







# FOODCROPS AND SHORTAGES

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	<p><b>AFRICA:</b> In eastern Africa, harvests have improved food supply but farmers' incomes have been severely affected by falling cereal prices. In Southern Africa, the 2002 maize production is anticipated to be reduced in several countries. The food supply situation in Malawi, Lesotho, Zambia and Zimbabwe is of particular concern following last year's poor harvests. In western Africa, the food situation is generally satisfactory except in Guinea, Liberia and Sierra Leone due to civil strife and in Mauritania due to a poor harvest. In Central Africa, civil strife also continues to disrupt food production in the Democratic Republic of Congo.</p>
	<p><b>ASIA:</b> Most countries expect good harvests, but in China cereal production is estimated to be 7.5 percent below average. Production is also below normal in Pakistan and Sri Lanka. In DPR Korea, emergency food supplies will be exhausted by July 2002, if new pledges are not forthcoming. In Mongolia, pastoralists have suffered yet another harsh winter. In Afghanistan, civil strife, successive years of drought and recent devastating earthquakes have exposed millions of people to extreme hardship. The food situation in the West Bank and Gaza Strip has deteriorated alarmingly as a result of a sharp escalation in military operations.</p>
	<p><b>LATIN AMERICA AND THE CARIBBEAN:</b> In Central America, the overall food supply situation continues to be tight particularly in El Salvador and Guatemala, mainly as a result of the drought and other adverse weather phenomena which affected crops last year. The situation has been aggravated by sharply declining international coffee prices. Food assistance continues to be provided in these countries. In Argentina, prospects for this year's maize crop are poor, as a result of reduced plantings and yields caused by excess rains at sowing.</p>
	<p><b>EUROPE:</b> The winter wheat area has increased significantly this year in the EC but dropped in the major producing eastern European countries. Weather conditions have been generally favourable throughout western and eastern countries for the winter crops and spring fieldwork so far. In the European CIS prospects for winter and spring grain harvest this year are favourable. With good weather conditions, larger sown areas and general availability of agricultural inputs, the 2002 cereal harvest is anticipated to be at least as large as the recovered harvest in 2001.</p>
	<p><b>NORTH AMERICA:</b> The United States' wheat area is expected to be down again this year but assuming normal weather for the rest of the season a larger harvested area and better yields could lead to a recovery in production. Early indications point to increased maize plantings this spring but a sharp decrease for sorghum. In Canada, early indications point to a decrease in wheat plantings this spring but an increase for coarse grains. However, if weather conditions return to normal, yields should recover from last year's drought-reduced levels and overall cereal output could increase.</p>
	<p><b>OCEANIA:</b> In Australia, wheat plantings are expected to increase this spring, but those for barley could decrease. Output of the minor 2002 summer coarse grains crops, to be harvested soon, is forecast to fall as a result of a decrease in plantings and the adverse weather during the growing period. In Cook Islands, the destructive fruit fly continues to pose a threat to the country's foodcrops. In Fiji, heavy rains and flooding in February resulted in considerable damage to sugar cane plantations.</p>



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

### COUNTRIES FACING EXCEPTIONAL FOOD EMERGENCIES (Total: 34 countries)

<u>Country/Region</u>	<u>Reason for Emergency</u>	<u>Country/Region</u>	<u>Reason for Emergency</u>
<b><u>AFRICA</u> (21 countries)</b>		<b><u>ASIA</u> (9 countries)</b>	
<b>Angola*</b>	Civil strife, population displacement	<b>Afghanistan*</b>	Drought, war
<b>Burundi*</b>	Civil strife and insecurity	<b>Armenia*</b>	Drought, economic constraints
<b>Congo, Dem.Rep.*</b>	Civil strife, IDPs and refugees	<b>Georgia*</b>	Drought, economic constraints
<b>Congo Rep. of*</b>	Civil strife	<b>Iraq*</b>	Sanctions, drought
<b>Eritrea*</b>	IDPs, returnees and drought	<b>Jordan</b>	Successive droughts
<b>Ethiopia*</b>	Drought, IDPs	<b>Korea, DPR*</b>	Adverse weather, economic problems
<b>Guinea</b>	IDPs and refugees	<b>Mongolia*</b>	Harsh winter, economic problems
<b>Kenya*</b>	Drought	<b>Tajikistan*</b>	Drought, water shortages
<b>Lesotho</b>	Drought in parts	<b>Uzbekistan*</b>	Drought and water shortages
<b>Liberia*</b>	Civil strife, population displacement	<b><u>LATIN AMERICA</u> (2 countries)</b>	
<b>Malawi</b>	Drought in parts	<b>El Salvador</b>	Drought, earthquakes
<b>Mauritania</b>	Poor harvest	<b>Guatemala</b>	Drought, economic problems
<b>Mozambique</b>	Drought in parts	<b><u>EUROPE</u> (2 countries)</b>	
<b>Sierra Leone*</b>	Civil strife, population displacement	<b>Russian Federation</b>	Civil strife, vulnerable groups
<b>Somalia*</b>	Drought, civil strife	<b>(Chechnya)</b>	
<b>Sudan*</b>	Civil strife in the south, drought in parts	<b>F.Rep. Yugoslavia*</b>	
<b>Swaziland</b>	Drought in parts	<b>(Serbia &amp; Montenegro)</b>	Vulnerable groups and refugees
<b>Tanzania</b>	Localized food deficits, refugees		
<b>Uganda</b>	Civil strife in parts, IDPs		
<b>Zambia</b>	Excessive rains, floods		
<b>Zimbabwe*</b>	Drought in parts		

### COUNTRIES WITH UNFAVOURABLE PROSPECTS FOR CURRENT CROPS

<u>Country</u>	<u>Harvest date</u>	<u>Main contributory factors</u>
<b>Afghanistan*</b>	May/July	Conflict, shortage of inputs, unfavourable weather
<b>Algeria</b>	June/August	Inadequate rains
<b>Argentina</b>	Mar./June	Excessive rains
<b>China</b>	May/June	Drought at planting
<b>Iraq*</b>	May/June	Shortage of inputs
<b>Morocco</b>	May/July	Inadequate rains
<b>Tunisia</b>	May/June	Inadequate rains

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

- Burkina Faso, Chad, Ethiopia, Kenya, Mali, Niger, Senegal, Sudan

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

Note: The maps on the front cover indicate countries with unfavourable crop prospects and/or those facing exceptional food emergencies.

## CROP AND FOOD SUPPLY SITUATION

### OVERVIEW

As of mid-April 2002, the number of countries facing serious food shortages throughout the world stands at 34. However, in several sub-regions the food supply situation has markedly improved compared to 2000/01.

In **eastern Africa**, favourable secondary season cereal harvests in parts and forecasts of near-normal rainfall over most of sub-region for the period March-May 2002, augur well for the food supply outlook. However, the effects earlier devastating droughts and past or ongoing conflicts continue to undermine the food security of an estimated 11 million people. In addition, recent floods in parts have displaced large numbers of people.

In Eritrea, despite a strong recovery in grain production in the 2001 main cropping season, the food supply situation of a large number of people affected by war with neighbouring Ethiopia and earlier drought remains precarious. Overall nearly 1.3 million people continue to depend on emergency food assistance. In Ethiopia, a bumper crop has significantly improved the food supply situation in 2002. Cereal market prices have fallen sharply in main producing areas, resulting in severe financial difficulties for farmers. In addition, some 5.2 million people are estimated to be facing severe food shortages in the pastoral areas in the south-eastern parts due to drought earlier. In Kenya, overall food supply has improved considerably following favourable rains in major cereal producing areas. However, a sharp decline in maize prices is negatively impacting on farmers' incomes. In northern and eastern Kenya, a large number of people, mainly pastoralists, still depend on food assistance due to the effects of earlier drought. In Somalia, despite the recently harvested better than expected secondary "Deyr" season cereal crop, up to 500 000 people are threatened by severe food shortages. The continuing ban on livestock imports from eastern Africa by countries along the Arabian Peninsula has sharply reduced foreign exchange earnings and severely curtailed the country's import capacity. In Sudan, food supply is generally adequate following the good 2001 main season cereal crop. However, large numbers of people in parts of southern and western Sudan depend on emergency food assistance due to crop failures and/or insecurity. In Tanzania and Uganda the food supply situation is generally stable, notwithstanding some localised food shortages. In Burundi, the overall food situation has improved following a satisfactory 2002 first season harvest, particularly of non-cereal crops. This reflects a relatively better security situation in most of the country and generally favourable weather during the growing season. Prices of staples in the main provincial markets have declined significantly compared to their levels a year ago. However, production was constrained by insecurity in eastern provinces and parts of Bujumbura Rural. Despite the peace agreement reached in mid 2001, the security situation remains volatile in these provinces. In Rwanda, the overall food supply situation has improved significantly as a result of a one-third increase in the 2002 first season harvests. However, many households remain food insecure, particularly in the provinces of Gikongoro, Butare and Gisenyi.

In **southern Africa**, the food supply situation is tight in several countries following sharp falls in maize production in 2001. Acute food shortages have emerged in Lesotho, Malawi, Zimbabwe and Zambia, where food reserves have been depleted and food prices have sharply risen, undermining access to food for large sections of their populations. The Governments have appealed for international food assistance. The food situation is also serious in the southern provinces of Mozambique, and for vulnerable rural populations in Swaziland and Namibia affected by poor harvests last year. Prospects for the current crops are mixed, with anticipated improved harvests in South Africa, Mozambique and Angola, and reduced production elsewhere.

In **central Africa**, while average to above-average harvests have been gathered in 2001 in most countries, agricultural activities continue to be disrupted by the persistent civil conflict in the Democratic Republic of Congo. In the Republic of Congo the food supply situation has deteriorated in the Pool region and in the capital city Brazzaville, following a resurgence of fighting which has caused renewed population displacement.

In **northern Africa**, harvesting of the 2002 cereal crops is due to start for most countries from May. Production prospects are unfavourable particularly for Algeria, Morocco and Tunisia, mainly as a consequence of insufficient soil moisture at planting in the main growing areas. Moisture deficits are still reported despite recent abundant rains. In Egypt, by contrast, the outlook is favourable, principally for the irrigated wheat crop. Prospects are also good for the barley crop.

In **western Africa**, land preparation and planting of the first maize crop is in progress in coastal countries along the Gulf of Guinea. In the Sahelian countries, seasonably dry conditions prevail and planting should begin in June/July with the start of the rainy season. The food outlook for 2002 is generally favourable, following above-average to record harvests in the Sahel and satisfactory crops elsewhere. However, the food supply situation is very tight in Mauritania where the harvest was below average. The situation was worsened by unseasonable heavy rains and floods last January that left hundreds of people homeless and killed an estimated 120 000 livestock. In Liberia, a resurgence of civil strife has led to fresh population displacements, with thousands of people fleeing their homes to

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seek safety elsewhere in the country or in neighbouring countries. In Sierra Leone, despite an improvement in the security situation, full recovery in food production is unlikely in the immediate term. These two countries will continue to rely on international food assistance for some time to come.

In **Asia**, a number of countries expect below average outputs from the 2001/02 harvest. China is forecasting the cereal crop at 7.5 percent below the 1997/2001 average, mainly due to a decrease in the planted area. In the important maize growing north-eastern province of Jilin, planting of maize is underway but is seriously hampered by very dry conditions. Cereal production will also be below expectations in Pakistan due to shortage of irrigation water. However, with large carry-over stocks, the country remains a net exporter in both wheat and rice. In Sri Lanka, despite favourable rainfall at planting, long dry spells in January and February affected yields and production is unlikely to exceed the reduced crop of last year. Cereal production in DPR Korea is estimated to be about 30 percent above previous year, but still falls far short of domestic needs. Against emergency food requirement of 610 000 tonnes, donor pledges amount to only 275 000 tonnes, and emergency supplies will be exhausted early in the third quarter of 2002, if additional donor support is not forthcoming. Food assistance is also needed in Mongolia, where an exceptionally cold December 2001 combined with heavy snowfall brought further suffering to vulnerable pastoralists and their animals. In Indonesia, cereal production is estimated to be marginally lower than last year as floods in January/February affected some 200 000 hectares of rice fields; the shortfall will need to be met by additional imports. By contrast, the world's two largest rice exporters, Thailand and Viet Nam, expect good harvests, as does India whose stocks of wheat and rice have grown to undesirably high levels due to limited export opportunities. In Bangladesh, reflecting adequate supply of irrigation water, cereal production has increased and imports declined. In Cambodia, following a third consecutive good harvest, the national food supply situation is satisfactory, but large sections of the population remain food-insecure due to the effects of floods in 2000 and 2001.

In the **Near East**, favourable weather conditions in most countries have improved prospects for winter grains, about to be harvested. However, the food situation in Afghanistan remains grave, notwithstanding the relative calm and improved delivery of food assistance. Years of civil strife and successive years of severe drought have exposed millions of people to extreme hardship. In addition, a devastating earthquake in northern parts in late March resulted in hundreds of deaths and a large number of people were left homeless. The food situation in the West Bank and Gaza Strip has deteriorated alarmingly following the recent escalation of military operations.

In the **Asian CIS**, several countries are facing food shortages due to below average snowfall, a major source of irrigation, below average river flows and general economic decline in the past three years. The worst affected countries are Tajikistan, Georgia, Uzbekistan and Armenia. However, there have been signs of improvements with high levels of precipitation during late winter and early spring.

In **Central America and the Caribbean**, planting of the 2002/03 cereal and bean crops is about to start. The overall food supply situation continues to be tight, particularly in El Salvador and Guatemala, as a consequence of the drought and other adverse weather phenomena which affected crops last year, and the sharp fall in international coffee prices. In the Caribbean, planting of the 2002/03 first season cereal and bean crops has started under normal weather conditions.

In **South America**, prospects are poor for this year's maize crop in Argentina, mainly as a result of excessive rains at planting. In Brazil, where the 2002 maize crop is also being harvested, a decline from last year's record output is expected but production will still be above average. In the Andean countries, the outlook in Bolivia is uncertain for the 2002 cereal and potato crops due to heavy rains and flooding. In Ecuador, prospects are also uncertain due to heavy rains and flooding which have disrupted harvesting operations. In Peru, thousands of people have been left homeless by heavy rains and flooding in early April. Damage to paddy and cotton crops is reported.

In **Europe**, latest information confirms a significant increase in the EC's winter wheat area for 2002 but other winter cereal areas may be down slightly. Yield prospects are generally good for the winter crops. The weather over the winter and into the early spring has been generally favourable for the developing winter crops and for spring fieldwork, for the bulk of spring grain planting to take place in the coming weeks.

