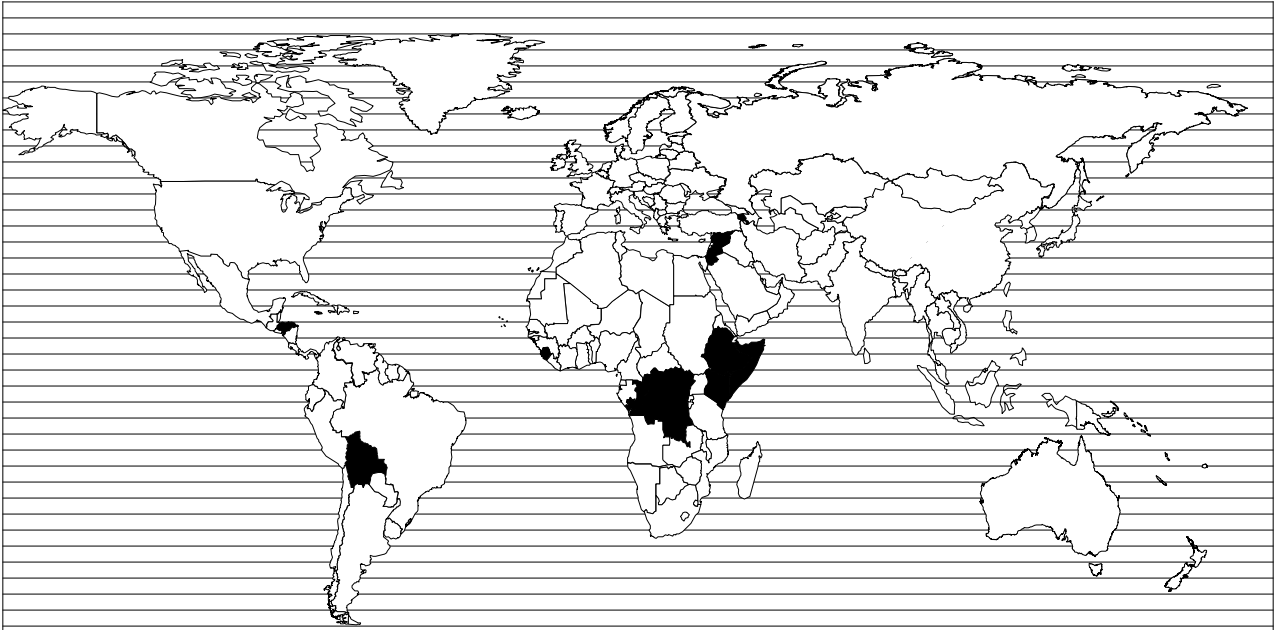


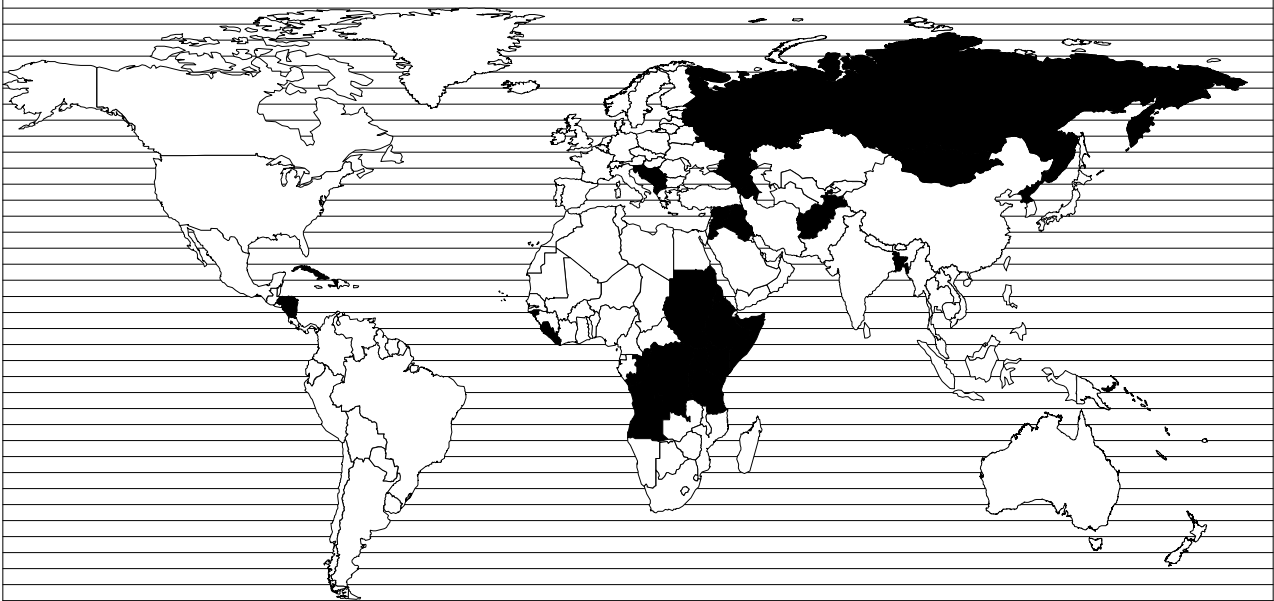
FOODCROPS AND SHORTAGES

No.4

September 1999



UNFAVOURABLE PROSPECTS FOR CURRENT CROPS



FOOD SUPPLY SHORTFALL IN CURRENT MARKETING YEAR REQUIRING EXCEPTIONAL ASSISTANCE



AFFECTED COUNTRIES^{1/}

UNFAVOURABLE PROSPECTS FOR CURRENT CROPS^{2/}

<u>Country</u>	<u>Harvest date</u>	<u>Main contributory factors</u>
Armenia*	Aug./Sept.	Dry conditions
Bolivia	Sept./Oct.	Reduced plantings, delayed rains
Congo, Dem.Rep.of*	Nov./Dec.	Civil strife
Congo, Rep. of*	Nov./Dec.	Civil strife
Ethiopia*	Oct./Dec.	Delayed plantings, low rainfall
Honduras	Aug./Oct.	Reduced plantings, low prices
Kenya	Aug./Oct.	Erratic rains, pests
Sierra Leone*	Nov./Dec.	Civil strife
Somalia*	Aug./Sept.	Drought/pests

SHORTFALLS IN FOOD SUPPLIES IN CURRENT MARKETING YEAR REQUIRING EXCEPTIONAL AND/OR EMERGENCY ASSISTANCE (Total: 35 countries)

AFRICA (15 countries):

Angola*; **Burundi***; **Democratic Republic of Congo***; **Republic of Congo***; **Eritrea***; **Ethiopia***; **Guinea-Bissau***; **Kenya**; **Liberia***; **Rwanda***; **Sierra Leone***; **Somalia***; **Sudan***; **Tanzania**; **Uganda**

ASIA (7 countries):

Afghanistan*; **Bangladesh**; **Iraq***; **Jordan**; **DPR Korea***; **Mongolia***; **Syria**

CENTRAL AMERICA (4 countries):

Cuba; **Haiti***; **Honduras**; **Nicaragua**

COMMONWEALTH OF INDEPENDENT STATES (5 countries):

Armenia*; **Azerbaijan**; **Georgia***; **Russian Federation**; **Tajikistan***

EUROPE (4 countries):

Albania; **Bosnia-Herzegovina***; **The Former Yugoslav Rep. of Macedonia**; **Fed.Rep.of Yugoslavia***

DISTRIBUTION OF LOCAL AND/OR EXPORTABLE SURPLUSES REQUIRING EXTERNAL ASSISTANCE:

- **Burkina Faso**, **Chad**, **Mali**, **Niger**, **Senegal**, **Sudan**

^{1/} New countries included in this report compared to the last report, are underlined on this page; 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 bad crops or food shortages are marked with an asterisk (*). Definitions can be found on the Contents page.

^{2/} Main crop unless otherwise indicated.

HIGHLIGHTS

A major human catastrophe is unfolding in East Timor following the vote for independence. Thousands have been killed by armed militia and up to 400 000 have been displaced by the violence or forcibly deported. Many have taken refuge in mountain terrain and now face the risk of starvation as they have no access to food and water. The UN and aid agencies are air dropping urgent food supplies to areas most in need. Large scale food and rehabilitation assistance is likely for the coming months and possibly into next year. Elsewhere in Asia, maize production is likely to be reduced in China by drought in key producing areas, whilst an erratic monsoon in India resulted in drought in parts, which will reduce rainfed production, and floods in others.

Food supply situation deteriorates in several parts of eastern Africa, due to adverse weather and/or civil strife. In Somalia, more than a million people face serious food shortages due to a poor "Gu" harvest, while in Ethiopia, the failure of "belg" crops increased the number of people needing food aid to more than 5 million. In Kenya, the food situation worsens in pastoral areas, as grain prices rise and those of livestock fall. In Uganda, prolonged drought in the west has decimated crops and severely affected livestock, whilst in Tanzania, serious crop failure affected several regions. The food situation is very tight in Eritrea for more than half a million people affected by war. In Sudan, some 2.4 million people in the south depend on emergency food assistance due to continuing civil war.

Food prospects remain precarious in Angola and are deteriorating as fighting intensifies and the number of displaced people increase. Deaths by starvation are reported from several parts. Distribution of emergency food aid is severely constrained by insecurity which has cut-off access to cities in the interior. Logistical support for airlifting food relief supplies is urgently needed. Elsewhere in southern Africa, overall food supply situation is tight in many parts due to reduced harvests.

In the Near East, the worst drought in decades severely reduced food production. In Afghanistan, sharply reduced cereal production will need to be covered by record imports, while in Iraq, drought damaged nearly half the total area cultivated. In Jordan, drought resulted in the lowest cereal harvest recorded, leaving some 180 000 vulnerable people in need of food assistance. Emergency assistance will also be needed in Syria for thousands of nomadic herders following the worst drought in living memory, which destroyed crops and pastures. In the Islamic Republic of Iran, 1999 cereal production fell sharply due to the worst drought in three decades.

Harvest prospects are favourable in the Sahel following widespread and above-normal rains in July and August. Crops are developing satisfactorily in the coastal countries of Western Africa. Although security remains volatile in Liberia and Sierra Leone, the overall food supply situation is improving.

In Central America and the Caribbean, harvesting of main season crops is underway and a recovery is expected following devastation last year from hurricanes 'Mitch' and "Georges". In South America, 1999 wheat output is expected to decline in Bolivia due to poor rains

Grain production in the Russian Federation is likely to recover to about 60 million tonnes, but nevertheless, the grain supply situation will remain tight.

Large-scale international aid continues to be needed in Kosovo, where the bulk of this year's agricultural production was lost. Assistance is also required for affected populations elsewhere in the Federal Republic of Yugoslavia and in neighbouring countries.

In the United States, although maize prospects have deteriorated somewhat, due to dry hot conditions, output is still forecast to be about average.

In Australia another good wheat crop of about 22 million tonnes is in prospect following increased planting and generally favourable conditions.

SUMMARY

WEATHER CONDITIONS AND CROP PROSPECTS

In **northern Africa**, harvesting of 1999 winter grains is complete; 1999 wheat output is estimated at about 13 million tonnes, some 9 percent below the 1998 crop but 4 percent above average. The coarse grains crop is estimated at 11 million tonnes, similar to last year. However, conditions have been mixed in the sub-region. In Morocco, production is estimated to be 41 percent below 1998 due to inadequate rainfall and reduced plantings. In contrast, favourable conditions in Algeria, Egypt and Tunisia benefited crops and cereal output is estimated to be above average and higher than last year.

In **western Africa**, overall harvest prospects are favourable in the Sahel and crops are developing satisfactorily in coastal countries. Unusually heavy rains caused serious flooding in Chad, Gambia, Mali, Mauritania, Niger and Senegal. Although this benefited crop and pasture development particularly in Mauritania, northern Senegal and Mali, but excess water may reduce potential yield in low-lying areas. Fighting in Liberia continues to hamper rehabilitation activities but the food supply situation continues to improve. Security remains volatile in Sierra Leone and crop output is expected to remain similar to last year. The overall situation, however, is improving following implementation of the peace agreement.

In **central Africa**, growing conditions are favourable so far in Cameroon and the Central African Republic. The security situation is improving in the Republic of Congo; it should also ease in eastern parts of the Democratic Republic of Congo following the ceasefire in late August.

In **eastern Africa**, favourable rains in July and August improved prospects for 1999 foodcrops for harvest later in the year. In Eritrea, crops are developing satisfactorily despite moisture stress earlier due to dry conditions. In Sudan, heavy rains in early September resulted in floods but crop damage was small. However, in Ethiopia, drought conditions earlier in the year resulted in failure of the "belg" crop and delayed planting of main season crops, which may affect yields. In Somalia, despite some improvement over last year's poor harvest, this year's "Gu" crop was also poor due to drought. In Kenya, the 1999 main maize crop is anticipated to be poor due to drought and pest infestation in major producing areas. In Tanzania and Uganda, where harvesting is complete, below-average cereal crops are forecast due to drought.

In **southern Africa**, latest estimates put aggregate 1999 coarse grains production only slightly higher than last year's below average crop. Favourable rains early in the season encouraged increased planting, but yields were negatively affected by excessive rains in some areas and by prolonged dry spell in others. In South Africa, the sub-region's largest producer, maize output declined from the already reduced level of 1998. Production of maize decreased also in Angola due to disruption in the agriculture sector caused by increased civil unrest. In Botswana, Lesotho, Namibia, Zambia and Zimbabwe coarse grain output increased over last year but remained below average. In contrast, in Malawi and Mozambique bumper maize crops were harvested, which resulted in an exportable surplus in the 1999/2000 marketing year (April/March). In Madagascar, the 1999 main paddy crop was estimated to be higher than average production last year.

In **Asia**, an erratic monsoon this year led to localised drought in parts and floods in others. Following dry conditions earlier in parts of northern China, in late August/early September scattered rainfall increased soil moisture for wheat planting to commence shortly. In southern parts, moderate to heavy showers in the first decade of September, maintained moisture supplies for late double-crop rice but slowed harvesting of single-crop rice. In India, hot, dry weather persisted over western and southern parts, further stressing crops. In Pakistan, rainfall was generally adequate for paddy crop in key producing areas, which may result in some increase in overall production. Heavy rainfall resulted in renewed flooding in southern most parts of the Rep of Korea, whilst, dry weather continued to stress filling crops across Korea DPR. In Vietnam, moderate to heavy showers increased moisture supplies for rice and bumper production is anticipated. In Indonesia, showers in main producing areas in Java supplemented irrigation supplies for irrigated second rice. In several countries of the Near East, the worst drought in decades severely reduced food production, notably in Iraq, Jordan, Syria and the Islamic Republic of Iran. In Afghanistan, a sharply reduced cereal crop will result in record cereal import requirement for 1999/2000. In the CIS countries in Asia, 1999 grain output in Kazakhstan could recover to about 9 million tonnes, provided conditions remain favourable until the harvest. In Turkmenistan, 1999 grain output was a record 1.5 million tonnes due to better incentives and seed and fertilizer use. By contrast, in Kyrgyz Republic, the trend to diversify out of grains continues and wheat production in 1999 could fall. In Tajikistan, output is likely to remain poor due to low yields. In the Caucasus, the outlook is also for reduced output in Armenia, Azerbaijan and Georgia.

In **Central America** and the **Caribbean**, normal rains favoured development of first season cereal and bean crops. A recovery in production from last year, which was affected by hurricane "Mitch", is anticipated in most countries, with the exception of Honduras where low prices deterred farmers from planting. In Mexico, normal rains in the southern plateau and Yucatan peninsula benefited development of important spring/summer crop for harvesting from late September. In the Caribbean, average maize and paddy production is forecast in Haiti and the Dominican Republic, while in Cuba, soil moisture deficits have affected development of minor foodcrops.

In **South America**, planting of the 1999/2000 wheat crop has been completed in southern countries. A recovery in production from the 1998/99 weather affected crops is anticipated in Argentina, Uruguay and Chile, while in Brazil, harvesting has already started and an average output is provisionally forecast. Land is also being prepared in southern countries for planting 1999/2000 coarse grains crops. In the Andean countries, land preparation is underway in Bolivia for planting coarse grain crops, while in Ecuador and Peru average to above-average output of recently-harvested maize crop is provisionally estimated. In Colombia, harvesting of 1999 maize is well advanced and average production is expected. In Venezuela, recently affected by heavy rains and flooding, harvesting of 1999 maize and paddy crops is underway.

In **Europe**, aggregate 1999 cereal production in the EC is forecast at 200 million tonnes, about 5 percent below last year due to increased compulsory set-aside and poor weather in parts. Lower cereal output in 1999 is also expected in some eastern European countries due to reduced planting and/or adverse weather. In the Federal Republic of Yugoslavia (Serbia and Montenegro), 1999 cereal production is significantly lower than last year due to adverse weather, shortage of farm funds/inputs and the conflict. In the CIS countries west of the Ural Mountains, the outlook for the 1999 cereal harvests is mixed due to unfavourable conditions and economic problems. In Belarus, 1999 grain output is likely to be lower than last year's 4.8 million tonnes. In Moldova, aggregate cereal output is likely to be less than last year's 2.5 million tonnes. In the Russian Federation, average yields, better than last year, are in prospect, but fuel shortages are slowing harvesting in parts. The projection is for increased production, possibly to about 60 million tonnes, despite an 8 percent fall in planting and unfavourable weather in parts. In the Ukraine, yields were affected by hot/dry weather in June and July; grain production in 1999 is forecast at about 27 million tonnes. In the Baltics, aggregate area sown declined somewhat in Latvia and Lithuania, and the outlook is for 1999 wheat output to remain close to last year's level and that of coarse grains to increase marginally. In Croatia, 1999 wheat output fell 50 percent while coarse grain planting also fell sharply due to economic problems and excessive rains. In Bosnia-Herzegovina, the current outlook is for both wheat and coarse grain production to remain stable at about 200 000 tonnes and 900 000 tonnes respectively.

In **North America**, due to lower planting, total 1999 wheat production in the United States is forecast at 62.8 million tonnes, 9 percent below last year. Prospects for 1999 maize have deteriorated due to dry, hot conditions in key producing areas in late July/August. Based on crop conditions in early-September, maize output is forecast at 238 million tonnes, some 4 percent lower than the above-average crop in 1998. The 1999 rice crop is in good condition and a record harvest of 9.7 million tonnes is forecast. In Canada, the 1999 wheat harvest is well underway under generally satisfactory conditions and an output of 25 million tonnes is expected, slightly above 1998. However, output of coarse grains will be lower as farmers have switched land to other non-cereal crops.

In **Oceania**, the outlook for 1999 winter wheat and coarse grains in Australia is satisfactory so far. Another good wheat harvest, of nearly 22 million tonnes is expected provided weather remains favourable until the harvest. However, coarse grain output could decline due to lower planting. The 1999 paddy harvest is almost complete and output is forecast at a near record 1.35 million tonnes.

COUNTRY REPORTS ^{1/}

AFRICA

NORTHERN AFRICA

ALGERIA (9 September)

Due to favourable weather, the recently harvested 1999 cereal crop is estimated at an above-average 4.4 million tonnes, some 44 percent above 1998. Wheat production is estimated at 2.8 million tonnes, 40 percent above 1998, while barley crop increased by 50 percent to 1.5 million tonnes. Imports of cereals, mostly wheat, are forecast at about 5 million for the 1999/2000 (July/June) marketing year.

EGYPT (9 September)

1999 cereal production is estimated at about 19.3 million tonnes, slightly above last year's above average crop. Wheat output is estimated at 6.3 million tonnes, 4 percent above 1998, while maize production is expected to remain unchanged at 6 million tonnes. The 1999 paddy crop is growing under normal weather conditions. An estimated 675 000 hectares have been sown this year, 30 percent above last year, and harvest prospects are favourable so far.

Imports of wheat in 1999/2000 (July/June) are forecast at 7 million tonnes and coarse grains, mostly maize, at 3 million tonnes.

MOROCCO (9 September)

1999 cereal output is estimated at 3.8 million tonnes, 41 percent below last year's crop, as a result of inadequate rainfall and reduced plantings. Wheat production is estimated at about 2.1 million tonnes, some 50 percent below 1998. The barley crop, which was also affected by drought, is estimated at 1.4 million tonnes, a 36 percent reduction while maize production is expected to remain unchanged at 200 000 tonnes.

Imports of wheat in 1999/2000 (July/June) are forecast at 2.8 million tonnes and coarse grains at 1.6 million tonnes.

TUNISIA (9 September)

The output of the 1999 cereal crop harvested recently is estimated at 1.7 million tonnes, some 2 percent higher than last year. Wheat production is estimated at 1.2 million tonnes, down 8 percent. In contrast, barley output is put at 455 000 tonnes, 50 percent above 1998, due to favourable conditions.

Imports of cereals in 1999/2000 (July/June), mostly wheat and maize, are forecast at about 1.6 million tonnes.

^{1/} 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 bad crops and/or food shortages are marked with an asterisk (*).

WESTERN AFRICA

BENIN (9 September)

Favourable conditions prevailed in the South while the North remained dry. Rains were widespread in June and became abundant in mid-July, particularly in Zou department, resulting in crop damage. Floods were reported in many villages and thousands of people were displaced. However, in the Northern part (Atakora and Borgou departments), rains were insufficient particularly in the Upper North. In July, infestations of black armyworm in Atakora and Borgou departments caused damage to emerging millet, sorghum and maize. Losses were heavy and farmers abandoned planting in these departments. So far, control measures have not been undertaken.

Food supply is satisfactory in the South, as the new crop comes into the markets. Prices remain lower than in 1998 mainly because Sahelian countries are importing less this year and farmers are selling more to compensate for low cotton incomes. The cereal import requirement for 1999 (January/December) is estimated at 200 000 tonnes (including re-exports) of wheat and rice.

BURKINA FASO (10 September)

Widespread and regular rains in August permitted satisfactory crop development. Following good growing conditions in July, rains were abundant and well distributed in August. Precipitation was particularly beneficial and above normal from the second dekad except in the north-east. Rainfall started to decrease in the third dekad but remained widespread. However, late-planted crops in the south-west will need more rain through September. In contrast, flooding delayed crop development in low-lying areas. Elsewhere, soil moisture reserves are generally adequate for crop development. Millet and sorghum are at heading and early maturation stages.

Pastures are abundant. The overall pest situation is calm. Substantial infestations of stemborers are reported in the North.

The overall food supply situation is satisfactory. With 2.65 million tonnes of cereals harvested in 1998, markets are well supplied and prices of local millet and sorghum are decreasing. In contrast, the price of white maize increased somewhat.

CAPE VERDE (10 September)

Continuous, regular rains in August favoured maize development. During the first dekad of August, regular rains were registered in Santiago and Fogo islands. From the second dekad, all agricultural islands received substantial rains (149 mm in São Nicolau and 145mm in Santo Antão). Rains remained abundant and well distributed over the whole country during the third dekad. Soil moisture reserves are adequate in most areas. Maize is elongating in humid zones of Santiago and Fogo islands while it is emerging in the arid zones.

Following increasing grasshopper and army worm infestation in Santiago (Tarrafal) and Fogo islands, preventive measures have been undertaken in several areas. Pastures have developed in highland zones but remain insufficient in coastal areas.

The overall food supply situation is satisfactory. Over 90 percent of annual food requirement is imported. Markets were regularly supplied in July/August and stocks or planned imports are adequate to cover needs in September and October. Food aid programs for year 2 000 have already been approved.

CHAD (10 September)

Growing conditions remained mostly favourable despite excessive rains in August in some areas. Rains in August were abundant and widespread. Unusually heavy rains in the first two dekads (146 mm in 8 hours on 5/8/99 and 400 mm for the month in 10 days in Ati, in Batha province) caused floods and crop damage. Soil moisture reserves are excessive in some areas, but so far overall crop development is satisfactory. Early crops are maturing while late plantings are at flowering stage. More rain is needed up to mid-September for late crops to mature in the Sudanian zone. Pastures are abundant countrywide. The overall pest situation is calm.

Following record cereal production in 1998 (estimated at 1.28 million tonnes), the overall food supply situation is satisfactory. However, impassable roads due to heavy rains in July/August have affected market supply. Prices of cereal are decreasing in rural areas as producers are selling stocks, anticipating a good harvest this season. WFP distributed 1 337 tonnes of food in deficit zones (Mayo-Kebbi, Tandjilé, Logone occidentale and Logone orientale) and 640 tonnes as emergency relief operations to refugees of Adre in the east.

COTE D'IVOIRE (9 September)

Conditions have been favourable for crop development so far, with regular rains from the second dekad of May. Well distributed rains occurred in June and the first two dekads of July. After the short dry season in late July/early August, rains resumed in the following dekad. Crop prospects at the end of August were above normal.

The overall food supply situation is satisfactory. Cereal import requirement for 1999 (January/December), is estimated at 640 000 tonnes, mostly wheat and rice.

THE GAMBIA (9 September)

Rainstorms and flooding occurred in mid-August in the west. During the first dekad of August, rains increased steadily and were unusually heavy in Jambajali in the Western Division. From the second dekad, rainstorms and floods caused crop damage in N'Jau and Sare Sofi. In the other Divisions, well distributed and above normal rains benefited crop development. Weeding is the major farm activity in August. No significant pest infestation has been reported so far.

The overall food supply situation is satisfactory following above-average cereal production in 1998. Markets are generally well supplied. However, some areas where millet production was poor remained vulnerable. WFP estimated the number of affected people at 110 000 and planned food aid distributions of 2 671 tonnes of cereals, 400 tonnes of pulses and 167 tonnes of oil.

GHANA (9 September)

Growing conditions are satisfactory so far. Rainfall was well distributed and above normal from the second dekad of June to mid-July, favouring crop development. Rains decreased notably thereafter during the short dry season. Army worm infestations were reported in the Upper East region, threatening millet and sorghum. Vegetation indices in August showed above normal vegetation in the south and normal to above normal indices over the rest of the country.

The overall food supply situation is satisfactory. About 20 000 Liberian refugees remain in the country, receiving food assistance. The 1999 cereal import requirement is estimated at 475 000 tonnes, mostly wheat and rice.

GUINEA (9 September)

Heavy rains in July/August affected crop development. Rains started in the third dekad of July/beginning of August. Precipitation was particularly heavy and above normal. Cumulative rains in Conakry and Boffa exceeded 500 mm. In some areas, heavy rain caused heavy crop damage. Thousands of people were displaced in Conakry due to floods.

The overall food supply situation is satisfactory except for displaced persons and refugees. According to UNHCR, some 366 000 refugees remain in the country. Over 14 000 have recently been moved away from the Liberian border following fighting in mid-August. The 1999 cereal import requirement is estimated at 385 000 tonnes, mostly wheat and rice.

GUINEA-BISSAU* (10 September)

Widespread and above-normal rains favoured crop development. Rains remained heavy and well distributed in August, particularly during the second and the third dekads. Conditions are satisfactory and rice transplanting in swamp fields has progressed notably.

In the post-conflict period, large number of people face food supply difficulties, whilst repatriation of refugees is underway. 629 Guinean refugees returned from Senegal in July. In addition, some returned from the Gambia and Cape Verde. Displaced persons and returnees are receiving food assistance.

LIBERIA* (9 September)

Growing conditions are favourable so far but crop prospects remain constrained by continuing civil disturbances. The 1999 rainy season has progressed satisfactorily. Rains have been generally well distributed and above normal. Crops are growing satisfactorily and output is expected to be similar to or above last year, except in the North where fighting broke out in Lofa in early August. Over 50 000 people have been displaced in Voinjama and Kolahum in upper Lofa County. Humanitarian programmes for Liberian returnees and Sierra Leonean refugees were disrupted by insecurity and stock looting.

The overall food situation has improved significantly. However, in the northern region the nutritional and health condition of displaced people has deteriorated, particularly among women and the elderly. Lack of food and drugs is reported. Resettlement and rehabilitation activities have allowed refugees and Internally Displaced persons to return to their homes. About 90 000 refugees from Sierra Leone remain in Liberia. On the basis of an estimated population of about 2.8 million in 1999, FAO estimates that Liberia needs to import 155 000 tonnes of cereals to meet consumption requirements. Commercial imports are anticipated at 100 000 tonnes of rice and 5 000 tonnes of wheat. The remaining 50 000 tonnes will need to be covered by food aid, estimated at 30 000 tonnes of wheat and 20 000 tonnes of maize products such as maize meal and CSB for distribution to vulnerable displaced people. At the end of August, 57 700 tonnes of food aid had been pledged and delivered.

MALI (9 September)

Harvest prospects are generally favourable reflecting abundant and widespread rains in August. Rains were unusually heavy in the first dekad of August, resulting in floods and crop damage in Bamako region. During the second dekad, precipitation was well above average in the west and the centre. During the third dekad, rains decreased in the west but remained heavy in the south and above normal in the north and centre. Millet and sorghum are developing satisfactorily, benefiting from adequate soil moisture reserves. Excess water however may reduce potential yields in some areas. Due to late planting, more rains are needed up to the end of September to improve crop prospects in Sudanian zones. Pastures are abundant countrywide and the pest situation is calm.

Cereal production in 1998 is estimated at a record 2.5 million tonnes (paddy equivalent), allowing farmers to replenish stocks. The overall food situation is satisfactory, with well supplied markets and lower prices than 1998. Although some areas in Goudan and Bourem regions, and in Central Gao are at risk of economic difficulties, no food aid is required.

MAURITANIA (9 September)

Growing conditions are favourable so far and harvest prospects for rainfed crops are good. Rains resumed in the south in the second dekad of August and were above normal and widespread in the third dekad. Unusually heavy rains were recorded at Aïoun El Atrouss, resulting in significant crop losses in Tchitt. Early millet and sorghum are developing satisfactorily.

Pastures are in good condition. Low numbers of Desert Locust adults are likely to be present in central and southern areas where numbers may increase due to an improvement in breeding conditions. No significant developments are likely.

Compared to 1997, cereal production in 1998 increased by 34 percent, resulting in stable cereal prices during the lean season. The food situation is not critical, but 161 692 persons in Aftout and Affolé require 6 897 tonnes of cereals to meet food needs. The cereal import requirement (including re-exports) for 1998/99 (November/October) is estimated at 310 000 tonnes and food aid at 35 000 tonnes

NIGER (10 September)

Harvest prospects are generally favourable. During the first dekad of August, rainstorms covered the south of Tahoua, Maradi and Diffa. However, no damage has been reported in these areas. Rainfall remained heavy during the second dekad in the south of Dosso, south-west of Tillabery, Tahoua, Maradi and Zinder. Soil moisture is adequate so far, benefiting crop and pasture development.

Pest infestations may result in crop damage. Grasshopper and army worm infestations were reported in Zinder department. Isolated Desert Locusts are likely to be present in Aïr and increase slightly in Tamesna as a result of breeding.

Aggregate 1998 cereal production is estimated at a record 2.96 million tonnes (paddy equivalent), about 74 percent above 1997 and about 44 percent above the five-year average. As a result, the overall 1999 food supply situation remains satisfactory. Markets are well supplied and prices of cereals are affordable. Cereal traders, unlike producers, are selling stocks in anticipation of a good harvest this season.

NIGERIA (9 September)

Crops are developing satisfactorily but a late start to the rainy season might constrain production. Rains started about one month later than usual in the northern areas hampering development of millet and sorghum. From May to June, cumulative rainfall was below normal. Rains resumed gradually in late June and remained satisfactory and above normal up to the end of August, allowing partial recovery in crop condition. Heavy rains caused the Zobe Dam in the northern state of Katsina to overflow, resulting in heavy crop losses.

The overall food supply situation is satisfactory. The cereal import requirement for 1999 is estimated at 1.25 million tonnes, including 1.05 million tonnes of wheat and 150 000 tonnes of rice.

SENEGAL (10 September)

Widespread above-normal rainfall in August improved crop prospects. During the first dekad, the south-west received substantial rainfall which progressed to the centre and the west during the second dekad. In mid-August, rainstorms covered southern and western regions, flooding many areas (Joal and Kaolack in particular). Rains increased notably in the eastern regions during the third dekad. So far, overall crop development is satisfactory and soil moisture reserves are sufficient. Millet and sorghum are generally heading in the south and the centre.

Pastures are abundant countrywide. Grasshopper and army worm infestations are reported in several areas. No significant developments of Desert Locusts are likely.

The overall food situation is satisfactory. Markets are well supplied and the price of rice is stable. Price of local cereals decreased significantly compared to last year. In addition, farmers and traders are selling stocks in anticipation of a good harvest. In the southern regions, the price of millet ranged from 75 to 145 F.CFA/Kg in August 1999 compared to 175 to 240 F.CFA/Kg last year. In Diourbel and Thiès region in the centre-north, prices were between 100 to 150 F.CFA in 1999 compared to 125 to 210 F.CFA last year. However, food supply difficulties are reported in some areas (Saint-Louis region (Matam, Podor and Dagana) or Louga and Diourbel regions) where rainfed production was poor.

SIERRA LEONE* (9 September)

The security condition has improved in many rural areas but might not affect 1999 production substantially. Output is expected to remain close to last year's level despite favourable climatic conditions so far. Insecurity in major parts of the country at the beginning of the season prevented the delivery of agricultural inputs and disrupted agricultural activities. Weather was generally favourable since the beginning of the season despite reduced rains in late July and in August. Satellite imagery shows below-normal vegetation over the country.

Following the peace agreement in early July between the government and rebels, the number of ECOWAS peace keeping forces have been reduced and will gradually be replaced by UN military observers who will monitor the disarmament and reintegration process. Improvement in the security situation also allows implementation of emergency and rehabilitation activities in the country. Food distribution is underway following the reopening of main roads from Freetown to Bo and Kenema, and from neighbouring Guinea to Kambia. However, the volume of food is insufficient to meet the needs of the large number of refugees and displaced persons, particularly in the north and the east. Current estimates put the number of displaced people at 700 000, whose nutritional status is reported to be precarious. Even in the case of a successful and fast implementation of the peace agreement, the country will continue to rely heavily on food assistance for several years. FAO estimates the cereal import requirement for 1999 at about 290 000 tonnes, including 140 000 tonnes of food aid. At the end of August, only 25 100 tonnes of food aid, mainly in the form of bulgur wheat, had been pledged and delivered.

TOGO (9 September)

Widespread and above-normal rains benefited crop development. Rains were regular during the entire rainy season. Soil moisture reserves are adequate and so far pest situation is calm. Crop prospects are normal in the north and above normal in the south.

The overall food supply situation is satisfactory. The cereal import requirement for 1999 (January/December), is estimated at 125 000 tonnes (including re-exports).

CENTRAL AFRICA

CAMEROON (9 September)

Rainfall was generally widespread and normal to above normal in July and August, favouring crop prospects.

The overall food supply situation is satisfactory. However, following food supply difficulties in northern areas affected by poor crops in 1998, WFP has planned an Emergency Operation to provide 9 500 tonnes of food to 660 000 affected persons in these areas.

CENTRAL AFRICAN REPUBLIC (9 September)

Following reduced rainfall in early July, precipitation remained generally widespread and normal to above normal later in late July/August. Rains were particularly heavy in late July and in early August in the west. Harvest prospects are favourable.

The food supply situation is satisfactory. For the 1999 marketing year (January/December), the cereal import requirement is estimated at 34 000 tonnes, mainly wheat.

CONGO, DEMOCRATIC REPUBLIC OF* (9 September)

Seasonably dry conditions prevail in the south. In the centre and the north, rains were generally above average in July and August. Following a cease-fire by rebel groups on 31 August, the security situation should improve in the east. However, violations of the cease-fire are reported. Rwandan and Ugandan soldiers have started to withdraw from the rebel-held town of Kisangani in Orientale Province, where heavy fighting between Ugandan and Rwandan forces caused high civilian casualties in August. Prices of goods have increased significantly in Kisangani. Rates of malnutrition throughout Orientale Province and north Equateur are reported to be on the rise. Supplementary and therapeutic feeding centres in Kisangani are currently assisting some 1 700 malnourished children under five years, with the numbers requiring assistance increasing.

In South Kivu, a group of UN agencies and NGOs estimate that 250 000 people are at immediate risk of life threatening levels of malnutrition. The situation is due to drought, poor soil, erosion, an influx of refugees exacerbated by ongoing war in the region which caused the displacement of hundreds of thousands of people. To address immediate needs, 15 000 tonnes of food are needed for distribution to displaced and local people, as well as 1 600 tonnes of seeds to allow planting for the main agricultural season this month.

CONGO, REP OF* (9 September)

Growing conditions are favourable reflecting heavy and widespread rains since June in central and northern parts. However, fighting which resumed in mid-May between Government forces and Ninja militia disrupted agriculture and marketing activities, thus seriously affecting the food supply situation, notably in Brazzaville. The security situation has improved in the Pool region over the past months but new clashes were reported in early September near Brazzaville.

EQUATORIAL GUINEA (9 January)

Rainfall remained low during the season, except during the second dekad of August, when rains were heavy and widespread. The staple crops are sweet potatoes, cassava and plantains. The 1999 cereal import requirement is estimated at 9 000 tonnes. Food aid requirement is estimated at 1 000 tonnes of wheat and rice.

GABON (9 January)

The main foodcrops are cassava and plantains but some maize is also produced (around 25 000 tonnes). The country commercially imports the bulk of its cereal requirement, estimated at around 82 000 tonnes in 1999. Around 10 000 refugees fled Congo-Brazzaville and are reported on temporary sites or in Libreville.

**EASTERN
AFRICA**

BURUNDI* (9 September)

The volatile security situation in the country has deteriorated in recent weeks, with an escalation in violent incidents and renewed displacement of people.

Planting of the 2000 A crop season is about to start. FAO, in collaboration with WFP and NGOs, has started an agricultural input distribution programme, targeting assistance of bean and vegetable seeds to about one million people.

A Government/FAO/WFP Mission at local level assessed production of the 1999 B season at 1.7 million tonnes, 6 percent below 1999 B production. The decline in production was mostly due to irregular rains, which were late in parts and ceased earlier than normal. This more than offset the positive impact on production of a relatively stable security situation, that allowed an increase in planting, and satisfactory and timely availability of agricultural inputs. Most affected crops were cereals and pulses. The output of beans is estimated at 157 000 tonnes, 22 percent lower than last year, while that of cereals is put at 161 000 tonnes, a decline of 10 percent.

The 1999 first season production of cereals and beans was also reduced. The deficit in the 1999 marketing year (January/December) is estimated at 38 000 tonnes of cereals and 61 000 tonnes of beans, of which only half is expected to be covered by commercial imports and food aid.

ERITREA* (6 September)

Prospects for 1999 main season cereal and pulse crops to be harvested from November have improved, due to above-average and well distributed rains in July and August. Earlier, erratic and inadequate spring rains (March to May) and below-average rainfall in June affected land preparation and early sowing in parts. The Desert Locust situation remains calm, however, an armyworm outbreak affected more than 4 000 hectares, mainly in Anseba province.

Despite a favourable harvest overall in 1998, the food situation remains very tight for an estimated 550 000 people affected by the war with Ethiopia. Furthermore, the failure of the 1998/99 winter (Keremti Bahri) rains (October to March) in coastal areas and the adjoining coastal escarpments has resulted in serious shortages of grain and forage in Semenawi and Keih Bahri provinces.

Donor support is sought for an Emergency operation approved by FAO and WFP in March this year for 44 000 tonnes to provide food assistance to 268 000 people most affected by the war. At the end of August total pledges amounted to 15 600 tonnes.

ETHIOPIA* (6 September)

Abundant rains in July and August benefited developing 1999 main "Meher" crops, particularly in parts of Ahmara, Tigray and eastern Oromiya where precipitation had been insufficient. However, inadequate rains in April and May delayed land preparation and planting of long-cycle crops in parts, which may affect yields. Furthermore, armyworm infestation affected thousands of hectares, but the extent of crop damage is not known.

The 1999 "Belg" crop, normally harvested from June, largely failed due to inadequate rainfall. Although Belg production accounts for only 7 percent of total cereal production, it is important in several areas where it provides the bulk of annual food supplies. The magnitude of food shortages has, therefore, increased in terms of numbers and areas affected. The worst hit area is the north-western Amhara Region, where some 2 million people face severe food shortages. The Government has recently appealed for 425 144 tonnes of food aid for an estimated 5.3 million vulnerable people, including those affected by the failure of the Belg season, as well as 385 000 internally displaced people due to the ongoing conflict with Eritrea.

Despite some beneficial rains in recent months, southern and eastern pastoral areas have yet to recover from consecutive years of drought and severe water shortages. The recent lifting of the ban on livestock imports from the Horn, by Saudi Arabia, is expected to increase incomes in pastoral areas. An Emergency Operation for food assistance to 1.2 million people, for US\$40.5 million was jointly approved by FAO and WFP on 31 May 1999. Against total requirements of 551 271 tonnes of food aid, pledges as of August 1999 amounted to about 470 000 tonnes, of which 295 000 tonnes have been delivered.

KENYA (6 September)

The 1999 main season maize crop has been affected by erratic rains, inadequate supply of agricultural inputs and armyworm infestation in parts. Preliminary official estimates indicate maize production of about 1.95 million tonnes compared to 2.44 million tonnes last year and an average of 2.5 million tonnes over the previous five years. Significant output reductions are reported for Eastern, Central and Rift Valley Provinces.

The food supply situation is critical in the northern and north-eastern pastoral districts where rainfall for the current season has been erratic and insufficient for adequate pasture and water supplies until the next rains in October. Severe food shortages are also reported in parts of Central and Eastern provinces. The Government has provided about 4 000 tonnes of relief food to vulnerable households in Eastern Province and the pastoral districts. The situation is likely to deteriorate in the coming months with a depletion of food stocks. Further food assistance, therefore, will be needed for the affected population.

RWANDA* (9 September)

Land preparation for planting of the 2000A season is underway under seasonally dry weather. Final estimates of a Government of Rwanda/FAO/WFP/USAID/EU mission at local level that assessed 1999B season production estimates an output of 2.4 million tonnes. This is 9 percent higher than the previous year, which was seriously affected by insecurity in northwestern areas and similar to pre-war levels before 1990. Despite an increase in planting, production this season was constrained by an early cessation of rains, which affected cereal and beans crops. The relatively recent displacement and reallocation of 650 000 persons in the northwestern prefectures of Ruhengeri and Gisenyi, also affected production since not all of the reallocated population had access to land. Cereal and pulses output are estimated at 149 000 tonnes and 126 000 tonnes respectively, above last year but below 1990.

1999 A season cereal and bean production was also reduced. The deficit for 1999 marketing year (January/December) is estimated at 123 000 tonnes of cereal equivalent, most of which is anticipated to be covered by commercial imports and expected food aid.

SOMALIA* (6 September)

A recent FAO/WFP Mission to the country found that the 1999 "Gu" season has largely failed due to erratic rains, uncontrolled crop pests and renewed civil conflict in southern parts of the country. After some early rains in March, the Gu season started late in April followed by erratic and below-average rains in May and a dry June. The low and poorly distributed rains resulted in poor yields and in many places crop failure. Irrigated maize suffered from low levels of water in the Shebelle and Juba rivers at the beginning of the season and lack of pumps.

1999 Gu cereal production, accounting for some 75-80 percent of annual production in normal years, is forecast at about 135 683 tonnes (37 135 tonnes of sorghum and 98 548 tonnes of maize), about 18 percent above last year's Gu, but 32 percent below the post-war average. At this level, the sorghum crop amounts to little more than one-third of the post-war average of about 100 000 tonnes, while maize is about average. Reflecting yet another poor Gu harvest, cereal retail prices rose sharply compared to the same period last year. In addition to short supplies, the increase in cereal prices, particularly in Mogadishu, have also been driven by increased money supply, as factions inject new currency into the market.

Assuming Deyr cereal output at a post-war average of 70 000 tonnes and taking into account the expected (reduced) harvest in northern regions (Somaliland), total cereal production in 1999/2000 is estimated at about 206 000 tonnes, about six percent above last year's poor output and 23 percent below the post-war average. With an opening stock of about 18 000 tonnes, total domestic cereal supply is estimated at 224 000 tonnes for the 1999/2000 marketing year (August/July). The country's total cereal utilisation requirement for the 1999/2000 marketing year is estimated at 534 000 tonnes, leaving an import requirement of about 310 000 tonnes. With commercial imports estimated at 240 000 tonnes, the cereal deficit amounts to 70 000 tonnes. So far, total food aid pledges amount to 63 000 tonnes leaving an uncovered deficit of 7 000 tonnes.

SUDAN* (6 September)

Heavy rains in northern and central parts of the country in August resulted in severe floods causing loss of life, population displacement, damage to infrastructure and property, and loss of cereals and cotton. Preliminary assessments indicate that nearly 200 000 people were affected by the floods. The Government has declared a state of emergency in the affected areas and has appealed for international assistance.

In Southern Sudan, crop conditions were favoured by abundant rainfall in July and August, except in parts of Eastern Equatoria where partial crop failures have been reported. Pasture conditions are reported to be satisfactory in most regions, especially in the Upper Nile, which was flooded last year. Livestock are being brought back to villages from seasonal swamps. This has increased the availability of livestock products.

Food shortages are reported in a number of locations in southern parts of the country. Civil unrest since early 1999, particularly in Western Upper Nile and Bahr-El-Ghazal regions, disrupted agricultural production and resulted in loss of assets and access to markets, leaving thousands of people in urgent need of assistance. However, relative peace in most other locations has helped continuing improvements and a decline in admissions to feeding centres. WFP delivered about 8 200 tonnes of food aid to southern areas in July, against a target of 9 500 tonnes, a 38 percent increase on June deliveries.

TANZANIA (16 September)

Harvesting of the 1999 main season cereal crops is complete. Preliminary estimates put total cereal production (maize, rice, wheat, sorghum and millet) at about 3.76 million tonnes, about 9 percent below last year. The decline is attributed to erratic rains, reduced use of inputs and an outbreak of armyworms. In contrast, prospects for non-cereal foodcrops (pulses, potatoes, cassava and plantains) are reported to be good.

As a result of reduced production, the cereal deficit is currently forecast at 590 000 tonnes. In addition to substitution with non-cereal foodcrops, much of the deficit is expected to be covered by commercial imports. However, food assistance will be required for nearly 1.2 million people, mainly in the regions of Dodoma, Mara, Shinyanga, Singida, Tabora, Tanga and southern Mwanza, all of which have suffered the third consecutive poor harvest. Food prices in most markets have declined with the increasing availability of maize.

The situation for some 420 000 refugees from Burundi, the Democratic Republic of Congo and Rwanda remains a big concern. Since the beginning of this year alone, the refugee influx from these countries totalled 99 326 persons with 6 975 Burundian and Rwandan refugees repatriated.

UGANDA (8 September)

In Western and south-western parts, a prolonged drought resulted in almost total loss of crops and also affected livestock severely. More than half a million farmers are reported to be facing severe food shortages and are in need of urgent assistance. Thousands more have moved to northern Tanzania in search of water and pasture. The worst hit counties are Nyabushozi, Kashari and Ibanda in Mbarara, and Ruhinda and Ruhaama in Bushenyi and Ntungamo respectively. The agro-pastoral north-eastern Districts of Moroto and Kotido are also facing serious food shortages as many areas report total crop failures due to inadequate rainfall. Furthermore, food difficulties persist in northern areas, where 400 000 people remain displaced by persistent insurgency. International food aid is being provided.

Elsewhere, the outlook for the 1999 main season cereal crop harvest, which is nearing completion, is generally favourable. Output in eastern and central districts is reported to be normal, with surpluses in beans and maize. In the north, where the rainy season extends from April through November, crop conditions were reported to be normal. Cereal production is expected to increase in Kitgum and Gulu due to abundant rainfall, satisfactory availability of inputs and improved security, which allowed increased access to cultivable land.

SOUTHERN AFRICA

ANGOLA* (9 September)

The already precarious food situation in the country has deteriorated further following an escalation of civil conflict in recent months. The number of displaced people from rural areas into provincial capitals increases daily. Unconfirmed reports indicate that apparently 200 people among the displaced population die daily by starvation, while the incidence of malnutrition, particularly among children, is also on the increase. It is currently estimated that over two million people, or one sixth of the population, has been displaced since renewed hostilities in November last year. Worst affected areas are Luena, Huambo, Kuito, Uige and Malanje cities, which have received a considerable influx of displaced people in recent weeks following intensified fighting between government troops and UNITA rebels. While large numbers of displaced people are close to famine conditions, the food supply situation is also extremely tight for the settled population. The provincial capitals have become isolated by the

closure of most roads due to insecurity and as a result food prices have risen significantly. Prevailing insecurity has also severely hampered the distribution of food aid to the affected population. In some cases, the increase in military activity has made it impossible to deliver emergency supplies by air.

Despite favourable conditions during the 1998/99 main growing season, production of the main staple maize was estimated by an FAO/WFP Crop and Food Supply Assessment Mission in May, to have declined 15 percent from last year. Overall import requirements for the 1999/2000 marketing year (April/March) were estimated at 505 000 tonnes of cereals. This comprises 325 000 tonnes expected to be imported commercially and 180 000 tonnes to be covered by food aid. Pledges to date fall short of this food aid requirement; donors are urged to make additional contributions. Urgent logistic support is also needed for costly air delivery operations. There is also need for agriculture inputs, mainly seeds, to allow IDPs to cultivate the next season starting in October. The Government has launched a programme to reallocate two million displaced people in agricultural areas around cities, where security conditions are relatively better.

BOTSWANA (9 September)

Recent estimates of 1999 coarse grains production have been revised down to 19 000 tonnes, mostly sorghum. This level is 90 percent above the very poor crop last year, but still below average. A good start to the rainy season encouraged a sharp increase in planting, but yields were negatively affected by a prolonged dry spell from February.

The cereal deficit in marketing year 1999/2000 (April/March) is expected to be entirely covered by commercial imports.

LESOTHO (9 September)

Final official estimates put 1999 coarse grain production at 182 000 tonnes, comprising 134 000 tonnes of maize and 48 000 tonnes of sorghum. While coarse grain output increased by 29 percent above last year, it remained well below 1996. The area planted was average, reflecting favourable rains at the beginning of the season. However, a dry spell from late January to late March, at the critical stage of growth, resulted in reduced maize yields. In contrast, output of the more resistant sorghum crop increased sharply from last year to above average levels.

This year's maize production will cover less than 50 percent of consumption requirements and 155 000 tonnes of commercial imports are anticipated to cover the deficit.

The 1999/2000 wheat crop, planted in June, is at the vegetative stage. Prospects are favourable.

MADAGASCAR (9 September)

1999 rice production is estimated at an above-average 2.6 million tonnes, 8 percent above last year. Although the start of the rains was delayed, precipitation was abundant during the season. Floods in southwestern parts due to heavy rains were localized and did not affect overall production. This year's crop also benefited from limited incidence of cyclones and locust infestations.

The food supply situation is anticipated to be satisfactory in the 1999/2000 (April/March) marketing year, particularly in the vulnerable areas in the south, where production was favourable.

MALAWI (9 September)

1999 coarse grain output, mostly maize, is estimated at a record 2.4 million tonnes, one third higher than the favourable production in 1998. Crops benefited from abundant and well-distributed rains during the growing season, coupled with improved distribution of agricultural inputs. Production of non-cereal crops, mainly cassava, is also estimated to be higher than last year.

As a result of the bumper harvest, the overall food supply situation is anticipated to be satisfactory in the 1999/2000 (April/March) marketing year. The country, which has had to import maize in recent years, is estimated to have 400 000 tonnes of exportable surplus in 1999/2000.

MOZAMBIQUE (9 September)

Total 1999 cereal output is estimated at a bumper 1.7 million tonnes. Favourable production is due to a slight increase in planting and higher yields due to abundant rains during the season, coupled with expanded use of agricultural inputs following distribution programmes and better functioning of markets. Despite a delay in the start of the rainy season in northern provinces and severe flooding in central and southern provinces, overall growing conditions were favourable for crop development. The heavy rains this year particularly benefited chronically food deficit areas in the south where favourable crops were harvested. The area lost to floods was estimated at 63 000 hectares, or some 2 percent of total area planted.

The food supply situation is anticipated to be satisfactory in the 1999/2000 marketing year, reflecting a good harvest and improvements in the marketing system. Exportable surpluses of maize in 1999/2000 are estimated at 150 000 tonnes. However, imports of wheat and rice, in which the country has a structural deficit, are forecast at 175 000 tonnes and 150 000 tonnes respectively.

NAMIBIA (9 September)

Latest official production estimates of the 1999 coarse grain output have been revised up to 70 000 tonnes. At this level production is one-third higher than last year's poor crop, but still below average of the past five years. The outcome reflects irregular and poorly distributed rains in northern growing areas. In general, cumulative precipitation from October to April in the maize belt was only 75 percent of normal. Higher prices and inadequate supply of seeds also adversely affected production.

To cover the deficit in coarse grains, import requirements of maize in the 1999/2000 (April/March) marketing year are estimated at 84 000 tonnes. In addition, the country has a structural deficit in wheat of some 42 000 tonnes. Most of the imports are anticipated to be on commercial basis and the overall food supply situation is expected to be satisfactory in 1999/2000. However, food supply difficulties will be experienced by poor farmers who had a reduced harvest.

SOUTH AFRICA (20 September)

Latest official estimates of the 1999 maize crop have been revised up to 7 million tonnes, due to favourable weather during the harvest. This includes both the commercial and peasant sectors. At this level, production still remains 8 percent below the reduced production of last year and 22 percent lower than the average of the past five years. Despite a good start to the rainy season, production was affected by excessive precipitation in mid-February and a prolonged dry spell subsequently.

After two consecutive reduced harvests, the country may have to import maize in marketing year 1999/00 (May/April) in order to meet domestic consumption, replenish the Security Grain Reserve (SGR) and meet export commitments.

Despite a decline of 5 percent in the area planted to wheat due to dry weather, latest official forecasts indicate an output of 1.5 million tonnes, virtually unchanged from last year's below-average crop. Wheat imports are forecast to increase in the year 2000.

SWAZILAND (9 September)

The final official forecast of 1999 maize production is 113 000 tonnes, 18 percent lower than last year's favourable level but around the five year average. Despite an increase in the area planted production was constrained by a prolonged dry spell from January, mainly in southern parts, that severely reduced yields. Hail storm and excessive weeds due to abundant rains at the beginning of the season, also affected crops negatively.

Import requirements of maize in the 1999/2000 (April/March) marketing year are estimated at 24 000 tonnes. In addition, the country has a structural deficit of wheat and rice, not produced domestically, of 40 000 tonnes and 8 000 tonnes respectively. All imports are anticipated to be on commercial basis.

ZAMBIA (9 September)

Final official estimates of the 1999 maize crop have been revised down to 813 000 tonnes, one-third higher than last year's reduced crop but below the five year average. Sorghum and millet production are also estimated to be higher, although below average. Poor rains in northern parts and localized floods in southern areas negatively affected this year's cereal production.

Prospects for the 1999 wheat crop are favourable due to an increase in planting. Production is forecast to be substantially higher than last year.

The tight food supply situation previously has eased with the arrival of new crops in the markets. Real prices of the main staple maize have declined in recent months. However, to fulfil the coarse grain deficit in the 1999/2000 (April/March) marketing year the import requirement of maize is estimated at 370 000 tonnes. Imports will be largely commercial.

ZIMBABWE* (9 September)

Final official estimates put 1999 maize production at 1.52 million tonnes, 4 percent above the poor crop in 1998, although some 20 percent below the five year average. Excessive rains during the season resulted in localized floods and generally reduced yields.

Following the reduced harvest and low level of carryover stocks, food prices have increased sharply in recent months. Food difficulties are also being experienced in areas where farmers gathered a poor harvest, and in urban areas by low-income families, whose access to food has been also constrained by high inflation. Import requirements of maize in marketing year 1999/2000 (April/March) are estimated at 450 000 tonnes.

Prospects for 1999/2000 wheat crop, to be harvested from October, are satisfactory reflecting an increase in area planted and favourable weather so far.

ASIA

AFGHANISTAN* (6 September)

An FAO/WFP Crop and Food Supply Assessment Mission which recently visited the country estimated total 1999 cereal production at 3.24 million tonnes, about 16 percent below last year's bumper output of 3.86 million tonnes. The reduction was due to low rainfall and an outbreak of pests. As a result, the cereal import requirement in the 1999/2000 marketing year (July/June) is estimated at a record 1.1 million tonnes, almost all wheat. Commercial cereal imports are estimated at 800 000 tonnes, leaving a deficit of 323 000 tonnes. The emergency food aid requirement (including food-for-work and food-for-seed), estimated at 97 000 tonnes, is already in the pipeline, leaving 226 000 tonnes to be covered by programme food aid.

A recent UN Inter-Agency Mission to Panjshir Valley found that nearly 100 000 people have been displaced by the recent escalation of factional fighting. With deteriorating weather

conditions and dwindling food stocks the Mission urged urgent international assistance. Food aid is being distributed to about 8 000 vulnerable households in the central highlands and to some 21 000 people in the north-eastern province of Badakhshan. An estimated 63 000 returnees from Iran and Pakistan are also receiving food assistance. Vulnerable groups are being provided with bread through urban bakeries and through institutional feeding programmes in hospitals, orphanages and health centres.

ARMENIA* (7 September)

1999 grain production is forecast at only 270 000 tonnes, compared to 326 000 tonnes in 1998. The area sown to winter wheat declined and autumn and winter precipitation was below normal. Spring conditions were also not good in some areas. In 1999/2000 the cereal import requirement is estimated to increase to nearly 400 000 tonnes. Against this requirement food aid pledges of roughly 100 000 tonnes have been made. The balance is expected to be imported commercially.

The country has been adversely affected by the financial crisis in the Russian Federation, its largest export market, and falling employment and remittances. Some 113 000 people continue to need targeted food assistance. There remains little scope at present for phasing out humanitarian assistance and WFP will continue to provide food aid for relief and recovery to refugees and the most vulnerable. Assistance will focus on community based food-for-work activities for vulnerable groups who are able to work, supporting economic and social development. The programme will have duration of three years and will be reviewed annually.

AZERBAIJAN (7 September)

Grain production is forecast to continue declining. 1999 grain production is projected to fall to about 900 000 tonnes, from the official estimate of 1 036 000 tonnes produced in 1998, due to below-average planting, a dry autumn and competition from cheaper grain imports from neighbouring countries. Ongoing land privatization and dismemberment of State farms has led to an increase in household food production (notably potatoes and animal products) at the expense of cash crops. The reduction in output also reflects the lack of viable marketing channels for produce as urban areas tend to be supplied from imports.

By April 1999 some 1.1 million hectares or 86 percent of the available land had been privatized and 84 percent of citizens entitled to land had been allocated plots. Yet only 149 000 hectares is actually reported to be farmed by private farmers.

Providing the production forecast materialises, the cereal import requirement is estimated at about 500 000 tonnes, which will be met commercially. Limited food aid is required for vulnerable groups, and pledges amount to 11 000 tonnes of cereals to date. WFP will continue its current programme in support of the most vulnerable IDPs, while income generation activities will be expanded. The programme will be reviewed annually and has a tentative duration of three to five years.

BANGLADESH (6 September)

In late August, floods caused by heavy rains affected some 50 000 families in northern and central parts, displacing many households. The worst affected areas were around Sirajganj, Kazipur, Belkuchi, Chowhali and Tarash. Although the full extent of damage to crops is yet to be determined, so far an estimated 10 000 hectares of Aman paddy and 200 hectares of seedbeds were submerged by flood water. In addition the floods exacerbated problems of soil erosion. Earlier floods in July also resulted in loss of lives and damage to property.

The latest estimate of boro (spring) rice production by the Ministry of Agriculture is a record 10.3 million tonnes, some 26 percent higher than the previous record in 1997. The main reasons for higher boro production were increased area, adequate fertiliser supplies, low insect damage and favourable growing conditions overall. Aggregate 1998/99 rice production is now put at 19.65 million tonnes.

The overall food situation in the country remains satisfactory. However, emergency food assistance continues to be provided to vulnerable groups affected by the worst floods in decades last year.

CAMBODIA (6 September)

Continuous heavy rain in late July/early August together with high water levels in the Mekong River, caused heavy flooding in south western part of the country. The provinces of Kampot and Sihanouk were particularly affected, where damage to infrastructure is reported. Overall the level of rainfall in July was higher than last year and the average for the past 30 years. This year there was a significant increase in the area of double crop rice, whilst that of maize was above average. Notwithstanding any flood damage that may have occurred last month, the prospects for double crop rice, currently being harvested, are favourable in view of good rainfall overall. Land preparation for wet season crops is underway in parts of the country.

Rice accounts for some 84 percent of annual food crop production and is planted on around 90 percent of cropped area, mainly in the Central Mekong Basin and Delta and the Tonle Sap Plain. Contrary to fears of reduced rice output in 1998/99, due to drought during the last wet season, total paddy production for the year was estimated at 3.52 million tonnes, some 3 percent above 1997/98 production and 19 percent above the five year average. The target for 1999/00 has been set at between 3.5-4.0 million tonnes.

Despite a satisfactory food supply situation overall, a sizeable section of the population remains vulnerable to food shortages. To meet the needs of these people, an FAO/WFP Crop and Food Supply mission, earlier this year, assessed that 40 000 tonnes of rice in food assistance would be needed in addition to varying amounts of fish and vegetable oil. These needs were to be met through a WFP Protracted Relief and Recovery Operation.

CHINA (6 September)

Drought conditions in parts of the north seriously damaged the maize crop, particularly in the provinces of Shanxi and Hebei and parts of Henan. In some areas, this represents the third year in succession that the crop has been affected by drought. Parts of southern Henan, received less than 90 mm of rain from June to mid August, compared to an average of around 550mm for the three months in normal years. Scattered light rain in late August brought little relief to these areas. Production in other important producing areas, however, remained unaffected and overall the extent of damage is less widespread than the severe drought in 1997. As a result, official reports anticipate maize production to remain similar to the 125 million tonnes produced last year. In contrast, cool, wet weather affected the rice crop in parts of the south, with heavy rainfall between late June and mid-August delaying maturing. In regions south of the Yangtze river rainfall was between 30 and 300 percent higher than normal. In late August/early September, typhoon Sam and a tropical storm

brought prolonged heavy rain in the south, which resulted in damage and a loss of lives. More heavy rain and storms are anticipated.

The grain production target for 1999 is 490 million tonnes (including roots and tubers) similar to 1998 production. In view of reduced winter wheat production, which was affected by drought last year, to meet the target there will be increased emphasis on rice and maize production.

CYPRUS (6 September)

Aggregate 1999 wheat and barley output is estimated at 106 000 tonnes, some 63 percent above last year's reduced crop but 6 percent lower than the five year average. Wheat imports in 1999/2000 (May/April) are forecast at 95 000 tonnes. Aggregate imports of barley and maize are forecast at some 540 000 tonnes, similar to last year.

GEORGIA* (7 September)

The 1998 grain and pulse harvest is expected to be about 80 000 tonnes or 10 percent larger than last year's 800 000 tonnes. The 1999 wheat harvest is now officially forecast to reach 200 000 tonnes, remaining the same as last year's poor level. Steadily rising wheat prices confirm poor harvest prospects but also reflect the increase from 0 to 20 percent in VAT for imported wheat. Rising prices and the consequent increase of the bread price by 15 percent adversely affect the economically vulnerable, particularly in the wake of the Russian financial crisis. Humanitarian assistance to vulnerable groups will also remain necessary in 1999/2000.

In 1999/2000 the cereal import requirement is tentatively forecast to increase to 530 000 tonnes, mostly wheat. Against this requirement, food aid allocations announced amount to 79 000 tonnes to date.

WFP has planned to provide 18 000 tonnes of food aid to 180 000 vulnerable people and targeted food-for-work schemes over a one-year period which commenced in July 1999 with a new phase of the protracted relief and recovery operation. The emphasis in the new phase is to increase the number of food-for-work beneficiaries to assist vulnerable people to meet their food needs under the current conditions of decreasing purchasing power.

INDIA (7 September)

Flooding in early September in eastern and northern regions may affect winter (Kharif) food production. Although normally by September, monsoon rains begin to recede, this year the rains have continued longer than expected. The overall pattern of rainfall has also been erratic with parts much drier than normal, which has led to localised drought, and others with excess rainfall.

The worst affected states by low rainfall, where crops have been stressed, include Gujarat, Madhya Pradesh, Maharashtra and Rajasthan. Crops most likely to be affected included groundnut, rice and soybeans. However the overall affect on rice may be offset somewhat by an increase in area planted this season, mostly in West Bengal, Bihar, Punjab and Haryana. In non irrigated areas that have been affected by below normal rains this year, overall rice prospects will depend heavily on rains for the remainder of September.

Erratic and below-normal rainfall has meant that rice production may not reach the record 86 million tonnes envisaged earlier in the season. The 1999 estimate of wheat production has been revised up to a record 73.5 million tonnes from 72.8 million tonnes in June. This is 7.6 million tonnes or 11.5 percent higher than 1998. The previous record for wheat production was in 1997, when 69 million tonnes were produced. The official estimate for the 1998/99 rice crop has also been revised up due to an upward revision in the area estimate. The 1998/99 area estimate has been revised to 44.5 million hectares and production to 84.7 million tonnes. The estimate for aggregate 1998/99 food grain production is now put at 202.5 million tonnes, including pulses, over a million tonnes higher than forecast earlier

In view of the record wheat crop and high support prices, the Food Corporation of India (FCI) procured a record 14 million tonnes of wheat this year. This raised stocks to a record 22.2 million tonnes by the beginning of July, 55 percent above the Government's minimum stock level. The comparatively high cost of domestic wheat, combined with falling world prices, however, have meant that exports remain unattractive. Moreover, the differences in world and domestic prices (including transport from producing areas) has also meant that wheat imports increased in August, particularly in southern parts. Currently the government is offering wheat to southern flour millers at around \$173/tonne, compared to an imported wheat cost of between \$120-140/tonne. The Food Ministry also anticipates higher rice procurement in the current 1999/00 marketing year than in 1998/99 to replenish stocks.

INDONESIA* (6 September)

Food production is heavily influenced by the pattern of monsoon rains which have an important bearing on performance during the main (wet) and secondary (dry) seasons. The wet season normally extends from October to March and produces some 60 percent of the country's annual rice crop and half of its maize, soybean and groundnuts. The dry season covers April to September during which most of the remaining annual crop is produced. Scattered, light showers across the main agricultural areas of Java in August, helped maintain adequate moisture supplies for the second rice crop, harvested in late August/September.

Overall, satisfactory weather this year and anticipated recovery in the economy, suggest improved prospects for rice production in 1999, compared to last year. In addition, reflecting investment and improvement of irrigation facilities, supported by the Government drive toward improved provision of credit and inputs, an increase in yields is also expected

Current projection for 1999 paddy production stands at 49.5 million tonnes, similar to the final estimate for 1998. The rice import requirement for the 1999/2000 marketing year (April- March), is estimated at around 3 million tonnes. In the period January to end-August, the National Food Logistics Agency, BULOG, procured 2.28 million tonnes of rice, nearly 800 000 tonnes higher than the earlier projection of 1.5 million tonnes.

The lives and food security of large numbers of displaced people have been seriously threatened by escalating civil unrest and killings in East Timor, in the aftermath of the vote for independence on 30 August 1999.

Although a resolution has been passed by the UN Security Council for the deployment of a peace keeping force, large numbers of the population still remain at considerable risk of violence, whilst hundreds of thousands have been displaced. In view of difficulties in accessing the province the full extent of the humanitarian crisis is not known. However, available estimates indicate that several thousand people have been killed whilst between 300 000 - 400 000 have been internally displaced. The crisis has left more than a quarter of the population, of around 900 000, cut off from food supplies and drinking water and at risk of starvation. As widespread concerns over their precarious situation mount, there is urgent need for international food and humanitarian assistance. The security situation, however, still remains dangerous, preventing urgent food and medical supplies from being transported to areas and population groups in dire need. In the interim before the security situation allows more extensive humanitarian operations to begin the UN and other aid agencies have begun urgent air drops of food and basic supplies to areas considered most at need. Earlier civil disturbances between 1977-1979, following forced re-location of the local population, also led to large scale food shortages, which resulted in large numbers of deaths.

Although the precise number of vulnerable people and food needs cannot be determined at this stage, there is little doubt that large scale food and agricultural rehabilitation assistance will be needed as soon as the security situation improves to allow humanitarian operations. Such assistance is likely to be required for the remainder of 1999 and possibly through next year. An FAO/WFP Crop and Food Supply Assessment Mission is planned to the province as soon as the security situation allows.

IRAN, ISLAMIC REPUBLIC OF (6 September)

The worst drought in 30 years severely affected agricultural production. Due to lack of rain since last December and reduced snow precipitation during winter, crops were severely affected by reduced soil moisture and low water reserves in irrigation reservoirs. The drought affected both rainfed and irrigated agriculture and also livestock, which provide an important livelihood for a large number of rural households. The worst affected provinces were in the west and north and include Zanjan, Ardabil, Kermanshel, Gilan, Lorestan and Marchasi.

Consequently, domestic wheat production fell by 25 percent from around 12 million tonnes expected to around 9 million tonnes, whilst latest government estimates indicate that the reduction in paddy, being harvested, will be around 20 percent from an expected 2.8 million tonnes to 2.3 million tonnes. Barley output is expected to fall by around 24 percent to around 2.5 million tonnes. As a result of the shortfall in crop production, imports are likely to be appreciably higher this year. Official reports indicate that already this year, the country has imported (contracted) 5.6 million tonnes of wheat, since March, up 2.6 million tonnes on total imports in the last marketing year, in addition to 800 000 tonnes of rice.

IRAQ* (6 September)

A severe drought coupled with serious shortages of essential agricultural inputs and the widespread pest and weed infestations have adversely affected 1999 winter crops. Nearly 1.2 million hectares under cereals, about 46 percent of total cultivated area, have been severely damaged. The drought also caused serious damage to livestock, already weakened by foot-and-mouth disease.

The UN Secretary- General has approved the distribution plan for the sixth phase of the "Oil-for-food" agreement in May, allowing Iraq to sell up to US\$5.26 billion of oil over six months, to buy food, medicine and health supplies, and for emergency repairs to infrastructure. Despite some improvement in the overall food supply situation following the implementation of the agreement, health and nutritional problems remain widespread in many parts. A recent survey by UNICEF found that child mortality rates have more than doubled in south and central parts since 1990. The drought is anticipated to exacerbate existing food supply problems in the country.

ISRAEL (6 September)

Due to a severe drought that affected several countries in the Near East, output of the recently harvested 1999 wheat crop, is estimated at 152 000 tonnes, about 10 percent below last year. Cereal imports in 1999/2000 (July/June) are forecast at some 2.6 million tonnes.

JAPAN (6 September)

In August, moderate to heavy rainfall increased moisture supplies but reduced the level of sun for filling rice. Generally favourable weather conditions throughout the season, suggest that rice production this year is likely to be above average.

JORDAN (6 September)

A recent FAO/WFP Crop and Food Supply Assessment Mission found that the worst drought in decades seriously damaged cereal and horticultural crops. The livestock sector was also affected and many sheep farms face financial ruin, as costs increased and products diminished in quality and quantity. An outbreak of foot and mouth disease also exacerbated drought-induced losses.

The Mission forecast the lowest recorded domestic cereal harvest at 13 000 tonnes in 1999. At this level, only about 0.6 percent of domestic consumption needs, instead of the normal 10 percent, will be met. The Mission estimated a total cereal import requirement of 1.94 million tonnes comprising 742 000 tonnes of wheat, 725 000 tonnes of barley, 370 000 tonnes of maize and 99 000 tonnes of rice for the 1999/2000 marketing year (July/June). About 80 percent of the requirement is anticipated to be commercial, leaving a deficit of 387 000 tonnes to be covered by emergency and programme food aid. Some 100 000 tonnes have already been pledged. An Emergency Operation for food assistance to 180 000 vulnerable people, for US\$429 000 for a period of nine months was approved by WFP in July 1999.

KAZAKHSTAN (7 September)

Overall growing conditions for 1999 grain crops have been satisfactory and the harvest is expected to recover from the drought reduced level of 7.3 million tonnes (FAO estimate) in 1998. Good rainfall this winter increased soil moisture reserves after last year's drought and most major areas have received adequate rains this spring and summer. However, some less important producing areas, such as Pavlodar, East and West Kazakhstan experienced dry conditions and some locust damage. Economic problems have resulted in a further reduction in the grain area sown, from 13.4 million hectares in 1998 to 11.4 million hectares. Given the chronic shortage of fuel and financial problems on farm, it is uncertain if the entire area planted will be harvested. Early harvest returns confirm better yields than last year. Provided the harvested area approaches 11 million hectares (compared to 11.4 million hectares last year), FAO tentatively forecasts 1999 grain production at around 9 million tonnes, including 7 million tonnes of wheat. Locusts laid eggs on some 9 million hectares, of which less than one quarter has been treated. Crop damage to this year's crop was limited as the locusts were already mature when they infested wheat fields. However, with uncontrolled breeding this year, next year's harvest could be at risk.

If the forecast production materializes, the country could export about 2.5 million tonnes of cereals in 1999/2000.

KOREA, REPUBLIC OF (6 September)

Heavy rains and flooding at the end of July, exacerbated by Typhoon Olga, flooded an estimated 50 000 hectares of farmland, mainly paddy. The worst affected provinces were Kyonggi-do and Kangwon-do. Official estimates indicate that 28 people were killed, whilst a large number of livestock, including nearly 2 million poultry and 200 000 cattle and hogs, were also lost.

Approximately 1.05 million hectares of paddy were cultivated this year and despite the floods earlier, milled rice production of around 5.1 million tonnes, similar to last year is in prospect. Harvesting of rice will begin in October. Overall, 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. Yields in these areas will be below average and highly dependant upon weather.

Closing rice stocks at the end of the 1999 marketing year in October are projected at around 983 000 tonnes, a relative increase of around 178 000 tonnes on last year.

KOREA, DEMOCRATIC PEOPLE'S REPUBLIC OF* (7 September)

Natural disasters from 1995 to 1997 and economic problems since the early 1990s, which have seriously affected national capacity to import food, essential inputs and energy, have severely undermined food security in DPR Korea. Efforts by the country to redress chronic food problems through intensive management of agriculture have had limited long term benefits in view of the scale of the problem and its root causes. This year, reduced rainfall at the beginning of the crop season in May/June, heavy rainfall in late July/ early August and below-normal rainfall in the latter part of August, resulted in some damage and may reduce potential yields.

Even if weather conditions remain favourable till the rice harvest in October, however, overall cereal production will remain well below needs as productivity remains highly constrained by lack of land and sufficient fertiliser and energy for mechanisation and irrigation on which the sector depends heavily. In view of the scale and depth of the problem, and in order to help the country attain greater food security, therefore, both short and long term measures, with international support, continue to be required.

In the last few years, the large- scale food shortages have resulted in chronic nutritional problems in the population at large, which will have long term consequences. A nutrition survey last year, by UN agencies, indicated that moderate and severe stunting, affected approximately 62 percent of children surveyed, while the incidence of moderate and severe underweight, or low weight for age was approximately 61 percent. The incidence of stunting is likely to remain high, irrespective of remedial nutritional actions now, though nutritional supplements could reduce wasting which is also widely observed. Differences in food consumption are also emerging, with some population groups, such as families receiving international food assistance and/or agricultural support, in a better position to cope with food shortages than people in mountainous areas and in families of industrial workers, especially in non-agricultural areas. Although WFP is responding to these concerns by targeting more beneficiaries in the north-east and increasing rations, beneficiary cover and food for work programmes in these areas, future targeting needs to be refined further to reflect geographical and demographic. So far this marketing year the country has received some 345 000 tonnes in food assistance.

An FAO/WFP Crop and Food Supply Assessment Mission is planned to visit the country in October, to assess the final 1999 harvest and food supply prospects for the next (1999/2000) marketing year.

KYRGYZ REPUBLIC (7 September)

The outlook for 1999 grain production is satisfactory. Conditions have been generally favourable this year and somewhat better average yields than last year could offset the gradual shift from grain to industrial and other foodcrops. 1999 grain production is tentatively projected at 1.6 million tonnes, including 1.2 million tonnes of wheat.

Provided the 1999 harvest forecast materialises, cereal imports, including food aid pledges amounting to 61 000 tonnes, in 1999/2000 are provisionally estimated at about 126 000 tonnes, mainly wheat. At the same time the country also exports wheat to neighbouring Uzbekistan (in payment for gas) and Tajikistan.

The country has good agricultural potential and agriculture plays a dominant role in the economy, accounting for nearly 50 percent of employment and GDP and almost 40 percent of foreign exchange earnings. However, salaries and purchasing power remain very low. In addition, the economic slowdown and inflation in the wake of the financial crisis in Russia in 1998 affected vulnerable groups. A referendum sanctioned the sale and private ownership of land but the Land Code, signed in May 1999 includes a 5-year moratorium on the sale of land. A Law on using land as a mortgage tool was also adopted. When activated, this law would enable farmers to pledge land in security for machinery and current inputs.

LAOS* (6 September)

Rain in late August, boosted moisture supplies for rice, following a reduction in monsoon activity in recent weeks, which provided sunnier weather for rice development but reduced soil moisture supplies. The south west monsoon season is from May to September. 1998/99 paddy production is estimated at 1.77 million tonnes, some 21 percent above the five year average and moderately higher than the previous year.

For vulnerable sectors of the population, project food aid continues to be needed to support well-targeted project interventions in areas affected by reduced rice production in 1998/99. Based on earlier FAO/WFP estimates 251 000 people needed around 12 000 tonnes of assistance this year for an average duration of 4 months. So far some 8 000 tonnes have been pledged and delivered.

LEBANON (6 September)

The output of 1999 wheat and barley is estimated at 62 000 tonnes, about the same as last year. Wheat imports in 1999/2000 (July/June) are forecast at some 0.5 million tonnes.

MALAYSIA (7 September)

Unseasonably heavy showers in late August/early September, boosted moisture supplies for crops across the country, but caused local flooding. The floods resulted in some deaths and required the evacuation of an estimated 2 000 people in Penang and Kedah. The current south west monsoon is expected to end by mid-September to be followed by an inter monsoon period before the onset of the north east monsoon which is likely to begin by mid-November. During the inter monsoon period, the country is expected to receive near normal or slightly below normal rainfall. Information from the meteorological department indicates that most parts of the country are expected to have normal to above normal rainfall in November and December 1999, to coincide with ongoing La Nina conditions, which are likely to become more intense at the end of the year and are expected to persist till the early part of 2000. The Ministry of Agriculture also announced recently that certain types of fragrant paddy would be destroyed, if planted, due to the risk of blast and neck rot disease. Paddy production in 1998, was estimated at slightly below average 2 million tonnes.

MONGOLIA* (6 September)

Harvesting of the country's main staple, wheat, will commence in October. However, productivity and production remain constrained by various problems in the agricultural sector largely as result of the transition from a centrally planned economy to one which is market oriented. In 1998, poor weather and continuing problems in the sector resulted in a further decline in cereal production. Wheat production declined to around 195 000 tonnes, the lowest level in 3 decades, some 18 percent below 1997 and 34 percent below the five year average. Although the Ministry of Agriculture and Industry increased the 1999 area and production targets, due to a shortage of seed the target may not be attained.

Dwindling domestic cereal supplies have resulted in deterioration in the country's ability to feed its people with the number of malnourished people rising sharply. Large imports continue to be necessary to meet requirements, a situation further compounded by low cereal reserves, a decline in export trading and the country's capacity to import sufficient quantities of grain commercially to meet the deficit.

To help the country during its transition various multi-lateral and bi-lateral aid packages have been announced. In June international donors pledged a record \$320 million in aid to stimulate the economy and promote foreign investment. The aid is primarily directed at infrastructure development and banking reforms which will improve the environment for investment. There are also positive trends in foreign investment which is expected to increase from, US \$39 million last year to around US \$60 million by the end of this year. The main sectors for investment are agro-processing (meat and milk products, camel wool, cashmere and leather processing) and tourism.

Around 60 000 tonnes of food aid were pledged to the country in 1999 of which 45 000 tonnes have been delivered. A further 48 000 tonnes of wheat seed have also been provided.

MYANMAR (7 September)

Following generally above-normal rainfall in the April and May, at the time of dry season rice planting and development, rainfall in June and the first half of July was below normal. By the end of July some

70 percent of main wet season rice planting had been completed for harvesting from October, whilst almost all the dry season crop had been harvested. The main rice crop accounts for around 85 percent of aggregate production. A slight increase in the area under main season rice is forecast this year. Yields, however, are likely to remain constrained by a shortage of critical inputs. To encourage rice exports, the Government has introduced a number of policy initiatives, such as allowing entrepreneurs, who reclaim fallow and wet lands for paddy, to export 50 percent of production.

Generally favourable conditions last year together with a 2 percent increase in area, resulted in a 7 percent increase in paddy production to 17.8 million tonnes compared to the previous year.

Rice exports for 1999 are projected at 100 000 to 150 000 tonnes, compared to around 94 000 tonnes in the previous year.

NEPAL (7 September)

Heavy monsoon rains and floods in July and August resulted in a number of deaths and property damage and affected 60 out of 75 administrative districts in the country. The full extent of any damage to crops is not yet known. Paddy production this year is projected at 3.6 million tonnes, slightly above last year and the five year average. The area under paddy is also estimated to have increased marginally to 1.5 million hectares.

PAKISTAN (7 September)

In the last dekad of August, although monsoon rains remained unusually weak across parts of the region, widespread rainfall generally maintained adequate moisture supplies for paddy. The south west monsoon typically begins its seasonal withdrawal from the region in early September, though this year the pattern in the region has been abnormal and rains have persisted. Improved weather in recent weeks and a slight increase in rice area suggest that milled rice production could be somewhat higher than the 4.7 million tonnes produced last year. However conditions during September, will be important to the final outcome.

The target for 1999/2000 wheat production is likely to be 19.5 million tonnes. To meet the fertiliser requirement for the rabi (winter) season, mainly for wheat, the Government has announced that it will import 300 000 tonnes of Di Ammonium Phosphate.

In July, the first month of the current 1999/2000 marketing year, around 72 000 tonnes of rice were exported, compared to 46 600 in the same period last year. An estimated around 3.6 million tonnes of wheat imports are envisaged for the 1999/2000 marketing year.

PHILIPPINES (8 September)

In August, widespread rain generally maintained adequate moisture supplies for crops across the country. However, floods and typhoons damaged rice in parts in late July/early August. Despite some losses, due to typhoon Isling and heavy monsoon rain in July, paddy production this year is expected to be significantly higher than in recent years. First and second quarter production were also favourable and official reports expect paddy output to be around 11.76 million metric tonnes this (calendar) year. The projected output amounts to an estimated 7.64 million tonnes of milled rice. Average paddy production for the last five years was around 10.6 million tonnes. Demand for food grains is also projected to increase due to anticipated economic recovery.

At the end of August, the National Food Authority had approximately 2.1 million tonnes of rice and 345 000 tonnes of maize in stock.

SAUDI ARABIA (6 September)

Production of wheat in 1999 is estimated at 1.5 million tonnes, about 17 percent below last year. Low numbers of locusts are likely to breed in the southern Tihama near Jizan and in some areas with recent rainfall. Barley import in 1999/2000 (July/June) are currently forecast at 6 million tonnes, similar to last year.

SRI LANKA (8 September)

Harvesting of the second (Yala) rice crop, which constitutes about a third of aggregate production, is underway. Favourable rains earlier in the season, adequate irrigation supplies and attractive rice prices at the time of planting suggest favourable production. Output is projected at 987 000 tonnes, around 8 percent higher than the 1998 Yala crop.

Aggregate 1998/99 paddy production is estimated at 2.72 million tonnes (1.87 million tonnes milled basis). The main 1998 Maha crop was damaged by heavy rains at ripening stage and production was estimated at around 1.74 million tonnes compared to 1.78 million tonnes in the previous year. Official reports indicate that the country imported around 150 000 tonnes of rice last year and around 0.9 million tonnes of wheat.

SYRIA (6 September)

A recent FAO/WFP Crop and Food Supply Assessment Mission found that the worst drought in decades has seriously affected crop and livestock production. Rainfall last season (October–March), was between 25 and 70 percent below normal in several parts of the country. As a result, barley production, which is almost entirely rainfed, is estimated at 380 000 tonnes this year, around 72 percent below the five-year average. Wheat production, 40 percent of which is irrigated, is estimated at 2.74 million tonnes, 33 percent lower than last year's bumper crop and around 28 percent below average. The drought also devastated range vegetation leading to a significant increase in sheep mortality rates that seriously affected household incomes and exposed a large number of the Badia (nomad) population to food shortages.

Overall, domestic wheat requirements estimated at 3.8 million tonnes are anticipated to be met from current production and existing stocks. However, barley import requirements for the 1999/2000 marketing year (July/June) are estimated at around 1.18 million tonnes. In view of the country's economic slowdown, Government imports are estimated at only 200 000 tonnes, leaving an uncovered deficit of 980 000 tonnes. As part of an emergency measure, private sector imports of barley have been authorised this year, but with low purchasing power of herders, only limited quantities are anticipated to be imported.

Emergency food assistance of about 24 000 tonnes of wheat flour is urgently required for an estimated 329 000 nomadic people for six months. International assistance is also urged to

support Government efforts to replenish the National Fodder Fund, mainly barley which is almost depleted.

TAJKISTAN* (7 September)

Reports indicate that 1999 grain and pulse production could fall sharply to 430 000 tonnes and that the food supply situation is deteriorating. This would be the second year in succession that production has fallen and would be mainly due to sharply lower yields than last year. Contrary to earlier official indications, the area sown to cereals is now reported to have remained stable at about 400 000 hectares but yields are officially forecast to fall to about 1 tonne per hectare. Lower yields than last year are due to heavy rains in July which caused severe but localized damage, heavy infestation of wheat with rust and smut, inadequate use of high quality seed and other inputs and poor irrigation. Given that about 150 000 hectares of the land sown to grain is irrigated, official average yield expectations seem too low, despite persistent economic problems in the sector. Lack of resources available to the national statistics office and the government's weak control over large parts of the country limit the accuracy of information on economic and agricultural activity.

The agricultural sector employs almost half of the labour force but generates less than 30 percent of recorded GDP. Reforms which are being undertaken to improve efficiency include registry certificates for land redistributed under the 1996 agrarian reform, and implementing a special programme to centralize farms in 160 associations.

The shortfall in cereal production will have to be met by food aid and commercial imports, the latter mainly from Kazakhstan and Kyrgyzstan. In 1999/2000, the cereal import requirement is estimated to increase to 403 000 tonnes. In 1998/99 the country received 46 000 tonnes of cereals as food aid. Allocations for the current year have not yet been finalized.

World Bank data indicates that about 85 percent of the population has incomes below the poverty line, 5 percent of the population are destitute and another 12 percent extremely poor. Standards of living have continued to decline in recent months. Recent assessments in the Karategin Valley found that large segments of the population were food insecure. Humanitarian assistance to vulnerable populations will continue to be necessary.

THAILAND (8 September)

Widespread rain in the later part of August boosted moisture supplies for rice. Earlier, heavy rains in late July, resulted in localised flooding in eastern and north-eastern parts, which is important for rice and sugar cane cultivation. The overall level of crop damage was estimated to be small.

Paddy production from the main crop, to be harvested in November/December is forecast at around 18.5 million tonnes, which together with second season production of around 4.5 million tonnes will bring aggregate 1999/2000 to around 23 million tonnes.

Rice exports in the first eight months of 1999 amounted to 4.09 million tonnes, compared to 4.33 million tonnes during the same period in 1998. Total rice exports this year are projected at between 5 and 5.5 million tonnes.

TURKEY (6 September)

A major earthquake, measuring 7.4 on the Richter scale, hit the country on 17 August causing more than 15 000 deaths and an estimated 600 000 people homeless. The main affected areas in and around Izmit were reported to be industrial but also produced grains and oil seeds. Government and relief agencies have distributed shelter and food assistance.

As with other countries in the Region, drought conditions also resulted in extensive crop damage in several parts, including Central Anatolia, the country's bread basket. The effects of drought were

most serious in the south. Wheat production in 1999 is currently forecast at 18 million tonnes, about 14 percent below last year's bumper crop but about 4 percent below the five year average. Similarly, barley production, forecast at 7 million tonnes, is around 15 percent and 10 percent below last year and the average respectively.

TURKMENISTAN (7 September)

1999 grain production is officially estimated at a record 1.5 million tonnes, nearly 300 000 tonnes above 1998. Of this amount private farmers produced 226 000 tonnes. The area sown to grains fell to 570 000 hectares but the import of high quality seed and increased use of fertilizer raised yields significantly. Given the difficult foreign exchange situation and the large 1999 harvest, which would be adequate to meet domestic requirements, cereal imports in 1999/2000 are expected to remain very low. The cotton target is 1.3 million tonnes. Actual production reached 700 000 tonnes in 1998.

UZBEKISTAN (7 September)

Harvesting of 1999 winter grains has been completed and output of wheat and barley crop is officially estimated at 3.9 million tonnes, some 140 000 tonnes above 1998. Public sector farms produced 3.3 million tonnes and households 631 000 tonnes. The procurement target of 2.2 million tonnes was surpassed by 100 000 tonnes. In addition, the country produces maize and rice. The rice production target is 500 000 tonnes, of which 300 000 tonnes are to be sold to the government. Indications are that total 1999 grain production could be around 4.4 million tonnes. Imports of grain are being reduced to maintain a positive trade balance. Cereal imports in 1999/2000 are estimated to fall to about 400 000 tonnes, to be met commercially.

VIET NAM (7 September)

As in neighbouring countries, widespread rain in late August, increased moisture supplies for rice. The country has three rice crops a year: the first is the 10th month (rainy season) crop, followed by the winter-spring crop and then the summer-autumn crop. This year, by mid July, 50 percent of the 10th month crop had already been transplanted in the north, where early rains benefited development. Rice production for 1999/2000 is forecast to be around 19 million tonnes (milled), similar to last years record crop of 18.92 million tonnes. A bumper rice crop was produced in 1998/99, despite drought early in 1999.

Recent reports indicate that the country could export 4.2 million tonnes of rice this year, some 200 000 tonnes higher than the target of 3.9 million tonnes. By the end of August an estimated 3.4 million tonnes had already been exported. Last year the country exported 3.8 million tonnes.

YEMEN (6 September)

Sorghum production in 1999 is anticipated to decline compared to last year's bumper crop of about 474 000 tonnes due to reduced planted area. Similarly, the wheat harvest is also expected to decline. Small scale breeding of desert locust could extend into areas of recent rainfall in the eastern desert. Hoppers are likely to appear from early October and may form small groups or bands.

Imports of cereals in 1999 - mainly wheat - are estimated at some 2.8 million tonnes.

CENTRAL AMERICA (including the Caribbean)

COSTA RICA (9 September)

Harvesting of 1999/2000 first season cereal and bean crops has begun under normal conditions. The outlook is good for the maize crop, particularly in the main producing regions of Brunca and Huetar

Norte. Annual output is forecast to be a near average 27 000 tonnes, assuming favourable conditions continue. Production of paddy in 1999 is anticipated to be an above-average 290 000 tonnes, but not enough to meet domestic demand. Some 90 000 tonnes will need to be imported in 2000 (January/December) marketing year. The output of beans, an important staple, is expected to be a low 19 000 tonnes, compared to 25 000 tonnes in 1998/99.

CUBA (9 September)

Normal rains have resumed, following months of prolonged drought, which affected minor foodcrops, fruits and pastures. The rain situation still needs to be closely monitored in producing areas with successive years of low rainfall. The rainy season is until October. The rains benefited recently planted 1999/2000 first season cereal crops. Harvesting has only started and maize output is forecast at an average 81 000 tonnes, compared to 76 000 tonnes last year when crops were affected by the dry spell. Paddy output is also expected to increase from 300 000 tonnes in 1998 to some 380 000 tonnes. Imports of some 375 000 to 400 000 tonnes would however still be required to meet demand.

DOMINICAN REPUBLIC (9 September)

Weather conditions favoured planting of 1999/2000 second season cereal crops which began recently. Prospects are good, particularly for maize, and outputs for the year (both crops) are forecast to increase from last year's weather affected crop. An average maize production is expected, but imports of some 650 000 tonnes to 700 000 tonnes would nevertheless be required in the 1999/2000 (July/June) marketing year, mainly to meet an anticipated expansion in demand for animal feed, following a contraction in the poultry sector last year due to hurricane "Georges". 1999 paddy output is also forecast to be slightly above average. Other foodcrops and pastures are reported in good condition.

EL SALVADOR (9 September)

Normal to heavy rains throughout the season benefited 1999/2000 first season maize, paddy and bean crops. Harvesting is underway and production of maize is expected to recover substantially from production last year which was affected by hurricane "Mitch". Output for the year is provisionally forecast at 682 000 tonnes, compared to 555 000 tonnes the year before. Paddy output is also forecast to increase from 50 000 tonnes to some 60 000 tonnes, while bean production is anticipated at 72 000 tonnes, some 35 percent above last year. The arrival of first maize and beans into markets reduced prices, affected earlier by speculation and stockpiling during the lean period.

Wheat imports in 1999/2000 (July/June) marketing year are expected to be around 175 000 tonnes, similar to 1998/99, while maize imports (August/July), mostly for the feed industry, are forecast to decrease to 150 000 tonnes compared to 264 000 tonnes last year.

GUATEMALA (9 September)

Heavy rains and flooding in early July damaged 1999/2000 first season coarse grain and bean crops somewhat. The worst affected areas were Boca Costa del Sur, Esquintla and Quetzaltenango. A detailed assessment of damage to the agricultural sector has not been made yet. Maize output is provisionally forecast at a near average 1 million tonnes. Production of beans is expected to be about average while an above-average paddy output is anticipated.

Maize imports, mostly yellow, in marketing year 1999/2000 (July/June) are forecast to increase from 550 000 tonnes last year to around 600 000 tonnes. The increase is mainly in response to an increase in demand from the poultry industry and a possible decrease in local production due to adverse weather.

HAITI* (9 September)

Harvesting of 1999/2000 first season maize and irrigated paddy crops has been completed under normal conditions, while planting of rainfed paddy and sorghum is well advanced. Average maize and paddy outputs (both first and second season crops) of some 190 000 tonnes and 70 000 tonnes respectively are provisionally forecast. This is mainly due to government programmes in collaboration with the international community which continues to provide food and technical assistance.

Wheat imports in the 1999/2000 marketing year (July/June) are forecast at around 285 000 tonnes, slightly above last year. Maize imports are expected to increase from about 50 000 tonnes to 70 000 tonnes, while rice imports (January/December) are expected to remain similar to this year's 170 000 tonnes.

HONDURAS (9 September)

Normal to above-normal rains have been reported for cereal and bean crops during the first season of 1999/2000. Harvesting began in August in main producing areas in the west (Santa Rosa de Copán) and centre-east (Danli). Despite favourable rains, maize output from the first season crop (main) is expected to be a low 400 000 tonnes, close to last year's crop which was severely affected by hurricane "Mitch". This is attributed largely to the unattractive producer prices. Paddy output is also anticipated to be low due to reduced planting caused by competition of low-priced imports and donations. In important grain areas it is expected that producers are likely to switch to more profitable crops such as sugar cane and tobacco. Production of beans from the first season crop, which accounts for only 30 percent of the annual output, is expected to be average. Rehabilitation and food assistance continues to be provided to the hurricane affected population.

MEXICO (9 September)

Normal and well-distributed rains in recent weeks across large producing areas of the southern plateau and Yucatan peninsula benefited planting of the important spring/summer maize crop. Dry weather prevailed in north-central areas, while more rain is still needed in parts of the north-eastern states despite beneficial rains in recent weeks. Harvesting of the 1999/2000 main maize crop (spring/summer plantings) is about to start. Output for the year is provisionally forecast at a near-average 18.1 million tonnes. Harvesting of sorghum is due from October and production is expected to be an above-average 6.1 million tonnes, but lower than last year's bumper crop. The anticipated decline is attributed to lower than average yields due to prolonged drought in main producing north-eastern states, particularly Tamaulipas.

Wheat imports in the 1999/2000 marketing year (April/March) are expected to be about 2.4 million tonnes, similar to last year. Maize imports (October/September) are forecast to be near 5.5 million tonnes, reflecting strong demand for feed in the poultry and livestock sector.

NICARAGUA (9 September)

Harvesting of the 1999/2000 first season cereal and bean crops is underway, while land is being prepared for planting of the second season crops. Normal rains benefited developing crops. However, delayed planting coupled with reduced yields are reported in some producing areas, particularly in the north-west, because of poor and ill-distributed rains while other areas have been affected by pests. Nevertheless, an important increase in production over last year, which was affected by hurricane "Mitch", is expected. Maize output for the year is provisionally forecast at an above-average 406 000 tonnes, which compares to 311 000 tonnes the year before. Production of sorghum is also forecast to be above average. Paddy output is forecast to increase from 210 000 tonnes in 1998 to some 250 000 tonnes. Growing conditions for minor foodcrops, such as roots and tubers as well as plantains, are reported to be normal. Rehabilitation and food assistance from the international community continues to be provided to the affected population

SOUTH AMERICA

ARGENTINA (9 September)

Normal rains benefited planting of the 1999 wheat crop in main growing areas, except in the important province of La Pampa. By the end of August, about 98 per cent of intended planting had been completed. Harvest is due from October and early production forecasts point to an output of about 12 to 12.5 million tonnes, some 12 to 16.6 percent above last year, but still below the five-year average. The increase is principally due to farmers' decision to enlarge plantings in response to improved prices and better export prospects. Harvesting of the 1999 paddy crop has been completed and a record 1.7 million tonnes is provisionally estimated. Lower rice exports, however, are reported than earlier anticipated and high carry-over stocks are expected.

Land is being prepared for planting of the 1999/2000 maize from October.

BOLIVIA (9 September)

Harvesting of the 1999 wheat winter crop, mainly in the eastern department of Santa Cruz, has started under generally dry conditions. The area planted declined with respect to last year as a result of delayed and ill-distributed rains. Aggregate wheat output for the year (both crops) is forecast at 141 000 tonnes compared to 164 000 tonnes in 1998. Land is being prepared for planting of the 1999/2000 coarse grains and potato crops from October.

Wheat imports in the 1999/2000 (July/June) marketing year are likely to increase over last year's 240 000 tonnes, as a result of lower domestic production. In contrast, maize imports should decrease substantially from 1998/99 to around 125 000 tonnes due to recovery in production.

BRAZIL (9 September)

Harvesting of the 1999 wheat crop continues under generally dry weather in main producing southern states. Production is forecast at about 2.3 million tonnes, close to average production last year. Earlier forecasts indicated increased output, in line with government measures, but planting was reduced as farmers in main growing states of Parana and Rio Grande do Sul were discouraged by high production costs and prospects of poor weather. Harvesting of the 1999 first season (main) maize crop has been completed as well as planting of second season ("safrihna") crops in the main producing southern central states. Aggregate maize output is forecast at some 32.4 million tonnes, compared to last year's low 29.3 million tonnes during which crops were affected by adverse weather. A near-record 1999 paddy crop has been produced. Paddy output is estimated at 11.4 million tonnes, compared to the five-year average of 10 million tonnes.

CHILE (9 September)

Normal rains are reported in the Central and Southern regions during the second half of August, benefiting development of the 1999/2000 wheat crop, for harvest from December. Dry weather continues in the north. Despite the rains, accumulated soil moisture for the year continues to be below average. A recovery in wheat production from last year's drought affected crop is tentatively forecast. Planting of the 1999/2000 maize crop has started. Intended plantings are forecast to improve from last year when the crops were affected by adverse weather.

COLOMBIA (9 September)

Normal to above-normal rains are reported in the Pacific and Caribbean coastal areas, as well as in some central and eastern plains. In contrast, dry weather is reported in central and southern parts of the Andean region. Harvesting of the 1999/2000 first season (main) coarse grain crops is well advanced. Maize output for the year is provisionally forecast at about an average 1 million tonnes, while below-average sorghum production is anticipated. Paddy output is expected to be slightly above average.

Wheat imports in the year 2000 (January/December) are forecast at about one million tonnes, similar to 1999. Maize imports are forecast to increase from this year's 1.4 million tonnes to some 1.5 million tonnes. Rice imports are expected to remain similar to 1999, at around 350 000 tonnes.

ECUADOR (9 September)

Harvesting of the 1999 white maize crop is almost complete, while that of yellow maize is well advanced. Aggregate output is provisionally forecast at a near-average 588 000 tonnes, a slight improvement over last year's below-average crop, but far from the level of the previous two years. Crops were affected by heavy rains at planting, particularly in coastal areas and the northern and central parts of the Andean region. Paddy production is expected to decline to 1.2 million tonnes from 1.3 million tonnes in 1998.

Wheat imports in 1999/2000 marketing year (July/June) are forecast at about 490 000 tonnes, similar to the previous year. Maize imports are also expected to be close to last year's 170 000 tonnes.

PERU (9 September)

Harvesting of 1999 wheat is almost complete under generally dry weather. Output is provisionally estimated at a near average 120 000 tonnes, compared to 146 000 tonnes in 1998. Harvesting of the 1999 white maize crop is also near completion, while that of the yellow maize crop is well advanced. Aggregate 1999 maize output is provisionally forecast at some 855 000 tonnes, 8 percent lower than 1998 but still above-average. A bumper paddy crop is anticipated, close to 1998, which was well above-average level.

URUGUAY (9 September)

Planting of the 1999/2000 wheat crop is well advanced under generally dry weather. Harvesting is due from November and early forecasts indicate recovery from 1998/1999, when production was affected by weather. Output is tentatively forecast at an above-average 545 000 tonnes.

Land is being prepared for planting of the 1999/2000 coarse grain and paddy crops to start from October. A recovery in maize production over 1998/999 is also anticipated.

VENEZUELA (9 September)

Heavy rains and flooding at the end of August were reported in the eastern, central and southern parts of the country, resulting in damage to housing and infrastructure. A state of emergency has been declared in the worst affected states of Anzoategui, Aragua, Bolivar, Delta-Amacuro, Vargas

and Zulia. A detailed assessment of damage has not yet been made. Harvesting of the 1999/2000 coarse grains and paddy crops is underway and near-average outputs are tentatively forecast for maize and sorghum, while production of paddy is expected to be slightly below average.

Wheat imports in the 1999/2000 (July/June) marketing year are forecast at about 1.3 million tonnes, similar to the previous year. Maize imports, mostly yellow, are also expected to remain similar to the 1.3 million tonnes in 1998/99.

EUROPE

EC (16 September)

FAO's latest forecast puts aggregate 1999 cereal production in the EC at 200 million tonnes, about 5 percent down from last year but still above the average of the past 5 years. The smaller crop expected reflects reduced areas due to a 5 percent increase in the compulsory set-aside requirements and adverse weather. Generally less favourable weather than last year during the winter and dry conditions in the spring in southern parts is expected to result in lower average yields notably for wheat. Wheat output is forecast at 97.2 million tonnes, 5 percent down from 1998, while aggregate output of coarse grains is forecast to fall by about 6 percent to 100.1 million tonnes. In the EC, the 1999 paddy season is underway. Current indications point to an area of 405 000 hectares and to an output of 2.6 million tonnes, virtually unchanged from last year.

ALBANIA (16 September)

Cereal output in 1999 is likely to fall by 24 percent to 477 000 tonnes, below average and covering only 50 percent of the domestic cereal requirement. An FAO/WFP Crop and Food Supply Assessment Mission which visited the country in June, found that the two main factors which affected cereal production were excessive rainfall during the autumn planting season and a preference by farmers to grow more lucrative vegetable crops. Combined, these factors led to a sharp reduction in the areas sown to cereals to 177 000 hectares. Growing conditions have been satisfactory overall and the yield of both wheat and maize is expected to be similar or marginally higher than in 1998, due to the absence of major diseases and pest infestations. Wheat (the basic food cereal) is expected to account for only 311 000 tonnes. Thus, the deficit of cereals which would have to be imported to meet normal consumption requirements in 1999/2000 is estimated at up to 478 000 tonnes, including 373 000 tonnes of wheat and 17 000 tonnes of rice. The bulk of the cereal import requirement is expected to be met commercially. This requirement excludes the food needs of refugees and host families, which are being met through a separate international assistance programme.

The precarious food security situation being experienced by many households is attributable mainly to the general economic and development difficulties that the country has experienced in the 1990's, rather than to the Kosovo crisis. Nevertheless, inadequate access to food, as a result of very low incomes continues to be a problem for poor households, and particularly the poorest households in the north and northeast mountainous regions.

BELARUS (7 September)

Hot and dry conditions coupled with economic problems resulted in another poor harvest. Average yields are reported to be around 1.75 tonnes per hectares, bunker weight, pointing to a cleaned weight harvest of less than last year's 4.9 million tonnes.

Despite the second poor cereal harvest in succession, provisionally estimated by FAO at 4.7 million tonnes, cereal imports in 1999/2000 are expected to be lower than last year. Aggregate cereal imports in 1999/2000 are tentatively estimated at 500 000 tonnes. Market demand for livestock products has collapsed and foreign exchange constraints limit feedgrain imports.

BOSNIA-HERZEGOVINA* (7 September)

Systematic cropping information is not available. Indications are that the 1999 cereal harvest could be similar to last year's 1.1 million tonnes. The area sown to winter crops remained stable but that of spring maize has continued to increase. However, untimely rains resulted in lower yields. The economy has been negatively affected by civil unrest in the region and the country is hosting refugees. Indications are, however, that the crop and overall food supply situation have not been unduly disrupted.

BULGARIA (16 September)

The 1999 wheat output is forecast to drop, by 20 percent, to 2.6 million tonnes due to smaller plantings and reduced fertilizer applications. Crop quality has been affected by excessive rains and low fertilizer use. Spring planting was delayed due to frequent rainfall but nevertheless the aggregate area sown to coarse grains increased. Yields are expected to be somewhat lower and aggregate coarse grain output is forecast at 2.2 million tonnes, compared to 2.4 million tonnes last year. Carry-forward stocks of wheat from the 1998/99 year, are expected to offset the reduced harvest and in addition to allow the country to continue to export wheat.

CROATIA (8 September)

1999 cereal production is expected to be significantly lower than last year, due to reduced winter and spring grain planting and untimely rains. The area sown to wheat fell sharply, from 242 000 to 150 000 hectares, in response to shortages of working capital and seeds. Untimely rains at harvest and inadequate use of inputs also resulted in lower yields and output is likely to halve to only 500 000 tonnes. Planting of spring grains, mainly maize, were also less than planned, but those of barley and oats (minor crops) were close to target. Overall, 1999 cereal production could be up to one third lower than last year's 3.2 million tonnes. The grain supply situation is likely to remain satisfactory as wheat stocks can be drawn down from last year's bumper harvest.

CZECH REPUBLIC (16 September)

Better overall yields than last year are expected to more than offset the reduction of 9 percent in the area sown. Aggregate cereal output in 1999 is officially forecast to increase by 3 percent to 6.9 million tonnes and include 4.0 million tonnes of wheat.

ESTONIA (8 September)

Planting of winter cereals for harvest in 2000 is underway. The aggregate area sown to grains has stabilized at about 350 000 hectares per annum and includes about 60 000 hectares of winter wheat and rye. 1999 cereal production is expected at about 700 000 tonnes, similar to last year. In 1999/2000, cereal imports are forecast at nearly 170 000 tonnes. Production in the dairy industry has declined during the first half of 1999.

Agricultural and economic policy are geared to harmonisation with those in the EU. The budget allocation for agricultural subsidies for the year 2000 has been increased by some 30 percent.

Subsidies for dairy and cereal production have been increased and farm collectives and non-farm enterprises in rural areas have become eligible for subsidies.

HUNGARY (16 September)

The latest official estimates indicate that the 1999 wheat harvest is only 2.6 million tonnes, 47 percent down from the 1998 crop. Farmers' incentive to plant wheat last autumn was dampened after they experienced severe marketing problems with their 1998 crops and adverse weather also sharply reduced the area sown. In addition, this year's crop was affected by severe flooding and torrential rains. The final wheat area for harvest in 1999 fell 36 percent, to 765 000 hectares. To compensate for the reduced wheat area, the area sown to maize increased by 10 percent and growing conditions have been favourable for this crop on the whole. The aggregate coarse grain output is expected to increase by a smaller percentage.

Despite the low wheat harvest, carry-forward stocks from the previous year, will enable the country to continue to export some wheat in the 1999/2000 marketing year. Maize could be used to replace feed wheat for certain livestock.

LATVIA (15 September)

The aggregate crop area, for harvest in 1999, declined by 8 percent, while cereal area fell by 13 percent, mainly due to a sharp reduction (-15 percent) in winter wheat and rye planting. Spring grain area also fell. Growing conditions have been mostly satisfactory and output could remain similar to last year's level of 970 000 tonnes.

LITHUANIA (15 September)

The aggregate area sown to grains is estimated to have fallen by 9 percent to 1.79 million hectares. Private farmers and households planted 858 000 hectares, 5 percent less than 1998, while large (former state) enterprises planted 211 000 hectares, some 22 percent less. Recession in the livestock industry following the devaluation of the Russian rouble as well as the accumulation of livestock and grain stocks has contributed to the reduction in area. In contrast, the areas sown to oilseeds and that under perennial pasture increased. Growing conditions have been mostly satisfactory, during the winter and spring growing seasons and about average yields are expected.

MOLDOVA (10 September)

1999 winter grain production (mainly wheat and barley) is officially reported at only 1 million tonnes. The area sown to wheat fell by 11 percent to 317 000 hectares, due to difficulties in marketing last year's crop and adverse growing conditions. Persistent economic problems coupled with frost in May and dry conditions in summer resulted in lower yields. The outlook for spring maize remains uncertain. Official expectations that the standing crop will produce only 600 000 to 800 000 tonnes, however, could be pessimistic.

Despite the reduced harvest, 1999 cereal production will be adequate to meet domestic food needs and significant commercial imports of cereals are not expected in the 1999/2000 marketing year (July/June). The government plans to purchase 100 000 tonnes of food wheat at US \$ 91 per ton from this year's harvest, to replenish government reserves.

POLAND (16 September)

The outlook for the 1999 grain harvest has improved somewhat. The aggregate area sown to cereal crops declined by 3 percent but the impact of reduced use of inputs is not as marked as was expected. The aggregate harvest is forecast to reach 26.1 million tonnes, i.e. about 1 million tonnes, or 4 percent, less than last year's. Output of wheat is now tentatively forecast at 9.3 million tonnes compared to the bumper 9.5 million tonnes in 1998. Output of coarse grains is tentatively forecast to decline by 5 percent to 16.8 million tonnes.

ROMANIA (16 September)

The 1999 wheat harvest reached only 4.7 million tonnes, compared to 5.2 million tonnes in the previous year. The reduction in the area sown last August was exacerbated by crop damage due to floods and torrential rains in the summer. In addition, farmers' financial difficulties constrained their use of inputs. By contrast, the summer maize crop is expected to recover from last year's low level to reach about 10.5 million tonnes. If achieved, this would bring the aggregate cereal harvest to 16.3 million tonnes, compared to 15.4 million tonnes in 1998.

Despite the lower wheat harvest, the country has an exportable surplus of wheat of 1 about million tonnes.

RUSSIAN FEDERATION (10 September)

Harvest returns to date confirm expectations of a larger harvest than last year's poor crop, despite a sharp reduction in grain area and locust infestations in some areas. FAO forecasts 1999 grain output at about 60 million tonnes, some 12 million tonnes higher than official output in 1998. At the forecast level, however, output would still be well below average. The aggregate area sown to grain crops, which survived winterkill, fell by 8 percent to 46.8 million hectares. This reduction is due to increased winterkill in 1999 (2.75mh compared to 2.1mh in 1998) and a reduction of 3 million hectares, to 35.4 million hectares, in the area sown to spring grains. This was due in part to shortages of seeds in the wake of last year's poor harvest. Also in response to the tight fodder situation, the aggregate area sown to wheat has fallen (for the first time since 1994) by over 3 million hectares to 23 million hectares, while that planted to coarse grains fell by 0.7 million hectares to 22.6 million hectares. Growing conditions have been mixed this year, particularly west of the Urals. Winter grain planting was hampered by dryness and yields in some parts of the North Caucasus (Stavropol, Rostov) and Volga Regions, making plants less resilient to winterkill. Frosts in May, but particularly hot and dry conditions in June and July reduced yields in some areas (notably Volgograd and Saratov, exacerbating lower winter plantings and winterkill losses) but overall winter grain yields are higher than last year's, which were affected by drought. Markedly better yields have been achieved in the belt stretching from the North Caucasus to the Ural Region. East of the Urals growing conditions on the whole have been better but inflation and the chronic shortage of inputs are expected to keep yields below average. In addition, the harvest in East Siberia has been delayed by heavy rains.

Given normal weather until the completion of the harvest, indications are that higher average yields could more than offset the reduction in the area sown. FAO tentatively forecasts 1999 grain production at 60 million tonnes, including some 31 million tonnes of wheat (1998:30 tonnes) and 28 million tonnes of coarse grains (1998: 22.6 tonnes).

This year, locust infestations have occurred on 1.1 million hectares. The main infestations, of Italian Locusts, are in areas adjacent to Kazakhstan, including Orenburg (216 000 hectares) Altai Kray (150 000 hectares) Omsk (150 000 hectares) and the Republic of Bashkortan (200 000 hectares). Further north, infestations have spread to some areas, e.g. Samara and Saratov regions, where locusts have not occurred for 40 years. In the Lower Povol'sk and Northern Caucasus region, despite control measures, Italian Locusts have affected 156 000 hectares of which only 98 000 have been treated to date. In the Astrakhan and Kalmyk Republic, infestations of Asian Migratory Locust cover 14 000 hectares.

Overall, the food supply situation in 1999/2000 will remain tight and there is no scope to replenish stocks following the drawdown last year. Despite last year's poor harvest and reduced imports, cereal stocks carried forward in to 1999/2000 amount to at least 5 million tonnes. Given minimum grain needs of 70-72 million tonnes, (and a further reduction in feed use of grains,) there would remain a deficit of 5-7 million tonnes, with no stock replenishment. Against this requirement, outstanding deliveries of food aid pledged in

1999/00 amount to about 2.7 million tonnes. Latest indications are that at least 50 percent of this year's harvest is food wheat. At the aggregate level, this would be adequate to cover food needs but many regions have imposed bans on the movement of grain. Livestock numbers and meat production continue to decline, (meat production by 8 percent in the first half of this year) and the short term outlook is for this trend to continue.

SLOVAK REPUBLIC (16 September)

No firm harvest estimates are available yet, but the outlook is for a reduced cereal harvest in 1999. Winter wheat planting fell, by about one third, to 270 000 hectares, and fell well short of the target of 400 000 hectares. The reduction was due to adverse weather at planting and economic problems on farm. Latest indications are that the areas sown to spring grains did not increase sufficiently to offset the reduction in winter grains. In addition, the spring grain crop has been affected by dry conditions. Moreover, crop yields in general are reduced as a result of deteriorating soil fertility and the aging farm machinery. The 1999 crop could fall by up to 13 percent to 3.1 million tonnes, compared to 3.6 million tonnes in 1998.

SLOVENIA (13 September)

Winter wheat area is estimated to be 16 percent lower than last year. This, together with adverse growing conditions late in the season, resulted in a 19 percent fall in production to 155 000 tonnes. Spring grain yields were affected by poor weather in June and July and aggregate output is expected to be significantly lower than last year's 600 000 tonnes. Output of sugarbeet is also forecast to fall.

THE FORMER YUGOSLAV REPUBLIC OF MACEDONIA (13 September)

An FAO/WFP Crop and Food Supply Assessment Mission which visited the country in June, found that the large-scale population movement and the humanitarian crisis in Kosovo had aggravated general economic instability and poverty. Affected households are having increasing difficulty in paying everyday expenses, and changes in food habits were noted. The major factor has been the collapse of trade with the Federal Republic of Yugoslavia, one of the country's most important export markets and a vital source of raw materials. The loss of the important fruit and vegetable markets in particular has resulted in lower producer prices so far this year. Farmers' financial situation has therefore deteriorated. Non-agricultural households are also affected as employment opportunities are disrupted by the shortage of raw materials.

The Mission forecast 1999 cereal production at an above average 759 000 tonnes, similar to estimated output in 1998. At the forecast level, domestic cereal production would cover about 80 percent of domestic requirement leaving an estimated cereal import requirement of 117 000 tonnes in the 1999/2000 marketing year. This is similar to the past years and is expected to be met mostly by commercial imports.

THE UKRAINE (10 September)

The 1999 grain harvest (with the exception of maize) is well advanced. Current indications point to another poor harvest, due to hot and dry conditions in June and July which exacerbated the effects of economic difficulties, shortages of inputs, heavy weed infestation and untimely frosts in May. These factors, together, therefore, reduced the yields. Depending on the outcome of the maize crop, the 1999 cereal and pulse harvest is not expected to recover from last year's drought reduced 29.5 million tonnes. (FAO estimate).

The aggregate grain area for harvest (12.9 million hectares) could be close to last year's. Winter grains will be harvested from an area of 6.5 million hectares, marginally higher than last year, as winterkill was not as serious. The spring grain area could remain stable but much depends on the proportion of the maize crop harvested for grain rather than silage. Official harvest returns indicate

that winter grain yields (mainly wheat and rye) are markedly lower than last year. Again this year, many regions placed controls to the free movement of grain. In addition, efforts by the government and regional authorities to recover debts owed by farmers have probably meant that there has been some understatement in actual yields. Nevertheless, there is little doubt that 1999 will see the second poor harvest in succession. At this early stage, with the final outcome of the maize harvest still uncertain, FAO provisionally estimates 1999 wheat production at about 14.5 million tonnes and total output at not less than 27 million tonnes.

Despite another poor harvest, the food supply situation is likely to remain satisfactory. However, the availability of animal feed will remain highly constrained. Even at the reduced level, domestic wheat production far exceeds the aggregate requirements for human consumption. The country therefore exported 5.8 million tonnes of grain, including 4.5 million tonnes of wheat in 1998/99. Current indications are that it is more profitable to export feed grains than to sell on the domestic market and cereal exports are likely to continue in 1999/2000, but at a reduced level.

YUGOSLAVIA, FED. REP. OF (SERBIA AND MONTENEGRO)* (10 September)

1999 cereal production is significantly lower than last year. Latest indications are that 1999 wheat output was only 2.2 million tonnes, some 27 percent less than last year. Lower average yields, some 15 percent down, exacerbated the reduction in the area sown during the autumn. The area sown to winter wheat fell to around 700 000 hectares mainly in response to economic difficulties, particularly rapid inflation and shortages of money as well as persistent and untimely rains at planting and harvest. No firm data are yet available on the outlook for 1999 spring coarse grains. Spring sowing operations were considered a strategic priority. Official plans called for spring crops to be planted on 2.5 million hectares, including 1.5 million hectares of maize. Official reports indicate that this target was achieved. However, heavy rains and floods in July, which caused damage and disease, are likely to have affected spring grains. Yields also continue to be heavily affected by chronic shortage of farm funds and inputs, disruption of labour and damage to fields and other infrastructure.

The effect of many years of economic sanctions has been aggravated by war damage and an increasing number of the resident population (in addition to refugees and recently displaced IDPs) face severe economic hardship. Despite the poor harvest the overall cereal supply situation is expected to remain satisfactory. Substantial carry-forward stocks are available to offset the low harvest. Nevertheless, some 825 000 socially and economically vulnerable people are assessed to need 74 300 tonnes of food aid over 6 months. Farmers' ability to mobilize funds for inputs for next year's crops is not assured.

In the Province of Kosovo, the output of all crops was severely disrupted by hostilities and large-scale population displacement. An FAO/WFP Crop and Food Supply Assessment Mission which visited the Province in August, forecast wheat production in the province in 1999 at about 113 000 tonnes, 65 percent lower than estimated output in 1997. This will meet only 30 percent of the domestic requirement. Output of maize, at 57 000 tonnes, is forecast to be only 20 percent of average. In addition the normal spring/summer vegetable harvest was almost zero and there has been widespread looting and slaughter of livestock. These losses will have both nutritional and economic consequences in the coming year.

Although the Republic of Serbia is a net exporter of cereals, the Province of Kosovo has a wheat import requirement in 1999/2000 marketing year of an estimated 228 000 tonnes, of which 143 000 tonnes of emergency food aid deliveries/pledges are scheduled up to the end of 1999, leaving an uncovered import gap of about 85 000 tonnes.

NORTH AMERICA

CANADA (16 September)

In Canada, the wheat harvest is well underway under generally satisfactory conditions. The latest official forecast, based on end-July information, puts the total 1999 wheat output at 25 million tonnes, up about 1.5 million tonnes from earlier expectations and slightly above the 1998 crop. A significant decline in durum wheat production is expected to be more than offset by increased production of other spring wheat. Both the area sown and output of coarse grains are forecast to decline somewhat as farmers have switched land to other non-cereal crops.

UNITED STATES (16 September)

Total wheat production in 1999 is currently forecast at 62.8 million tonnes, 9 percent down from last year. The winter wheat crop has been harvested and latest official estimates put output in 1999 at 46 million tonnes, 10 percent down from the 1998 crop. Although yields are estimated to be virtually unchanged, the area planted last autumn fell sharply. The spring wheat harvest is being impeded by poor weather in some areas. Latest forecasts put the total spring crop at about 17 million tonnes, about 8 percent down from 1998. Most of the reduction is due to lower durum wheat yields.

Prospects for the 1999 maize crop have deteriorated. The area sown to maize fell to 28.7 million hectares, 2 percent down from the previous year. In addition, yields have been affected by unfavourable dry conditions and extreme high temperatures in some key-producing areas in the last two dekads of July and August. The latest official forecast of the 1999 maize crop, based on 1 September crop conditions, is 238 million tonnes, some 4 percent down from the above-average crop in 1998. Aggregate coarse grain output is forecast at 262 million tonnes, about 4 percent less than last year.

Planting of the 1999 paddy crop is complete. Crops are reported to be in good condition and four of the six rice producing States are expecting record crops, assuming favourable growing conditions for the rest of the season. Overall, USDA is anticipating an all-time high output of 9.7 million tonnes, 14 percent up on last year.

OCEANIA

AUSTRALIA (16 September)

The outlook for the 1999 winter wheat and coarse grain crops is satisfactory so far and current indications point to an aggregate harvest of some 31 million tonnes, about 1 million tonnes more than last year. The area sown to wheat increased marginally this year to nearly 12 million hectares. Although dry conditions initially delayed plantings, growing conditions improved subsequently and another good harvest, of 22 million tonnes, 4 percent more than last year's, is expected provided the weather remains favourable until the harvest as of October. By contrast, the area sown to barley and oats declined by about 10 and 6 percent respectively, pointing to somewhat lower harvests. The 1999 paddy harvest is almost complete and reflecting favourable growing conditions throughout the season, output is forecast to reach 1.35 million tonnes, up slightly from the previous season and close to the record established in 1997.

PAPUA NEW GUINEA (9 September)

Heavy rains in late August and high seas caused flooding in coastal areas of the Central Province and some southern areas, affecting an estimated 30,000 people. Food gardens, water supplies and housing were damaged but a precise assessment of the situation has been difficult because of the poor condition of roads in the affected areas which has restricted movement of damage and relief evaluation teams.

The country has received normal to above-normal rains during the growing season. This benefited crops, mainly roots and tubers, and harvest prospects are favourable so far. However, the food supply situation is expected to be tight for vulnerable population groups and those who will lose their crops as a result of the drought.

**ESTIMATED CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/
a) 1998/99 or 1999 estimates (in thousand tonnes)**

COUNTRY	Marketing year	1997/98 or 1998			1998/99 or 1999			
		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
AFRICA		25 488.7	1 885.5	27 374.2	25 185.0	20 205.8	1 751.6	18 454.2
Northern Africa		13 621.2	64.9	13 686.1	13 935.0	13 935.0	16.5	13 918.5
Egypt	July/June	9 933.7	52.4	9 986.1	10 320.0	10 320.0	13.0	10 307.0
Morocco	July/June	3 687.5	12.5	3 700.0	3 615.0	3 615.0	3.5	3 611.5
Eastern Africa		3 762.9	998.6	4 761.5	3 203.0	1 877.3	879.6	997.7
Burundi	Jan./Dec.	41.5	0.5	42.0	38.0	0.7	0.7	0.0
Comoros	Jan./Dec.	41.8	4.2	46.0	46.0	5.6	1.0	4.6
Djibouti	Jan./Dec.	61.7	10.8	72.5	66.0	30.6	2.0	28.6
Eritrea	Jan./Dec.	223.7	103.3	327.0	109.0	15.6	15.6	0.0
Ethiopia 2/	Jan./Dec.	61.8	546.1	607.9	185.0	487.8	460.5	27.3
Kenya	Oct./Sept.	1 874.7	76.0	1 950.7	1 129.0	370.7	81.0	289.7
Rwanda	Jan./Dec.	58.1	141.8	199.9	149.0	84.3	84.3	0.0
Somalia	Aug./July	265.1	16.6	281.7	385.0	252.1	45.9	206.2
Sudan	Nov./Oct.	509.0	63.3	572.3	500.0	179.9	117.9	62.0
Tanzania	June/May	625.5	36.0	661.5	596.0	450.0	70.7	379.3
Southern Africa		1 349.4	373.3	1 722.7	2 025.0	1 666.2	405.0	1 261.2
Angola	April/March	350.8	157.3	508.1	495.0	455.8	142.9	312.9
Lesotho	April/March	127.0	7.8	134.8	188.0	164.8	8.4	156.4
Madagascar	April/March	176.2	38.0	214.2	205.0	107.1	19.1	88.0
Malawi	April/March	113.0	3.6	116.6	202.0	200.1	34.1	166.0
Mozambique	April/March	151.9	164.8	316.7	212.0	270.8	164.9	105.9
Swaziland	May/April	61.5	0.0	61.5	63.0	75.0	0.0	75.0
Zambia	May/April	369.0	1.8	370.8	660.0	392.6	35.6	357.0
Western africa		6 077.7	436.3	6 514.0	5 308.0	2 580.7	440.8	2 139.9
Coastal countries		3 801.3	287.8	4 089.1	3 395.0	1 931.1	211.4	1 719.7
Benin	Jan./Dec.	110.8	10.2	121.0	125.0	31.1	8.0	23.1
Cote d'Ivoire	Jan./Dec.	603.3	22.6	625.9	640.0	215.3	1.4	213.9
Ghana	Jan./Dec.	419.4	51.8	471.2	475.0	235.3	100.8	134.5
Guinea	Jan./Dec.	403.1	6.9	410.0	385.0	21.1	18.1	3.0
Liberia	Jan./Dec.	94.6	105.3	199.9	155.0	91.7	57.7	34.0
Nigeria	Jan./Dec.	1 844.7	0.0	1 844.7	1 250.0	1 253.7	0.3	1 253.4
Sierra Leone	Jan./Dec.	206.2	87.6	293.8	290.0	26.1	25.1	1.0
Togo	Jan./Dec.	119.2	3.4	122.6	75.0	56.8	0.0	56.8
Sahelian countries		2 276.4	148.5	2 424.9	1 913.0	649.6	229.4	420.2
Burkina faso	Nov./Oct.	195.2	20.5	215.7	150.0	71.3	58.8	12.5
Cape Verde	Nov./Oct.	35.5	45.5	81.0	95.0	91.8	90.8	1.0
Chad	Nov./Oct.	64.0	21.5	85.5	72.0	10.2	6.4	3.8
Gambia	Nov./Oct.	116.1	5.5	121.6	124.0	26.9	3.0	23.9
Guinea Bissau	Nov./Oct.	103.4	0.9	104.3	92.0	33.2	19.6	13.6
Mali	Nov./Oct.	84.3	9.9	94.2	80.0	19.9	8.0	11.9
Mauritania	Nov./Oct.	303.1	17.3	320.4	295.0	56.8	10.5	46.3
Niger	Nov./Oct.	478.6	25.5	504.1	200.0	28.9	25.7	3.2
Senegal	Nov./Oct.	896.2	1.9	898.1	805.0	310.6	6.6	304.0
Central Africa		677.5	12.4	689.9	714.0	146.6	9.7	136.9
Cameroon	Jan./Dec.	257.5	2.5	260.0	280.0	76.0	2.6	73.4
Cent.Afr.Rep.	Jan./Dec.	37.1	1.9	39.0	34.0	0.0	0.0	0.0
Congo, Dem.Rep.	Jan./Dec.	247.8	2.2	250.0	250.0	46.7	4.7	42.0
Congo, Rep.	Jan./Dec.	119.2	1.7	120.9	130.0	23.5	2.0	21.5
Eq. Guinea	Jan./Dec.	8.3	0.7	9.0	9.0	0.0	0.0	0.0
Sao Tome	Jan./Dec.	7.6	3.4	11.0	11.0	0.4	0.4	0.0

**ESTIMATED CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/
a) 1998/99 or 1999 estimates (in thousand tonnes)**

COUNTRY	Marketing year	1997/98 or 1998			1998/99 or 1999			
		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
ASIA		39 360.9	3 115.3	42 476.2	40 394.0	36 326.2	3 486.1	32 840.1
Afghanistan	July/June	562.0	138.0	700.0	740.0	740.0	92.2	647.8
Armenia	July/June	279.0	154.0	433.0	367.0	367.0	19.0	348.0
Azerbaijan	July/June	370.0	60.0	430.0	542.0	542.0	21.0	521.0
Bangladesh	July/June	2 698.3	549.4	3 247.7	4 985.0	5 379.0	1 234.0	4 145.0
Bhutan	July/June	15.0	0.0	15.0	20.0	20.0	0.0	20.0
Cambodia	Jan./Dec.	43.5	16.5	60.0	60.0	1.0	1.0	0.0
China 3/	July/June	10 109.9	90.1	10 200.0	9 500.0	9 500.0	170.9	9 329.1
Georgia	July/June	447.0	160.0	607.0	505.0	505.0	91.0	414.0
India	April/March	2 263.9	208.4	2 472.3	1 700.0	1 674.8	247.4	1 427.4
Indonesia	April/March	6 857.9	0.0	6 857.9	8 840.0	7 261.0	716.1	6 544.9
Korea, D.P.R.	Nov./Oct.	578.6	1 196.6	1 775.2	1 040.0	465.4	342.9	122.5
Kyrgyz Republic	July/June	59.0	72.0	131.0	117.0	117.0	5.0	112.0
Laos	Jan./Dec.	60.7	4.3	65.0	67.0	8.0	8.0	0.0
Maldives	Jan./Dec.	34.3	2.7	37.0	35.0	37.0	0.0	37.0
Mongolia	Oct./Sept.	170.0	30.0	200.0	193.0	94.6	60.3	34.3
Nepal	July/June	24.0	4.9	28.9	75.0	75.0	24.7	50.3
Pakistan 4/	May/April	4 147.9	173.1	4 321.0	2 521.0	2 521.0	115.0	2 406.0
Philippines	July/June	4 600.0	8.5	4 608.5	3 600.0	3 685.0	2.5	3 682.5
Sri Lanka	Jan./Dec.	999.0	81.5	1 080.5	1 118.0	918.7	109.7	809.0
Syria	July/June	916.2	21.0	937.2	750.0	750.0	16.9	733.1
Tajikistan	July/June	280.0	128.0	408.0	354.0	354.0	46.0	308.0
Turkmenistan	July/June	204.0	0.0	204.0	56.0	56.0	0.0	56.0
Uzbekistan	July/June	937.0	0.0	937.0	539.0	539.0	0.0	539.0
Yemen	Jan./Dec.	2 703.7	16.3	2 720.0	2 670.0	715.7	162.5	553.2
CENTRAL AMERICA		3 450.3	285.1	3 735.4	3 713.0	3 724.3	314.8	3 409.5
Cuba 5/	July/June	1 521.2	104.6	1 625.8	1 625.0	1 460.3	10.9	1 449.4
Guatemala	July/June	972.1	12.5	984.6	930.0	985.5	36.4	949.1
Haiti	July/June	420.0	115.0	535.0	480.0	488.0	120.3	367.7
Honduras	July/June	370.8	23.0	393.8	500.0	532.0	44.9	487.1
Nicaragua	July/June	166.2	30.0	196.2	178.0	258.5	102.3	156.2
SOUTH AMERICA		1 343.4	74.5	1 417.9	1 375.0	719.1	173.8	545.3
Bolivia	July/June	321.8	68.0	389.8	501.0	362.4	161.4	201.0
Ecuador	Jan./Dec.	1 021.6	6.5	1 028.1	874.0	356.7	12.4	344.3
OCEANIA		338.4	8.0	346.4	326.0	71.6	8.6	63.0
Kiribati	Jan./Dec.	8.0	0.0	8.0	8.0	8.0	0.0	8.0
Papua New Guinea	Jan./Dec.	275.4	8.0	283.4	263.0	8.6	8.6	0.0
Samoa	Jan./Dec.	17.0	0.0	17.0	17.0	17.0	0.0	17.0
Solomon Isl.	Jan./Dec.	26.0	0.0	26.0	26.0	26.0	0.0	26.0
Tuvalu	Jan./Dec.	1.0	0.0	1.0	1.0	1.0	0.0	1.0
Vanuatu	Jan./Dec.	11.0	0.0	11.0	11.0	11.0	0.0	11.0
EUROPE		660.6	38.4	699.0	793.0	793.0	133.7	659.3
Albania	July/June	336.7	2.3	339.0	388.0	388.0	31.9	356.1
Bosnia&Herzegovina	July/June	213.9	36.1	250.0	290.0	290.0	91.8	198.2
Macedonia, FYR	July/June	110.0	0.0	110.0	115.0	115.0	10.0	105.0
TOTAL		70 642.3	5 406.8	76 049.1	71 786.0	61 840.0	5 868.6	55 971.4

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.\$ 1505 in 1997), 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 refugee needs.

3/ Includes import requirements of Taiwan Province. 4/ Excludes Afghan refugee requirements.

**ESTIMATED CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/
b) 1999/2000 estimates for LIFD countries which have entered the 1999/2000 marketing year (in thousand tonnes)**

COUNTRY	Marketing year	1998/99 or 1999			1999/2000			
		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
AFRICA		15 765.2	537.3	16 302.5	16 773.0	1 747.1	214.7	1 532.4
Northern Africa		13 918.5	16.5	13 935.0	14 635.0	1 348.2	0.0	1 348.2
Egypt	July/June	10 307.0	13.0	10 320.0	10 220.0	944.0	0.0	944.0
Morocco	July/June	3 611.5	3.5	3 615.0	4 415.0	404.2	0.0	404.2
Eastern Africa		585.5	116.6	702.1	322.0	116.2	65.4	50.8
Somalia	Aug./July	206.2	45.9	252.1	310.0	63.0	63.0	0.0
Tanzania	June/May	379.3	70.7	450.0	12.0	53.2	2.4	50.8
Southern Africa		1 261.2	404.2	1 665.4	1 816.0	282.7	149.3	133.4
Angola	April/March	312.9	142.9	455.8	505.0	23.6	12.6	11.0
Lesotho	April/March	156.4	8.4	164.8	198.0	49.0	0.0	49.0
Madagascar	April/March	88.0	19.1	107.1	168.0	6.6	6.6	0.0
Malawi	April/March	166.0	34.1	200.1	114.0	14.3	14.3	0.0
Mozambique	April/March	105.9	164.1	270.0	325.0	178.3	115.8	62.5
Swaziland	May/April	75.0	0.0	75.0	72.0	10.9	0.0	10.9
Zambia	May/April	357.0	35.6	392.6	434.0	0.0	0.0	0.0
ASIA		31 284.1	2 801.7	34 085.8	32 038.0	6 733.6	1 938.6	4 795.0
Afghanistan	July/June	647.8	92.2	740.0	1 127.0	35.4	35.4	0.0
Armenia	July/June	348.0	19.0	367.0	392.0	99.0	99.0	0.0
Azerbaijan	July/June	521.0	21.0	542.0	529.0	23.3	11.0	12.3
Bangladesh	July/June	4 145.0	1 234.0	5 379.0	2 100.0	695.3	345.3	350.0
Bhutan	July/June	20.0	0.0	20.0	22.0	0.0	0.0	0.0
China 3/	July/June	9 329.1	170.9	9 500.0	11 160.0	1 158.0	0.0	1 158.0
Georgia	July/June	414.0	91.0	505.0	580.0	80.8	79.0	1.8
India	April/March	1 427.4	247.4	1 674.8	1 000.0	177.1	177.1	0.0
Indonesia	April/March	6 544.9	716.1	7 261.0	5 540.0	3 227.9	650.8	2 577.1
Kyrgyz Republic	July/June	112.0	5.0	117.0	126.0	61.0	61.0	0.0
Nepal	July/June	50.3	24.7	75.0	79.0	0.0	0.0	0.0
Pakistan 4/	May/April	2 406.0	115.0	2 521.0	3 621.0	300.0	300.0	0.0
Philippines	July/June	3 682.5	2.5	3 685.0	3 751.0	675.0	50.0	625.0
Syria	July/June	733.1	16.9	750.0	1 175.0	70.7	0.0	70.7
Tajikistan	July/June	308.0	46.0	354.0	403.0	125.1	125.0	0.1
Turkmenistan	July/June	56.0	0.0	56.0	5.0	5.0	5.0	0.0
Uzbekistan	July/June	539.0	0.0	539.0	428.0	0.0	0.0	0.0
CENTRAL AMERICA		3 409.5	314.8	3 724.3	3 690.0	414.7	194.4	220.3
Cuba	July/June	1 449.4	10.9	1 460.3	1 467.0	113.8	0.0	113.8
Guatemala	July/June	949.1	36.4	985.5	1 015.0	115.4	36.7	78.7
Haiti	July/June	367.7	120.3	488.0	525.0	39.2	29.2	10.0
Honduras	July/June	487.1	44.9	532.0	505.0	58.4	57.7	0.7
Nicaragua	July/June	156.2	102.3	258.5	178.0	87.9	70.8	17.1
SOUTH AMERICA		201.0	161.4	362.4	271.0	11.8	11.8	0.0
Bolivia	July/June	201.0	161.4	362.4	271.0	11.8	11.8	0.0
EUROPE		659.3	133.7	793.0	838.0	7.2	7.2	0.0
Albania	July/June	356.1	31.9	388.0	431.0	6.0	6.0	0.0
Bosnia&Herzegovina	July/June	198.2	91.8	290.0	290.0	0.0	0.0	0.0
Macedonia, FYR	July/June	105.0	10.0	115.0	117.0	1.2	1.2	0.0
TOTAL		49 472.4	3 428.1	52 900.5	51 472.0	8 515.5	2 152.0	6 363.5

SOURCE: FAO

for footnotes, please see page 45.

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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.

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