March)**

Heavy rainfall in the first two dekads of March in southern and north-western parts of the country slowed fieldwork for second season rice. Earlier harvesting of main wet season rice crop was completed in January/February. 2000/01 rice production is forecast at around 24 million tonnes providing weather conditions remain satisfactory.

Rice exports dropped slightly from a record of 6.68 million tonnes in 1999 to 6.54 million tonnes last year. Exports are projected to decline further this year due to weaker demand.

#### **TURKEY (27 March)**

Despite recent favourable rains, prospects the 2001 winter crops, to be harvested from June, are uncertain due to warm and dry weather in major producing areas. The 2000 wheat production is estimated at 19 million tonnes, about 5 percent above the previous year's reduced crop but about average.

The government has significantly reduced its grain support prices in June 2000 with the objective of reducing inflationary pressures and lowering government outlays. For instance, support prices for Anatolian Hard Red Wheat, which is most commonly produced, has been reduced by about 14 percent to 166 US\$/tonne compared to 1999.

Turkey's state grain board (TMO) purchase from farmers in 2000 is estimated at about 4.5 million tonnes of cereals.

#### TURKMENISTAN (22 March)

The 2001 winter crop remains mostly dormant except in southern areas of Mary. The area sown to winter cereals is planned to increase to 775 000 hectares, 100 000 hectares more than sown last year. The production target of winter cereals has been raised to 2 million tonnes, following the reported achievement of the 1.7 million tonne target in 2000 and aggregate cereal production (including maize and rice) estimated at 1.8 million tonnes. However, most private sources find the production estimate unrealistic. On the one hand, land privatization and private responsibility for production under leasehold has provided incentives to maximize yields. The bulk of cereals is grown in the winter and escaped the worst of the drought, although rice and cotton, both spring crops, were affected. Cotton output fell by 20 percent. Reflected imports of wheat and flour have also decreased sharply. On the other hand, the fact that wheat, rice and cotton are crops which remain under state marketing orders, and for which inputs can be mobilized, could also mean that the areas sown are being overestimated and inputs are diverted to other foodcrops. Unofficial sources indicate that actual wheat yields are between 1.5-2.0 tonnes per hectare rather than the 2.5 –2.6 tonnes per hectare officially reported since 1999. Salinization due to excessive irrigation of fragile desert soils and poor drainage is a growing problem.

Imports of wheat have fallen sharply in recent years. However, data on trade is difficult to come by but there are reports of informal flows of wheat flour.

#### UZBEKISTAN (22 March)

**At this early stage of the season, crop development is less than at the corresponding time last year in most areas except Tashkent oblast. However, this could be due to colder weather and/or later plantings. Early reports indicate that the area sown to winter cereals has increased slightly, despite late and reduced planting in the northern areas affected by severe water shortage in the summer and autumn of 2000. The final outcome will depend crucially on precipitation in the coming months and the adequacy of snow and glacier melt in neighbouring countries to replenish irrigation reserves affected by last year's drought.**

**The 2000 grain harvest is officially estimated at 3.9 million tonnes, below target (5.8 million tonnes) and some 10 percent below the previous year. Output was reduced as a result of a shortage of irrigation water following a mild winter and poor management of water resources, with catastrophic impacts on agriculture in the down river regions of the AmuDarya, the Autonomous Region of Karakalpakstan and Khorizem, but particularly the former. Output of cotton, a major export crop with which imports of wheat and machinery are financed, has fallen to 3 million tonnes compared to 3.6 million tonnes last year. The rice harvest (irrigated) is also sharply down to 155 000 tonnes from 421 000 tonnes in 1999.**

**Imports of foodstuffs have declined in recent years in part due to a sharp increase in cereal production (notably wheat), and in part, to maximize funds available for the creation of import substituting industries. Nevertheless, the import requirement for wheat in 2000/01 is estimated at over 800 000 tonnes. The bulk of cereal imports will be mobilized commercially but the government has requested (and received) 38 200 tonnes of durum wheat for pasta production. Larger volumes of cereals than normal will have to be transferred to drought affected populations. Budget constraints may reduce the capacity of the government to make adequate provision for the affected populations but the central government has not requested any emergency food assistance. A rapid nutrition assessment in November-December in Karakalpakstan showed low levels of acute malnutrition but led MSF to conclude that there is evidence for widespread stunting in children under five.**

VIET NAM (26 March)

Harvesting of winter spring rice has begun in the south and will commence shortly in the north. Generally, in the north the crop is planted in January to March for harvest in June/July, whilst in the south planting and harvesting are around a month earlier. In view of weaker rice prices cropped area has declined. Consequently to stimulate production and replenish stocks, the Government recently introduced a floor paddy procurement price. The minimum price has been set at 1 300 dong (\$1=VND14 536) a kilogram. Other measures to stimulate production include the postponement of first-half year agricultural taxes from rice farmers till the end of June.

Due to a slow down in rice trade in the world market, rice export revenues were lower in 2000 than anticipated. Compared to a revised target of 3.8 million tonnes some 3.7 million tonnes were exported. The 2001 rice export target has been set at 4 million tonnes.

YEMEN (27 March)

Rainfall and temperatures for the main, sorghum and millet crops to be harvested towards the end of the year, are reported to be normal. Total cereal output in 2000 is estimated at 721 000 tonnes, similar to the average for the previous five years.

The Desert Locust situation remains calm but with recent winter rains along the Red Sea coastal plains, conditions are likely to be favourable for breeding.

Imports of cereals in 2000, mainly wheat, are estimated at some 2.6 million tonnes.

**CENTRAL**  
**AMERICA**  
**(including the**  
**Caribbean)**

COSTA RICA (13 March)

Harvesting of second season cereal crops has finished and land is being prepared for the first season crop of the 2001 agricultural campaign to be planted from April. Harvesting of the most important beans season crops has started in the important Huetar region in the North and total output for year 2001 is forecast at about 15 000 tonnes. Paddy harvest has finished with an estimated bumper crop of about 320 000 tonnes.

Wheat imports in marketing year 2000/01 (Jul/Jun) are estimated to decrease to slightly below 220 000 tonnes. In the same period, white maize imports (accounting for less than 10 percent of all maize imports) are expected to increase by 50 percent. Rice imports in marketing year 2000 (Jan-Dec) decreased to some 42 000 tonnes, and are forecast to decrease even further in the current marketing year.