Throughout the eastern European countries winter weather conditions have been generally satisfactory but more rain would be beneficial in some parts, particularly Bulgaria and western Romania because of accumulated dryness after two years of drought. Although information on the final winter grain planting among these countries is incomplete, an overall decrease is likely reflecting reduced areas in Romania and Hungary, two of the largest producers.

In the European **CIS** prospects for winter and spring grain harvest this year are favourable. With favourable weather conditions, larger sown areas and general availability of agricultural inputs, the 2002 cereal harvest is anticipated to be at least as large as the sharply recovered harvest in 2001. Civil strife and military operations in

Chechnya, in the Russian Federation continues to disrupt agricultural activities. WFP and NGOs continue to provide food assistance to the IDPs and refugees.

In the **Balkans**, cereal production is expected to be similar to the high level of the preceding year. Further recovery is expected in the Federal Republic of Yugoslavia, where production significantly increased last year. However, much depends on spring and summer weather conditions when most of the floods occur. WFP has extended its emergency food assistance programme to December 2002, targetting 575 000 beneficiaries.

In **North America**, the overall wheat area in the United States is expected to fall again this year, to the lowest level since 1972, due to smaller spring wheat planting expected this spring. However, assuming that normal weather conditions prevail for the rest of the season, this year's harvested area and yields will likely be better than last year and wheat production could recover. Early indications for the maize crop to be sown in the coming weeks point to an increase in maize plantings throughout most of the Corn Belt, but a sharp decrease for sorghum. The rice area in 2002 is expected to decrease marginally, by less than 1 percent. In Canada, early indications for the 2002 cereals to be sown later this year, point to a reduction in wheat area but an increase for coarse grains. However, if weather conditions return to normal, yields for all crops should recover from last year's drought-reduced levels and overall cereal output could increase.

In **Oceania**, planting of the main 2002 cereal crops in Australia is due to start in May. Early information points to an increase in wheat area but a decrease for barley, the main coarse grain. Harvest of the bulk of the minor 2002 summer coarse grains crops, mainly sorghum and maize, will start soon. Output is forecast to fall as a result of a decrease in plantings and the adverse effect of hot dry conditions during January in some parts.

Fiji was affected by heavy rains and flooding at the end of February, resulting in extensive damage to rural infrastructure and the agricultural sector. Considerable loss was incurred in the important sugar cane crop. In Cook Islands, sanitary measures continue to be in force to contain the spread of the destructive fruit fly which still poses a threat to foodcrops. In Tonga, relief assistance, including food aid, continues to be delivered following the destruction by cyclone "Waka" earlier in the year.

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

### **AFRICA**

#### **NORTHERN AFRICA**

##### **ALGERIA (22 April)**

Despite normal rainfall in early February, the water balance is still showing an above-average deficit in the country, except for the northwestern parts which received abundant precipitation in November and December. This has resulted in significantly lower than average plantings for the whole of the country. Yields are anticipated to be slightly below average. The outlook for the 2001/02 winter cereal crops, to be harvested from June, has therefore considerably deteriorated and outputs of wheat and barley, the main cereals, are expected to be below the average of the past 5 years.

Imports of wheat in marketing year 2002/03 (July/June) are forecast at 4.9 million tonnes, same level as in 2001/02 (July/June). Food aid from the international community continues to be delivered to refugees fleeing from Western Sahara.

##### **EGYPT (10 April)**

Planting of the 2002 irrigated wheat crop, as well as that of barley and other food crops such as lentils, beans, chick peas, etc., has been completed under normal weather conditions. An increase in the area planted is reported for some of the crops, particularly barley.

Wheat imports in marketing year 2002/03 (July/June) are expected to increase on the previous year to about 6.2 million tonnes, reflecting the strong demand for this food staple.

##### **MOROCCO (20 April )**

Drier than normal weather in January and February has aggravated the moisture deficit in the main growing areas, with the exception of some parts in the east and north of the country. A smaller planted area has resulted, particularly for wheat, while yields are also anticipated to be lower than normal. Harvesting of the 2001/02 cereal crops is due to start from May and below-average outputs are forecast.

Wheat imports in marketing year 2002/03 (July/June) are expected to increase from the 3 million tonnes imported in 2001/02.

##### **TUNISIA (18 April)**

With the exception of some parts in the north and south east, the country continues to be affected by below-normal rainfall. Harvesting of the 2001/02 wheat and barley crops is due to start from June. Production is anticipated to be close to the low outputs of the past five years.

Wheat imports in marketing year 2002/03 (July/June) are expected to be about 1.2 million tonnes, similar to 2001/02.

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

## **WESTERN AFRICA**

### **BENIN (25 April)**

Planting of the first maize crop is underway in the south and will progress northwards following the onset of the rains. The first official estimate of aggregate 2001 cereal production, mostly maize and sorghum, is 904 000 tonnes, some 100 000 tonnes lower than the record of the previous year but slightly above average.

The overall food supply situation remains satisfactory; markets are well supplied and prices have decreased slightly. Cereal imports for domestic use and re-exports during the 2002 marketing year are estimated at 144 000 tonnes including 14 000 tonnes of food aid.

### **BURKINA FASO (25 April)**

Seasonably dry conditions prevail. The final 2001 production estimates released by the statistical services indicate that 2001 aggregate production of cereals reached a record of 3.11 million tonnes, 36 percent higher than the previous year and 28 percent above average

The overall food supply situation is satisfactory. Markets are well supplied. However, above-normal cereal prices have been reported and localized food shortages may persist in areas which harvested poor crops due to early cession of the rains.

### **CAPE VERDE (28 March)**

Seasonably dry conditions prevail. Production of maize (virtually the only cereal produced in the country) in 2001 has been estimated by a joint FAO/CILSS Crop Assessment Mission in mid-October at 18 680 tonnes. This is 23 percent lower than the previous year but some 5 000 tonnes higher than average. In early January 2002 the country experienced unseasonable heavy rains and floods which caused damage to infrastructure and farmland.

In anticipation of a tight food supply situation in several areas, the Government has appealed for international food assistance, as well as agricultural inputs.

Cereal import requirement in 2001/02 marketing year (November/October) is forecast at 93 000 tonnes, with food aid accounting for more than 50 percent. Pledges amount to 39 000 tonnes, of which 16 000 tonnes have been delivered so far.

### **CHAD (25 April)**

Seasonably dry conditions prevail. Reflecting above-average rains in September, prospects for the secondary sorghum recession crop are good and pastures are abundant.

Following release of final production estimates by national statistical services, the aggregate 2001 cereal production is estimated at a record 1.32 million tonnes, 49 percent higher than the previous year and 24 percent above average.

As a result, the overall food supply situation is satisfactory, especially in the chronically food deficit areas in the Sahelian zone which harvested poor crops in 2000. However, some 143 000 people in the Sudanian zone are at risk of food shortages following floods that affected 144 000 hectares of arable land.

Import requirement of cereals (wheat and rice) in 2001/02 marketing year (November/October) is estimated at 68 000 tonnes, including 13 000 tonnes of food aid.

### **COTE D'IVOIRE (25 April)**

Planting of the first maize crop is underway in the south and progressing northwards with the arrival of the rains. The aggregate output of cereals (mostly maize and rice) in 2001 is estimated at 1.86 million tonnes, slightly more than the previous year and above average.

The overall food supply situation is satisfactory. The cereal import requirement for the 2002 marketing year is estimated at 1 025 000 tonnes, mainly rice and wheat. There are some 120 000 Liberian refugees still in the country, mainly in the west.

#### THE GAMBIA (25 April)

Seasonably dry conditions prevail. The country harvested a record cereal crop for the second consecutive year. A joint FAO/CILSS Crop Assessment Mission estimated the aggregate 2001 cereal output at 198 600 tonnes, 13 percent above 2000 and 49 percent above the average of the last five years. The increase in production was due to generally favourable growing conditions and a significantly larger area planted to cereals. Increased production is also reported for the major cash crops. Groundnut output increased 8 percent to some 149 600 tonnes.

Following three consecutive years of bumper harvests, the overall food supply situation is satisfactory and markets are well supplied.

Cereal import requirement for the marketing year 2001/02 (November/October) is forecast at 123 000 tonnes.

#### GHANA (25 April)

In the early February, a joint FAO/WFP crop and food assessment mission visited Ghana where unusually dry weather conditions had affected crop production in the northern regions. The mission estimated the 2001 cereal production at 1.52 million tonnes, which is below average. However the overall food supply situation is close to normal as the reduction in production of cereals in northern regions will be covered by adequate availability of other foodcrops, anticipated commercial imports and food aid already pledged. Pasture and livestock conditions are only marginally worse than normal for the time of year.

The mission estimated total cereal import requirements in 2002 (January/December) at 461 200 tonnes including 89 000 tonnes of food aid. Worst affected areas and vulnerable groups will require food assistance estimated at about 5 000 tonnes to compensate for their reduced harvests.

#### GUINEA (25 April)

**The overall food supply situation is satisfactory following satisfactory harvests in 2000 and 2001. The first official estimate of aggregate 2001 cereal production is 1 026 000 tonnes, slightly lower than previous year but above average. Markets are well supplied, except in the south-east where recurrent rebel incursions from Sierra Leone have severely affected agricultural and marketing activities.**

**The presence of a large refugee population and the persistent instability in the sub-region have exacted a heavy toll on the country. Armed clashes in and around the country have also resulted in increasing numbers of internally displaced persons (IDPs).**

**Cereal import requirement for the 2002 marketing year is estimated at 330 000 tonnes.**

#### GUINEA-BISSAU (28 March)

Seasonably dry conditions prevail. A joint FAO/CILSS Crop Assessment Mission estimated 2001 cereal production at some 164 000 tonnes, 3 percent lower than the previous year but 3 percent above average.



Cereal import requirement in 2001/02 (November/October) is forecast at 70 000 tonnes, including 10 000 tonnes of food aid.

**LIBERIA\* (25 April)**

The output of the 2001 paddy crop is estimated slightly above the 144 000 tonnes in the previous year, reflecting generally favourable weather conditions. However, following a deterioration of the general security situation, the Government declared a state of emergency on 8 February 2002.

Increasing hostilities between Government forces and rebels in the north, north-west and central regions have displaced over 100 000 people. It has also led to the repatriation of more than half of the 36 000 Sierra Leonean refugees. The farming season has been disrupted and many people are now dependent on food aid than before.

WFP is currently assisting 75 000 IDPs throughout the country.

**MALI (25 April)**

Seasonably dry conditions prevail. Prospects for off-season irrigated or recession crops are favourable and pastures are abundant. Reflecting adequate growing conditions, the aggregate 2001 cereal production was estimated by a joint FAO/CILSS Crop Assessment Mission at 2.87 million tonnes, 20 percent more than the previous year and significantly above average. Maize production almost doubled compared with 223 000 tonnes harvested in the previous year, while sorghum and paddy outputs increased by 17 percent and 13 percent respectively to 695 000 tonnes and 840 000 tonnes.

The overall food situation is satisfactory. Markets are well supplied and prices are stable. Import requirement in cereals in 2001/02 (November/October) is estimated at 90 000 tonnes, including 5 000 tonnes of wheat as food aid.

**MAURITANIA (25 April)**

In Mauritania, a joint FAO/CILSS Crop Assessment Mission in October 2001 estimated aggregate cereal production in 2001 at some 160 000 tonnes, lower than both the previous year and average. This decrease was mostly due to inadequate availability of irrigation water due to the low water level in the Senegal River which reached the flood level only in early September. By contrast, production in low-lying areas has increased compared to 2000 as all operational dams reached over 70 percent of capacity.

The tight food supply situation has been worsened by unseasonably heavy rains and cold weather which killed more than 120 000 head of livestock and damaged at least 6 000 tonnes of rice just harvested. Prices of cereals, which were already higher than a year ago, have risen considerably on most markets. WFP is currently assisting more than 300 000 people throughout the country.

**NIGER (28 March)**

Seasonably dry conditions prevail. Reflecting favourable growing conditions and availability of agricultural inputs, the final official aggregate 2001 cereal production is estimated at 3.11 million tonnes, 46 percent higher than the poor crop in the previous year and about one-third more than average. Most of the increase came from millet which rose by 0.75 million tonnes to 2.4 million tonnes.

The overall food supply situation is satisfactory. However, an untimely sharp rise in cereal prices on all markets across the country has been reported, which makes access to food difficult. The above-normal cereal prices are mainly due to activities of speculators and outflows to Nigeria.

Cereal import requirement in 2001/02 (November/October) is estimated at some 345 000 tonnes, almost half actual imports in the previous year.

**NIGERIA (25 April)**

Land preparation and the sowing of the first maize crop are underway in the south. Production of cereals (including rice in paddy terms) in 2001 is estimated at some 23 million tonnes, higher than both the previous year and the average.

The food supply situation is tight in several areas notably in the states of Benue, Nasarawa and Taraba as a result of communal conflicts. As these are some of the most important food producing areas, the adverse situation could seriously threaten national food security.

**SENEGAL (25 April)**

Unseasonably heavy rains and cold weather which affected the northern regions of Saint Louis and Louga between 9-11 January caused casualties and left thousands of people homeless. In addition, more than 2 000 hectares of arable land was damaged and an estimated 470 000 head of livestock died. Significant losses of food, including rice and vegetables, are also reported. On 17 January the Government launched an international appeal for assistance to meet the immediate needs of the population in the affected regions.

Overall, the food situation is satisfactory following above average 2001 cereal crop and substantial imports late last year. The markets are well supplied and prices of millet and sorghum have decreased with the arrival of fresh produce on the markets.

Cereal import requirements in 2001/02 (November/October) are forecast at 845 000 tonnes, some 50 000 tonnes less than actual imports in the previous year.

**SIERRA LEONE\* (25 April)**

**Cereal production in 2001 is estimated at 348 000 tonnes, reflecting increased plantings by returning refugees and farmers previously displaced, as well as improved conditions for the distribution of agricultural inputs.**

**In an effort to continue helping the country, a UN Consolidated Inter-Agency Appeal was launched on 26 November 2001, including an agricultural component with five projects proposed by FAO to facilitate recovery of food production and reduce dependence on food aid.**

**Sierra Leone's cereal import requirement for 2002 is estimated at 225 000 tonnes including 40 000 tonnes of food aid.**

**TOGO (25 April)**

Planting of the first maize crop is underway in the south and will progress northwards following the arrival of the rains. Notwithstanding irregular rains during the entire growing season, the aggregate output of cereals in 2001 is estimated at about 0.7 million tonnes, which is average. The overall food supply situation is satisfactory.

## **CENTRAL AFRICA**

### **CAMEROON (25 April)**

Planting of the first maize crop for harvest from July is underway in the south. Reflecting overall favourable growing conditions, 2001 cereal production is estimated to be similar to the previous year's average crop.