CUBA (13 March)

Cuba's recent drought significantly affected sugar cane and coffee plantations. Sugar cane output is expected to fall below 3.78 million tonnes. Harvesting of the important export earning coffee crop finished in February in the important producing provinces of Granma, Guantanamo, Santiago and Holguin with an estimated 20 to 30 per cent output decline. Although March and April are the last months of the dry season, a close monitoring of water stress will be required throughout year 2001 due to the accumulated water deficit. The current lack of rains is keeping the harvest of second season paddy crop on schedule (which started in March), but it is not favouring the coffee crops which are already beginning to flower.

Cuba's rice imports for marketing year 2000/01 (Jan/Dec) are forecast to increase to about 400 000 tonnes, virtually unchanged from last year.

DOMINICAN REPUBLIC (13 March)

Planting of year 2001 first season coarse grain crops has started under relatively dry weather conditions, while third season crops, currently in reproductive state, are being harvested in April. Heavy rains in April damaged some area planted with paddy, but the crop is reported to be in good condition. Rice availability is usually low in March and April, but prices this year are not expected to rise significantly due to the government's decision to allow the import of 13 000 tonnes which will act as a reserve until harvests start in May. The land area planted with secondary food crops (yucca, beans and potatoes) is reported average.

Wheat imports in marketing year 2000/01 (Jul/Jun) are estimated at some 300 000 tonnes, while maize imports, mainly for feed, are expected to increase. Rice imports for marketing year 2001 (Jan/Dec) are forecast to remain unchanged from last year's 70 000 tonnes.

**EL SALVADOR (13 March)**

**The country is beginning to recover from the January and February earthquakes, but food and other types of emergency relief assistance are still being provided by the international community. The government is concerned that the approaching rains of April could provoke landslides, disrupting the cultivation of the forthcoming first season crop. In anticipation of the potential problems, the government is distributing input packages in an effort to ensure the planting of the crop. Official sources have already reported that output of basic grains is not likely to be below last year's level.**

**Although imports of basic grains in year 2001 are forecast to increase, the government does not expect severe food shortages in the short run. Wheat imports in marketing year 2000/01 (July/June) are expected to be some 200 000 tonnes, and maize imports about 440 000 tonnes. Rice imports in marketing year 2001 (Jan/Dec) are expected to increase from 30 000 tonnes to some 40 000 tonnes last year.**

GUATEMALA (14 March)

Normal weather conditions are favouring land preparation for the first season coarse grains crop to be sown in April/May, but no estimates of planting intentions are yet available. Food price increases have already been observed in some local markets, but these are not uncommon this time of the year because the supply decreases until August when maize crops are harvested.

Imports of maize in the 2000/01 marketing year (July/June) are expected to remain unchanged from last year's some 550 000 tonnes. Rice imports in marketing year 2001 (Jan/Dec) are expected to increase to some 35 000 tonnes, up from 30 000 tonnes in 2000.

**HAITI\* (20 March)**

**It is the dry season in Haiti, but early prospects for the next crops are unfavourable. It is reported that in the Centre province farmers have not seen rains for the last six months and that water courses are at a critical low level. Similar reports are received from Artibonite, North and West provinces. The drought is affecting the development of the first season bean crop which is mainly grown in these provinces. A close monitoring of the weather is required in the following months, for the drought could be more severe than the one last year which extended into May and June affecting first season coarse grain crops. Maize is being planted in the important producing provinces of Grand Anse and Sud where drought has not been reported. The government is co-ordinating the supply of food aid as a way towards poverty alleviation and greater food security for the poorest families during these critical months between harvests. Food aid pledges for 2001 amount to 70 000 tonnes, of which 69 000 tonnes have been delivered.**

HONDURAS (20 March)

Planting of first and most important maize season crop starts in April. Paddy farmers and the milling industry agreed this year a 5 percent price increase for the forthcoming crop in an effort to foster production amidst a climate of reconstruction. The accord is expected to result in a small expansion of the area planted in the first season (from April and due be harvested in September). The country has found it difficult to recover from the damage caused by Hurricane "Mitch" (late 1998) which plunged the economy into a deep recession, and the current outlook for the food situation is uncertain. As a result of last year's dry spell and low international coffee prices, the Honduran Coffee Institute estimates that coffee growers will incur a 30 per cent loss of income (coffee was Honduras' most important export crop before Hurricane "Mitch").

#### MEXICO (21 March)

Previous favourable prospects for Mexico's irrigated autumn/winter wheat crops are now being questioned due to the lack of rains in early 2001. The area cultivated has been revised downwards and is now estimated to be 7 per cent lower than last year, and the forecast for production now stands slightly lower than 3.3 million tonnes. Dry weather conditions are not favouring Tamaulipas' non-irrigated sorghum crop, but total production in 2001 is forecast to increase reflecting larger plantings fostered by the strong demand from the livestock sector. Paddy production in 2001 is expected to remain unchanged from last year's some 420 000 tonnes.

Yellow maize imports in marketing year 2001/02 (Jul/Jun) are expected to increase slightly due to the sustained demand from the feed industry. Rice consumption is expected to increase in marketing year 2001 (Jan/Dec) to reflect increasing purchasing power and population growth, but large carry-over stocks from last year suggest that total imports will remain unchanged from last year's some 500 000 tonnes.

#### NICARAGUA (21 March)

Following the damage caused by Hurricane "Mitch" in late 1998, government's efforts to diminish food insecurity in rural areas were blocked by last year's drought and low world coffee prices. However, recent *apante* harvest (third season crop) brings a sign of recovery, for its output is estimated to be average. Official sources indicate that the normal weather is favouring *apante* crops, which account for two thirds of bean and one third of maize total outputs. The area of *apante* beans harvested was revised upwards to some 75 000 hectares from an earlier estimate of 70 000 hectares. Land is currently being prepared for the forthcoming first season maize crop to be planted with the arrival of the rains in April, and normal weather conditions should produce a higher output in 2001 (about 320 000 tonnes) than the approximately 290 000 tonnes harvested last year.

### **SOUTH AMERICA**

#### ARGENTINA (22 March)

Land preparation has started for the autumn planting of wheat crops in Argentina. Planting intentions for year 2001 are forecast to increase slightly due to the expectation of moderate wheat price increases in the forthcoming months. Harvesting of coarse grains started in March, and the outlook is favourable thanks to the abundant rains that fell over the central provinces throughout the summer. Maize harvest is progressing according to schedule and output is forecast to reach 15.4 million tonnes. Harvesting of paddy crops has also started in the northern provinces, and total output is expected to fall because of a reduction in the area planted. The low planting of paddy is due to increases in energy prices and a reduction in paddy prices following a decrease in the quantity demanded by Brazil.

#### **BOLIVIA (22 March)**

Heavy rains and drought forced the government to declare most of the country a natural disaster area in February. Food aid and preventing measures of epidemic outbreaks are currently being provided by the international community. The heavy rain that fell over the country since January in the "altiplano" region (highlands) overflowed the banks of the rivers causing localized floods in La Paz, Cochabamba, Potosí and Beni. Santa Cruz is now suffering from floods and landslides in the Chaco region that previously was being hit by drought. The crops affected include maize, rice, wheat and tubers. Road damages have complicated the supply of food, and a rapid escalation of food prices has been observed in some local markets. The government is currently assessing the damage on cereal production, and preliminary reports indicate that the crop area affected is about 7 per cent of the total planted. The outlook in terms of total food production is yet uncertain because the rains also benefited food crops in some highlands and valleys, where early harvests are yielding higher than average. Food aid pledges amount to 69 000 tonnes, of which 65 000 tonnes have been delivered.

#### **BRAZIL (22 March)**

Rains began to fall in March after a dry start to the rainier season (February/May) in semi-arid north eastern Brazil. PROCLIMA's current forecast is that total rainfall will not deviate from the historic average. More to the south, harvesting of coarse grains has started on schedule (March/April) in central and southern Brazil. The increase in planting area and the beneficial summer rains will produce a bumper crop. According to Brazil's National Food Supply Agency (CONAB), maize output is expected to satisfy domestic demand for the first time since the early 1980s. A 10 percent fall in the area planted to second season maize (*safrinha*) is forecast following a reduction in prices (farmers are expected to replace it with sorghum). Harvesting of paddy crops was delayed in central Brazil, and the quality of the grains produced so far is poor. Production for year 2001 is forecast to decrease to about 11 million tonnes from last year's 11.4 million tonnes due to a reduction in paddy prices.

#### **CHILE (22 March)**

Having finished the wheat harvest, and despite the increased planted area, current estimates of production indicate that output may not reach the 1.5 million tonnes previously forecasted due to cold and wet weather during seasoning. The outlook for the estimated 83 000 hectares of maize crops planted is uncertain, as floods in Valparaíso have caused localized damage to crops, while more to the south (Temuco) higher than average yields are currently being obtained.

#### **COLOMBIA (22 March)**

Dry and very dry weather conditions all over the country during February and March favoured the harvest of the irrigated second season coarse grain crops of year 2000, as well as the preparation and planting of the 2001 rain-fed first season crops. Moderate rains at the end of March are helping germination, but more water will be needed in April to assist the normal development of the crop. Paddy output in Colombia in year 2001 is estimated to remain at last year's some 1.8 million tonnes. Rice prices increased by 25 per cent in February, and the government authorized the import of 160 000 tonnes to halt the increase until the month of July, when the harvest of the main season crop is expected.

#### **ECUADOR (23 March)**

Heavy rains in coastal areas throughout March caused localized floods which killed over 40 people and forced the evacuation of several thousand families from their homes. Reports indicate some localized damage to coarse grain crops and no damages to the important coffee and paddy crops. The rest of the country saw moderate rains in March, which are favouring the development of the 2001 first season coarse grains crops. Harvest of winter yellow maize planted in the highlands is due

to start in May, and a record output is early forecast. Harvest of paddy (cultivated in coastal areas) is due starts in mid-April, and reports indicate that, despite the heavy rains, the crop looks in good conditions.

#### PERU (23 March)

Planting of 2001 wheat crops (November/March) in the important producing provinces of Junín, Hancavelica and Ayacucho is completed, and harvest is due to start from May. The forecast is for a small reduction in output due to a fall in the area planted. A similar outlook is forecast for white maize which is sown from September till January, and due to be harvested from April. Conversely, yellow maize production in 2001 is forecast to increase reflecting both water availability and larger plantings (white maize is planted all year round and used as animal feed). In relation to paddy, the good weather is pushing upwards earlier forecasts of unchanged outputs, and the crop (mainly rain-fed) is provisionally estimated to produce 1.9 million tonnes in year 2001.

The Government has declared a state of emergency in Puno, Arequipa and Tacna after heavy rains in April caused localized floods. Some 170 000 people and 48 000 hectares of crops were affected and about 50 000 livestock animals were lost.

#### URUGUAY (23 March)

Land preparation has started for the forthcoming wheat crop and the area planted is forecast to increase slightly relative to last year's 123 000 hectares due to the better weather and the expectation of higher regional prices in 2001. Harvest is in progress for coarse grains crops which were favoured by the abundant summer rains. Maize output is expected to reach 200 000 tonnes compared to last year's 65 000 (70 per cent of maize and sorghum was lost in year 2000 due to a prolonged drought). Paddy harvest started in March and yields so far indicate that earlier forecasts of a total output of about 900 000 tonnes may need to be revised upwards in the next months.

#### VENEZUELA (23 March)

Planting of first season coarse grain crops will begin with the arrival of the rains at the end of April and will continue throughout May. Earlier forecasts of paddy production in 2001 are revised to some 800 000 tonnes, up slightly from an estimated 750 000 tonnes in year 2000 due to larger plantings. The increase is due to lower interest rates for producers and a 20 percent reduction in fertilizer prices.

### **EUROPE**

#### EC (3 April)

In the EC, latest indications continue point to an overall reduction in cereal area for the 2001 harvest, largely reflecting a significant contraction in the winter sown soft wheat area. The main reductions in the soft wheat area are reported in France and the United Kingdom. In Italy, while the soft wheat area is expected to fall sharply, the area dedicated to the more important durum wheat is forecast to remain relatively unchanged from the previous year. In Spain, although final data is not yet available, the wheat area is tentatively estimated to be down by about 5 percent from the previous year due to heavy rains during the main planting period. Also in Portugal, heavy rains have caused a significant drop in the wheat area. Assuming normal weather conditions prevail for the remainder of the season, aggregate wheat output in the EC in 2001 is tentatively forecast at 101 million tonnes, down by about 4 percent from the bumper crop in 2000 but still above the average of the past five years. For coarse grains, much will depend on the outcome of spring/summer planting, which is only just starting. Early indications suggest that the area dedicated to the main feed grains such as barley and maize may expand in anticipation of increased demand from the feed industry following the ban on the use of meat and bone meal. However, assuming a return to normal yields after last year's bumper levels, the EC's overall output of coarse grains in 2001 is tentatively forecast



at about 107 million tonnes, 2 percent down from 2000. Preparations for the Community's 2001 rice crop are underway but planting intentions are uncertain.