The overall food supply situation is satisfactory. Cereal imports in the 2002 marketing year are estimated at 310 000 tonnes, virtually same as in the previous year.

### **CENTRAL AFRICAN REPUBLIC (25 April)**

The main 2002 maize crop to be harvested from July is being sown. Reflecting normal to above normal rains and favourable growing conditions, cereal production in 2001 is estimated at about 143 000 tonnes, fractionally higher than the 2000 harvest.

The food supply situation is satisfactory.

### **CONGO, DEMOCRATIC REPUBLIC OF\* (15 April)**

**The agricultural activities continue to be disrupted by the persistent civil conflict, particularly in the eastern Kivu provinces. In spite of adequate rains, planting of the 2002 second season crops has been negatively affected by intensification of fighting in these areas in the past months, particularly in the Hauts Plateaux of South Kivu Province. Recent reports indicate that about 64 percent of the population of eastern DRC are undernourished. This is where most of the 2.2 million internally displaced persons (IDPs) are located. Overall, it is estimated that 16 million people, or 33 percent of the DRC population face critical food needs as a result of prolonged displacement. While access to the vulnerable population has improved in Government's controlled areas due to the simplification of procedures for international humanitarian agencies, the situation remains desperate in the Kivu provinces and northern Katanga, where insecurity and violence continues to hamper provision of humanitarian assistance.**

### **CONGO, REP OF\* (25 April)**

**A resurgence of fighting in the Pool region (surrounding the capital Brazzaville) at the end of March has led to new population displacements. At least 15 000 IDP have been reported in Pool region and about 50 000 in Brazzaville. The WFP Emergency Operation initially scheduled to end on 31 March has been extended until 31 May 2002.**

**Cereal imports for the 2002 marketing year are estimated at 125 000 tonnes, mostly wheat and rice.**

EQUATORIAL GUINEA (25 April)

The staple crops are sweet potatoes, cassava and plantains. Cereal import requirement for 2002 is estimated at 15 000 tonnes (10 000 tonnes of rice and 5 000 tonnes of wheat).

GABON (25 April)

The main foodcrops are cassava and plantains but some maize is also produced (around 31 000 tonnes). The country imports commercially the bulk of its cereal requirement, estimated at around 88 000 tonnes for 2002.

SAO TOME AND PRINCIPE (25 April)

The staple foodcrops are roots, plantains and tubers. The cereal import requirement in 2002 is estimated at 10 000 tonnes

## **EASTERN AFRICA**

**BURUNDI\* ( 22 April)**

**Planting of the 2002 second-season foodcrops is completed. The early outlook is favourable reflecting abundant rains at sowing. The output of the 2002 first season crops, mainly of non-cereal foodcrops, was good. Production of cereals and beans remained almost unchanged. Food prices that declined at harvest time in December/January remain stable.**

**Food assistance continues to be required for some 432 000 internally displaced people as a result of insecurity in parts. Intensified fighting between Government forces and rebels in the past month has resulted in fresh waves of population displacement, particularly in Bujumbura Rural province.**

**ERITREA\* (25 April)**

**The final estimate of the 2001 cereal crop is now put at about 220 000 tonnes. This is about twice the harvest of the previous year and about average. Furthermore, the favorable weather outlook forecast for the March-May period in major cereal producing areas is anticipated to encourage planting of long-cycle cereal crops.**

**The overall food supply situation, however, remains tight reflecting the displacement of farmers by the recent war with Ethiopia and lingering effects of drought. Although the number of IDPs in camps is gradually declining (currently about 50 000), food assistance continues to be required, and also for refugees returning from Sudan, demobilized soldiers, resettled IDPs and drought affected people. During 2001, WFP distributed about 150 000 tonnes of food to 1 million beneficiaries and expects to distribute about 130 000 tonnes to 800 000 people in 2002.**

**ETHIOPIA\* (25 April)**

**Planting of the 2002 secondary "belg" grain crops is underway. The belg crop accounts for some 10 percent of total grain production but in some areas it provides most of the annual grain production.**

**The 2001 main "meher" season grain harvest was estimated by FAO/WFP Crop and Food Supply Assessment Mission late last year at 88 million tonnes, about 5 percent above the average of the previous five years. The bumper harvest has resulted in sharply falling grain prices in most markets, negatively impacting on farmers' income, and could also negatively affect this year's production. On the other hand, the low prices offer an opportunity for a**

significant build-up of stocks at all levels. Export possibilities to neighbouring countries will be restricted because of good harvests in neighbouring Kenya and Sudan.

The overall good harvest masks the existence of food insecure communities in most parts of the country due to localized drought, population displacement and limited purchasing power. Emergency food requirements in 2002 are projected at about 560 000 tonnes targeting some 5.2 million people. The Mission strongly recommended local purchases to the extent possible for donors wishing to give food aid to the country. (For more details, the Mission Report can be found at the address <http://www.fao.org/giews/english/alerts/2002/SRETH202.htm>)

#### **KENYA\* (25 April)**

The 2002 main "long rains" cropping season has begun and the early outlook is favourable according to the forecast near-normal rainfall. Exceptions are Turkana, western Marsabit, northern coastal districts and areas around the shores of Lake Victoria.

Harvesting of the 2001/02 secondary "short rains" cereal crop, which accounts for some 15 percent of annual production, is complete. Favourable rains during the season in main producing areas helped improve yields. The 2001 main "long rains" cereal crop was significantly higher than in 2000, mainly reflecting abundant and well distributed rains in the main producing area of the Rift Valley Province. The aggregate 2001/02 maize production is now estimated at 2.7 million tonnes. Maize prices have declined sharply in recent months, prompting the Government to appeal to donors to increase local purchases.

Despite an overall improvement in food supply, food difficulties persist in pastoral areas, particularly in Turkana, Mandera and parts of Marsabit Districts, where erratic rains continue to constrain food production. An Emergency Operation was jointly approved in April 2002 by FAO and WFP for food assistance to 1.26 million drought-affected people, worth US\$ 36.26 million for a period of 6-1/2 months (15 April to 31 October).

#### **RWANDA\* (20 April)**

Planting of the 2002 second-season foodcrops is complete. Abundant rains in January and February provided adequate soil moisture for sowing operations, while normal precipitation in March allowed good establishment of the sorghum and bean crops. The early outlook is favourable. The output of the 2002 first season foodcrops was estimated at 3.7 million tonnes, 28 percent higher than last year's first season, with the largest increases in non-cereal crops (banana, sweet potato and cassava).

The overall food supply situation remains satisfactory. Prices of the main food staples have declined significantly.

#### **SOMALIA\* (25 April)**

The output of the recently harvested secondary "Deyr" season cereal crop, normally accounting for some 25-30 percent of annual cereal production, is forecast at 141 000 tonnes, which is about 46 percent above the previous year's harvest.

Despite the good "Deyr" harvest, however, the food supply situation in several parts including Gedo, East Sanag, Sool and parts of Bari gives cause for serious concern. Overall, more than 500 000 people are estimated to be facing severe food difficulties in Somalia, mainly due to past poor harvests due to successive droughts, long-term effects of insecurity and reduced foreign exchange earnings due to the continuing ban on livestock imports from eastern Africa by countries along the Arabian Peninsula.

#### **SUDAN\* (25 April)**

The 2001/02 total cereal production has been estimated at 4.75 million tonnes, comprising 3.77 million tonnes of sorghum, about 579 000 tonnes of millet, 315 000 tonnes of wheat (being harvested) and about 146 000 tonnes of other cereals. At this level, cereal production is about 36 percent above last year's crop and about 13 percent above the average of the last five years. Sorghum market prices have fallen below production costs in main producing areas, and this may depress planted area next year.

Despite the improved food supply situation, an estimated 3 million IDPs, drought-affected and vulnerable people in different parts of the country will require food assistance through 2002. An Emergency Operation was jointly approved in April 2002 by FAO and WFP for food assistance for 2.9 million people, worth US\$132.8 million for a period of 12 months (1 April 2002 to 31 March 2003).

#### **TANZANIA (25 April)**

Prospects for the main season coarse grains in the southern highlands are favorable due to abundant rains. In the bi-modal areas the main season maize crop is now being planted. The weather forecast for March-May 2002 predicts a normal to above-normal rainfall over the northern-half of the country while normal to below-normal rains are predicted over the southern half.

Aggregate 2001/02 cereal production, mainly maize, is estimated at about 4 million tonnes, about 15.5 percent above the previous year's harvest. Consequently, the overall food supply situation remains satisfactory. However, prices of maize continue to rise in the south due increased exports to neighbouring countries which are facing crop failures. Price increases are also observed in the east coast and northern parts of the country due reduced "Vuli" season harvests.

WFP is assisting some 166 000 people in drought-affected districts for a period of 2 months (up to end-April).

#### **UGANDA (25 April)**

Harvesting of the 2001 secondary season crop is complete. Aggregate cereal production in 2002 is provisionally estimated at 1.7 million tonnes 9 percent and 5 percent above the 2001 and the previous five years average respectively. Scattered rains in March in many parts of the country signified the beginning of the main cropping season. The seasonal forecast for the March to May period indicates an increased likelihood of near normal to above-normal rainfall over central, western, south-western and north-western Uganda; while most eastern, south-eastern and north-eastern districts have increased likelihood of receiving near normal to below normal rainfall.

The start of the rains in pastoral areas of south-western region is replenishing ground water and rejuvenating vegetation. Livestock, therefore, currently have adequate access to drinking water and pastures. Seasonably dry conditions prevail in the north-eastern Karamoja region (Kotido, Moroto and Nakapiripirit Districts).

The overall food supply situation is seasonably satisfactory. However, some 700 000 refugees and displaced persons remain dependent on food assistance.

## **SOUTHERN AFRICA**

### **ANGOLA\* (22 April)**

**Despite favourable crop growing conditions, this year's production, as in past years, will be affected by reduced plantings as a result of insecurity at sowing time.**

**After 27 years of civil war, a cease-fire agreement has been signed between the Government and rebel groups. Food assistance to large numbers of internally displaced and vulnerable people has improved with the relative peace and the de-escalation of the military conflict in many parts of the country. Also roads previously closed due to insecurity are now open. However, the presence of landmines and poor conditions of the roads and broken bridges mean that the switch from costly airlift operations to cheaper ground transport will be very gradual. An FAO/WFP Crop and Food Supply Assessment Mission will visit the country in mid-May.**

### **BOTSWANA (25 April)**

Harvesting of the 2002 cereal crops, mainly sorghum, is about to start. Prospects are uncertain. Despite adequate precipitation in recent months, a prolonged dry spell in January is likely to have affected yields, in particular those of the maize crop.

The overall food supply situation remains satisfactory. The country imports most of the food it requires.

### **LESOTHO (25 April)**

**Prospects for the 2002 main season cereal harvest, about to start, have deteriorated with persistent heavy rains in the past months. Excessive precipitation since the beginning of the rainy season in October, coupled with hailstorms and pest infestations in parts, has adversely affected yields of maize, wheat and sorghum crops. Preliminary production forecasts indicate a reduced harvest for the third consecutive year, which is likely to aggravate the already precarious food security situation in several areas.**

**Food shortages are being experienced by many poor households affected by last year's poor crop. The Government has recently declared a state of famine in the country. Food aid is being distributed by relief organizations to 36 000 most vulnerable people. WFP is distributing 2 200 tonnes of maize meal, beans and vegetable oil to about 7 000 families in five eastern, southeastern and northeastern districts until the next harvest.**

**An FAO/WFP Crop and Food Supply Assessment Mission is currently in the country.**

### **MADAGASCAR (25 April)**

Harvesting of the 2002 cereal crops, mainly rice, is underway. Overall prospects are satisfactory reflecting generally adequate rains and the absence of significant locust infestation during the growing season. However, production is expected to be reduced in parts. In northeastern coastal areas, affected by a prolonged dry spell in December and January, heavy rains in March may have arrived too late to prevent yield reductions of the rice crop. In southeastern parts, below-average rains in March are also likely to have adversely affected maize yields.

Shortages of rice, sugar, salt and essential non-food items, including fuel, are being experienced in Antananarivo, due to disruption of transport (road blocks, damaged bridges, etc.) by the current

political crisis. Prices of food staples are on the increase and the food supply situation is likely to deteriorate if the crisis is not resolved soon.

#### **MALAWI (22 April)**

Widespread normal to above-normal rains during the third dekad of March improved prospects for the 2002 cereal crops affected by a dry spell in the previous two dekads. Despite normal cumulative rainfall since the beginning of the season, yields may have been negatively affected by a late start of the rainy season and erratic precipitation, with prolonged dry spells and floods in parts.

The food supply situation is extremely tight following last year's reduced maize harvest, depletion of strategic reserve and delayed imports. According to civic and church groups, more than 300 people have died by starvation in recent months. As a result of the food shortages, the current maize crop is being consumed green, which will affect supplies in marketing year 2002/2003 (April/May). WFP launched in February an Emergency Operation aiming to distribute 11 400 tonnes of food to assist 301 000 people.

An FAO/WFP Crop and Food Supply Assessment Mission is currently in the country.

#### **MOZAMBIQUE (23 April)**

Harvesting of the 2002 cereal crops is about to start. In the main maize growing northern areas, a good harvest is expected reflecting adequate precipitation during the growing season. However, prolonged dry spells in the southern provinces of Maputo, Gaza and Inhambane, as well as in southern parts of the Central Provinces of Manica, Sofala and Tete, are expected to result in reduced cereal production. However, overall, cereal production is expected to increase over the good harvest last year. In the three Southern provinces, it is estimated that up to 40 000 hectares of various food crops were lost to dry weather, seriously affecting 50,000 households. In general, yields are anticipated to be reduced for the third consecutive year in these areas. Emergency food aid is currently being distributed by WFP to 190 000 most affected people.

An FAO/WFP Crop and Food Supply Assessment Mission is currently in the country.

#### **NAMIBIA (23 April)**

Normal to above-normal rains in February and March benefited the developing 2002 cereal crops. However, precipitation arrived too late to prevent yield reductions in the maize crop already affected by a prolonged dry spell in January. The area planted to millet/sorghum and maize was reduced due to insufficient rains at planting time. Latest estimates indicate an area planted to cereals of 216 000 hectares, comprising 195 400 hectares of sorghum and 20 600 hectares of maize. This is 20 percent lower than last year. The coarse grains output is forecast at 82 000 tonnes, 20 percent below the cereal crop of 2001. The already tight food supply situation for farmers who gathered a poor harvest last year, and for vulnerable groups in urban areas, is expected to deteriorate in marketing year 2002/2003 (May/April).