#### ALBANIA (6 April)

Generally favourable weather conditions for autumn cereal planting suggest some recovery in cereal production could be possible in 2000 after adverse weather during both the previous autumn and spring planting periods reduced overall cereal area and output in 1999. However, production potential remains limited by an absence of credit, which is the major constraint on the increased use of fertilizer and other inputs. Food assistance continues to be provided by WFP for some 60 000 persons who have been rendered vulnerable by the Balkan crisis.

#### BELARUS (23 March)

Crops are greening in southern parts of Brest and Gomel oblasts. Growing conditions for the 2000/01 winter cereal crop have been satisfactory to date. Given good growing conditions until the completion of winter and spring harvests, the aggregate cereal output could be marginally higher than the 4.4 million tonnes produced in 2000. In 2000/01, the country will need to import cereals for human consumption as well as feed.

#### BOSNIA-HERZEGOVINA\* (23 March)

The outlook for the 2001 cereal harvest remains uncertain. The condition of winter grains is satisfactory so far, but more precipitation is needed to recharge soil moisture reserves after dry conditions last season. To meet consumption demand, wheat imports have increased steadily. In addition the country is importing maize after last year's drought reduced output.

#### BULGARIA (3 April)

Latest indications for the 2001 cereal crops suggest that a partial recovery from the previous season's reduced output could be possible but much will depend on the weather during the remainder of the season. The winter wheat area is officially estimated at some 1.2 million hectares, up about 12 percent from the previous season, while the barley area is also estimated up at about 250 000 hectares. The increase is largely attributed to farmers' preference to plant the relatively more drought resistant winter crops, rather than spring maize, under the current dry conditions. Preparations for the spring sowing are reported to already be delayed by persisting dry conditions and latest official forecasts point to an 8.5 percent reduction in the maize area to about 500 000 hectares. However, if rainfall returns to normal levels for the remainder of the season, maize yields could recover greatly from last years sharply reduced levels and the overall output could increase.

#### CROATIA (23 February)

The early outlook is uncertain. The 2000 drought persisted into the autumn, delaying winter cereal plantings, which are planned to decline. Precipitation has improved since December but crop development in early March was less than at the corresponding time last year, when the final wheat harvest reached bumper 1.08 million tonnes. The area to be sown to spring crops overall is planned to be reduced somewhat, with less sunflower, sugarbeet and barley to be sown. The maize area is targeted to increase marginally to 386 000 hectares, from 379 000 hectares in 2000 to help replenish maize supplies after the drought reduced harvest in 2000 of only 1.3 million tonnes, compared to 2.1 million tonnes in 1999. Despite the poor harvests and a tight supply situation, maize is being exported to neighbouring Bosnia Herzegovina. The country also plans to export about 200 000 tonnes of wheat in 2000/01.

#### CZECH REPUBLIC (3 April)

In the Czech Republic, the 2001 cereal area is forecast to remain similar to the previous year's level at about 1.6 million hectares, of which wheat accounts for about 900 000 hectares. Based on conditions so far, an average output is expected.

#### ESTONIA (23 March)

The early outlook for winter grains is satisfactory. The 2000 grain harvest is estimated at a bumper 0.6 million tonnes cleaned weight from 330 000 hectares. Output is some 25 percent more than in 1999. Good pasture conditions also led to an increase in milk production in 2000.

#### FORMER YUGOSLAV REPUBLIC OF MACEDONIA (3 April)

Latest reports indicate that exceptionally dry winter conditions, especially in eastern parts of the country, could affect the 2001 cereal crops. Winter wheat production in particular is forecast to fall by as much as 50 percent in some counties. Although there are already strong indications that the overall output will fall below average this year, calling for increased imports to meet the normal wheat requirements, the final outcome will still depend on weather conditions during the remainder of the season.

WFP continues to provide food assistance to refugees in the country. As of mid-March, the planning figures for food deliveries for the international community in March and April were for 7 600 refugees, 1 450 host families accommodating refugees and 9 500 most vulnerable social case families.

#### HUNGARY (3 April)

Moisture conditions are reported to have improved over the past few weeks for the winter cereal crops and spring field operations after previously dry conditions. The winter cereal area has increased from the previous year and the output in 2001 is now expected to recover significantly in 2001 to about 4.5 to 5 million tonnes, after reduced outputs in the past two years.

#### LATVIA (23 March)

The early outlook for the 2001 cereal harvest is satisfactory. Good precipitation this winter has provided adequate soil moisture reserves. The area sown has likely remained average.

The 2000 grain output is officially put at 924 000 tonnes, 18 percent above the poor harvest of 1999. With livestock production remaining depressed, and animal numbers continuing to shrink, imports of cereals in recent years are limited to about 50 000-70 000 tonnes per annum, mainly of bread quality wheat to admix with local production. Indications are that animal productivity is increasing.

#### LITHUANIA (23 February)

The early outlook for the 2001 winter cereal harvest is satisfactory but crop development in the northeastern corner of the country, bordering Latvia is less than a year ago. The 2000 grain harvest reached 2.7 million tonnes, above average and 0.6 million tonnes more than in 1999, reflecting sharply higher yields for both winter and spring crops. Livestock production declined across the board but the aggregate output of agriculture increased by 2.2 percent in 2000. Agriculture ranks as the fifth largest contributor to national GDP and accounts for about 20 percent of employment.

#### MOLDOVA (23 March)

The early outlook for the 2001 cereal harvest is satisfactory. Autumn weather favoured winter cereal planting and overwintering conditions have been more satisfactory. The area sown to winter wheat and barley has increased. Satellite imagery indicates markedly better crop development than at the

corresponding time last year throughout the country. After two poor years, current indications are that the 2001 cereal harvest could return to an about average 2.4 million tonnes, given normal growing conditions until the completion of the harvests.

The 2000 grain harvest is officially reported to have reached 2.1 million tonnes, significantly higher than earlier estimates and only marginally less than the equally drought affected harvest in 1999. However, independent analysts question the official estimate, evaluating the yield of wheat at 75-50 percent of the official estimate of over 2 tonnes/hectare. Equally, the 2000 maize harvest, officially forecast at 1.091 million tonnes, could also be less.

The low quality of the 2000 wheat harvest will necessitate imports of high gluten wheat for bread making but purchasing power could keep such imports low. Following the second poor harvest in succession, the availability of feedgrains for livestock is very tight, necessitating destocking. Despite official bans on wheat exports, some 30 000 tonnes are likely to be exported in 2000/01.

#### POLAND (3 April)

Weather conditions are reported to have been generally satisfactory over the past few weeks. The winter grain area for this year's crop is estimated to be about average. If normal conditions prevail for the remainder of the season, output of wheat and coarse grains will likely recover significantly from last year's reduced level.

#### ROMANIA (3 April)

The outlook for the 2001 cereal crops is unfavourable in view of continuing drought that has afflicted the country for over a year. Although the area sown to winter cereals is estimated to be similar to that of the previous year, yield prospects are poor and unlikely to improve unless significant precipitation arrives soon. If the drought continues, spring grain planting is also likely to be severely affected.

Following a reduced wheat crop in 2000, the Government has begun to release state reserves of wheat to supply mills throughout the country, which have already exhausted their supplies. It is expected that imports of about 500 000 tonnes of wheat will be necessary to maintain wheat supply to consumers before this year's harvest.

#### RUSSIAN FEDERATION (23 March)

The early outlook for the 2001 winter cereals is good. The area sown to winter crops for harvest in the spring/summer of this year increased to 14.7 million hectares, mainly due to larger plantings in the North Caucasus. Overwintering conditions have been good overall and over 90 percent of the winter wheat, barley and rye crop is in good to satisfactory condition. Heavy snowfall this winter has provided good soil moisture reserves in most areas except limited parts of the North Caucasus and adjoining areas. Satellite imagery shows better crop development in most areas where winter cereals have emerged from dormancy.

Spring grain planting has started in the most southerly areas. Good demand for cereals coupled with adequate moisture supplies are expected to lead to an increase in the area of spring cereals, notably in the North Caucasus and Volga regions. The aggregate area to be sown to grains is officially estimated to reach up to 48.6 million hectares, up to 3 million hectares more than in the past year. Given normal conditions until the harvest, the 2001 grain harvest could exceed last year's 71 million tonnes, including 38 million tonnes of wheat and 31 million tonnes of coarse grains. FAO's production estimates are about 10 percent higher than the official estimates, in view of systematic underestimation.

In the 2000/01 marketing year, cereal imports are forecast to fall to about half of last year's level (8.4 million tonnes) and to be partially offset by exports amounting to around 2 million tonnes. Cereal imports up to December amount to 1.6 million tonnes while exports total nearly 1 million tonnes.

Food insecurity is primarily a problem of access rather than availability. Income distribution is very uneven. Some 50 percent of the population live below the poverty line of US\$4.30/person/day. Specific causes of poverty include arrears in the payment of pensions, salaries and wages.

**In Chechnya, the outlook for the 2001 grain harvest remains bleak due to lack of financial resources and fuel. The 2000 agricultural production was greatly compromised by the security situation as well as the shortages of machinery, fuel and inputs.**

**The conflict in Chechnya continues to cause severe hardship for the local and displaced population within the country and in surrounding areas. An estimated 170 000 persons remain displaced inside Chechnya and 155 000 are registered in Ingushetia. Relief operations are seriously hindered by problems of security and a severe shortage of resources. In March, WFP distributed partial rations to 33 600 Chechen IDPs in Ingushetia (only wheat flour) and to 6 000 school children in Chechnya (high-energy biscuits).**

#### SLOVAK REPUBLIC (3 April)

In the Slovak Republic, prospects for the winter grain crops are satisfactory and output is expected to recover after last year's reduced harvest.

#### UKRAINE (23 March)

Unlike the preceding two years, the early outlook for the 2001 winter cereals is good. The latest estimates indicate that the area sown to winter crops may have increased by up to 1.4 million hectares to 8.9 million hectares, some 0.5 million hectares more than previously estimated. The bulk of this is sown to winter cereals. Overwintering conditions have been mostly good in the 2000/01 season to date and some 88 percent of the crop are in good/satisfactory condition. So far, crop losses due to winterkill, reported between 300 000-400 000 hectares, are well below average. Moreover, soil moisture reserves have been replenished in all areas except the south where they are nevertheless 70-80 percent of normal. The availability of inputs is better and satellite imagery shows markedly better conditions than at the corresponding time last year.

The government discontinued provision of commodity loans to agricultural enterprises last year. Instead it assists agricultural enterprises in obtaining working capital for sowing and harvesting crops. Among other things, this season, the government decided to compensate 70 percent of the interest payments on loans that agricultural enterprises obtain from commercial banks. The National Bank of Ukraine's discount rate is used to calculate the amount of compensation. Meanwhile the moratorium on payment of value-added tax by agricultural enterprises has been extended until 2004. In addition several tax breaks in the Law on Stimulating Development of Agriculture During the 2001-2004 Period have been introduced.

Spring planting has started in the Crimea. As the area to be sown in the spring is also expected to increase, the area for harvest could be around 1 million hectares more than in 2000. Demand for contractual harvest services later this year is also greater than at the same time last year. The recent flood damage in Zarkapatia has led to loss of life and left thousands of people homeless but its effect on crops is likely to be limited. However, it could delay spring planting in that area. Provided normal weather continues until the completion of the harvests, the 2001 grain output could reach up to 30 million tonnes, compared to an estimated 23.4 million tonnes in 2000. However, the mild wet winter has led to increased weed infestation and disease and could affect crop quality.

Despite the drought-reduced harvest in 2000, the country could remain a net exporter of cereals. In the first seven months of the current marketing year, the country has exported in excess of 1.2 million tonnes (mainly barley) and imported roughly 0.6 million tonnes (mainly wheat). In the 2000/01 marketing year, aggregate cereal exports are anticipated to halve to 1.5 million tonnes while imports should increase to about 900 000 tonnes, from just over 600 000 tonnes in 1999/2000.

**YUGOSLAVIA, FED. REP. OF (SERBIA AND MONTENEGRO)\* (23 March)**

The outlook for winter wheat, to be harvested as of June, has improved somewhat with localized rains but more precipitation is needed to replenish soil moisture supplies. In addition, there is a critical shortage of fertilizers for both winter and spring crops.

Prolonged dry weather delayed winter wheat planting and hindered crop establishment but somewhat better rains and mild temperatures since late December have improved the outlook. Also, despite poor economic conditions, farmers managed to plant some 700 000-750 000 hectares to winter wheat. This is less than planned – 800 000 hectares – but, more than was actually sown and harvested last year (roughly 600 000 hectares) and closer to average. The wheat production target is 2.5 million tonnes, but the critical shortage of fertilizers could result in a significantly smaller harvest.