#### **SOUTH AFRICA (22 April)**

Prospects for the 2002 main maize crop, to be harvested from May, are favourable. This reflects generally adequate rains since the beginning of the season and an increase of 5 percent in the area planted. Official production forecasts by mid-April point to a maize crop of some 9.0 million tonnes, some 18 percent above last year's crop of 7.5 million tonnes. Following large exports of maize in marketing year 2001/2002 (May/April), the supply is tight and prices are at high levels. The country is importing 100 000 tonnes of white maize and about 290 000 tonnes of yellow maize to replenish stocks.



**SWAZILAND (20 April)**

Prospects for the 2002 cereal crops are poor. After abundant rains at the beginning of the cropping season, which encouraged larger plantings of maize, a mid-season dry spell at the critical tusselling stage seriously reduced yields. The output is forecast to be reduced for the third consecutive year.

The food situation is extremely tight as a result of two successive reduced harvests, low levels of reserves and inadequate imports. The Government has appealed for emergency food aid.

An FAO/WFP Crop and Food Supply Assessment Mission is currently in the country.

**ZAMBIA (20 April)**

Prospects for the 2002 cereal harvest, mainly maize, have further deteriorated with dry weather in March in the southern half of the country. Rains in previous months in these areas were also below average and yields are anticipated to be low. By contrast, normal to above-normal precipitation in March in northern parts benefited maturing cereal crops. Rains in these areas have been adequate since the beginning of the growing season and crops are reported in good condition. Overall, the output is expected to be reduced for the second consecutive year.

Food shortages are reported from several locations as a result of last year's poor maize harvest and delayed imports. Prices of food have increased sharply since last July. WFP is currently distributing emergency food aid to 1.1 million most-affected people in 19 districts. However, it is expected that only some 20 000 tonnes out of the 42 000 tonnes required, will be distributed before the next harvest.

An FAO/WFP Crop and Food Supply Assessment Mission will visit the country from 6 May.

**ZIMBABWE\* (22 April)**

Prospects for the 2002 cereal crops, about to be harvested, are unfavourable. The area planted to the main maize crop is provisionally estimated at 1.26 million hectares, 3 percent above the reduced level of last year but 11 percent below that of 2000. Yields are anticipated to be reduced as a result of a prolonged dry spell in January and February. The maize output is forecast lower than the poor crop of 2001. The marketing year 2002/03 (April/March) will begin with completely depleted reserves and the already very tight food supply situation is anticipated to further deteriorate in 2002/03. Protracted humanitarian assistance will be necessary for the most vulnerable groups.

Prices of maize have continued to increase despite the price control imposed by the Government, reflecting inadequate levels of maize imports. Food shortages are reported from several locations of the country, particularly in Matabeleland South, Matabeleland North, Masvingo, Midlands, Manicaland, and parts of Mashonaland West and Central Provinces. WFP is providing emergency food assistance to the most vulnerable populations but donor contributions fall short of requirements.

An FAO/WFP Crop and Food Supply Assessment Mission is currently in the country.

## **ASIA**

### **AFGHANISTAN\* (25 April)**

Prospects for the 2002 winter cereal crops, mainly wheat, are generally uncertain due to inadequate precipitation in some cereal producing areas, shortage of agricultural inputs and disruption of farming activities by the recent military operations which coincided with the planting season.

The food situation in Afghanistan remains grave, notwithstanding the relative calm and improved delivery of food assistance. Years of civil strife and three successive years of severe drought have exposed millions of people to extreme hardship. Even before the events of 11 September, Afghanistan was in the grip of a severe food crisis and intensifying economic problems due to continuing civil conflict. During the past three years, the country has suffered a devastating drought which compounded the impact of years of conflict and brought a large section of the population to the brink of starvation. In addition, a devastating earthquake in northern parts in late March resulted in hundreds of deaths and an estimated 10 000 people have been left homeless. Relief operations are underway and temporary shelters have been established for the homeless.

The 2001 cereal output has been estimated at about 2 million tonnes, well below average and about one-half of the production in 1998. As a result, cereal import requirements in the current marketing year 2001/02 (July/June) were forecast at a near record 2.2 million tonnes. An FAO/WFP Crop and Food Supply Assessment Mission is planned to visit the country from mid June to assess the overall food supply conditions and estimate cereal import requirements in 2002/03, including food aid.

An Emergency Operation worth US\$284.98 million was jointly approved in January 2002 by FAO and WFP for food assistance to some 9.88 million vulnerable people for a period of 9 months.

### **ARMENIA\* (3 April)**

Prospects for the 2002 grain crops are good and tentatively seen to match the sharply recovered harvest of the preceding year at 417 000 tonnes. This would be some 33 percent higher than the average of the past six years and would include 340 000 tonnes of wheat and 74 000 tonnes of coarse grains. However, the forecast production would depend on spring and early summer precipitation, which are crucial for coarse grains and potatoes, the latter being a major staple food crop. Cereal import requirement for the marketing year 2001/02 is estimated at about 338 000 tonnes including an estimated food aid requirement of 71 000 tonnes.

### **AZERBAIJAN (2 April)**

Significantly large areas have been planted to winter cereals and official estimates indicate that grain harvest this year would be about 2.3 million tonnes, compared with the sharply recovered harvest of about 2 million tonnes in 2001. However, much will depend on spring and early summer precipitation.

Cereal import requirement for 2001/02 marketing year is estimated at 800 000 tonnes, including 780 000 tonnes of wheat and 20 000 tonnes of rice, which should be commercially procured. However the most vulnerable and internally displaced population will continue to depend on targeted food assistance

#### BANGLADESH (16 April)

Harvesting is underway of the 2002 winter wheat crop planted in November 2001. Despite temperatures higher than normal during the early stages of growth and delayed planting in some areas, subsequent favourable weather benefited crop growth. Presently the outcome of the harvest is estimated at 1.82 million tonnes, marginally below last year.

The irrigated Boro rice crop is gaining in importance and now accounts for about 49 percent of the national rice output. The crop is planted in November through January for harvesting from April. Despite below average rainfall from December 2001 through February 2002, adequate supplies of irrigation water and inputs benefited crop development, and the 2001/02 Boro harvest is expected to exceed the record output of last year. The outcome of the Aus crop harvested in July/August 2001 (accounting for about seven percent of the production) as well as that of the Aman (monsoon) crop harvested in October/December 2001 (about 44 percent of production) was slightly lower than the previous year. Nevertheless, with the expected record Boro crop, total production for 2001/02 is estimated at 26 million tonnes of rice (milled), which is a record.

Due to a marked rise in cereal production in recent years, cereal imports have been declining from a level of 4.2 million tonnes in 1998/99 to 1.7 million tonnes in 2000/01. For the 2001/02 marketing year (July/June) the import requirement is estimated at 1.8 million tonnes (rice 0.4 million tonnes and wheat 1.4 million tonnes). So far, 1.4 million tonnes have been imported, including 0.5 million tonnes of food aid.

#### CAMBODIA (8 April)

The dry season irrigated and flood recession paddy crops are being harvested. These crops account for about 20 percent of the annual rice output. An about average harvest of 0.8 million tonnes of paddy is expected. The main 2001/02 rice crop was harvested in December/January; despite a very dry July 2001 and excessive rains and flooding in August, the latest estimate points to an above-average harvest of 3.3 million tonnes of paddy. In aggregate, the 2001/02 paddy harvest is estimated at 4.1 million tonnes, equivalent to 2.6 million tonnes of milled rice, slightly below the good harvests of the past two years.

Following three years of good rice harvests, the national food supply situation in 2002 is satisfactory. However, Cambodia is one of the poorest countries in south-east Asia, and a large part of its population remains food-insecure, while thousands who were affected by the floods of 2000 and 2001 still need food assistance.

#### CHINA (15 April)

**Good snow cover in early March in the major winter wheat producing provinces of Henan and Shandong (accounting for more than 40 percent of total wheat production) helped protect crops from low temperatures and will substantially improve soil moisture in these provinces. The area planted to winter wheat in September/October 2001 is estimated at 21.5 million hectares compared to 22.2 million hectares the previous year, a reduction of about 3 percent. This reflects dry conditions at planting time, low domestic wheat prices and attractive alternative crops. The latest forecast of the June 2002 harvest points to an output of 86.2 million tonnes. The spring wheat now being planted is tentatively forecast to produce some 6.2 million tonnes, which gives total national wheat production of 92.4 million tonnes for the 2002/03 marketing year (July/June), compared to 93.4 million tonnes the previous year.**

**The 2002 coarse grain crop, of which maize accounts for 90 percent, is now being planted. In the important maize growing north-eastern province of Jilin, sowing is seriously affected by very dry conditions. Provisionally, production of coarse grain is forecast at 130 million tonnes.**

**China's paddy production has been falling over the past five years from a harvest of 200.7 million tonnes in 1997/98 to an estimated 177.0 million tonnes in 2001/02, mainly reflecting a decrease in the area planted. Indications are that the area for the 2002/03 early paddy crop, planted in February/March, has followed the downward trend, while lower plantings are also foreseen for both the main crop to be planted in May/June and the late crop to be planted in June/July. As a result, despite expected higher yields, the preliminary forecast of the total 2002/03 paddy harvest is 176.6 million tonnes (121 million tonnes milled rice).**

**The latest estimate of the 2002 national cereal production is 398.9 million tonnes, about the same as the poor crop of the previous year and 7.5 percent below the 1997/2001 average. The shortfall in production is expected to be met partly by higher imports and partly by drawdown of stocks.**

**CYPRUS (3 April)**

The prospects for 2002 winter grain crops, for harvest from May, are favourable. Production of cereals in 2001, mainly barley, is estimated at 129 000 tonnes, some 50 percent above the average for the previous five years. Cereal production normally covers less than one-third of total domestic requirements.

Imports of cereals in 2001/02 (May/April), mainly wheat and barley, are forecast at about 650 000 tonnes, similar to the previous year.

**EAST TIMOR (3 April)**

The territory, currently administered by the United Nations, is still recovering from the civil unrest in late 1999 after the overwhelming vote for independence from Indonesia. Of some 250 000 to 270 000 people who fled the country, an estimated 60 000 refugees still remain in camps in Indonesian West Timor. Furthermore, in a recent survey carried out by the World Bank, the UNDP and other international organizations, it is estimated that some 340 000 people of the total population of 0.8 million live in poverty and under-nourishment. Assistance from the international community continues to be provided for the resettlement of East Timorese returnees.

Maize and rice are the main staples of the country, but cassava and sweet potatoes constitute an important part of the diet, especially in drought years. Harvesting of maize planted in November is about to start, while wet season rice planted in December/January will be ready for harvest in May/June. An about average harvest is expected.

On 20 May 2002, East Timor will officially become an independent nation.

**GEORGIA\* (25 April)**

**Exceptionally cold and dry winter and strong wind storms have compromised winter crops, while snowfall has been rather thin, which may have repercussions for summer crops. A reduced cereal harvest this year of 579 000 tonnes is, therefore, forecast compared with 718 000 tonnes in 2001. The forecast is based on the assumption that drought does not affect summer crops as much as it did in 2000. However, much will depend on late spring and summer precipitation. The western parts of the country have been particularly prone to drought, where many people have been in need of emergency food assistance.**

**WFP Emergency Operation for drought-affected people will be extended by two months until the end of June. In addition, activities under the ongoing protracted relief and recovery operation will continue until March 2003.**

**INDIA (16 April)**

Prospects for the 2002 winter wheat crop, now being harvested, are good. Below normal, but timely rainfall in January and February 2002 accompanied by a prolonged cold spell benefited crop development. The latest estimate of production from the 26.5 million hectares planted in October/November 2001 is 73.5 million tonnes, some 7 percent above the harvest of 68.8 million tonnes of last year, but well below the record crop of 76.4 million tonnes in 2000.

Rice production in 2001 is estimated at 90.7 million tonnes, 7 percent more than the 84.9 million tonnes harvested last year, and a record. The production of coarse grains harvested in September/November 2001 is estimated at 30.9 million tonnes, which is about average. For 2002, the coarse grain production is provisionally forecast to increase to 33 million tonnes.

Following the good harvests of both wheat and rice in recent years, the overall food supply situation is satisfactory. India's cereal stocks have grown to record and undesirably high levels, reflecting attractive farmers' support prices, sluggish consumer demand and poor export opportunities. With yet another expected record procurement, India's wheat and rice stocks in 2002 could grow to levels of 45 million tonnes and 30 million tonnes, respectively, or about 20 percent of world stocks of the two cereals.

#### INDONESIA (3 April)

Torrential rainfall from late January to mid February 2002 caused widespread flooding and landslides, with the islands of Java and Sumatra most seriously affected and the capital Jakarta in particular. Thousands of homes were destroyed, and almost 200 deaths related to the flooding have been reported. National and international relief organizations provide assistance with health and feeding programmes.

The floods only marginally affected the outcome of the 2001/02 main season rice crop, which is now being harvested. An assessment by the Ministry of Agriculture suggests that of a total area planted to paddy of 11.4 million hectares, the floods affected only 204 000 hectares, of which 10 000 hectares were totally lost. Thus, the national paddy production in 2001 is estimated at 49.6 million tonnes (31.2 million tonnes milled rice), against 51.9 million tonnes the previous year. The 2002 dry season paddy crop will be planted from May, while the main season crop is planted in October/November. A tentative forecast of paddy production in 2002 is 49 million tonnes.

In the main maize growing areas of East Java and Sumatra, the harvest started in January 2002 and is now complete. The heavy rains in January/February caused wet conditions during harvesting time, which affected the quality rather than the quantity of the maize crop. The 2002 national maize production is provisionally estimated at 11.1 million tonnes, about 21 percent above last year. The country produces no wheat.

Reflecting the lower paddy production, rice imports in the 2002/03 marketing year (April/March) are expected to increase. So far, 3 million tonnes of rice imports are planned, of which one million tonnes will be handled by the National Logistics Planning Agency, BULOG, and the remainder by private traders. Imports of wheat and maize will also be needed.

#### IRAN, ISLAMIC REPUBLIC OF (12 April)

Following three years of devastating drought, precipitation has improved this winter in most parts of the country, though in the major rainfed wheat regions in the north-west, rainfall still remained below average. In early April, heavy rain and floods in the central province of Isfahan caused localised serious damage to property, infrastructure, fields and tree crops. However, overall, both wheat and barley planted in September/October 2001 have benefited from the improved conditions. Tentatively, harvest is forecast at 8.5 million tonnes of wheat and 2 million tonnes of barley, well below normal, but a great improvement over last year's poor output of 7.5 million tonnes of wheat and 1.65 million tonnes of barley. The rice crop is planted from mid-April to June for harvest from August through November. The outcome of the crop will crucially depend on the extent to which the recent precipitation has replenished dam levels for irrigation purposes.