Similarly, the spring planting and output targets may not be achieved. These include 6 million tonnes of maize from an area of 1.4 million hectares, 2.5 million tonnes of sugarbeet from 60 000 hectares, 450 000 tonnes of sunflower from 200 000 hectares and 350 000 tonnes of soybeans from 120 000 hectares.

WFP is currently targeting about 700 000 refugees and socially vulnerable people. In addition the ICRC assists 200 000 IDPs with an individual food ration and 100 000 people (social cases) through a hot meal under their soup kitchen programme.

**NORTH AMERICA**

**CANADA (3 April)**

In Canada, the bulk of the 2001 wheat crop is due to be sown from May to June. The area planted is expected to expand marginally from the previous year and overall output of wheat is tentatively forecast at almost 27 million tonnes, compared to 26.8 million tonnes in 2000. The bulk of the coarse grains crops will be sown in May-June. Latest indications of farmers planting intentions point to a likely increase in area dedicated to the main coarse grains. Output of barley and maize are currently forecast to increase by 9.5 percent and almost 30 percent respectively to 14.7 million tonnes and 8.9 million tonnes respectively.

**UNITED STATES (2 April)**

Wheat output in the United States could decline further in 2001. Winter wheat plantings fell to their lowest level since 1971 and harsh weather in some areas in late 2000 delayed crop emergence while a reduction in the spring wheat area is also in prospect. Latest official estimates put the winter wheat areas at 16.7 million hectares, some 800 000 hectares or 5 percent less than in the previous year. Early indications for spring wheat plantings in the USDA Prospective Planting Report point to a 1.2 percent reduction in area to about 7.7 million hectares. A sharp decline in durum plantings is expected to more than offset a marginal increase in the area sown to other spring wheat. Based on the estimate of the winter wheat area and the spring wheat planting intentions, and assuming normal weather conditions prevail for the rest of the season, FAO currently forecasts the aggregate 2001 wheat output in the United States at about 60 million tonnes, slightly down from the previous year's below-average crop.

Some early coarse grains crops are already in the ground in southern parts, but the bulk of the maize planting in the Corn Belt states takes place from late April. Early indications in the USDA Prospective Planting Report point to 4 percent reduction in maize plantings but a 2 percent increase for sorghum. Planting of the 2001 rice crop in the United States is expected to start in March/April. Output is forecast to reach 8.9 million tonnes, 200 000 tonnes more than last year. This forecast is based on expectations of a 4.2 percent expansion in area but a return to normal yields from the exceptionally high levels achieved last year. Paddy producers have benefited since 1999 from high

government support that has boosted their incomes, notwithstanding low international prices. As a result, rice remains an attractive crop.

## **OCEANIA**

### **AUSTRALIA (2 April)**

Planting of the main 2001 wheat and coarse grains crops is due to start in May. Early official forecasts indicate an increase in wheat production to some 23 million tonnes from a below average output of 21.2 million tonnes in 2000. The forecast is based on an expected increase in plantings to about 12 million hectares, and an assumption of average seasonal weather conditions, giving an average yield of about 1.9 tonnes/hectare. The winter barley crop is also forecast to increase, by about 5 percent, to reach almost 6 million tonnes. Harvest of the minor 2001 summer coarse grains crop, mainly sorghum and maize, is underway. Output of sorghum is forecast to fall significantly to about 1.5 million tonnes reflecting dry conditions at planting time. The 2001 rice harvest has started sooner than expected due to good weather during the maturation period. The 2001 rice output is forecast to reach 1.75 million tonne, more than 60 percent above last year, following a 40 percent expansion in the area to 186 000 hectares and good yield prospects.

### **SOLOMON ISLANDS (9 April)**

Despite the signing of a comprehensive peace agreement between the major factions last year, the humanitarian situation remains a cause for concern. A large number of the estimated 50 000 people that had been forced out of their homes during the civil conflict remain displaced. These internally displaced as well as returnees are striving for basic needs such as food, drinking water and shelter. In addition to the collapse of the national economy and essential services, recent heavy rains have aggravated conditions for people living on subsistence agriculture. Local and international NGOs have appealed for humanitarian assistance including food, agricultural tools and other inputs, and water/sanitation to assist authorities in the rehabilitation and resettlement process.

### **TONGA (8 April)**

Cyclone Paula hit the country in early March, causing damage estimated at US\$300 000 to property and infrastructure facilities, as well as with localized damage to agricultural crops such as kava on isolated, elevated and exposed areas.

ESTIMATED CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/  
a) 2000/01 or 2001 estimates (in thousand tonnes)

COUNTRY	Marketing year	1999/2000 or 2000			2000/01 or 2001			
		Actual imports			Total import requirements (excluding re-exports)	Import position		
		Commercial purchases	Food aid	Total commercial and aid		Total commercial and aid	Food aid allocated committed or shipped	Commercial purchases
<b>AFRICA</b>		<b>26 581.3</b>	<b>2 720.2</b>	<b>29 301.5</b>	<b>31 340.0</b>	<b>13 260.8</b>	<b>1 814.2</b>	<b>11 446.6</b>
<b>Northern Africa</b>		<b>13 846.7</b>	<b>73.3</b>	<b>13 920.0</b>	<b>16 015.0</b>	<b>10 443.6</b>	<b>293.3</b>	<b>10 150.3</b>
Egypt	July/June	9 555.9	64.1	9 620.0	10 700.0	7 638.3	20.7	7 617.6
Morocco	July/June	4 290.8	9.2	4 300.0	5 315.0	2 805.3	272.6	2 532.7
<b>Eastern Africa</b>		<b>4 002.3</b>	<b>1 884.2</b>	<b>5 886.5</b>	<b>5 788.0</b>	<b>1 466.8</b>	<b>849.0</b>	<b>617.8</b>
Burundi	Jan./Dec.	61.3	8.7	70.0	106.0	2.2	2.2	0.0
Comoros	Jan./Dec.	46.0	0.0	46.0	46.0	9.4	0.0	9.4
Djibouti	Jan./Dec.	98.5	9.5	108.0	68.0	22.8	4.2	18.6
Eritrea	Jan./Dec.	77.4	194.1	271.5	240.0	73.7	54.5	19.2
Ethiopia	Jan./Dec.	67.7	1 170.9	1 238.6	970.0	544.5	544.5	0.0
Kenya	Oct./Sept.	1 771.3	117.1	1 888.4	2 164.0	343.8	160.1	183.7
Rwanda	Jan./Dec.	50.0	167.0	217.0	175.0	16.4	16.4	0.0
Somalia	Aug./July	274.6	35.4	310.0	203.0	50.6	39.2	11.4
Sudan	Nov./Oct.	900.7	132.8	1 033.5	1 126.0	143.4	25.8	117.6
Tanzania	June/May	654.8	48.7	703.5	690.0	260.0	2.1	257.9
<b>Southern Africa</b>		<b>1 608.7</b>	<b>328.3</b>	<b>1 937.0</b>	<b>2 144.0</b>	<b>829.4</b>	<b>465.9</b>	<b>363.5</b>
Angola	April/March	389.6	140.9	530.5	753.0	262.0	179.9	82.1
Lesotho	April/March	235.0	3.0	238.0	248.0	3.1	3.1	0.0
Madagascar	April/March	214.1	16.0	230.1	518.0	191.5	13.5	178.0
Malawi	April/March	61.6	67.9	129.5	60.0	40.8	29.9	10.9
Mozambique	April/March	208.4	93.5	301.9	413.0	316.8	235.6	81.2
Swaziland	May/April	73.0	0.0	73.0	88.0	10.9	0.0	10.9
Zambia	May/April	427.0	7.0	434.0	64.0	4.3	3.9	0.4
<b>Western Africa</b>		<b>6 401.3</b>	<b>383.5</b>	<b>6 784.8</b>	<b>6 655.0</b>	<b>480.2</b>	<b>180.8</b>	<b>299.4</b>
<b>Coastal countries</b>		<b>4 564.1</b>	<b>189.2</b>	<b>4 753.3</b>	<b>4 531.0</b>	<b>371.7</b>	<b>93.7</b>	<b>278.0</b>
Benin	Jan./Dec.	113.0	6.0	119.0	118.0	4.7	4.7	0.0
Cote d'Ivoire	Jan./Dec.	1 179.0	14.3	1 193.3	778.0	7.9	3.8	4.1
Ghana	Jan./Dec.	435.9	42.2	478.1	445.0	74.8	36.1	38.7
Guinea	Jan./Dec.	348.7	1.3	350.0	390.0	4.0	4.0	0.0
Liberia	Jan./Dec.	106.9	102.7	209.6	200.0	10.7	7.8	2.9
Nigeria	Jan./Dec.	2 182.4	0.0	2 182.4	2 200.0	181.0	0.0	181.0
Sierra Leone	Jan./Dec.	132.2	18.7	150.9	320.0	35.9	33.3	2.6
Togo	Jan./Dec.	66.0	4.0	70.0	80.0	52.7	4.0	48.7
<b>Sahelian countries</b>		<b>1 837.2</b>	<b>194.3</b>	<b>2 031.5</b>	<b>2 124.0</b>	<b>108.5</b>	<b>87.1</b>	<b>21.4</b>
Burkina faso	Nov./Oct.	121.2	29.7	150.9	240.0	10.9	10.9	0.0
Cape Verde	Nov./Oct.	30.3	54.5	84.8	88.0	57.3	57.3	0.0
Chad	Nov./Oct.	32.8	18.5	51.3	85.0	1.2	1.2	0.0
Gambia	Nov./Oct.	115.3	4.6	119.9	120.0	6.9	1.9	5.0
Guinea Bissau	Nov./Oct.	50.2	10.4	60.6	72.0	1.1	1.1	0.0
Mali	Nov./Oct.	104.2	3.2	107.4	90.0	2.3	2.3	0.0
Mauritania	Nov./Oct.	269.7	25.3	295.0	285.0	13.9	0.7	13.2
Niger	Nov./Oct.	372.1	10.7	382.8	377.0	2.7	2.7	0.0
Senegal	Nov./Oct.	741.4	37.4	778.8	767.0	12.2	9.0	3.2
<b>Central Africa</b>		<b>722.3</b>	<b>50.9</b>	<b>773.2</b>	<b>738.0</b>	<b>40.8</b>	<b>25.2</b>	<b>15.6</b>
Cameroon	Jan./Dec.	288.0	2.8	290.8	300.0	5.0	5.0	0.0
Cent.Afr.Rep.	Jan./Dec.	28.4	2.6	31.0	33.0	0.0	0.0	0.0
Congo, Dem.Rep.	Jan./Dec.	217.9	32.1	250.0	250.0	2.2	2.2	0.0
Congo, Rep.	Jan./Dec.	173.4	8.3	181.7	135.0	21.4	14.0	7.4
Eq. Guinea	Jan./Dec.	8.4	0.9	9.3	10.0	5.8	0.0	5.8
Sao Tome	Jan./Dec.	6.2	4.2	10.4	10.0	6.4	4.0	2.4

ESTIMATED CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/  
a) 2000/01 or 2001 estimates (in thousand tonnes)