Following improvement in cereal production, the import requirement in the coming marketing year is expected to decline from the high average of 9.9 million tonnes over the past three years. These high levels of imports reflect the impact of the three consecutive years of drought and the burden of a refugee population of over 2.5 million (more than 2.3 million from Afghanistan and 0.2 million from Iraq and other countries).

#### **IRAQ\* (3 April)**

**Despite improved precipitation compared to the previous three years, the outlook for 2002 winter crops remains uncertain. Cereal production will be affected by serious shortages of fertilizers, spare parts for agricultural machinery and other agricultural inputs. Production of cereals (mainly wheat and barley) in 2001 is estimated at 1.4 million tonnes, 21 percent below average.**

**Grain imported under the SCR 986 oil-for-food deal has led to significant improvements in the overall food supply situation, but malnutrition remains a serious problem.**

#### **ISRAEL (3 April)**

The outlook for the 2002 wheat crop, for harvest from April/May, continue to be favourable, due to beneficial precipitation during the growing season. Production of wheat in 2001 is estimated at 150 000 tonnes, some 30 percent higher than the average for the previous five years.

Imports of cereals in 2001/02 (October/September) are forecast at some 2.8 million tonnes, 2.5 percent higher than the previous year.

#### **JAPAN (4 April)**

Japan produces only about one quarter of its domestic cereal requirement. Rice, which accounts for 90 percent of cereal production, is planted from mid May to July for harvest in September/November. To reduce carry-over stocks of rice and divert production to other crops, the Government in 1995 introduced the Rice Area Adjustment Programme. Since then the area has declined by 2 percent and production by some 3 percent. The 2001 rice crop for consumption in the marketing year 2001/02 (October/September) is estimated at 8.2 million tonnes (milled) compared to 8.6 million tonnes the previous year. Wheat is grown as a winter crop, being planted in October/November and harvested in June/July. The early forecast of the 2002 wheat production is 0.7 million tonnes. Some 0.2 million tonnes of coarse grain, mainly barley, are also grown annually.

Japan is the world's largest importer of cereals. For the marketing year 2001/02 (October/September) cereal imports are forecast at 5.9 million tonnes of wheat, 16.1 million tonnes of maize and about 4 million tonnes of other coarse grains.

#### **JORDAN (3 April)**

**Heavy snow cover in early January and favourable rains in March, following a brief dry period in February, improved prospects for the 2002 winter grains, for harvest from May. This signified a welcome relief from the severe drought conditions that seriously affected crop and livestock production in the previous three years.**

**Aggregate production of wheat and barley in 2001 was estimated at 20 000 tonnes, about 52 percent below the reduced crop of the previous year. Domestic cereal production normally meets only a small proportion of consumption requirements the rest being covered by imports. Imports of wheat in 2001/02 (July/June) are forecast at 800 000 tonnes, slightly higher than last year. Coarse grain imports are forecast at 1.2 million tonnes, about the same as in 2000/01.**

#### KAZAKHSTAN (2 April)

Spring sowing campaign has had a good start owing much to ample soil moisture and favourable weather conditions. Total area under grains is seen to increase by 143 000 hectares in 2002 compared with 2001. FAO tentatively forecasts the 2002 grain harvest at about 16.6 million tonnes, which is about 600 000 tonnes higher than the good harvest in 2001. The forecast harvest this year includes 13.5 million tonnes of wheat, 2 million tonnes of barley and 260 000 tonnes of maize. The forecast will very much depend on the incidence of pests and diseases as well as precipitation levels during late spring and early summer season.

Kazakhstan is set to export 3.4 million tonnes of cereals during 2001/02 marketing year (July/June), nearly 3.0 million tonnes of which will be wheat. Stocks have increased from 1.5 million tonnes in 2000/01 marketing year to about 5.5 million tonnes in 2001/02 marketing year.

#### KOREA, DEMOCRATIC PEOPLE'S REPUBLIC OF\* (25 April)

Harvesting of the 2001/02 winter wheat crop will commence in mid-May. An estimated 57 000 hectares were planted in September/October 2001 and provisionally an output of 117 000 tonnes of wheat is expected. Under the Double Cropping Programme, the area will immediately after harvest be re-sown with spring wheat and spring barley before planting of the 2002/03 main season maize and rice crops. The aggregate production of winter and spring cereals is provisionally forecast at 178 000 tonnes, but following favourable rainfall, the figure may need to be revised. Together with the main season cereal crops harvested in September 2001, estimated at 2.9 million tonnes the total cereal production for consumption in the 2001/02 marketing year (November/October) is provisionally estimated at 3.1 million tonnes, compared to 2.3 million tonnes last year. Another important main staple is potatoes. For 2001/02 the potato production is estimated at 1.9 million tonnes or 475 000 tons in grain equivalent, against 290 000 tonnes last year.

Despite the higher food production, domestic supplies fall short of requirements by some 1.47 million tonnes in 2001/02. The commercial import capacity is not likely to exceed 100 000 tonnes, leaving 1.37 million tonnes to be covered by food aid or concessional imports. Of this, the WFP estimates that 525 000 tonnes of cereals and 85,000 tonnes of other food are required to provide nutritional support to 6.4 million beneficiaries, mainly children, pregnant and nursing mothers and elderly people. Against this requirement, so far about 275 000 tonnes, including carry-overs from last year that arrived in early 2002. Thus, early in the third quarter, the WFP pipeline will have dried up if additional donor support is not immediately forthcoming. In addition, other donors have pledged 360 000 tonnes of cereals, of which 236 000 tonnes have been delivered. International donors are urged to increase pledges and expedite their delivery.

#### KOREA, REPUBLIC OF (1 April)

The main crop of the country is rice, which accounts for more than 90 percent of the cereal output. Some 400 000 tonnes of coarse grains (mainly barley) are grown annually, while virtually no wheat is produced. The rice crop harvested in October/November 2001 for consumption during the 2001/02 marketing year (October/September) is estimated at 5.52 million tonnes (milled), 4 percent up on 5.29 million tonnes produced in the previous year. This increase reflects abundant rains in July that boosted the areas planted as well as yields. The 2001 barley crop (the most important coarse grain) is now being harvested and the output is provisionally estimated at about 380 000 tonnes.

The Republic of Korea is one of the world's largest importers of cereals. For the 2001/02 marketing year (October/September), imports are forecast at 3.9 million tonnes of wheat, 8.8 million tonnes of maize and 0.4 million tonnes of other coarse grains.

#### KYRGYZ REPUBLIC (3 April)

Prospects for 2002 crops are good and cereal harvest is expected to remain at the sharply recovered output of 2001 at 1.8 million tonnes. Kyrgyzstan has maintained and even slightly increased area planted to winter cereals and plans to increase area under spring and summer cereals in 2002 compared with the significantly increased area in 2001. This year area under cotton is planned to decrease by 2 000 hectares while area planted to sugarbeet would decrease by 5 400 hectares compared with 2001. Domestic cereal requirements are about 1.9 million tonnes. Therefore, cereal import requirement in 2001/02 marketing year is estimated at 165 000 tonnes.

#### LAOS (24 April)

Rice, which is the country's main crop, is grown during two seasons. The wet season rice is planted in June/July and harvested in October/November and account for about 85 percent of annual rice output. The dry season irrigated crop, which is planted in December/January and harvested in April is entirely under high yielding varieties and is becoming increasingly important. The 2001/02 rice crop for consumption in the 2002 marketing year (January/December) is provisionally forecast at 1.32 million tonnes (milled), the same level as the previous year. This production virtually covers national consumption requirements. However, poorer sections of the population, predominantly in upland areas, have inadequate access to rice and are chronically food insecure and in need of assistance, as are victims of crop losses due to floods. WFP assistance is provided through both food for work projects and emergency operations.

#### LEBANON (3 April)

Prospects for the 2002 winter harvest in June/July remain favourable. Production of wheat and barley in 2001, estimated at 60 000 and 28 000 tonnes respectively, remained similar to the previous year. The country depends heavily on imports (around 90 percent) to meet demand for rice, sugar and milk powder.

Imports of cereals - mainly wheat - in 2001/2002 (July/June) are forecast at some 750 000 tonnes, similar to the previous year.

#### MALAYSIA (27 March)

Harvesting of the main season rice crop is almost complete and the secondary rice crop is being planted. Though below normal rainfall affected non-irrigated rice fields, the production from the main season was higher than last year. Providing fair weather for the secondary crop, the 2001 rice harvest is forecast at 1.49 million tonnes (milled) from a harvested area of some 700 000 hectares. This compares to 1.38 million tonnes produced in 2000 and the average of the previous five years of 1.36 million tonnes. As a result of the increase in production, Malaysia now covers more than 70 percent of its domestic requirement in rice, while the remainder is met by imports, forecast at some 600 000 tonnes in 2002.

Malaysia grows no wheat and only insignificant quantities of maize. The country's requirement in these grains is met by imports, which for 2002 are estimated at 1.4 million tonnes of wheat and 2.9 million tonnes of maize.



#### **MONGOLIA\* (4 April)**

Some 30 million livestock in Mongolia, which play a fundamental role in the nutritional status of the majority of the population, continue to be seriously stressed by harsh winter conditions. Temperatures in December 2001 were much below normal and below those of the previous year which, combined with heavy snowfall, brought further suffering to vulnerable pastoralists. Large numbers of their animals have died as a result of three harsh winters and the poor pastures caused by overgrazing and very dry weather last summer. These conditions have forced many families, into urban centres where there is already unemployment and few social services to support them.

Wheat is virtually the only cereal grown in the country. Production has declined progressively over the past years mainly due to structural changes in the economy. From an area of 650 000 hectares and a production of some 700 000 tonnes in the early 1990's, only 290 000 hectares were planted in 2001 with an output of 191 000 tonnes. Planting of the 2002 wheat crop is about to start and harvesting will take place in September. Provisionally, production is forecast to remain unchanged from last year at some 190 000 tonnes. This covers only about 50 percent of domestic wheat utilization, leaving an estimated import requirement for 2001/02 of 202 000 tonnes. Imports of 32 000 tons of rice are also foreseen. The food aid need is 40 000 tonnes of which 31 000 tonnes have been pledged and delivered.

#### **MYANMAR (16 April)**

Harvesting of the 2001/02 dry season rice crop planted in October/November 2001 is underway. This crop normally accounts for about 15 percent of annual production. Following favourable weather, an about average harvest is expected. The main monsoon crop, which was harvested in November 2001, was above average. In aggregate, the 2001/02 rice output is estimated at 13.5 million tonnes (milled) from 6.4 million hectares planted. The wheat and coarse grains harvested in November 2001 yielded some 85 000 tonnes and 530 000 tonnes, respectively.

Reflecting the increase in rice production over the past years, the national food supply position is favourable. Myanmar, which was once the world's biggest exporter of rice, has steadily increased exports in recent years. For the marketing year 2001/02 (July/June) the Government forecasts rice exports to reach 1 million tonnes, against 55 000 tonnes in 1999/00 and 241 000 tonnes in 2000/01.

#### **NEPAL (24 April)**

The 2001/02 wheat crop planted in November/December 2001 is being harvested. With normal growing conditions this season, an output of 1.1 million tonnes is forecast, slightly below the previous season. The rice crop harvested in November/December 2001 is estimated at 2.8 million tonnes (milled) compared to 2.7 million tonnes the previous year. Production of coarse grain (maize and millet) in 2001 was 1.8 million tonnes. The aggregate cereal output for consumption in the 2001/02 marketing year (July/June) is 5.7 million tonnes (rice in milled equivalent).

While this production by and large covers national cereal requirements, 42 percent of the country's population of 22 million live below the poverty line and are food insecure. A number of relief agencies including WFP support the most vulnerable groups through feeding and health care projects, while assistance to some 100 000 Bhutanese refugees is also required.

#### **PAKISTAN (12 April)**

Harvesting is underway of the 2001/02 wheat crop planted in October/December 2001. The bulk of the wheat is irrigated, but about 15 to 20 percent of the crop is rainfed. The area planted is estimated to have decreased to 8.3 million hectares, mainly due to shortage of irrigation water. As a result, the estimated output of 19.2 million tonnes in 2002 is lower than the 20.0 million tonnes planned, and the 2000 record wheat production of 21.1 million tonnes.

Rice production is estimated at 3.5 million tonnes (milled), about one million tonnes below the previous season. This reflects shortages of irrigation water and a consequent combination of a lower area planted and lower yields. Tentatively, an output of 3.5 million tonnes of rice (milled) is forecast. The output of coarse grains harvested in September/October 2001 is estimated at 2.1 million tonnes.

Pakistan, traditionally an exporter of rice and an importer of wheat, emerged as a wheat exporter in 2000/01. Despite the lower production in 2002, large carryover stocks will enable the country to remain a net exporter in wheat in 2002/03 (May/April), but at a lower level. Reflecting reduced poor paddy harvest in 2001, rice exports in 2002 are tentatively expected to decrease to some 1.5 million tonnes, from 2.4 million tonnes exported in 2001.

However, large groups of vulnerable people, notably farmers without access to irrigation, livestock owners in drought stricken pastoral areas and smallholder fruit producers who have lost up to 60 percent of their trees need food and other assistance. On 22 March 2002, a WFP Emergency Operation was approved for food assistance to drought affected persons in Balochistan and Sindh provinces. The Operation will provide 20 500 tonnes of cereals and other food to 343 000 targeted individuals in the two provinces.

#### PHILIPPINES (16 April)

On 6 March 2002 an earthquake measuring 6.8 on the Richter scale struck southern Philippines. On the island of Mindanao, a major rice growing area, it caused 15 deaths and extensive damage to infrastructure; there are no reports of serious impact to crop production.

Harvesting of the secondary season rice crop is about to start. An output of some 3.1 million tonnes of paddy is forecast. The latest estimate of the total 2001 paddy crop is 13.1 million tonnes (8.6 million tonnes milled), a third consecutive record output. This reflects a larger area planted under irrigation and higher yields following an increase in the use of hybrid rice seeds. Planting of the 2002/03 main season rice is due to start at the end of April. Providing normal growing conditions prevail, the output of paddy from the 2002 season is tentatively forecast at 13 million tonnes.

The 2001/02 maize production is estimated at 4.5 million tonnes from 2.6 million hectares, about the same as the previous year. The country produces no wheat.

The country, which used to be a leading rice producer, has in recent years become a major net importer of rice with an average import of 1 million tonnes over the past five years. However, as a result of the improved rice production, imports are expected to decline from this high level. For 2001/02, the Government estimates an import requirement of 390 000 tonnes, which has been put out for tender. As the country produces no wheat, its requirements are met by imports, estimated at 3.0 million tonnes for 2001/02, about the same as last year. Some 600 000 tonnes of maize imports are also expected.

#### SAUDI ARABIA (3 April)

Prospects for the 2002 wheat and barley crops, for harvest in April/May, are unfavourable due to adverse weather this season. Production of wheat in 2001 is estimated at about 1.8 million tonnes, similar to the previous year. Imports of coarse grains (mainly barley and maize) in 2001/02 (July/June) are forecast to remain unchanged at 6.5 million tonnes.

SRI LANKA (25 March)

Much below normal rainfall in 2001 caused a reduction in rice output, notably in seven districts in the south of the country. An estimated 1.6 million people are affected, of whom 300 000 are in need of food assistance. A WFP Emergency Operation to provide 22 680 tonnes of cereals and other food is underway to meet the immediate needs.

The main Maha rice crop planted in October/November 2001 has been harvested. After a normal start to the monsoon season, subsequent long dry spells in January and the second half of February 2002 affected yield potentials. Thus, production is not likely to exceed last year's drought-reduced Maha crop of 1.1 million tonnes (milled). Assuming average growing conditions for the Yala crop to be harvested in August/September 2002, the total national production of rice in 2002 is provisionally forecast at 1.8 million tonnes (milled), about the same as in 2001.

SYRIA (3 April)

Reflecting abundant rainfall in the winter months, particularly in the western parts of the country, and adequate availability of agricultural inputs, the prospects for the wheat and barley crops to be harvested from May are favourable. Production of wheat in 2001 is estimated to have increased by about 1.8 million tonnes to a record level of 4.5 million tonnes. Barley output rose significantly to 1.3 million tonnes nearly double the average for the previous five years.

The General Establishment for Cereal Processing and Trade (HOBBOB) bought 3.5 million tonnes of wheat from farmers, up 84 percent on previous year purchases. Imports of wheat and rice in 2001/02 (July/June) are forecast at a total of 290 000 tonnes, nearly the same as last year while those of maize are forecast at 500 000 tonnes, about 37 percent below the previous year.

TAJKISTAN\* (3 April)

**Reports point to an improved harvest this year compared with the drought-reduced harvest of the past few years. Tentatively forecasts indicate a grain harvest of about 400 000 tonnes in 2002, which is about 100 000 tonnes higher than the drought reduced harvest of the preceding year. However, spring and summer precipitation and snowmelt are crucial for achieving the forecast harvest. Some reports indicate that the drought may not have been over, ground water levels have not been sufficiently restored and the level of river flow is still below average. Even if the target harvest is achieved, Tajikistan will still require targeted food aid to the vulnerable, internally displaced and drought affected population. Cereal import requirement for the coming marketing year has been estimated at 793 000 tonnes, including 387 000 tonnes of food aid.**

THAILAND (3 April)

Harvesting of the 2001/02 second rice crop planted in January/February is about to begin. Above average rainfall in December 2001 provided good soil moisture for planting of the crop. However, subsequent below normal precipitation from January to March 2002, caused some stress to unirrigated crops. Thus, the outcome from this harvest is forecast at 5.7 million tonnes of paddy, down by 6 percent from 6.1 million tonnes harvested last year. The 2001/02 main season rice harvest, completed in January 2002, is estimated at 19.6 million tonnes paddy. In aggregate, the 2001 paddy production is provisionally estimated at 25.3 million tonnes, equivalent to 16.7 million tonnes of milled rice, almost matching the record production of the previous year.

Thailand, the largest rice exporter in the world, in 2001 exported a record 7.52 million tonnes. The country's rice exports in 2002 are presently forecast at 7 million tonnes, seven percent lower than last year.

TURKEY (3 April)

Prospects for the 2002 winter crops, to be harvested from June are favourable. Good winter rains and snow have helped boost crop forecasts, following three consecutive poor seasons. Wheat production in 2001 is estimated at 16 million tonnes, about 24 percent lower than 2000 due to dry and warm weather and poor availability of high quality seeds. Production of barley, estimated at 6.9 million tonnes, was 0.5 million tonnes lower than 2000. Output of coarse grains (mostly barley and maize) decreased by about 594 000 tonnes to 9.4 million tonnes. Paddy production is forecast at 300 000 tonnes similar to the previous year.

Wheat imports in 2001/02 (July/June) are forecast at 1.3 million tonnes compared with 0.4 million tonnes estimated for the previous year. Maize imports are also forecast to increase by 150 000 tonnes to 950 000 tonnes. Exports of wheat and barley in the year ending June 2002 are expected to decline sharply.

TURKMENISTAN (3 April)

Prospects for 2002 cereal production, mainly wheat, are good and similar to the good harvest of the preceding year. Improved but still below average precipitation, and increased area under wheat may enable the country to sustain the improved cereal harvest of last year, 1.6 million tonnes. Turkmenistan heavily depends on Amu and Murghab rivers for crop production. Precipitation and snowmelt upstream and hence the levels of water flow in the two rivers are crucial for crop production in the country. Some food shortages were reported last year in Mary province (bordering the Islamic Republic of Iran and Afghanistan) and Dashagouz (bordering Karaklpakistan region of Uzbekistan).

**UZBEKISTAN\* (3 April)**

**Early prospects for winter cereals, mainly wheat and barley, have improved with late winter and early spring precipitation. However, the river flow levels, which is the main source of irrigation, are still below average and ground water levels have reportedly not been sufficiently replenished due to three years of consecutive drought. Some 3.8 million tonnes are tentatively forecast for 2002, nearly 150 000 tonnes higher than the drought reduced harvest in 2001. Prospects for this year's cereal harvest could improve with further precipitation during spring and summer and more importantly increased river flow levels in the two main rivers, Amu and Syr. The worst affected areas for the past two years have been Karakalpakstan and Khorzam autonomous regions, where a large number of people required emergency food assistance.**

**Cereal import requirement for 2001/02 marketing year is estimated at about 1 million tonnes. Food aid requirement is estimated at about 162 000 tonnes, including 60 000 tonnes of wheat, 92 000 tonnes of rice and 10 000 tonnes of maize.**

VIET NAM (2 April)

Harvesting of the winter/spring rice crop is underway in southern regions, where below normal rainfall had only an insignificant effect on the crop. The output is estimated to be slightly below that of 2001. In the northern areas, rainfall has generally been above normal and a good crop is expected. The aggregate paddy production from all seasons in 2002 is tentatively forecast at 32.3 million tonnes, marginally above 31.9 million tonnes in 2001.

Vietnam, the number two rice exporter in the world, plans to export about 3.8 million tonnes of rice in 2002, against 3.5 million tonnes exported in 2001. However, the rice market is under pressure from India's efforts to reduce its rice stocks, and during the first quarter of 2002 there was a sharp decline in Vietnam's rice exports. Consequently, total rice exports in 2002 are likely to be below the target.

YEMEN (3 April)

Rainfall and temperatures for the main, sorghum and millet crops to be harvested towards the end of the year, are reported to be generally normal. Cereal production in 2001 is estimated at about 700 000 tonnes, about 1 percent above the level of the previous year.

As a result of several successive months of rainfall, low numbers of locusts could be present.

Imports of cereals in 2001 - mainly wheat - are estimated at about 2.4 million tonnes, an increase of some 9 percent compared with 2000.

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

**COSTA RICA (18 April)**

Land is being prepared for planting of the 2002/03 first season cereal and bean crops to be started with the arrival of the first rains in April/May. The area planted is forecast to increase from last year's drought affected plantings. Paddy production, the main cereal, in 2001 was below average and imports of rice in marketing year 2002 (January/December) are thus expected to increase to some 65 000 tonnes from some 55 000 tonnes imported in 2001. This reflects the strong domestic demand for this important staple in the population's diet.

**CUBA (20 April)**

Normal to above-normal rains are reported in March in the western and central parts of the country, except for parts in the central province of Cienfuegos, while generally below-normal rains have prevailed in the rest of the island. The absence of adequate rains have affected the developing winter paddy crop which is about to be harvested. Harvesting of the important foreign exchange earner sugar cane crop continues and is expected to end in May. Production is officially forecast at 3.6 million tonnes which compares to 3.5 million tonnes collected in 2001.

Land is being prepared for planting of the 2002/03 first season cereal crops to be started with the arrival of the seasonal rains in late April or early May.

**DOMINICAN REPUBLIC (20 April)**

Planting of the 2002/03 first season maize and sorghum crops has started while harvesting of this year's main paddy crop is due to start from May. An above-average paddy output is anticipated.

Wheat and maize imports in marketing year 2002/03 (July/June) are tentatively forecast at 320 000 tonnes and 700 000 tonnes respectively, similar to the volume of imports in 2001/02. The relatively large amount of maize imports is required to meet the strong demand from the poultry feeding industry.

#### **EL SALVADOR (24 April)**

Preparation for planting of the 2002/03 first season cereal and bean crops has started under generally normal weather conditions. Sowing should start with the arrival of the first rains which are forecast by end-April. Production is expected to recover from last year, when the crops were severely affected by a prolonged drought. The food security situation is tight at the moment and is likely to continue until the first season crop harvest in August. The possibility of alternative employment in rural areas is minimal. Food assistance to some 10 000 drought-affected families should continue until August. In addition, some 16 500 families, victims of last year's February earthquakes, are still receiving food assistance from the international community.

#### **GUATEMALA (19 April)**

Land is being prepared for planting of the 2002/03 first season cereal and bean crops to be started with the arrival of the first seasonal rains by end-April. Production from last year's first season crops was seriously affected by drought, but some recovery took place due to the good second season crop outturns. However, the food supply situation continues to be tight in several of the most affected areas, where food assistance from the international community is still being provided. About 88 out of 102 most affected municipalities have been selected for assistance. In total, about 155 000 people are being assisted, of whom about 60 000 are children suffering from malnutrition. The situation is also difficult for a large number of unemployed and low paid workers from coffee plantations as a result of the crisis affecting the industry caused by the fall in international coffee prices.

#### **HAITI (20 April)**

Planting of the 2002/03 rainfed maize and sorghum crops has started under rather dry weather conditions, while sowing of the important irrigated paddy crop is underway. An average area planted is intended for maize and paddy respectively. Food assistance from the international community continues to be distributed through development projects to most needed groups, mainly in the poorest areas in the north and north-west of the country, which has been particularly affected by the dry weather and where prices of important staples (bananas, beans and maize) are reported to have gone up.

#### **HONDURAS (20 April)**

Land is being prepared under generally dry weather for planting of the 2002/03 first season cereal and bean crops to be started from late April with the arrival of the first seasonal rains. Production is expected to recover from last year, when the first season crops in particular were affected by severe drought. The food supply situation is expected to remain tight until the start of harvesting operations of the first season crops, which should take place from August. Assistance from the international community has been provided to some of the hardest stricken groups in the most drought affected departments of Choluteca, Francisco Morazán, Intibuca, Valle, El Paraiso, Comayagua and El Paraiso, in the south.

#### **MEXICO (16 April)**

Harvesting of the 2002 irrigated wheat crop is about to start in the main growing areas of the north west, including the states of Sonora, Sinaloa and Baja California. The outlook is good and an average output of some 3.2 million tonnes is tentatively forecast. Land is being prepared under favourable weather conditions for planting of the important spring/summer maize crop in the large producing states of Jalisco, México, Michoacán, Chiapas and Puebla, where the bulk of the crop is grown. Plantings are expected to increase from last year's satisfactory level mainly as a result of the support given by government programmes to farmers.

NICARAGUA (3 April)

Land is being prepared for sowing of the 2002/03 first season cereal and bean crops to be started with the expected arrival of the first seasonal rains in late April. A recovery in overall production is anticipated, following the below-average outturns of last year when the main crops (first season crops) were affected by a severe prolonged drought, and the second season crops by the heavy rains and flooding caused by hurricane "Michelle" in November. The food supply situation is nevertheless expected to continue to be tight for the drought affected rural families until harvest of the first season crops, to be started from August. The situation is aggravated by the high number of unemployed and low paid workers from coffee plantations, critically affected by the fall in international coffee prices.

**SOUTH  
AMERICA**

ARGENTINA (24 April)

**Improved weather conditions have benefited the growth of the 2001/02 maize crop following a period of intensive rains at planting (October-December), which resulted in a significant reduction in plantings, and weeks of dry weather in February which adversely affected the developing crop. Harvesting is underway in the main growing areas in northern Buenos Aires province, Santa Fe and Córdoba and maize yields so far are higher than earlier anticipated. By end March, about 15 per cent of the total maize crop had been harvested. Maize output is presently forecast at about 12.5 million tonnes, an improvement over earlier estimates but still below the average of the past 5 years. Weather conditions also favoured development of the paddy crop. Harvesting is underway and an average crop is forecast.**

BOLIVIA (4 April)

Normal weather conditions were reported in March, following heavy rains and flooding in February which affected the development of the 2002 first (main) cereal and potato crops, particularly in the main grain producing eastern department of Santa Cruz. Field operations have consequently been resumed. Harvesting is about to start and the outlook at present is uncertain for the outcome of those crops which were affected by the harsh weather.

BRAZIL (24 April)

Planting of the 2002 wheat crop has started in the main producing southern areas. Intended plantings in the states of Parana, Santa Catarina and Rio Grande do Sul are expected to expand due to higher minimum wheat prices established by the government. Non-wheat producing states, such as Goias, Mato Grosso, Mato Grosso do Sul and Sao Paulo are also expected to plant, attracted by the newly improved minimum prices fixed by the government. Overall, wheat production in 2002 is officially forecast at an above-average of nearly 3.7 million tonnes. Harvesting of the 2002 maize crop is underway. Output is forecast to decline from last year's record mainly due to significant losses in the large producing states of Rio Grande do Sul and Santa Catarina, caused by dry weather during the developing period, principally December and January. Another contributing factor to the decline was the decision of many producers to shift in favour of soybean production. To compensate for these losses in overall maize production, the government intends to encourage farmers increase their second season crop ("safrihna") plantings. An above-average production is forecast for 2002 but short of 2001 record of 41.5 million tonnes. Harvesting of the 2002 paddy crop is well advanced and production is tentatively forecast at an average 7.7 million tonnes (milled), 11 percent above the 2001 crop.

CHILE (4 April)

Harvesting of the 2001 wheat crop has been completed and output collected is provisionally estimated at an above-average 1.8 million tonnes. Harvesting of the 2002 maize crop has started and production is early forecast at a slightly below average level of some 676 000 tonnes.

Wheat imports in marketing year 2001/02 (December/November) are expected to fall from 2000/01 (December/November) volume of 580 000 tonnes to some 300 000 tonnes. Maize imports in marketing year 2002/03 (February/January) should remain close to the previous year's volume of 1.1 million tonnes.

#### COLOMBIA (4 April)

Harvesting of the 2001 second cereal crops has been completed and average to above-average outputs of wheat and maize respectively have been collected. A slightly above-average output of paddy has also been harvested. Planting of the 2002 cereal crops is about to start and expanded plantings are tentatively forecast, mainly as a result of government incentives and favourable weather conditions.

Food assistance from the international community is being provided to the internally displaced population, victims of the civil strife affecting the country.

#### ECUADOR (19 April)

Heavy rains and flooding and resulting landslides, in late February and the early half of March, along the coastal areas of the provinces of El Oro, Guayas and Manabi, have inflicted death to a number of people and left more than 400 families temporarily homeless. Relief and food assistance from the international community has been provided to the affected population. Harvesting of the paddy crop in the stricken areas has been disrupted while the start of the harvesting operations of the maize crop has been delayed. An assessment of damage has not been available yet, but it is reported that some losses might have been incurred to the crops. Both crops had been earlier affected by dry weather late in 2001 and beginning of this year. Damage to the important coffee crop is also reported. The Government has declared a state of emergency in the affected areas.

#### PERU (20 April)

Heavy rains and flooding in northern parts, particularly in the Department of Piuras, have affected thousands of people and left hundreds homeless. It is officially reported that the paddy and cotton crops have suffered some damage. Planting of the 2002 wheat crop has been completed and harvesting is due to start from May. A modest increase in the area planted compared to 2001 is reported. Production is forecast early at an above-average 190 000 tonnes. The bulk of the white maize crop has been planted (August – December 2001) and a small decline in the area planted with respect to 2001 is reported. A decline in yellow maize plantings for the same period is also being reported. Yellow maize, as well as white maize, are planted virtually all year around, although the bulk of sowing operations for the latter type is concentrated from August to January. Yellow maize plantings in the following months are nevertheless expected to increase and exceed the above-average level reached in 2001. The area planted to irrigated paddy for the same period August– December 2001 shows a significant increase with respect to 2001 and represents, on the average, about 40 per cent of the annual plantings. An increase in total plantings relative to 2001 is presently forecast.



#### URUGUAY (4 April)

Land is being prepared for planting of the 2002 wheat crop and the area planted is expected to increase slightly with respect to the 2001 crop. Harvesting of the 2002 maize crop is well advanced and output is tentatively forecast at a near-average level. Harvesting of the important paddy crop is underway and production is forecast to be close to last year's below-average output of about 1 million tonnes.

#### VENEZUELA (4 April)

Planting of the 2002 coarse grain and paddy crops has only started and the intended area planted should be close to the average of the past 5 years, while that of paddy is expected to decline from the 2001 average level.

### **EUROPE**

#### EC (2 April)

Wheat output in 2002 is forecast to increase after a significant expansion (+10 percent) in the area sown last autumn, mostly at the expense of other winter grains for which areas are expected to be down. The largest wheat area expansions have been in France and the United Kingdom, but significant increases are also reported for Germany, Italy and Spain among the major producers. Furthermore, generally mild winter conditions have favoured crop development throughout most of the Community and yield prospects are good in most parts. The bulk of spring grain planting has still to take place in the coming weeks. Generally dry weather in late March favoured fieldwork throughout the area and was especially welcome in Germany where earlier conditions had been too wet.

#### ALBANIA (4 April)

Generally normal weather conditions have prevailed in the major winter grain areas. Wheat is the main crop grown and output is expected to remain about the average of the recent years at between 300 000 to 350 000 tonnes.

#### BELARUS (2 April)

Latest information indicate that winter cereals, mainly wheat and rye, have not been significantly affected by prolonged frost and snow. Spring sowing campaign has been progressing well ahead of schedule and the prospects are for an improved harvest, similar to the previous year. FAO tentatively estimates 5.2 million tonnes of grain harvest in 2002, including 0.8 million tonnes of wheat, 1.7 million tonnes of barley and 1.6 million tonnes of rye. Cereal import requirements in 2001/02 marketing year was estimated at 717 000 tonnes, which is above the previous year's import estimates of 681 000 tonnes.

#### BOSNIA-HERZEGOVINA (3 April)

Recent reports indicate that cereal harvest this year may total 1.1 million tonnes, nearly 100 000 tonnes higher than the flood and hail affected harvest in 2001. The harvest this year will depend on weather conditions, in particular seasonal floods and hail, which normally occur during late spring and early summer. Total domestic consumption needs are estimated at 1.3 million tonnes of cereals, hence import requirement in the ensuing marketing year is estimated at 230 000 tonnes, including 80 000 tonnes of food aid.

#### BULGARIA (3 April)

Predominantly dry conditions persist for the second year in succession. Despite adequate snow cover in December and early January, and heavy rains in mid-March, subsoil moisture in late March was reported to be below the previous year's already low level. Combined with the dry conditions, unusually warm temperatures have been recorded since the second half of January, reducing the hardness of the winter crops and thus rendering them vulnerable should there be a late cold spell. The area sown to winter grains (mostly wheat and barley) last autumn is officially reported to have increased by about 5 percent but planting was late in many parts and carried out under predominantly dry conditions, as in the preceding year. Although the condition of these crops is reported as satisfactory in late March more rain is needed for vegetative growth in the coming weeks. Wheat output is expected to remain similar to last year's level. Early indications for spring planting point to a reduction in the maize area in response to the ongoing drought and the poor performance of the crop in the past two years. Land will likely be shifted to producing drought-hardier non-cereals such as sunflower.

#### CROATIA (3 April)

Early reports indicate that cereal harvest in 2002 will match the 2001 harvest at 3.1 million tonnes. Cereal harvest in 2002 is seen to include 912 000 tonnes of wheat, 2 million tonnes of maize and 165 000 tonnes of barley. Cereal exports during the ensuing marketing year is estimated at about 250 000 tonnes, including 150 000 tonnes of maize and 100 000 tonnes of wheat.

#### CZECH REPUBLIC (3 April)

The winter wheat area is estimated at 840 000 hectares, about 4 percent below the previous year and below the recent average. However, the prospects for the overall wheat output still depend on the level of spring wheat plantings in the coming weeks. Spring wheat accounted for about 6 percent of the total wheat area last year. Barley is the main coarse grain crop in the Czech Republic; as for wheat, the winter barley area is reported to have decreased but the bulk of the barley is spring sown so the prospects for the total crop are still very unsure.

#### ESTONIA (3 April)

Latest reports indicate that cereal harvest this year would be at least as high as last year's at 579 000 tonnes. Ample soil moisture and favourable weather conditions have contributed to maintaining the improved harvest of the past two years. Total cereal consumption requirement in the country is estimated at 0.8 million tonnes per year. Import requirement for the current marketing year is estimated at 283 000 tonnes, including 147 000 tonnes of wheat, 68 000 tonnes of maize and 30 000 tonnes of barley.

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

Generally satisfactory weather conditions since the autumn grain planting period point to some recovery in cereal yields in 2002 after predominantly dry conditions in the past two years. Output of wheat should return to around the normal 300 000 tonnes level after falling by about one-third last year. However, in many localized parts, particularly in the north-west of the country, agricultural production is still compromised as a result of drought and conflict.

#### HUNGARY (3 April)

Latest estimates point to a lower winter grain area despite generally favourable weather conditions for planting last autumn and lower output is expected. The decrease is largely in response to low prices as a result of abundant stocks following last year's good harvests. The winter wheat area is estimated at 1.1 million hectares (2001: 1.2 million hectares), and that of winter barley at 220 000

hectares (2001: 370 000 hectares). Weather conditions remain generally favourable as of late March although more rainfall would be beneficial in southern parts of the country.

LATVIA (3 April)

Winter cereals covered similar areas this year compared to 2001 and winterkill has been minimal with a high proportion of cereal crops in good condition, while spring planting is progressing with a satisfactory pace. Therefore, FAO tentatively forecasts cereal harvest in 2002 at 894 000 tonnes from an area of 420 000 hectares, which is, respectively, similar to 2001. Grain output in 2002 is seen to include 390 000 tonnes of wheat, 260 000 tonnes of barley and 120 000 tonnes of rye.

LITHUANIA (3 April)

Prospects for winter cereals are good and spring planting campaign has begun ahead of time owing to favourable weather conditions, below average winterkill and adequate soil moisture. FAO, therefore, forecasts cereal harvest in 2002 at about 2.6 million tonnes compared with 2.5 million tonnes in 2001. Cereal exports in 2001/02 marketing year are estimated at 191 000 tonnes, mainly wheat (100 000 tonnes) and rye (80 000 tonnes), while cereal import requirement is estimated at 113 000 tonnes.

MOLDOVA (2 April)

Despite harsh winter and long periods of frost, winterkill has not been significant and winter crops are seen to match the improved harvest of the preceding year. Given favourable weather conditions prevail in the ensuing season, Moldova is set to harvest 2.7 million tonnes of grains in 2002, which is similar to 2001 but nearly 750 000 tonnes higher than the average harvest of the previous six years. Moldova, despite being a predominantly agrarian economy, will remain a net importer of grains in 2002/03, mainly food grade wheat (20 000 tonnes) and some rice (6 000 tonnes).

POLAND (3 April)

Latest information puts the winter grain area unchanged from the previous year. Wheat plantings are estimated at about 2.6 million hectares, rye at 2 million hectares, and barley at 1.1 million hectares. Weather conditions have been generally favourable so far and output should be similar to the previous year's.

ROMANIA (3 April)

Beneficial rainfall in eastern parts in March improved conditions for winter crops development and improved spring crop planting prospects but more rainfall is needed, especially in the west of the country. Latest information indicates a significant reduction in winter wheat plantings last autumn due partly to adverse weather and partly to a shift of land out of cereal crops encouraged by the Government. The winter wheat area is estimated at 2.16 million hectares, 14 percent down from 2001 and production is expected to fall accordingly.

RUSSIAN FEDERATION (2 April)

Spring planting began earlier than usual and the area under spring crops is anticipated to exceed the 2001 area by one million hectares. Winter cereals covered 16.5 million hectares of land in 2002, 3 million hectares more than in 2001. Winter-kill and replanting of winter crops has been minimal and below average. Harvest is tentatively forecast at 87 million tonnes in 2002, nearly 2 million tonnes higher than the 2001 harvest, which was the highest since the Soviet era. Cereal exports in 2001/02 marketing year are estimated at about 4.5 million tonnes while cereal imports are estimated at about 2.3 million tonnes. In 2000/01 marketing year Russia imported about 2.6 million tonnes and exported about 1.3 million tonnes of cereals.

**Civil strife and military operation in Chechnya continue to disrupt life and agricultural activities. WFP and some international NGOs continue to provide supplementary food and non-food assistance to internally displaced and refugee population. WFP intends to provide supplementary food assistance to some 310 000 people in Ingushetia and Chechnya. The current emergency programme, which began last January, is expected to continue until the end of June this year. By then some 65 000 tonnes of food would have been distributed to 270 000 internally displaced and vulnerable people.**

**SLOVAK REPUBLIC (4 April)**

The wheat area is estimated to have decreased slightly this year to about 400 000 hectares. Weather conditions have been generally satisfactory during the season so far.

**THE UKRAINE (2 April)**

Winter grains this year have suffered from overwintering and extensive frost at critical crop development stages this year. Therefore, winter cereal harvest (wheat, barley and rye) in 2002 is estimated at 20.6 million tonnes, nearly 3 million tonnes less than the previous year. FAO tentatively estimates total grain harvest of 33.8 million tonnes in 2002 compared with 36.7 million tonnes the previous year. Grain harvest this year includes 18.5 million tonnes of wheat, 8 million tonnes of barley and 3.2 million tonnes of maize.

Cereal exports in 2001/02 marketing year is estimated over 8 million tonnes and imports are estimated at only 220 000 tonnes. Ukraine exported some 1.7 million tonnes of cereals and imported some 858 million tonnes in 2000/01 marketing year. This year's exports have been boosted by lower tariffs on Ukrainian cereals in the EU.

**YUGOSLAVIA, FED. REP. OF (SERBIA AND MONTENEGRO)\* (3 April)**

**Prospects for cereal harvest this year is favourable and seen to match the sharply recovered harvest of 2001 at 8.8 million tonnes. Bad weather conditions last winter hampered the planned increase in area sown to cereals, in particular wheat, which if realised would have significantly increased cereal output in 2002. Provided that sufficient seeds and fertilisers are available and favourable weather conditions prevail, cereal harvest this year may be at least as high as the 2001 harvest. Cereal harvest last year included 2.9 million tonnes of wheat, 5.5 million tonnes of maize and 303 000 tonnes of barley. Current domestic cereal utilisation is estimated at 8.2 million tonnes. Therefore, cereal exports for 2001/02 marketing year is estimated at 700 000 tonnes, including 400 000 tonnes of wheat and 300 000 tonnes of maize.**

**WFP has extended its emergency food assistance programme, which will be continuously phased out by December 2002. WFP currently assists some 575 000 beneficiaries, of which 215 000 are refugees and 360 000 social cases, the latter will be phased out from the combined programme by mid 2002.**

**NORTH  
AMERICA**

**CANADA (2 April)**

The bulk of the 2002 wheat crop is due to be sown from May to June. Early forecasts point to a slight reduction in the area planted with land being switched to other grains and non-cereals. However, assuming a return to normal weather after last year's dry conditions, wheat yields should recover significantly and the overall crop is tentatively forecast to increase by about 12 percent from 2001. The areas planted to barley and oats (the two main coarse grains) are expected to increase by 15 percent and 30 percent respectively and, with a recovery in yields expected for these grains also, overall coarse grains output in 2002 is forecast to rise significantly.

#### UNITED STATES (2 April)

According to the USDA Prospective Planting Report (28 April), all wheat plantings for the 2002 crop are forecast to fall by about 1 percent to 23.9 million hectares, the lowest level since 1972. The winter wheat area is estimated to be virtually unchanged from the previous year, while spring wheat plantings are forecast to decrease by about 3 percent. Regarding harvested area and yield it is still too early to make firm forecasts. Winter crops across most of the Plains have been stressed by dry conditions since planting last autumn and their overall condition rating at the beginning of April was somewhat below normal. However, despite this, a repeat of last year's exceptionally high winter kill-out rates is not expected. Assuming normal weather conditions for the remainder of the season and that the harvested/planted ratio and yields for the overall wheat crop are about the recent (3-years) average, aggregate wheat output in 2002 could increase by 5 percent to about 56 million tonnes.

Some early coarse grains crops are already in the ground in southern parts, but the bulk of the maize planting in the Corn Belt states takes place from late April. Early indications in the USDA Prospective Planting Report point to a 4 percent increase in maize plantings throughout most of the Corn Belt after reductions last year due to adverse wet weather. By contrast, a sharp 12 percent decrease is forecast for sorghum. The rice area in 2002 is expected to decrease marginally, by less than 1 percent.

### **OCEANIA**

#### AUSTRALIA (2 April)

Planting of the main 2002 wheat and coarse grains crops is due to start in May. Early official forecasts indicate a marginal increase in wheat production to almost 24 million tonnes from 23.8 million tonnes in 2001. This very tentative forecast is based on the expectation of a 2 percent increase in area and an assumption of average seasonal weather conditions, leading to slightly lower yields than in the previous year. By contrast, the area sown to winter barley (the main coarse grain crop) is forecast to decrease by about 2 percent after last year's record crop. Harvest of the bulk of the minor 2002 summer coarse grains crops, mainly sorghum and maize, will start soon. Output of sorghum is forecast to fall by about 13 percent to 1.8 million tonnes as a result of a decrease in plantings and the adverse effect of hot dry conditions during January in some parts.

#### COOK ISLANDS (31 March)

Sanitary measures are still in force to contain the spread of the fruit fly in the main island of Rarotonga. The insect is considered one of the most destructive pests of fruit and vegetables. The presence of the fruit fly was initially discovered in late November, but a new discovery in early February, the first in the previous four weeks, poses a new threat to the island's food crops.

#### FIJI (28 March)

Heavy rains and flooding, particularly in the northwestern parts of Viti Levu, Fiji's main island, at the end of February, caused extensive damage to rural infrastructure and coastal sea walls. The rains also affected the agricultural sector. Some 15 000 tonnes of sugar cane are reported to be damaged, which represents about 5 per cent of the annual crop estimate. Serious damage was also incurred to cassava plantations and vegetables. About 2 000 rural families are considered affected by the disaster.

#### TONGA (28 March)

Relief assistance, including food supplies and construction materials, continues to arrive in Tonga's small island of Vava'u, following the destruction caused by cyclone "Waka" in early January. Besides the enormous damage to rural infrastructure and housing, most of the island's foodcrops were destroyed by the storm.

**ESTIMATED CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/  
a) 2001/02 or 2002 estimates (in thousand tonnes)**

COUNTRY	Marketing year	2000/01 or 2001			2001/02 or 2002			
		Actual imports			Total import requirements (excluding re-exports)	Import position		
		Commercial purchases	Food aid	Total commercial and aid		Total commercial and aid	Food aid allocated committed or shipped	Commercial purchases
<b>AFRICA</b>		<b>30 405.7</b>	<b>2 941.4</b>	<b>33 347.1</b>	<b>28 779.0</b>	<b>11 833.1</b>	<b>938.8</b>	<b>10 894.3</b>
<b>Northern Africa</b>		<b>15 229.1</b>	<b>298.3</b>	<b>15 527.4</b>	<b>15 150.0</b>	<b>8 858.6</b>	<b>38.8</b>	<b>8 819.8</b>
Egypt	July/June	10 629.9	20.7	10 650.6	10 550.0	7 204.1	34.3	7 169.8
Morocco	July/June	4 599.2	277.6	4 876.8	4 600.0	1 654.5	4.5	1 650.0
<b>Eastern Africa</b>		<b>4 220.8</b>	<b>1 774.1</b>	<b>5 994.9</b>	<b>3 740.0</b>	<b>580.6</b>	<b>304.9</b>	<b>275.7</b>
Burundi	Jan./Dec.	64.2	45.8	110.0	61.0	2.7	2.7	0.0
Comoros	Jan./Dec.	46.0	0.0	46.0	46.0	0.0	0.0	0.0
Djibouti	Jan./Dec.	58.8	9.2	68.0	63.0	9.9	9.9	0.0
Eritrea	Jan./Dec.	65.4	269.9	335.3	140.0	20.5	20.5	0.0
Ethiopia	Jan./Dec.	37.7	844.8	882.5	295.0	11.1	11.1	0.0
Kenya	Oct./Sept.	1 697.7	348.2	2 045.9	1 045.0	195.5	108.2	87.3
Rwanda	Jan./Dec.	144.2	30.8	175.0	170.0	2.1	2.1	0.0
Somalia	Aug./July	206.7	34.3	241.0	320.0	16.9	16.5	0.4
Sudan	Nov./Oct.	1 389.8	158.1	1 547.9	1 270.0	22.0	22.0	0.0
Tanzania	June/May	510.3	33.0	543.3	330.0	299.9	111.9	188.0
<b>Southern Africa</b>		<b>1 390.1</b>	<b>416.2</b>	<b>1 806.3</b>	<b>1 852.0</b>	<b>1 572.0</b>	<b>359.6</b>	<b>1 212.4</b>
Angola	April/March	351.9	200.9	552.8	581.0	515.9	168.9	347.0
Lesotho	April/March	224.9	3.1	228.0	181.0	180.8	2.8	178.0
Madagascar	April/March	369.8	26.3	396.1	205.0	85.0	28.6	56.4
Malawi	April/March	12.2	27.2	39.4	125.0	124.6	6.6	118.0
Mozambique	April/March	271.3	155.5	426.8	499.0	405.9	131.9	274.0
Swaziland	May/April	87.0	0.0	87.0	78.0	78.2	1.2	77.0
Zambia	May/April	73.0	3.2	76.2	183.0	181.6	19.6	162.0
<b>Western Africa</b>		<b>8 824.6</b>	<b>377.5</b>	<b>9 202.1</b>	<b>7 299.0</b>	<b>782.7</b>	<b>204.5</b>	<b>578.2</b>
<b>Coastal Countries</b>		<b>6 405.0</b>	<b>175.7</b>	<b>6 580.7</b>	<b>5 225.0</b>	<b>573.4</b>	<b>93.8</b>	<b>479.6</b>
Benin	Jan./Dec.	113.1	14.3	127.4	114.0	12.0	12.0	0.0
Cote d'Ivoire	Jan./Dec.	1 378.0	5.7	1 383.7	1 025.0	55.6	2.6	53.0
Ghana	Jan./Dec.	468.1	53.7	521.8	461.0	51.6	35.1	16.5
Guinea	Jan./Dec.	314.3	33.2	347.5	330.0	18.0	18.0	0.0
Liberia	Jan./Dec.	187.8	16.3	204.1	210.0	8.4	6.4	2.0
Nigeria	Jan./Dec.	3 628.8	0.0	3 628.8	2 770.0	407.8	0.0	407.8
Sierra Leone	Jan./Dec.	230.0	46.5	276.5	225.0	20.0	19.7	0.3
Togo	Jan./Dec.	84.9	6.0	90.9	90.0	0.0	0.0	0.0
<b>Sahelian Countries</b>		<b>2 419.6</b>	<b>201.8</b>	<b>2 621.4</b>	<b>2 074.0</b>	<b>209.3</b>	<b>110.7</b>	<b>98.6</b>
Burkina faso	Nov./Oct.	216.8	18.9	235.7	171.0	12.7	12.7	0.0
Cape Verde	Nov./Oct.	41.5	49.7	91.2	93.0	39.3	39.3	0.0
Chad	Nov./Oct.	69.2	33.7	102.9	68.0	1.3	1.3	0.0
Gambia	Nov./Oct.	163.1	1.2	164.3	123.0	5.9	3.4	2.5
Guinea Bissau	Nov./Oct.	45.9	7.3	53.2	70.0	5.7	5.7	0.0
Mali	Nov./Oct.	108.2	6.5	114.7	90.0	0.9	0.9	0.0
Mauritania	Nov./Oct.	280.0	32.7	312.7	269.0	92.4	3.7	88.7
Niger	Nov./Oct.	622.3	29.5	651.8	345.0	32.6	32.6	0.0
Senegal	Nov./Oct.	872.6	22.3	894.9	845.0	18.5	11.1	7.4
<b>Central Africa</b>		<b>741.1</b>	<b>75.3</b>	<b>816.4</b>	<b>738.0</b>	<b>39.2</b>	<b>31.0</b>	<b>8.2</b>
Cameroon	Jan./Dec.	318.8	6.1	324.9	300.0	0.9	0.9	0.0
Cent.Afr.Rep.	Jan./Dec.	32.4	0.6	33.0	38.0	0.0	0.0	0.0
Congo, Dem.Rep.	Jan./Dec.	219.4	28.6	248.0	250.0	33.5	25.3	8.2
Congo, Rep.	Jan./Dec.	147.6	33.9	181.5	125.0	0.0	0.0	0.0
Eq. Guinea	Jan./Dec.	16.5	1.5	18.0	15.0	0.0	0.0	0.0
Sao Tome	Jan./Dec.	6.4	4.6	11.0	10.0	4.8	4.8	0.0

**ESTIMATED CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/  
a) 2001/02 or 2002 estimates (in thousand tonnes)**

COUNTRY	Marketing year	2000/01 or 2001			2001/02 or 2002			
		Actual imports			Total import requirements (excluding re-exports)	Import position		
		Commercial purchases	Food aid	Total commercial and aid		Total commercial and aid	Food aid allocated committed or shipped	Commercial purchases
<b>ASIA</b>		<b>31 089.4</b>	<b>3 915.3</b>	<b>35 004.7</b>	<b>38 129.0</b>	<b>14 546.4</b>	<b>2 714.3</b>	<b>11 832.1</b>
Afghanistan	July/June	957.6	246.3	1 203.9	2 178.0	344.2	275.9	68.3
Armenia	July/June	372.0	95.0	467.0	338.0	67.1	36.1	31.0
Azerbaijan	July/June	794.7	10.3	805.0	802.0	303.4	11.9	291.5
Bangladesh	July/June	1 169.8	511.1	1 680.9	1 760.0	1 427.3	517.3	910.0
Bhutan	July/June	59.0	0.0	59.0	54.0	2.9	2.9	0.0
Cambodia	Jan./Dec.	69.1	31.7	100.8	60.0	31.7	20.5	11.2
China 2/	July/June	8 729.4	70.6	8 800.0	11 700.0	4 994.2	33.2	4 961.0
Georgia	July/June	560.0	97.0	657.0	536.0	285.6	105.0	180.6
India	April/March	116.4	191.8	308.2	282.0	176.3	171.0	5.3
Indonesia	April/March	6 919.0	446.1	7 365.1	6 988.0	2 481.5	231.5	2 250.0
Korea, D.P.R.	Nov./Oct.	705.8	1 428.7	2 134.5	1 586.0	425.4	425.4	0.0
Kyrgyz Republic	July/June	78.0	61.0	139.0	165.0	86.2	20.1	66.1
Laos	Jan./Dec.	25.0	12.0	37.0	37.0	15.5	15.5	0.0
Maldives	Jan./Dec.	29.0	8.0	37.0	37.0	0.0	0.0	0.0
Mongolia	Oct./Sept.	139.9	63.4	203.3	202.0	48.3	31.3	17.0
Nepal	July/June	69.7	9.3	79.0	95.0	6.9	6.9	0.0
Pakistan	May/April	147.8	2.2	150.0	633.0	221.9	221.9	0.0
Philippines	July/June	4 505.4	104.3	4 609.7	4 207.0	1 859.7	249.5	1 610.2
Sri Lanka	Jan./Dec.	1 059.0	119.7	1 178.7	1 120.0	72.8	9.8	63.0
Syria	July/June	1 615.0	31.1	1 646.1	1 090.0	773.8	11.8	762.0
Tajikistan	July/June	340.0	159.0	499.0	793.0	386.3	152.4	233.9
Turkmenistan	July/June	20.0	6.0	26.0	45.0	14.9	7.5	7.4
Uzbekistan	July/June	569.0	38.0	607.0	1 036.0	454.6	156.6	298.0
Yemen	Jan./Dec.	2 038.8	172.7	2 211.5	2 385.0	65.9	0.3	65.6
<b>CENTRAL AMERICA</b>		<b>3 923.5</b>	<b>260.4</b>	<b>4 183.9</b>	<b>4 074.0</b>	<b>2 034.6</b>	<b>243.0</b>	<b>1 791.6</b>
Cuba	July/June	1 657.4	1.9	1 659.3	1 687.0	575.3	6.0	569.3
Guatemala	July/June	983.1	64.5	1 047.6	1 022.0	612.8	93.7	519.1
Haiti	July/June	511.0	104.9	615.9	550.0	254.3	78.7	175.6
Honduras	July/June	559.4	54.3	613.7	525.0	333.1	17.1	316.0
Nicaragua	July/June	212.6	34.8	247.4	290.0	259.1	47.5	211.6
<b>SOUTH AMERICA</b>		<b>833.4</b>	<b>143.9</b>	<b>977.3</b>	<b>948.0</b>	<b>488.8</b>	<b>96.0</b>	<b>392.8</b>
Bolivia	July/June	200.6	65.4	266.0	268.0	37.8	26.6	11.2
Ecuador	July/June	632.8	78.5	711.3	680.0	451.0	69.4	381.6
<b>OCEANIA</b>		<b>388.5</b>	<b>0.0</b>	<b>388.5</b>	<b>383.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>
Kiribati	Jan./Dec.	8.0	0.0	8.0	8.0	0.0	0.0	0.0
Papua New Guinea	Jan./Dec.	325.5	0.0	325.5	320.0	0.0	0.0	0.0
Samoa	Jan./Dec.	17.0	0.0	17.0	17.0	0.0	0.0	0.0
Solomon Isl.	Jan./Dec.	26.0	0.0	26.0	26.0	0.0	0.0	0.0
Tuvalu	Jan./Dec.	1.0	0.0	1.0	1.0	0.0	0.0	0.0
Vanuatu	Jan./Dec.	11.0	0.0	11.0	11.0	0.0	0.0	0.0
<b>EUROPE</b>		<b>643.4</b>	<b>92.6</b>	<b>736.0</b>	<b>856.0</b>	<b>138.2</b>	<b>138.2</b>	<b>0.0</b>
Albania	July/June	326.1	2.9	329.0	309.0	32.7	32.7	0.0
Bosnia&Herzegovina	July/June	215.0	75.0	290.0	290.0	104.6	104.6	0.0
Macedonia, FYR	July/June	102.3	14.7	117.0	257.0	0.9	0.9	0.0
<b>TOTAL</b>		<b>67 283.9</b>	<b>7 353.6</b>	<b>74 637.5</b>	<b>73 169.0</b>	<b>29 041.1</b>	<b>4 130.3</b>	<b>24 910.8</b>

SOURCE: FAO

1/ Includes food deficit countries with per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. U.S.\$ 1 445 in 1995) which is in accordance with the guidelines and criteria agreed to by the CFA should be given priority in the allocation of food aid. 2/ Includes import requirements of Taiwan Province.

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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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