COUNTRY	Marketing year	1999/2000 or 2000			2000/01 or 2001			
		Actual imports			Total import requirements (excluding re-exports)	Import position		
		Commercial purchases	Food aid	Total commercial and aid		Total commercial and aid	Food aid allocated committed or shipped	Commercial purchases
<b>ASIA</b>		<b>36 315.5</b>	<b>3 612.3</b>	<b>39 927.8</b>	<b>33 321.0</b>	<b>18 408.5</b>	<b>3 107.9</b>	<b>15 300.6</b>
Afghanistan	July/June	1 159.1	107.7	1 266.8	1 325.0	461.4	161.4	300.0
Armenia	July/June	353.0	19.0	372.0	515.0	262.0	106.0	156.0
Azerbaijan	July/June	744.0	33.0	777.0	610.0	400.4	10.3	390.1
Bangladesh	July/June	1 181.1	962.9	2 144.0	1 691.0	1 574.1	689.2	884.9
Bhutan	July/June	22.0	0.0	22.0	22.0	0.2	0.2	0.0
Cambodia	Jan./Dec.	32.7	33.4	66.1	75.0	51.7	32.8	18.9
China 2/	July/June	10 108.0	192.0	10 300.0	9 000.0	5 372.7	58.6	5 314.1
Georgia	July/June	498.0	70.0	568.0	748.0	137.3	85.4	51.9
India	April/March	1 834.0	259.1	2 093.1	400.0	293.0	192.8	100.2
Indonesia	April/March	8 009.7	508.3	8 518.0	6 956.0	4 806.3	541.0	4 265.3
Korea, D.P.R.	Nov./Oct.	783.7	910.5	1 694.2	1 865.0	964.7	686.5	278.2
Kyrgyz Republic	July/June	227.0	79.0	306.0	169.0	104.5	61.0	43.5
Laos	Jan./Dec.	53.1	3.9	57.0	47.0	0.0	0.0	0.0
Maldives	Jan./Dec.	34.3	2.7	37.0	37.0	0.0	0.0	0.0
Mongolia	Oct./Sept.	203.0	0.0	203.0	203.0	40.0	40.0	0.0
Nepal	July/June	107.7	6.3	114.0	79.0	9.8	9.8	0.0
Pakistan	May/April	2 054.0	267.2	2 321.2	290.0	2.2	2.2	0.0
Philippines	July/June	3 935.0	50.0	3 985.0	3 869.0	2 996.1	144.3	2 851.8
Sri Lanka	Jan./Dec.	1 211.0	13.5	1 224.5	1 190.0	121.4	42.3	79.1
Tajikistan	July/June	524.0	77.0	601.0	792.0	323.2	138.5	184.7
Turkmenistan	July/June	7.0	7.0	14.0	10.0	5.2	3.4	1.8
Uzbekistan	July/June	633.0	0.0	633.0	808.0	326.5	55.0	271.5
Yemen	Jan./Dec.	2 601.1	9.8	2 610.9	2 620.0	155.8	47.2	108.6
<b>CENTRAL AMERICA</b>		<b>2 729.3</b>	<b>445.5</b>	<b>3 174.8</b>	<b>3 050.0</b>	<b>1 098.7</b>	<b>145.9</b>	<b>952.8</b>
Cuba	July/June	1 662.3	50.6	1 712.9	1 571.0	334.1	1.9	332.2
Haiti	July/June	419.9	180.8	600.7	590.0	235.3	70.1	165.2
Honduras	July/June	476.3	110.3	586.6	622.0	356.7	44.1	312.6
Nicaragua	July/June	170.8	103.8	274.6	267.0	172.6	29.8	142.8
<b>OCEANIA</b>		<b>387.4</b>	<b>0.0</b>	<b>387.4</b>	<b>381.0</b>	<b>0.6</b>	<b>0.6</b>	<b>0.0</b>
Kiribati	Jan./Dec.	8.0	0.0	8.0	8.0	0.0	0.0	0.0
Papua New Guinea	Jan./Dec.	324.4	0.0	324.4	318.0	0.6	0.6	0.0
Samoa	Jan./Dec.	17.0	0.0	17.0	17.0	0.0	0.0	0.0
Solomon Isl.	Jan./Dec.	26.0	0.0	26.0	26.0	0.0	0.0	0.0
Tuvalu	Jan./Dec.	1.0	0.0	1.0	1.0	0.0	0.0	0.0
Vanuatu	Jan./Dec.	11.0	0.0	11.0	11.0	0.0	0.0	0.0
<b>EUROPE</b>		<b>678.0</b>	<b>174.0</b>	<b>852.0</b>	<b>699.0</b>	<b>57.3</b>	<b>51.5</b>	<b>5.8</b>
Albania	July/June	373.9	19.1	393.0	319.0	5.2	0.0	5.2
Bosnia&Herzegovina	July/June	228.5	61.5	290.0	300.0	49.5	49.5	0.0
Macedonia, FYR	July/June	75.6	93.4	169.0	80.0	2.6	2.0	0.6
<b>TOTAL</b>		<b>66 691.5</b>	<b>6 952.0</b>	<b>73 643.5</b>	<b>68 791.0</b>	<b>32 825.9</b>	<b>5 120.1</b>	<b>27 705.8</b>

SOURCE: FAO

1/ Includes food deficit countries with per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. U.S.\$ 1460 in 1998), which is in accordance with the guidelines and criteria agreed to by the CFA should be given priority in the allocation of food aid. 2/ includes import requirements of Taiwan Province.



## CONTENTS

	Page
Affected Countries .....	2
Highlights .....	3
Summary - Weather Conditions and Crop Prospects .....	4
Country Reports .....	8
Northern Africa .....	8
Western Africa .....	9
Central Africa .....	14
Eastern Africa .....	15
Southern Africa .....	19
Asia .....	22
Central America .....	36
South America .....	38
Europe .....	40
North America .....	45
Oceania .....	46
Summary Tables:	
Cereal Import Requirements of LIFD Countries: Estimates for 2000/01 or 2001 .....	48

### DEFINITIONS:

**"Unfavourable Prospects for Current Crops":** Refer to prospects of a shortfall in production of current crops as a result of a reduction of the area planted and/or adverse weather conditions, plant pests, diseases and other calamities which indicate a need for close monitoring of the crops for the remainder of the growing season.

**"Shortfalls in Food Supplies in Current Marketing Year Requiring Exceptional External Assistance":** Refer to an exceptional shortfall in aggregate supplies or a localized deficit as a result of crop failures, natural disasters, interruption of imports, disruption of distribution, excessive post-harvest losses, other supply bottlenecks and/or an increased demand for food arising from population movements within the country or an influx of refugees. In the case of an exceptional shortfall in aggregate food supplies, exceptional and/or emergency food aid may be required to cover all or part of the deficit.

**"Distribution of Local and/or Exportable Surpluses Requiring External Assistance":** Refers to a situation of an exceptional surplus existing in a particular area of a country which needs to be transported to deficit areas in the same country or the neighbouring countries for which purpose external assistance is required.

**NOTE: This report is prepared on the responsibility of the FAO Secretariat with information from official and unofficial sources. Since conditions can change rapidly and information may not always represent the current crop or food supply situation as of present date, further enquiries should be made before any action is taken. None of the reports should be regarded in any way as statements of governmental views.**

**Enquiries may be directed to Mr. Abdur Rashid, Chief, Global Information and Early Warning Service, Commodities and Trade Division, (ESC), FAO, Rome (Telex: 610181 FAO I, GIEWS Direct Facsimile: 0039-06-5705-4495, E-mail INTERNET: [GIEWS1@FAO.ORG](mailto:GIEWS1@FAO.ORG)).**

**Please note that this report is available on the Internet as part of the FAO World Wide Web at the following URL address: <http://www.fao.org/giews/>.**

The designations employed and the presentation of material in this bulletin do not imply the expression of any opinion whatsoever on the part of the Food and Agriculture Organization of the United Nations concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries.