



Crop Prospects and Food Situation

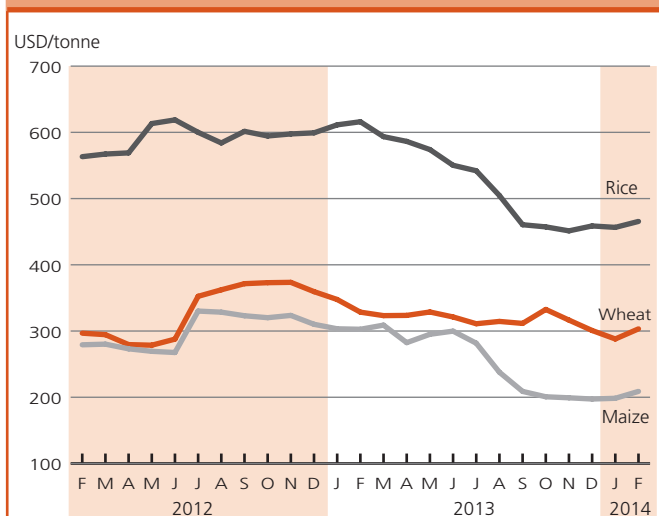
HIGHLIGHTS

- **FAO's forecasts for global cereal production, consumption, trade and stocks in 2013/14 have all been raised since February**, with overall supply conditions significantly improved compared to the previous season.
- **Export prices of wheat rose in February mainly on concerns about the 2014 winter wheat crop in the United States.** Prices of maize also increased, supported by strong domestic and export demand for feed and industrial use. Overall, however, cereal export prices remained below their year-earlier levels.
- **Aggregate cereal imports in LIFDCs in 2013/14 are estimated at a near-record level mainly due to reduced harvests in Africa**, overall stagnant domestic production and rising demand.
- **In the Central African Republic, continued widespread conflict has displaced large numbers of people and sharply increased the dire food security situation.**
- **In Eastern Africa, food security conditions have deteriorated sharply in South Sudan** since the conflict erupted in mid-December, and about 3.7 million people are estimated to be in need of emergency assistance.
- **In Western Africa, the overall food security situation has remained stable following an above average 2013 cereal harvest.** However, over 20 million people are estimated to be in need of food assistance due to insecurity and reduced crops in parts of the Sahel.
- **In Southern Africa, tighter maize supplies and high food prices have affected access to food, mainly to vulnerable groups;** however, conditions are expected to improve with a favourable production outlook in 2014.
- **In North Africa, early prospects for the 2014 winter wheat and coarse grains crops, to be harvested from May, are favourable.**
- **In the Far East, overall early prospects for the subregion's 2014 wheat crop are favourable, with record outputs expected in India and China.** However, more than 4 million people still remain displaced in **the Philippines** by Typhoon Haiyan.
- **Conflict in the Syrian Arab Republic continues to affect agricultural production, trade and humanitarian aid distribution.** The number of people in need of urgent food and livelihood assistance is estimated at about 6.3 million. In **Yemen**, some 43 percent of the population is estimated to be food insecure.
- **In South America, overall prospects for the first season 2014 maize crop remain favourable despite dry spells in parts, as improved rainfall in early 2014 prevented significant yield reductions in the main producing countries - Argentina and Brazil.** In Bolivia severe floods hit the northern El Beni department affecting the livestock sector and causing localized crop losses.
- **FAO estimates that globally 33 countries, including 26 in Africa, are in need of external assistance for food due to or a combination of conflict, crop failures, and high domestic food prices.**

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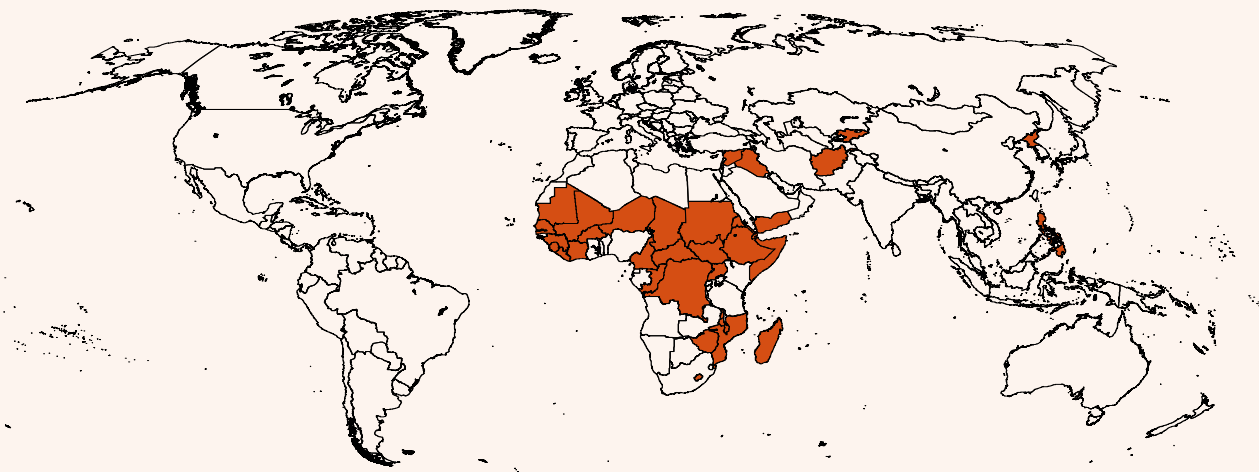
Selected international cereal prices



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

Countries requiring external assistance for food¹

World: 33 countries



country requiring
external assistance
for food

AFRICA (26 countries)

Exceptional shortfall in aggregate food production/supplies

Central African Republic

Crop production in 2013 sharply declined from last year's level due to prevailing civil insecurity. The number of people in need of food assistance was estimated in November at about 1.3 million, about 30 percent of the rural population. IDPs increased sharply in December and January to 714 000 following a further escalation of violence in December 2013.

Zimbabwe

Tight maize supplies in 2014, following a reduced domestic harvest in the previous year, caused a deterioration in food security conditions, particularly in southern and western parts. An estimated 2.2 million people were assessed to be food insecure until the start of the main harvest in April, significantly above the 1.67 million in the first quarter of 2013.

Widespread lack of access

Bukina Faso

A massive influx of refugees from Mali has put additional pressure on local food supplies. About 50 000 Malian refugees are estimated to be living in the country as of November 2013.

Chad

Influx of refugees (over 467 000 people from the Sudan's Darfur region, the Central African Republic and northern Nigeria) and the return of an estimated 350 000 Chadians have put additional pressure on the local food supply affecting food security.

Djibouti

About 70 000 people are still severely food insecure, mainly in pastoral southeastern areas that received below average July-September rains and depend on humanitarian assistance.

Eritrea

Vulnerability to food insecurity due to economic constraints.

Guinea

Despite improved access to food in recent months, driven mostly by lower prices of imported commodities, assistance is still needed to overcome the lingering effects of several years of high food prices and general inflation.

Liberia

Slow recovery from war related damages, inadequate social services and infrastructure, poor market access and presence of some 58 000 Ivorian refugees in the country (as of January 2014) result in the need for continued international support.

Malawi

In spite of an above-average national maize harvest in 2013, an estimated 1.9 million persons in 2013/14 were assessed to be food insecure. Continuing increases in the price of maize and localised production short falls contributed to the poor food security conditions.

Mali

Insecurity in northern Mali has disrupted commodity flows and resulted in large population displacement, worsening the already precarious food security situation created by the 2011 drought. There were 283 000 IDPs in the country and over 169 000 Malian refugees in neighbouring countries as of November 2013. Another below-average crop was gathered in 2013, and about 3.3 million people are estimated to be at risk of food insecurity.

Mauritania

More than 67 000 Malian refugees have been registered in the southeastern part of the country. Moreover, Mauritania continues to be affected by relatively high domestic food prices. About 470 000 people are estimated to be at risk of food insecurity.

Niger

The country has been struck by successive severe food crises in recent years that resulted in depletion of household assets and high level of indebtedness. Another below-average crop was gathered in 2013. About 4.2 million people are estimated to be at risk of food insecurity.

Sierra Leone

Despite improved access to food in recent months, driven mostly by lower prices of imported commodities, assistance is still needed to overcome the lingering effects of several years of high food prices and general inflation.

Severe localized food insecurity**Cameroon**

In North and Far North regions, recurrent climatic shocks in recent years have negatively impacted agricultural activities, resulting in localized crop failures. This has led to severe food insecurity and malnutrition for about 615 000 people. In addition, since May 2013, northern Cameroon received more than 12 000 Nigerian refugees, while the 16 684 refugees received from early 2013 from the Central African Republic are mainly hosted in the eastern region.

Congo

Despite the recovery from the floods and the explosion in the capital in 2012, the country still faces significant problems of food insecurity: 216 000 people are food-insecure (8 percent of all households), of which 37 000 people face poor food consumption and 179 000 borderline food consumption levels.

Côte d'Ivoire

Conflict related damage to agriculture in recent years and the lack of support services mainly in the northern regions. The 2011 post election crisis forced thousands of people to leave the country and seek refuge, mostly in eastern Liberia where some 58 000 Ivorian refugees were still living as of January 2014.

Democratic Republic of the Congo

The number of people in need of food assistance was estimated in December 2013 at about 6.7 million, with a 5 percent increase compared to June 2013. The areas most affected by severe food insecurity (IPC phase 4: "Humanitarian Emergency") are the conflict affected Maniema, Oriental and Katanga provinces. As of late December 2013, the total number of IDPs was estimated at more than 2.9 million, with a 12 percent increase compared to June 2013. In addition, since early 2013, the DRC has received about 53 000 refugees from the CAR, and about 120 000 returnees who were expelled from Angola.

Ethiopia

The overall food security conditions have improved with the good harvests from the 2013 main "meher" season. However, about 2.4 million people are still estimated to be in need of humanitarian assistance.

Lesotho

Food security conditions remain stable, however an estimated 223 000 persons were assessed to be food insecure in 2013/14 and require assistance until the start of the main harvest in April 2014.

Madagascar

Lower rice production (18 percent below average) and higher prices in 2013 contributed to a deterioration in food security conditions. Southwestern areas are of particular concern, following the impact of the locust plague and Cyclone Haruna.

Mozambique

Overall satisfactory food security situation, benefiting from favourable 2013 harvests (main and secondary season). However, high prices continue to constrain food access.

Senegal

Cereal production in 2013 is estimated to be 8 percent below the average. Already in 2012, production shortfalls and high food prices led to a deterioration of the food security situation in several parts of the country. About 2.2 million people are estimated to be at risk of food insecurity this year.

Somalia

About 600 000 people are estimated to be in need of emergency assistance, down from 870 000 at the end of 2013, mainly IDPs and poor households in some pastoral central and northwestern areas with below average livestock production.

South Sudan

The number of severely food insecure people increased dramatically to about 3.7 million following the conflict that erupted in mid December 2013.

Sudan

The number of people estimated to be in need of humanitarian assistance, mainly IDPs in conflict-affected areas, is estimated at about 3.3 million people.

Uganda

About 100 000 people in Karamoja region are estimated to be severely food insecure following two years of below average crop production.

ASIA (7 countries)**Exceptional shortfall in aggregate food production/supplies****Iraq**

Severe civil insecurity.

Syrian Arab Republic

Due to worsening civil conflict, 6.3 million people are estimated to be facing severe food insecurity. Although some international food assistance is provided, the Syrian refugees are also putting strain on other countries in the region.

Widespread lack of access**Democratic People's Republic of Korea**

Despite a small increase in the aggregate food production for a third year in a row in 2013/14, the food security situation remains unsatisfactory with 84 percent of households having borderline or poor food consumption. While the cereal import requirement of 340 000 tonnes, for the 2013/14 marketing year, is the narrowest in many years, it needs to be covered through additional purchases by the government and/or international support to avoid undernourishment. The food system in the DPRK remains highly vulnerable to shocks and serious shortages exist particularly in the production of protein-rich crops. The rates of stunting during the first 1 000 days of a child's life remain high and micronutrient deficiencies are of a particular concern.

Yemen

The severely food-insecure population in need of emergency food assistance is estimated at 4.5 million people, 18 percent of the population, as a result of high levels of prolonged conflict, poverty, and high food and fuel prices.

Severe localized food insecurity**Afghanistan**

Some groups, particularly IDPs displaced by the conflict, returnees from Pakistan and natural disaster-affected households continue to face high level food insecurity.

Kyrgyzstan

Despite a rebound in cereal harvest, the high food prices are still affecting the purchasing power of the poorest and vulnerable families. In addition, socio-political tensions still exist in Jalalabad, Osh, Batken and Issykul Oblasts.

The Philippines

The aftermath of Typhoon Haiyan that hit the Philippines on 8 November, affecting nine Regions across central parts of the country, is continuing. According to the latest estimates, as of 20 January 2014, a total of 14.1 million people were still affected and over 4.1 million were displaced. Severe damages to housing and infrastructure, irrigation and storage facilities were reported. The country was also hit in October by Typhoon Nari which affected 740 000 people in 13 provinces across northern and central Luzon. The partial recovery in the agriculture sector has begun; however, it is expected to take a few seasons to recover fully. Given the food security concerns in the affected areas, FAO has appealed (as of 27 January 2014) for over USD 38 million for agricultural rehabilitation.



Countries with unfavourable prospects for current crops² (total: 4 countries)

AFRICA (3 countries)

Kenya

A below-average "short rains" cereal harvest is expected in southeastern and coastal marginal agricultural livelihood zones due to unfavourable rains.



Somalia

Below average 2013/14 "deyr" season harvest over major cropping areas in southern regions of Juba, Gedo, Lower Shabelle and Hiran.



United Republic of Tanzania

In northern bimodal rainfall areas, the 2013/14 "vuli" harvest is forecast at below average levels due to unfavourable rains.



ASIA (1 country)

Syrian Arab Republic

Civil insecurity, high costs of production and reduced input availability have caused reduced plantings of the 2013/14 winter cereal crops.



Key - Changes since last report (December 2013)

No change ■ Improving ▲ Deteriorating ▼ New Entry +

Terminology

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

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

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

Global overview

World 2013 cereal production revised upward

FAO's latest estimate for world cereal production in 2013 stands at a record 2 515 million tonnes (including rice in milled terms), 13 million tonnes above the February figure and 9 percent more than the previous year's level. The latest upward adjustment mostly reflects a significant revision to the estimates for Australia, where the winter grain harvest has recently been concluded, and some upward revisions to the figures for wheat and coarse grains in China. At the current level, wheat production is estimated to account for 716 million tonnes, 8.5 percent up from 2012, while output of coarse grains is put at 1 305 million tonnes, a year-on-year increase of almost 13 percent. Global rice production is seen to rise moderately in 2013, by less than 1 percent to 494 million tonnes, in milled equivalent.

Early outlook favourable for global 2014 wheat production

At this stage of the season, with the bulk of the coarse grains and paddy crops yet to be planted it is still too early for even a preliminary forecast of global cereal output in 2014. For wheat, however, winter crops are already developing or are soon to come out of dormancy in the northern hemisphere, which accounts for the bulk of the global production, while spring planting is underway in some countries. As a result, a preliminary picture of global prospects is already available. FAO's first forecast for world wheat production in 2014 stands at 704 million tonnes, which represents a decrease of 1.7 percent from the 2013 record harvest but would still be the second largest crop. The decrease is expected to be accountable mostly to a reduction in area and yields in

Canada, after a record high last year, and in the European CIS states, where yields are expected to return to average after relatively high levels in 2013. The expected reductions would more than offset the few, and less marked, increases that are foreseen this year mainly in the European Union (EU), India and the United States.

In the EU, aggregate plantings are estimated to be about 3 percent higher and the winter wheat condition is reported to be good as of mid-February. Elsewhere in Europe, crop conditions are reported to be satisfactory in the Russian Federation and Ukraine. Plantings are estimated to have increased in the Russian Federation, but are expected to have declined somewhat in Ukraine. Assuming normal weather for the remainder of the season and average yields, production in both countries would decline after last year's above average levels. In North America, prospects for the United States winter wheat crop are mixed. Conditions remain generally satisfactory for the bulk of the crop in the Great Plains, despite some deterioration in recent weeks due to extreme cold and dryness,

but for the southern Plains and the major white winter wheat areas in the west of the country persisting dryness remains a significant concern. At this early stage, based on the area, current conditions of the winter crop and assuming a normal spring crop season, the United States' aggregate wheat output in 2014 is tentatively forecast at 60 million tonnes, 3.5 percent up from the previous year. In Canada, conditions for the minor winter wheat crop are favourable. The main crop will be sown later this spring and plantings are expected to decline after the ten-year high last year. In Asia, prospects for the 2014 wheat crop in the Far East subregion, to be harvested from April, are mostly favourable in the main producing countries. In China, the consistent upward trend in wheat production is expected to continue with another increase of the Minimum Support Price encouraging farmers to increase the area under wheat again. In India, larger plantings and anticipated higher yields, reflecting ample moisture availability, could result in a record high wheat crop this year. In Pakistan, wheat production is expected to be slightly below the previous year's above-average level, as a result of dryness in some northern parts of Punjab that negatively impacted on rain-fed crops. In North Africa, prospects for

Figure 1. World cereal production and utilization

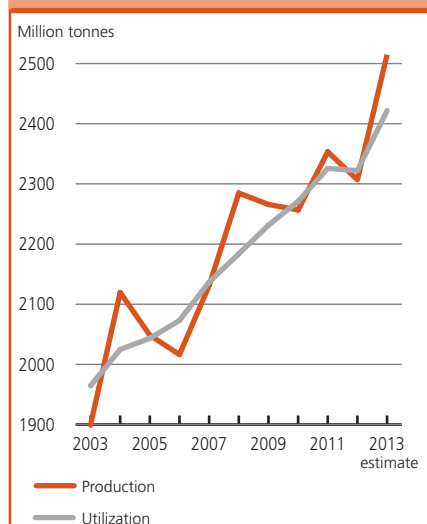
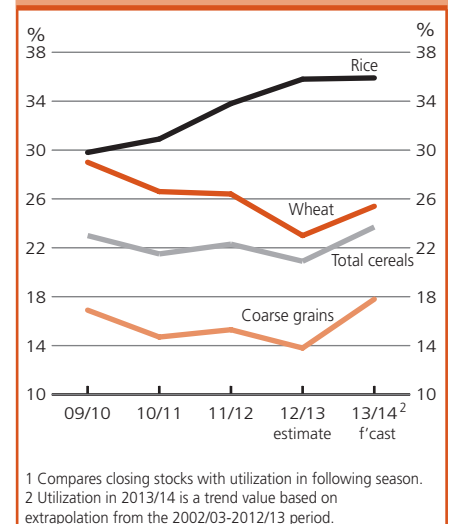


Figure 2. Ratio of world cereal stocks to utilization¹



the 2014 winter wheat crops are generally favourable. In the southern hemisphere, the major wheat crops will be sown later this year. In Australia, early indications for the 2014 wheat crop point towards some decline from the good level in 2013; the area planted to wheat is tentatively expected to remain unchanged, but yields are assumed to return to average after the bumper levels were attained in some parts last year.

Favourable outlook for southern hemisphere 2014 coarse grains crops

In South America, the first 2014 maize crops are already developing or, in some case, about to be harvested, and prospects are generally favourable. In Brazil, following favourable precipitation, official forecasts point to production levels similar to the corresponding season's output last year. Planting progress for the second season crop is also satisfactory under good moisture conditions. However, the area is expected to decline by 9 percent from last year's level due to lower prices and the high level of the first season harvest. In Argentina, official estimates indicate that maize plantings have fallen by 7 percent from the record high of 2013 due to severe dry conditions during planting. Nevertheless, the estimated area is still the second highest in the last five years and production is expected to remain above the country's average at 24 million tonnes. In Southern Africa, the 2014 cereal crops are reported in satisfactory condition overall, but early season dry conditions may have limited yield potential in some parts. Although, precipitation has been near normal in the main producing zones, water deficits were recorded in some parts of the southwest (including areas in South Africa, Botswana, Namibia and Angola) as well as parts in northern Mozambique, Malawi and Zambia, which delayed planting activities and impeded early crop growth, limiting potential crop yields. In South Africa, the subregion's

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

	Average 2011-13	2012	2013 estimate	2014 forecast	Change: 2014 over 2013 (%)
European Union	137.6	132.6	142.5	145.0	1.8
China (Mainland)	120.1	120.8	122.2	122.8	0.5
India	91.8	94.9	93.5	95.6	2.2
United States of America	58.0	61.7	58.0	60.0	3.5
Russian Federation	48.7	37.7	52.1	50.0	-4.0
Canada	30.0	27.2	37.5	29.7	-20.9
Australia	26.5	22.5	27.0	25.5	-5.6
Pakistan	24.3	23.5	24.2	23.8	-1.8
Turkey	21.3	20.1	22.0	19.7	-10.5
Ukraine	19.9	15.8	21.5	19.0	-11.6
Kazakhstan	16.3	9.8	16.3	15.0	-8.0
Iran Islamic Rep. of	13.8	13.8	14.0	13.8	-1.4
Argentina	10.6	8.2	9.2	9.5	3.3
Egypt	8.7	8.8	8.8	8.8	0.0
Uzbekistan	6.6	6.7	6.9	6.5	-5.5
World	692.9	660.2	716.2	704.0	-1.7

¹ Countries ranked according to average production 2011-13.

main producer, the 2014 maize area is estimated down moderately. However production is expected to recover from the 2013 drought reduced level on account of higher yields.

Subdued prospects for rice crops in 2013

Although well advanced, the 2013 rice season is still running in several northern Hemisphere countries, which have still to plant their secondary paddy crops. However, with the season already concluded in most parts, production forecasts have changed little since last month, still pointing to a second year of scant growth. Indeed, global production is anticipated to hover around 493.9 million tonnes, in milled rice equivalent, barely 0.6 percent more than in 2012 and well below the ten-year trend of over 2 percent per annum. This disappointing outcome is largely imputable to a negative performance of the sector in China, the EU, Madagascar, Thailand and the United States, which are all set to incur marked production declines. Of these, only Thailand still has to harvest a 2013 secondary crop. As for the country's first crop, this is estimated to be 3.4 percent larger than in 2012, sustained by the high prices promised under the pledging

programme. As for the secondary crop, the uncertainty surrounding the upholding of the price support programme beyond February is likely to prompt farmers to cut the area, which may result in an overall fall of production in 2013. Likewise, the declines of output in the EU and the United States were mainly induced by economic considerations that fostered a switch of land to more remunerative crops. By contrast, the negative season results in China and Madagascar are to be attributed to weather disruptions. Other countries are likely to face declines in 2013, albeit of smaller dimension. In Asia, they include Malaysia and the Philippines, where crops suffered from excessive rains and typhoons; in Africa, Benin, Liberia and Senegal, because of erratic rainfall; in Latin America and the Caribbean, Bolivia and Uruguay, due to excessive precipitation causing planting delays; and, in Europe, the Russian Federation, which experienced a retrenchment of both area and yields. With those exceptions, most of the other producing countries harvested crops similar or greater than in 2012. The largest gains, in absolute terms, were obtained by Bangladesh, India, Indonesia, Myanmar and Pakistan. Out of Asia, sizeable increases have been reported for Brazil,

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

	2011/12	2012/13 estimate	2013/14 forecast	Change: 2013/14 over 2012/13 (%)
PRODUCTION¹				
World	2 353.3	2 306.8	2 514.8	9.0
Developing countries	1 352.0	1 396.0	1 437.6	3.0
Developed countries	1 001.3	910.8	1 077.2	18.3
TRADE²				
World	319.4	309.3	325.3	5.2
Developing countries	101.6	125.6	108.7	-13.5
Developed countries	217.8	183.7	216.6	17.9
UTILIZATION				
World	2 326.6	2 324.7	2 419.8	4.1
Developing countries	1 470.6	1 489.2	1 543.1	3.6
Developed countries	856.0	835.5	876.7	4.9
Per caput cereal food use (kg per year)	151.9	152.2	152.9	0.5
STOCKS³				
World	519.4	505.1	578.5	14.5
Developing countries	370.1	388.6	420.5	8.2
Developed countries	149.3	116.5	158.0	35.6
WORLD STOCK-TO-USE RATIO%	22.3	20.9	23.7	13.7

Note: Totals and percentage change computed from unrounded data.

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

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

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

Egypt, Guyana, Nigeria and Paraguay.

While the 2013 rice season is still not completely over, countries along and south of the equator are preparing or are already engaged in the sowing of their 2014 first or single crop. Among them, Indonesia faced flash floods in January that would require a re-transplanting of rice in the affected areas. Nonetheless, the government ambitious target still calls for a sizeable increase of production to 76 million tonnes of paddy, up from the 70.9 million tonnes garnered in 2013. Based on its fifth official crop survey, Brazil anticipates the sector to sustain a 6 percent production increase in 2014, largely relying on improved average yields, as planting in the highly productive southern states rises. In the rest of South America, the rice areas are reported steady or falling, constrained in Uruguay by excessive rainfall. On the other hand, poor availability of water for irrigation is limiting rice cultivation in Australia and Sri Lanka.

GLOBAL CEREAL UTILIZATION, STOCKS AND TRADE ROUND- UP IN 2013/14

World cereal **utilization** in 2013/14 is currently projected at nearly 2 420 million tonnes, 5 million tonnes more than what was expected in February, following higher anticipated feed use of coarse grains in several countries, in particular Australia, Argentina, China, Mexico and Ukraine. The current forecast would imply a 4 percent (nearly 95 million tonnes) increase in total cereal utilization compared to 2012/13, sustained mainly by a strong growth in feed use of maize, of at least 10 percent (52 million tonnes), to 554 million tonnes. Bumper crops and lower prices compared to the previous season are boosting maize use since the start of the current season, especially in the United States, where it may rebound by 22 percent, or 24.5 million tonnes, from 2012/13. In China, another record crop in 2013 is likely to foster a 10 percent (14 million tonnes) increase in

maize feed use in the 2013/14 marketing season. In Brazil too, a record maize crop is anticipated to result in a 10.5 percent (or 4 million tonnes) expansion in feed use. By contrast, the world utilization of wheat as feed is likely to contract slightly (by about 1 percent) to 130 million tonnes, as reductions in China and the United States more than offset an upturn in the EU.

Total food consumption of cereals is forecast at 1 093 million tonnes in 2013/14, 1.6 percent (nearly 18 million tonnes) more than in the previous season. This would lift the average per caput intake of cereals at the global level marginally from 151.3 kg in 2012/13 to 151.7 kg in 2013/14. Total food consumption of cereals in the Low Income Food Deficit Countries (LIFDCs) is forecast to increase by 2.4 percent to 472 million tonnes in 2013/14, resulting in a slight (0.3 percent) gain in the per caput intake for the LIFDCs as a group. Among the major cereals, per caput food consumption of rice is expected to rise by 0.7 percent, to 57 kg, while, for both wheat and coarse grains, it is foreseen to remain stable around 67 kg and 28 kg respectively.

Other usages of cereals, excluding food and feed, are expected to show strong (4.5 percent or 20 million tonnes) growth in 2013/14, with most of the increase reflecting higher use of maize for the production of ethanol in the United States, which is officially forecast to rebound by 7.6 percent, after a 7 percent decline in 2012/13. Based on the latest official forecast, the ethanol industry would absorb nearly 36 percent of the 2013 maize production in the United States. According to the International Grains Council (IGC), cereal utilization for the production of starch is also expected to increase significantly, by around 5 percent, in 2013/14 to 113 million tonnes, with most of the expansion occurring in China, EU and the United States. China is the largest producer of starch from cereals, accounting for 40 percent of the world total, followed by the United States (25 percent) and the EU (13 percent).

The FAO forecast for world cereal **stocks** by the close of the 2014 crop seasons has been raised by around 1 percent (5 million tonnes) since February, to 578.5 million tonnes. The revision reflects the upward adjustment to the world production forecast, which more than offset this month's increase in cereal utilization. At the current level, world cereal stocks would be as much as 14.5 percent (73 million tonnes) above their reduced opening levels and the highest since 2001/02, or in 12 years. The sharp recovery in global cereal production in 2013 would be the main force behind the anticipated replenishment of world granaries. Based on the latest stock and utilization forecasts, the global cereal stocks-to-use ratio is seen to reach close to 24 percent in 2013/14, its highest value since 2002/03 and comfortably above the 2007/08 historical low of 18.4 percent. Across the main cereals, world wheat stocks may attain 179 million tonnes, 3 million tonnes more than last anticipated and 12.7 percent (20 million tonnes) higher than at the beginning of the season. The revision to the 2014 ending stock forecast stems principally from upward adjustments in Australia (+1 million tonnes), Bangladesh (+1.3 million tonnes) and India (+1.2 million tonnes), more than offsetting downward adjustments in the United States (-1.4 million tonnes). The anticipated expansion in world wheat inventories compared to last season is largely led by a significant build-up in China, Canada and the Russian Federation. These increases are expected to lift the global stock-to-use ratio of wheat from a six-year low of 23 percent in 2012/13 to 25.4 percent in 2013/14. Similarly, the ratio of major wheat exporters' closing stocks to their total disappearance (defined as domestic utilization plus exports), which is a better measure for availabilities in global markets, is expected to increase from the previous season low of 14.3 percent to 16 percent in 2013/14, still about 2 percentage points below its five-year average level. One reason is the projected level of ending

stocks in the United States, which is put at 15 million tonnes, 4 million tonnes less than in the previous season, following the decrease in 2013 production in the wake of continued strong exports.

The level of world coarse grains stocks by the end of seasons in 2014 is put at 220 million tonnes, its highest level in 14 years. This is 2 million tonnes higher than forecast in February, as increased forecasts for ending stocks in China and Mexico more than compensated for downward adjustments in the United States. Compared to the previous season (i.e. opening levels), more than one-half of the anticipated expansion in world stocks of coarse grains would be associated with a sharp rise of maize inventories in the United States (up 19 million tonnes from their low opening levels). Maize stocks are also to increase significantly in Brazil, Canada, China, EU and Ukraine. By contrast, in South Africa, tightening supplies have driven domestic prices to record levels and stocks are forecast to be halved. Given the overall increase of world inventories, the stocks-to-use ratio for coarse grains is expected to recover from its historical low of 13.8 percent in 2012/13 to 17.8 percent in 2013/14. Even more importantly for global food price stability, the ratio of major exporters' closing stocks to their total disappearance is expected to rise to 12.8 percent, well above the low of only 8.3 percent registered in the previous season.

Global rice stocks at the close of seasons in 2014 have been raised slightly compared to last month, owing to an official upgrade in Brazil inventories, and are now forecast to strike a new high of 179.1 million tonnes. China would be responsible for much of the yearly increase, lifting its share in world reserves to over 55 percent. Despite the rather poor expected 2013 production outcome, Thailand is likewise expected to end the season with larger inventories, reflecting the accumulation of supplies under the rice pledging programme and a slack export performance. Further

stock increases are expected in Sri Lanka and Viet Nam. By contrast, India, the second largest rice stock holder, may see inventories fall, as the implementation of the newly passed National Food Law boosts domestic consumption. Likewise, Myanmar, Pakistan, the Philippines and the United States may face a marked contraction in rice reserves. The latest forecasts for rice inventories and utilization would result in a world stock-to-use ratio rising only slightly from 35.8 percent in 2013 to 35.9 percent in 2014. As for the ratio of major exporters' closing stocks to their total disappearance, it would pass from 28.5 percent to 28 percent, still high and sufficient to suggest rice supplies for trade would remain abundant in the course of the year.

The FAO forecast for world cereal **trade** in 2013/14 has been raised by 4 million tonnes since February to around 325 million tonnes, now as much as 5 percent, or 16 million tonnes, above the global trade estimate for 2012/13. The latest upward adjustment concerns wheat, and to a lesser extent, also maize. Global cereal trade peaked in 2011/12 but fell in 2012/13, as very tight exportable supplies constrained wheat flows. In sharp contrast to 2012/13, ample cereal supplies and more affordable prices are anticipated to boost international cereal trade in 2013/14 to a new record.

World wheat trade is forecast at a near record level of 146 million tonnes (July/June), 2.5 million tonnes more than expected in February and 4.4 percent (6 million tonnes) above the estimate for trade in 2012/13. Ample availabilities in nearly all major exporting countries and generally strong demand in Asia are behind the anticipated expansion. This month's upward revision reflects higher import forecasts for Afghanistan, Bangladesh and Egypt. However, the expected fast growth in world wheat imports would be mostly on account of China (+5 million tonnes), Egypt (+ 2.4 million tonnes) and Bangladesh (+900 000 tonnes) more than offsetting

a decline in Morocco (-1.7 million tonnes) and Turkey (-500 000 tonnes). The increase in world import demand is likely to be met by larger exports from several major exporting countries, in particular Canada, the EU, the Russian Federation and Ukraine, while shipments from Argentina and Australia look set to decline.

The forecast for world trade in coarse grains in 2013/14 (July/June) has been raised by 1.5 million tonnes from February's level to 141 million tonnes. This points to a 6.7 percent (almost 9 million tonnes) increase from 2012/13 and a new record. The higher forecast compared to February reflects expectations for larger imports by Mexico and a number of countries in Asia. The bulk of the trade expansion from the previous season would be on account of larger imports by China, Mexico and Saudi Arabia, more than offsetting declining purchases by the EU, the Islamic Republic of Iran, Turkey and the United States. The rise in world import demand is likely to be met by bigger exports from the EU, Ukraine, the United States and the Russian Federation, while shipments from Argentina, Brazil, India and South Africa are expected to decline.

The FAO forecast for rice trade in calendar 2014 has changed little since December, remaining at 38.3 million tonnes. At that level, it would be almost 3 percent larger than currently estimated for 2013 and match the 2012 record. Much of the rebounding is anticipated to rest on a 23 percent surge of shipments from Thailand, where the government is releasing large supplies from public stocks for domestic and international sale. Deliveries from Pakistan, the United States and Viet Nam are also anticipated to rise. Overall, these will more than compensate for a sizeable contraction of exports by India, which is nonetheless foreseen to retain its leadership among exporters. Lower international prices and/or tight domestic supplies are forecast to underpin imports by Asian countries, especially China, Indonesia, Nepal and the

Philippines. Deliveries to African countries and the EU are also projected to rise.

INTERNATIONAL PRICE ROUND-UP

Cereal export prices increased in February but remained at relatively low levels

Export prices of **wheat** from the United States rose by 5 percent in February, after the decline of the previous three months. The benchmark US wheat price (No.2 Hard Red Winter, f.o.b.) averaged USD 303 per tonne which, however, was still 8 percent lower than in February 2013. The recent increase in prices mainly reflects concerns over the impact of cold and dry weather on the 2014 winter crop in the main growing areas of the United States. Large export sales provided further support. However, ample global supplies prevented further price gains.

International maize prices increased in February, with the benchmark US maize value (No.2, Yellow) averaging USD 209 per tonne, 5 percent higher than in the previous month but still 31 percent below their levels a year earlier. Strong domestic

and export demand, for feed and industrial use, underpinned prices, more than offsetting the downward pressure from large global supplies following the 2013 record production.

Export prices of **rice** were generally subdued in February, except for Japonica rice, which saw quotations advance strongly on lower expected 2014 crops in Australia and the United States. Prices in the other market segments were either down or stagnating. The increase of Japonica prices, however, was sufficient to lift the FAO Rice Price Index by 4.7 percent compared to January. Rice prices in the various origins also followed contrasting patterns: Thai prices gathered strength, a reflection of a stronger baht and reduced access of traders to public stocks, a tendency reflected in a 2 percent increase in the benchmark Thai white rice 100 percent B quotation to USD 466 per tonne. Likewise, prices were sustained by a stronger currency in India and Pakistan and by a tightening of supplies in the United States and South America. By contrast, prices edged lower in Viet Nam.

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

	2013					2014	
	Feb.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.
United States							
Wheat ¹	329	312	333	317	301	288	303
Maize ²	303	209	201	199	197	198	209
Sorghum ²	288	217	204	196	207	216	224
Argentina³							
Wheat	358	300	344	353	340	330	328
Maize	283	219	207	207	212	215	218
Thailand⁴							
Rice, white ⁵	616	461	457	451	459	457	466
Rice, broken ⁶	562	407	405	376	347	309	311

*Prices refer to the monthly average.

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

² No.2 Yellow, Gulf.

³ Up river, f.o.b.

⁴ Indicative traded prices.

⁵ 100% second grade, f.o.b. Bangkok.

⁶ A1 super, f.o.b. Bangkok.

Low-Income Food-Deficit Countries food situation overview¹

Early prospects point to a favourable 2014 cereal outputs for most LIFDCs

Preliminary prospects for the 2014 cereal crops of LIFDCs are generally favourable. In Egypt, the only LIFDC in **North Africa**, harvesting of the winter crops is expected to commence in May and a comparable output to the previous year is foreseen. Similarly, the 2014 winter crops are reaching maturity in the **Near East**, and the production outlook is positive, with average to above average harvests anticipated, while a promising irrigated secondary rice crop is forecast in the LIFDCs of **Asia** (including Bangladesh, India, Indonesia and Sri Lanka). India², the largest cereal producing LIFDC, is forecasting a near-record Rabi wheat and rice crop, on account of an expansion in plantings and an anticipated increase in yields. In **Africa**, following a generally poor outturn in 2013, cereal production in Southern Africa is expected to recover in 2014; however, dry spells in late 2013 in southern and western parts may limit yields. Planting of the 2014 main season crops in Eastern Africa is underway and near-average rains are forecast from March to May. In South Sudan, there are concerns that the ongoing civil conflict will have a significant negative impact on production this year.

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

<http://www.fao.org/countryprofiles/lifdc.asp>.

² Given that India has been a huge net-exporter of cereals in past few years, it is expected to come out of this in an updated list.

Aggregate LIFDCs output virtually unchanged in 2013, reflecting decreases in Africa and increases in Asia

Since the release of the December 2013 issue of this publication, slight upward adjustments were made to the 2012

and 2013 outputs mainly on account of a 1 million production increase in India in each year. In addition, an improved performance, compared to earlier expectations, of the 2013 crop in Eastern Africa, notably in Ethiopia, led to a minor upward adjustment. In aggregate, the 2013 cereal output of the LIFDCs is virtually unchanged compared to that of 2012, after three consecutive years of growth.

The static 2013 aggregate output is largely attributed to a near 2 percent year-on-year reduction in **Africa**, by approximately 2 million tonnes, which

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

	2011/12	2012/13 estimate	2013/14 forecast	Change: 2013/14 over 2012/13 (%)
Cereal production¹	517.9	539.9	539.6	-0.1
<i>excluding India</i>	283.3	298.1	298.8	0.2
Utilization	568.7	580.8	594.9	2.4
Food use	450.7	460.8	471.8	2.4
<i>excluding India</i>	262.4	268.9	274.0	1.9
Per caput cereal food use (kg per year)	0.2	0.2	0.2	0.6
<i>excluding India</i>	0.2	0.2	0.2	-0.2
Feed	52.1	54.2	55.1	1.7
<i>excluding India</i>	44.7	46.4	47.2	1.6
End of season stocks²	112.1	114.7	112.9	-1.6
<i>excluding India</i>	66.5	65.3	63.0	-3.4

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

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

Table 5. Cereal production¹ of LIFDCs (million tonnes)

	2011	2012	2013 estimate	Change: 2013 over 2012 (%)
Africa (39 countries)	124.2	132.2	130.1	-1.6
North Africa	20.0	20.7	20.3	-1.7
Eastern Africa	39.0	44.0	42.0	-4.4
Southern Africa	15.4	13.7	12.9	-6.5
Western Africa	45.2	49.1	50.1	2.0
Central Africa	4.7	4.6	4.8	2.9
Asia (17 countries)	391.5	405.9	407.5	0.4
CIS in Asia	9.4	9.6	10.0	3.7
Far East	372.9	386.2	386.7	0.1
- India	234.6	241.8	240.8	-0.4
Near East	9.3	10.0	10.8	7.8
Central America (3 countries)	2.2	1.8	2.0	10.1
Oceania (3 countries)	0.0	0.0	0.0	0.0
LIFDC (62 countries)	517.9	539.9	539.6	-0.1

Note: Totals and percentage change computed from unrounded data.

¹ Includes rice in milled terms.

offset the overall gain recorded in **Asia**, despite a small decline in India. In absolute terms, **Eastern Africa** posted the largest annual decrease of about 2 million tonnes, reflecting a significant reduction in the Sudan's cereal output on account of a late start and generally below average seasonal rains. While **Southern Africa's** output decreased by 7 percent, representing the biggest relative annual decline, as a result of erratic weather conditions, which caused large output contractions in Zimbabwe and Madagascar. Significant annual decreases were also registered in several countries in the Sahel belt in **Western Africa**, albeit from their bumper harvests gathered in 2012. In aggregate, the subregional production was still above average and slightly higher than the previous year, mainly on account of a significant increase in Nigeria, the subregion's largest cereal producer. Good weather in **Central America** supported production gains, with harvests exceeding both the low 2012 output and the preceding five-year average.

Cereal imports for 2013/14 revised upwards since December 2013 to near-record levels

The aggregate import requirement of LIFDCs for the 2013/14 marketing years has been revised upwards to 81.1 million tonnes from 75.2 million tonnes that was reported in the December issue of this publication. This marks an increase

of some 8 percent above the previous year's low level. The current estimate is close to the record level of 2011/12, as countries in **Africa** compensate for an overall reduced harvest and others seek to replenish stocks. The largest year-on-year increase was recorded in Egypt, mainly as a result of higher wheat demand. Similarly, higher imports, 9 and 8 percent, respectively, are forecast in Eastern and Southern Africa reflecting their lower cereal outputs. In spite of the overall increase in the 2013 aggregate subregional production in Central and Western Africa, and Central America,

slightly higher import requirements are expected due to higher local demand and some stock build-up. In the Near East, smaller domestic harvests in Afghanistan and Yemen caused an expansion in their import requirements. Import needs for the Far East were revised upwards to 20.3 million tonnes from 19.2 million, due to higher import needs in the Philippines and the Bangladesh. Among the other subregions, only countries in CIS Asia are estimated to require lower levels of imports this year, following the bumper 2013 harvest. In Oceania cereal imports are anticipated to remain stable.

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

	2012/13 or 2013 Actual imports	2013/14 or 2014			
		Requirements ¹		Import position ²	
		Total imports:	of which food aid	Total imports:	of which food aid pledges
Africa (39 countries)	39 840	43 921	1 617	8 245	40
North Africa	13 778	16 571	0	6 262	0
Eastern Africa	7 533	8 185	1 044	703	21
Southern Africa	2 245	2 426	175	1 181	15
Western Africa	14 275	14 698	263	98	4
Central Africa	2 009	2 041	135	0	0
Asia (17 countries)	32 775	34 820	604	9 887	13
CIS in Asia	3 620	3 393	1	1 758	0
Far East	19 193	20 320	437	7 556	12
Near East	9 962	11 107	166	573	0
Central America (3 countries)	1 873	1 934	142	499	3
Oceania (3 countries)	442	447	0	0	0
Total (62 countries)	74 929	81 123	2 364	18 631	56

Note: Totals computed from unrounded data.

¹ The import requirement is the difference between utilization (food, feed, other uses, export plus closing stocks) and domestic availability (production plus opening stocks).

² Estimates based on information available as of early February 2014.

Regional reviews

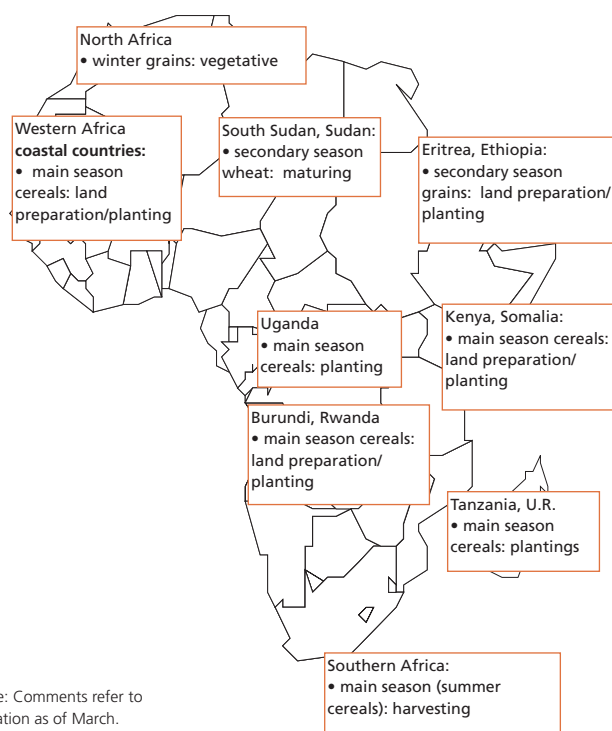
Africa

North Africa

Good early prospects for the 2014 winter crops

In North Africa, early prospects for the 2014 winter wheat and coarse grains, to be harvested from May, are favourable. Preliminary reports indicate a similar level of plantings to last year. Crop production in the region varies markedly from year to year depending on the rainfall variations. In **Algeria**, a delayed onset of seasonal rains in some central and western areas was followed by above average rainfall in November, which improved soil moisture, encouraged plantings and benefited crop establishment. In **Morocco**, a lack of soil moisture remains a concern in southernmost portions of the country. In **Tunisia**, the northern part of the country, primarily producing cereals, suffered from lack of rains in December but a return of rains in January provided sufficient moisture for development of vegetative wheat and barley. In **Egypt**, reports indicate average meteorological conditions and plantings similar to last year, resulting in wheat production forecasts of 8.8 million tonnes.

The subregion's 2013 aggregate output of wheat (the main crop) is estimated at 20.2 million tonnes, 12 percent up from the already above-average harvest in 2012. The 2013 wheat harvest was uneven across the region as Algeria, Egypt and Morocco recorded above-average levels of production while Tunisia gathered only 55 percent of the near record amount harvested in 2012, due to unfavourable weather conditions. The subregional production of coarse grains is estimated at about 12.5 million tonnes in 2013, an increase about 7 percent over 2012.



Imports expected to decline slightly in 2013/14

Cereal import requirements for the 2013/14 are expected to be about 7 percent higher than the previous year. The subregion will still import about 22.7 million tonnes of wheat in 2013/14, about the average of the previous five years. North African countries rely heavily on wheat imports from the international market to cover their consumption needs.

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

Table 7. North Africa cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2011	2012	2013 estim.	2011	2012	2013 estim.	2011	2012	2013 estim.	2011	2012	2013 estim.	Change: 2013/2012 (%)
North Africa	18.9	18.0	20.2	12.6	11.7	12.5	5.7	6.0	6.2	37.2	35.8	38.9	8.6
Algeria	2.8	3.4	3.2	1.5	1.6	1.9	0.0	0.0	0.0	4.2	5.0	5.1	1.1
Egypt	8.4	8.8	8.8	7.8	7.8	7.3	5.7	5.9	6.1	21.8	22.5	22.2	-1.3
Morocco	6.0	3.9	7.0	2.6	1.4	2.9	0.1	0.1	0.1	8.6	5.3	10.0	87.1
Tunisia	1.6	1.8	1.0	0.7	0.8	0.3	0.0	0.0	0.0	2.3	2.6	1.3	-50.3

Note: Totals and percentage change computed from unrounded data.

Western Africa

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

An above-average harvest gathered in 2013 at regional level in spite of reduced crops in Sahelian countries

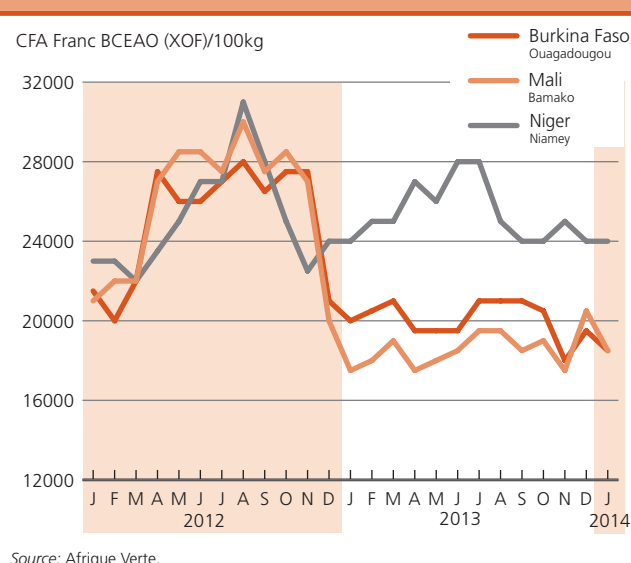
The subregion's aggregate cereal output in 2013 was provisionally estimated at about 55 million tonnes, which is similar to the previous year's bumper crop and 8 percent above the average of the previous five years. Reduced harvests in the Sahel belt were more than offset by above-average crops in coastal countries. In the Sahel, the 2013 cereal production is estimated to drop by 13 percent compared to the 2012 crop. Output declined significantly in most Sahelian countries, notably in **Chad** by 24 percent, **Niger** and **Mali** by 18 percent and in **Senegal** by 11 percent. By contrast, estimates indicate good cereal, and root and tuber crop production in the coastal countries along the Gulf of Guinea, notably in **Nigeria**, the largest producer of the subregion, where cereal production is estimated to have increased by 20 percent compared to the 2012 flood-affected output. An above-average cereal crop was also gathered in most coastal countries including **Benin**, **Côte d'Ivoire**, **Guinea** and **Ghana**.

Prices of coarse grains dropped considerably in recent months

Reflecting increased supplies from last year's above-average harvest, coarse grains prices have been mostly stable or declining in recent months in both Sahelian and coastal countries.

In Sahelian countries, millet prices have been mostly stable over the last three months in Niamey (**Niger**) and Bamako (**Mali**), while they declined by about 10 percent in Ouagadougou (**Burkina Faso**). In **Chad**, where cereal trade was disrupted

Figure 3. Millet prices in selected Western African markets



Source: Afrique Verte.

in 2013 by insecurity in Nigeria and some internal restrictions on commodity movements, the new cereal harvests pushed prices down in November and December and millet prices in N'Djamena were 13 percent lower than their previous year's levels. Similarly, prices of maize, the staple cereal in the coastal countries along the Gulf of Guinea, declined significantly. In **Nigeria**, maize prices in the main northern Kano market stabilized in December after falling by over 40 percent between July and October. The decline in cereal prices in Nigeria came after several months of steep increases due to a reduced 2012 cereal production and conflict-induced trade disruptions. In **Benin**, prices have stabilized since October after decreasing steeply in previous months and were at generally low levels. In **Togo**, maize prices exhibited mixed trends, dropping significantly in cereal-producing regions and increasing in the capital city, Lomé.

Seasonal declines in coarse grain prices were less notable in the western part of the subregion, notably in **Senegal**. Although the new cereal harvests led to slight decrease in prices during the last quarter of 2013, millet prices in Dakar in November 2013 were still 5 percent higher than the 2011/12 crisis affected levels and 25 percent higher in Saint Louis. Several consecutive years of below-average coarse grains harvests have led to a relatively tight market in Senegal.

Table 8. Western Africa cereal production (million tonnes)

	Coarse grains			Rice (paddy)			Total cereals ¹			
	2011	2012	2013 estim.	2011	2012	2013 estim.	2011	2012	2013 estim.	Change: 2013/2012 (%)
Western Africa	37.4	40.8	41.5	12.2	12.8	13.4	49.7	53.8	55.0	2.2
Burkina Faso	3.4	4.6	4.8	0.2	0.3	0.3	3.7	4.9	5.1	4.5
Chad	1.5	3.0	2.2	0.2	0.2	0.2	1.7	3.2	2.4	-23.5
Ghana	2.2	2.4	2.3	0.5	0.5	0.5	2.6	2.9	2.8	-3.7
Mali	4.0	4.7	3.5	1.7	1.9	2.0	5.8	6.7	5.5	-18.2
Niger	3.5	5.3	4.3	0.1	0.1	0.1	3.6	5.3	4.4	-17.9
Nigeria	17.4	14.9	18.4	4.6	4.4	4.7	22.1	19.3	23.2	20.0

Note: Totals and percentage change computed from unrounded data.

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

Prices of imported rice, mainly consumed in urban centres, have remained relatively stable in recent months in most countries of the subregion, both in the Sahel and in coastal countries, including in Senegal where rice is the main staple. Rice prices in Senegal had increased steeply from December 2011, but government intervention in the form of price control has kept prices stable since April 2012.

Food and agricultural assistance continues to be needed in the region

In spite of the above-average cereal harvest gathered at regional level in 2013, crop and pasture production was affected in several Sahel countries by dry spells, floods and poor rainfall distribution. These countries have already been affected in recent years by a series of severe food crises that have had adverse longer-term impact on household assets and savings. Moreover, conflict in **the Central African Republic (CAR)**, **Mali** and northern **Nigeria** has resulted in large population displacement in the subregion. For example, in Chad, the continuing civil conflict in neighbouring countries has increased the number of refugees and returnees fleeing from Darfur, the CAR, Nigeria and Libya. As of early February 2014, more than 467 000 refugees were living in Chad, while about 350 000 Chadians have returned to their country. Similarly, about 150 000 Malian refugees are still living in neighbouring countries, including 60 000 in **Mauritania**, 40 000 in **Niger** and 50 000 in **Burkina Faso**.

As a result of these various factors, over 20 million people are estimated to be in need of food assistance in the region, including 4.2 million in northern Nigeria, 4.2 million in Niger, 3.3 million in Mali, 2.4 million in Chad, 2.25 million in Senegal, 1.3 million in Burkina Faso, 470 000 in Mauritania and 285 000 in the Gambia. The United Nations and humanitarian partners recently launched a three-year Regional Strategic Response Plan (RSRP) to provide aid to millions of people in nine countries of the Sahel belt. The RSRP is seeking to mobilize USD 2 billion to provide food and non-food assistance to nearly 30 million people across the subregion.

Central Africa

Serious food security situation in the Central African Republic and parts of the Democratic Republic of Congo

Continued civil insecurity in **the Central African Republic (CAR)** and in parts of **the Democratic Republic of Congo (DRC)** has resulted in massive population displacements and hindered access to food for the affected population. In addition, disruptions in humanitarian interventions have compounded the impact on vulnerable groups.

In **the CAR**, the already widespread and dire civil insecurity situation has further deteriorated since December 2013, with intercommunal violence incidents causing the number of displaced individuals, estimated at about 500 000 in early December, to sharply increase to 700 000 as of late-February. According to the analysis conducted by the FAO-supported Integrated Food Security Phase Classification (IPC) in November 2013, about 1.3 million people (out of a total population of 4.6 million), were in need of urgent assistance, nearly double the estimated level in February 2013. Out of these 1.3 million, approximately 60 percent are in IPC phase 3 "Crisis" and 40 percent in IPC phase 4 "Humanitarian Emergency". The areas most affected by food insecurity are the districts of Ouham (northwest), Nana-Gribizi (northeast) and Mbomou (south). In addition, the situation in four additional districts (Lobaye, Ouham-Pendé, Ouham and Ombella-Mpoko) is likely to have deteriorated to IPC phase 4 "Humanitarian Emergency" in December due to violent episodes that occurred soon after the conclusion of the analysis. According to the findings of the multi-agency Multi-Sectoral Initial Rapid Assessment (MIRA) undertaken in December 2013, food reserves are almost non-existent: 60 percent of interviewed households reported to have completely exhausted their food stocks, while the remaining households declared that their food reserves could cover their requirements for up to two weeks in urban areas and one month in rural areas. Assistance is planned to be provided to 1.9 million beneficiaries.

In **the DRC**, according to the latest IPC food security analysis, conducted in December 2013, the number of people in acute food insecurity and livelihood crisis (IPC phase 3: "Crisis" and IPC phase 4: "Humanitarian Emergency") was estimated at about 6.7 million, with a 5 percent increase compared to June 2013, when it was estimated at 6.4 million. The areas most affected by severe food insecurity (IPC phase 4: "Humanitarian Emergency") include parts of Maniema and

Table 9. Central Africa cereal production
(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals ¹			
	2011	2012	2013 estim.	2011	2012	2013 estim.	2011	2012	2013 estim.	Change: 2013/2012 (%)
Central Africa	4.4	4.3	4.4	0.5	0.5	0.5	4.9	4.8	5.0	3.0
Cameroon	2.8	2.8	2.9	0.2	0.1	0.2	3.0	3.0	3.1	5.3
Central Africa Rep. Dem.Rep.of the Congo	0.2	0.2	0.2	0.0	0.0	0.0	0.2	0.2	0.2	-9.0
	1.3	1.2	1.3	0.3	0.3	0.3	1.6	1.6	1.6	0.6

Note: Totals and percentage change computed from unrounded data.

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

Oriental provinces in the east, and parts of Katanga province in the south, where the escalation of civil conflict during 2013 severely damaged local livelihood systems and caused massive displacement. As of late December 2013, the total number of IDPs was estimated at more than 2.9 million, with a 12 percent increase compared to June 2013, when it was estimated at 2.6 million. The conflict affected North and South Kivu, and Katanga provinces account for more than 70 percent of the total IDP number. In addition, the DRC has received about 53 000 refugees from the CAR since early 2013 and about 120 000 Congolese who were expelled from Angola. Assistance is planned to be provided to about 4.8 million vulnerable people throughout the country.

The 2014 main cropping season is about to start in the subregion with uncertain prospects in the CAR due to insecurity and displacements

In Central Africa, planting of the 2014 main season maize crop, due for harvest from July, will begin in March. In southern DRC, where the rainfall pattern is similar to Southern Africa, planting of the secondary season maize crop, to be harvested from April/May, is complete. In the CAR, agricultural activities are severely hampered by the widespread conflict, which resulted in massive displacement of people, caused input shortages and depleted households' productive assets that already were inadequate. According to the findings of the MIRA assessment, in December 2013, 94 percent of the interviewed communities reported that they would not have enough seeds to plant for the next agricultural season. Despite the efforts of the international community to support farmers, interventions to date have been constrained by the prevailing civil insecurity. As a result, further and significant decline in agricultural output in 2014 is very likely.

Good cereal production in 2013 in all countries of the subregion except in the CAR

The 2013 aggregate output of cereals is estimated to be average to above-average in most countries. In the CAR, however, despite the favourable rainfall received in most cropping areas, agricultural activities were severely disrupted by widespread civil insecurity. Large numbers of households could not access their fields and seeds were in short supply due to looting or were used for consumption. As a result, 2013 cereal production was sharply reduced. In Cameroon, despite some localized losses reported in the cropping areas near the capital Yaoundé due to erratic rainfall, above-average cereal outputs were gathered in 2013 due adequate rainfall over most producing regions. In the DRC, according to remote sensing analysis, adequate rains were received in most areas, with the exception of some eastern parts, where erratic rainfall may have negatively impacted yields of the main season maize crop, harvested in November 2013. As

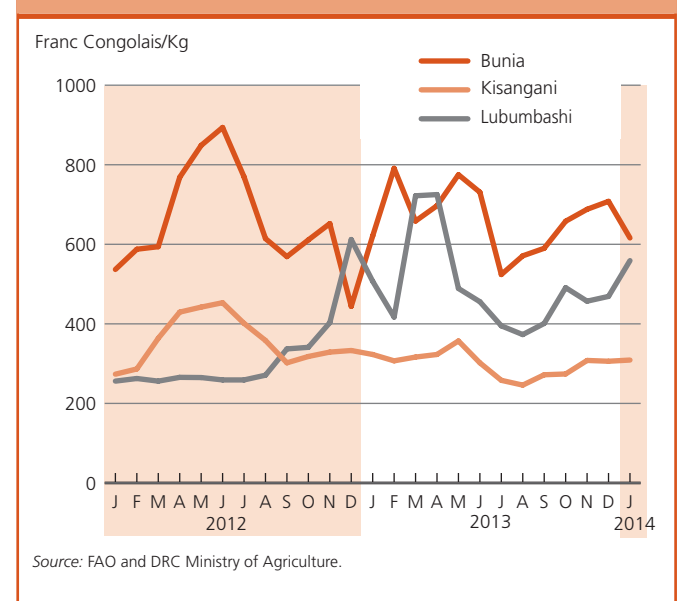
a result, the 2013 cereal output is estimated at average levels. In Congo and Gabon, crops benefited from adequate rainfall; however, in both countries, the bulk of the national cereal requirement is met through imports.

The subregional production forecast for cereals in 2013 is put at 5 million tonnes, with a 3 percent increase over the 2012 output.

High food prices recorded in the CAR and parts of the DRC

In the CAR, food prices, already high and volatile, increased in recent months in the capital Bangui as the intercommunal violence which erupted in mid-December 2013 caused severe trade disruptions and significant damage to market infrastructure. Between November 2013 and January 2014, prices of cassava, the main staple, increased by 17 percent despite new supplies from the harvest; similarly, prices of beans, groundnuts and palm oil increased by 9, 14 and 19 percent, respectively, over the same period. In the DRC, prices of cereals have remained generally high and volatile since late 2012 in conflict affected eastern and southern areas. In December 2013, prices of maize declined by 26 percent in Bunia, in the eastern Ituri province, as local harvests and increased imports from neighbouring Uganda increased supplies, while they remained stable in Lubumbashi, in the southern Katanga province. However, in these markets maize prices in December 2013 were still about 60 percent higher than in Kisangani, Mbandaka, Kananga and Zongo markets, located in non-conflict areas of the country.

Figure 4. Democratic Republic of the Congo, maize retail prices



In **Gabon**, prices of imported wheat, the main staple, after having sharply declined between April and May 2013 (-30 percent), remained at low levels in the following months, despite some volatility. The December prices were 27 percent below their levels of twelve months earlier, mainly due to the Government's decision, taken in May 2013, to expand the number of food commodities subject to price control from 66 to 166, including wheat flour. In **Cameroon**, prices of maize were mostly stable in recent months and in December 2013 they were around the same levels of twelve months earlier in most monitored markets due to adequate availabilities from the good 2013 cereal production. By contrast, in the capital Yaoundé, prices of maize, cassava and some fruits and vegetables (including fresh beans, tomatoes and onions) increased in recent months and in December they were up to 50 percent higher than twelve months earlier due to high demand and localized production shortfalls.

Eastern Africa Unfavourable prospects for 2013/14 secondary season crops

Harvesting of the 2013/14 secondary season crops is underway in most countries, except in **Ethiopia** where planting of the "belg" season crops is about to start. Below average cereal production is forecast in several countries, due to late onset and erratic distribution of the October to December short rains, especially over the eastern part of the subregion (eastern Kenya, northern parts of the United Republic of Tanzania and southern Somalia).

In eastern and northern bimodal rainfall areas of **Kenya**, a below average "short rains" cereal harvest is expected, with particularly poor prospects in southeastern and coastal marginal agricultural livelihood zones, where the delayed onset of rains resulted in considerably delayed planting and a prolonged dry spell in November resulted in poor crop development. In these areas, where the short rain crops account for up to 65 percent of the total annual crop production, the seasonal maize production

is expected to be about 40 to 50 percent below average. Similarly, in northern bimodal rainfall areas of **the United Republic of Tanzania**, the "vuli" harvest is forecast at below average levels due to late, poorly distributed and insufficient rains.

Harvest prospects are particularly critical in **Somalia**, where the "deyr" season performed poorly over major cropping areas in southern regions of Juba, Gedo, Lower Shabelle and Hiran. In these areas, rains had a late onset, erratic distribution and low amounts until their recent cessation in January. In addition, in some surplus-producing areas of Middle and Lower Shabelle, extensive floods in November damaged germinating crops. Over the western part of the subregion, seasonal rains performed comparatively better and cereal production for the second season harvests in bimodal areas of southern-central **Uganda** and for the "A" season harvests in **Rwanda** and **Burundi** are forecast at near average levels, with some localized production shortfalls.

The aggregate 2013/14 cereal output (main and secondary seasons) for the subregion is estimated at 42.9 million tonnes, 4.3 percent below the previous year, but 10 percent above the last five-year average. Except for **Ethiopia** and **South Sudan**, all the countries of the subregion gathered reduced cereal harvests in 2013. The sharpest decrease was recorded in **the Sudan**, where the 2013 cereal production was about half of the previous year's good output and about 38 percent below the previous five-year average, due to erratic rainfall and civil insecurity.

Planting of the 2014 main season crops underway

Land preparation for the 2014 main season cereal crops has started in major growing areas of Central, Rift Valley and Western provinces in **Kenya** (long-rains season), in south and central **Somalia** ("gu" season) and in bimodal rainfall areas of **South Sudan** and **Uganda**. In **the United Republic of Tanzania**, planting of the 2014 "msimu" crops, to be harvested in May/June, has just been completed in central and southern

unimodal rainfall areas. In general, the 2014 March to May rains are expected to start at seasonally normal times and to be near normal in terms of total rainfall. In **South Sudan**, deep concerns exist over the upcoming 2014 cropping season, due to the recent civil conflict which has resulted in input shortages and depleted households' productive assets that were often already inadequate.

Table 10. Eastern Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Total cereals ¹			
	2011	2012	2013 estim.	2011	2012	2013 estim.	2011	2012	2013 estim.	Change: 2013/2012 (%)
Eastern Africa	4.0	4.5	4.9	33.1	37.9	35.5	40.0	44.9	42.9	-4.3
Ethiopia	3.1	3.5	4.0	16.7	17.4	19.5	20.0	21.1	23.6	12.0
Kenya	0.3	0.4	0.4	3.7	3.9	3.5	4.1	4.5	4.0	-11.0
Sudan ²	0.3	0.3	0.2	2.5	5.7	2.6	2.9	5.9	2.9	-51.2
Tanzania U.R.	0.1	0.1	0.1	5.5	6.2	5.7	7.8	8.1	7.7	-4.6
Uganda	0.0	0.0	0.0	3.3	3.3	2.9	3.5	3.5	3.1	-11.3

Note: Totals and percentage change computed from unrounded data.

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

² Including South Sudan.

Cereal prices generally decline, but still remain high in several countries

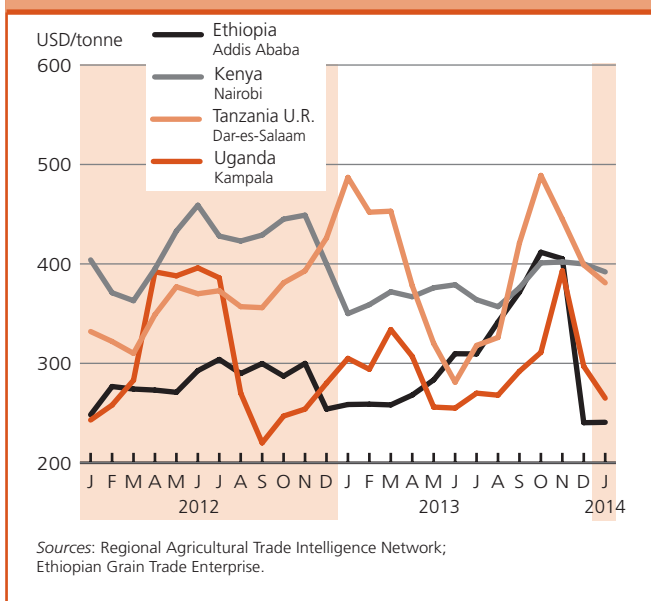
By the end of 2013, prices of coarse grains generally declined as the main season harvests increased supplies. Nevertheless, prices remained firm in **Kenya** and in some markets of the **United Republic of Tanzania**, and increased in **Somalia** on the back of concerns over the performance of second season harvests. In **Ethiopia**, cereal prices declined sharply in December and January in all monitored markets from the peaks reached in November as 2013 “meher” season crops increased supplies. In the capital Addis Ababa, prices of maize, teff and red sorghum in January were below or around their levels at the same time a year earlier, due to the adequate supplies from the good 2013 cereal production. In **the Sudan**, prices of sorghum, the main staple crop, declined slightly in January from the record levels reached in December as crops from the delayed 2013 harvest reached local markets. However, January prices were up to 50 percent above the levels of the same month of the previous year due to the sharply reduced 2013 cereal production as well as the removal of fuel subsidies in September 2013.

In **Uganda**, prices of maize declined by about 30 percent between November 2013 and January 2014 as crops from the recently completed 2013 second season harvest increased market supplies. However, in Lira market, located in a key producing area in the north of the country, prices remained 12 percent higher than at the same time last year reflecting the reduced 2013 crop production, coupled with strong export demand from neighbouring countries. Prices of matooke cooking bananas, the main staple, declined sharply in January as a result of abundant supplies from the new harvest and were around their levels of a

year earlier. In **Kenya**, prices of maize remained firm in recent months and in January they were about 10 percent above their levels of twelve months earlier, reflecting the reduced output of the recently completed 2013 main “long-rains” harvest and the unfavourable prospects for the secondary “short-rains” harvest. However, the availability of imports from neighbouring Uganda and the United Republic of Tanzania have contributed to mitigating price increases.

In **the United Republic of Tanzania**, prices of maize in January remained at generally low levels in most markets due to adequate availabilities from the above-average 2013 cereal production. In the northern Arusha market, however, prices rose markedly due to concerns over the performance of the secondary “vuli” harvest. Prices of rice were stable and at low levels in recent months due to improved supplies from the good 2013 harvest and reduced exports following an import ban introduced by neighbouring countries **Rwanda, Uganda and Kenya**. Low prices of rice, a substitute for maize in urban areas, have exerted downward pressure on maize prices and contributed to their decline in the capital Dar es Salaam in recent months. In **South Sudan**, prices of locally-produced sorghum started to increase at the beginning of December in some markets following normal seasonal patterns and have likely strengthened since then due to trade disruptions and uncertainty caused by the civil conflict which erupted in mid-December 2013. In **Somalia**, prices of locally produced maize and sorghum increased in January 2014 in several markets of the south despite the imminent start of the “deyr” harvest, driven by serious concerns over crops performance. January prices of maize and sorghum were well above their levels of twelve months earlier as a result of reduced humanitarian assistance and market disruptions in parts, caused by civil insecurity.

Figure 5. Maize prices in selected Eastern African markets



Sharp deterioration of the food security situation in South Sudan

The armed hostilities that began in Juba, South Sudan's capital city in mid-December, quickly spread throughout the country, seriously affecting six out of ten states. The conflict started at the end of the main cropping season with only the late harvests remaining in the fields. Due to the widespread displacement of people (as of 13 February, the IDPs caseload was estimated at more than 707 000 individuals), a large number of households lost their food stocks, with a negative impact on food availability in conflict-affected areas. In addition, the fighting has caused the destruction of market infrastructures and the disruption of domestic and cross-border trade flows. As a result, the food security situation has sharply deteriorated since the start of the conflict. According to the latest Integrated Phase Classification (IPC) analysis, the number of people in acute food insecurity and

livelihood crisis (IPC phases 3, “Crisis” and 4, “Humanitarian Emergency”) was estimated by late January 2014 at about 3.7 million, almost four times the pre-crisis estimate of 1 million individuals. The areas most affected by food insecurity are Unity, Jonglei and Upper Nile States. Despite serious access constraints to most conflict-affected areas, WFP has planned to provide food assistance to 419 000 IDPs, while FAO will implement emergency interventions for the timely distribution of critical agricultural inputs aimed at supporting 2014 planting operations and protecting local livelihood systems.

Currently, the number of people in need of humanitarian assistance in the subregion is estimated at about 11 million (including 3.7 million in **South Sudan**, 3.3 million in **the Sudan**, 2.4 million in **Ethiopia**, 850 000 in **Kenya**, 600 000 in **Somalia**, 100 000 in Karamoja region of **Uganda** and 70 000 in **Djibouti**), down by about 25 percent compared to estimates in March 2013 of 14.7 million people. Major pockets of high food insecurity are reported in northern pastoral areas of Turkana and Wajir districts in Kenya, in Ethiopia’s northeastern pastoral areas of Afar region as well as predominantly belg-growing areas of Amhara region, and among IDPs in South Kordofan and Darfur in the Sudan. In Somalia, IDPs represent three quarters of the people in acute food insecurity situations (IPC Phases 3 and 4), while the rest is in rural and urban areas in Sanaag, Sool, Bari, Nugaal, North and South Mudug, Galgaduud, Hiran, and Middle Shabelle as well as Middle and Lower Juba regions.

Southern Africa

Overall satisfactory 2014 crop conditions, but early dry spells a worry in parts

Harvesting of the 2014 cereal crops is expected to commence in March, with the bulk of the harvest to be completed between April and June. Cumulative precipitation levels since the start of the rainy season in October 2013 have been near normal in the main crop producing zones. However, water deficits were recorded in some parts of the southwest (parts of **South Africa**,

Botswana, **Namibia** and **Angola**) as well as areas in northern **Mozambique**, **Malawi** and **Zambia**, which delayed planting activities and impeded early crop growth, limiting potential crop yields. Rains, however, improved as the season progressed towards the end of 2013 and into the beginning of 2014, and current conditions point to generally satisfactory crop development. Although estimates are not yet available for most countries, a larger aggregate cereal crop is foreseen in 2014 compared to the below-average production of the previous year. Maize planting estimates in South Africa, which accounts for more than half of the subregion’s output, show a moderate contraction in the 2013/14 cropping season, but remain above the previous five-year average, while a small increase for the minor sorghum crop is estimated. However, preliminary estimates indicate a recovery in maize production in 2014. Elsewhere, small outbreaks of army worms were reported in parts of Malawi, Zambia and Mozambique, while flood damage in central provinces of Mozambique, as well as parts of Zambia and Zimbabwe, were caused by heavy rains in January and February; however, the impact on cereal outputs at the national level is expected to be minimal. The anti-locust campaign in **Madagascar** treated nearly 68 000 hectares since November 2013 significantly reducing damage to the 2014 crop.

Lower 2013 cereal production results in larger import requirements in 2013/14

Following several years of surplus production, lower domestic maize harvests in 2013 resulted in tighter supplies and caused an 11 percent increase in the subregion’s aggregate import requirement for the 2013/14 marketing year (generally May/April), estimated at about 1.37 million tonnes. **South Africa** is supplying nearly all maize requirements in the subregion, mainly to **Zimbabwe**, **Botswana**, **Lesotho**, **Namibia** and **Swaziland**, following the reduced exportable surplus in **Zambia**, which is the subregion’s second largest supplier. South Africa also exported large volumes of yellow maize during the first six months (May-October) of 2013/14, mainly to Asian countries, while white

Table 11. Southern Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2011	2012	2013 estim.	2011	2012	2013 estim.	2011	2012	2013 estim.	2011	2012	2013 estim.	Change: 2013/2012 (%)
Southern Africa	2.3	2.2	2.1	25.0	24.1	23.8	4.8	5.1	4.2	32.1	31.4	30.1	-4.0
- excl. South Africa	0.3	0.3	0.4	13.5	10.8	11.0	4.8	5.1	4.2	18.6	16.2	15.5	-4.4
Madagascar	0.0	0.0	0.0	0.4	0.4	0.5	4.3	4.6	3.6	4.7	5.0	4.1	-17.8
Malawi	0.0	0.0	0.0	4.0	3.7	3.8	0.1	0.1	0.1	4.1	3.8	3.9	1.4
Mozambique	0.0	0.0	0.0	2.6	1.8	1.8	0.3	0.3	0.4	2.9	2.2	2.2	1.9
South Africa	2.0	1.9	1.8	11.5	13.3	12.9	0.0	0.0	0.0	13.5	15.2	14.6	-3.6
Zambia	0.2	0.3	0.3	3.1	2.9	2.6	0.0	0.0	0.0	3.4	3.2	2.9	-9.3
Zimbabwe	0.0	0.0	0.0	1.6	1.1	1.0	0.0	0.0	0.0	1.7	1.2	1.0	-13.4

Note: Totals and percentage change computed from unrounded data.

maize has predominantly been exported to African countries. So far, just over 1.9 million tonnes of South African maize has been exported, and with only two months remaining of the marketing year, it is expected that total exports will be close to 2 million tonnes, about 200 000 tonnes up on the previous year. The lower domestic outputs in 2013 has also resulted in a draw-down of national inventories, with countries also purchasing supplies to replenish domestic stocks.

Aggregate wheat import requirements, which account for the largest share in total cereal imports, is estimated at 3.3 million tonnes in 2013/14, marginally higher than the previous year, reflecting increasing demand and generally static production. Rice imports are also estimated to expand, largely attributed to increased demand in Madagascar as they seek to compensate for the sharp production shortfall in 2013.

Prices of maize reach record levels in several markets

Tighter maize supplies and strong export demand has sustained upward pressure on maize prices this year, pushing them to record levels in several markets.

Prices in **South Africa**, the subregion's main exporter, rose steeply in December and January, and reached record highs that were more than 40 percent above their levels a year earlier. The sharp increases were driven by the reduced 2013 white maize crop; large volumes of yellow maize exports in 2013, mainly to Asia; the depreciation of the Rand; and uncertain prospects for the 2014 crop, particularly in the drought affected Northwest province (the third largest producing province). However, good

rains at the start of 2014 improved the production prospects and contributed to easing price pressure, with daily values declining from their highs observed at the end of January.

Prices in **Malawi**, **Mozambique** and **Zambia** recorded strong gains since the last quarter of 2013, supported by reduced national supplies, changes in subsidy policies and increased transportation costs. Malawi recorded the largest year-on-year increases in January, nearly doubling their price levels, mainly a result of the devaluation and subsequent depreciation of the country's currency (the kwacha), as well as localised production shortfalls. In Zambia, the removal of maize and fuel subsidies added an upward pressure on prices in 2013, and in January 2014 maize meal prices were about one quarter above their levels a year earlier. The release of maize supplies by the Food Reserve Agency (about 150 000 tonnes with a cost of ZMW 1 700 per tonne to millers) is expected to ease the upward pressure on prices. Prices of maize in Mozambique remain well above their levels last year with larger increases recorded in central and northern markets. In contrast, rice prices remained stable due to falling or stable international quotations.

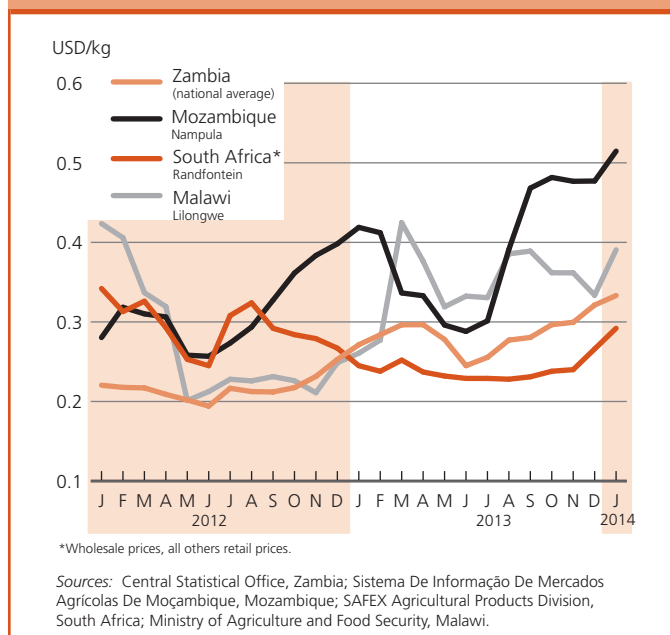
Food security deteriorates in parts

Food security conditions during the current lean season (January-March 2014) worsened markedly compared to the corresponding period of last year, mainly on account of reduced 2013 domestic harvests and high maize prices.

The number of food insecure in **Zimbabwe** was estimated at 2.2 million persons (25 percent of the rural population and significantly above the 1.67 million in the first quarter of 2013), with the highest prevalence of food insecure in southern and western provinces, reflecting both low household stocks and comparatively higher maize prices. In **Malawi**, the revised 2013 Malawi Vulnerability Assessment Committee (MVAC) evaluation in November, indicates increased food insecurity with approximately 1.9 million food insecure persons, up 27 percent on July 2013. Similarly, the Government of Namibia revised upwards the number of people requiring food assistance by nearly 130 000 to 463 581 persons in late 2013. In total, approximately 780 000 people were estimated to be food insecure, following the impact of the 2013 drought. Food insecurity is also up in southern parts of **Angola** due to the impact of the drought in 2013 and in **Madagascar** on account of the below-average 2013 rice crop and high rice prices.

Governments and humanitarian partners are providing assistance to the affected population, as well as supporting medium-term measure to build household resilience against future shocks. However, funding limitations in Zimbabwe resulted in a readjustment of programmes, with only half-rations being distributed to 1 million beneficiaries as of January. Food security conditions are anticipated to improve with the start of the early harvests in March.

Figure 6. White maize prices in selected Southern African markets

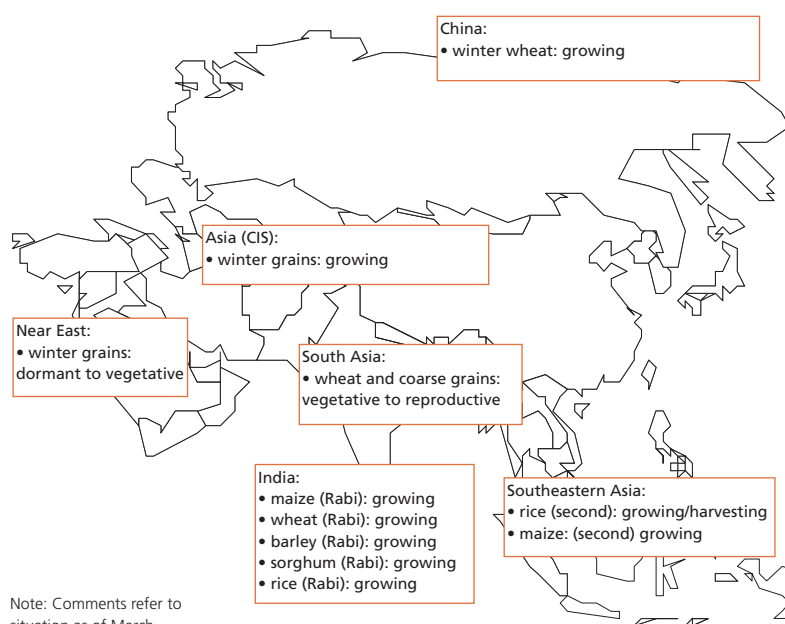


Asia

Far East

Overall favourable prospects for the 2014 main wheat and secondary rice crops

In the Far East subregion, mainly irrigated winter wheat, barley and the secondary rice crops, sown from October 2013 onwards, are in the critical growing stages in most countries. Weather conditions since the start of the season have been generally favourable in most countries with good early rains as well as adequate water reservoir levels for irrigation, benefiting early plantings and crop development. In **China**, the area planted to wheat is preliminarily estimated to have increased marginally from last year's level to 24.4 million hectares, largely seen as a response to consecutive increases of the Minimum Support Price. In **India**, the "Second Advance Estimate" from the Ministry of Agriculture points to a record harvest of the 2014 winter wheat (Rabi) crop at 95.6 million tonnes, following an estimated increase in plantings and anticipated higher yields, reflecting relatively good prospects for irrigation water, availability of fertilizers and other inputs. Preliminary production estimates in **Pakistan** point to a slightly reduced 2014 wheat output. An overall contraction in the area planted and expected lower yields, following early season dryness that affected the rain-fed crop in northern parts of Punjab province, account for the anticipated reduction.



Harvesting of the 2013/14 rice crop began in December, with the bulk of harvest to commence in March-April. Prospects for the irrigated, mainly secondary, rice harvests in 2014 are good in **Bangladesh, India, Indonesia, Myanmar** and **Viet Nam**. On the other hand, in **China** a prolonged dry spell through much of August in some south central and eastern parts of the country, including the provinces Hubei, Hunan and Zhejiang is estimated to have reduced yields, reducing the 2013/14 late double paddy crop to 35.1 million tonnes, 6 percent down from the previous year's record harvest of the same season. Similarly, in **the Philippines** the lingering effects of the several typhoons, including Typhoon Nari in October which struck northern parts

Table 12. Far East cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2011	2012	2013 estim.	2011	2012	2013 estim.	2011	2012	2013 estim.	2011	2012	2013 estim.	Change: 2013/2012 (%)
Far East	233.7	243.9	244.6	294.1	309.8	322.0	655.1	662.7	666.9	1 182.9	1 216.4	1 233.5	1.4
Bangladesh	1.0	1.3	1.3	2.0	2.3	2.3	50.8	50.8	51.5	53.9	54.3	55.1	1.5
Cambodia	0.0	0.0	0.0	0.7	1.0	0.9	8.8	9.3	9.3	9.5	10.2	10.3	0.1
China	117.4	120.8	122.2	201.4	214.7	227.2	202.7	205.9	204.5	521.5	541.5	553.9	2.3
India	86.9	94.9	93.5	42.5	41.6	41.1	157.9	157.9	159.3	287.3	294.4	293.9	-0.2
Indonesia	0.0	0.0	0.0	17.6	19.4	18.5	65.8	69.1	70.9	83.4	88.4	89.4	1.1
Japan	0.7	0.9	0.8	0.2	0.2	0.2	10.5	10.7	10.8	11.4	11.7	11.8	0.5
Korea Rep. of	0.0	0.0	0.0	0.2	0.2	0.2	5.6	5.4	5.7	5.9	5.6	5.9	5.6
Myanmar	0.2	0.2	0.2	1.5	1.7	2.0	29.0	28.1	29.0	30.7	30.0	31.2	4.1
Nepal	1.8	1.8	1.9	2.5	2.3	2.4	5.1	4.5	4.6	9.3	8.7	8.9	2.3
Pakistan	25.2	23.5	24.2	4.8	5.2	5.3	9.2	8.3	9.0	39.3	37.0	38.5	4.2
Philippines	0.0	0.0	0.0	7.0	7.4	7.4	17.0	18.1	18.0	24.0	25.5	25.4	-0.7
Thailand	0.0	0.0	0.0	5.2	5.1	5.2	38.1	38.0	36.6	43.3	43.1	41.9	-2.8
Viet Nam	0.0	0.0	0.0	4.8	4.8	5.2	42.4	43.7	44.1	47.2	48.5	49.3	1.5

Note: Totals and percentage change computed from unrounded data.

and Super Typhoon Haiyan in early November which severely impacted central areas, are estimated to have reduced the area planted of the secondary season. In **Thailand**, planting of the 2013/14 secondary rice crop is underway. Prospects are unfavourable as a result of an expected 22 percent reduction in plantings compared to the same season last year following the decision of Thai authorities to reduce support prices for the secondary season crops by 13 percent to THB 13 000 (USD 400). In addition, scanty rains in January and February have resulted in drought conditions, particularly affecting the minor rice producing north and northeastern provinces. As a result, the secondary season production is officially forecast at 8.5 million tonnes, some 21 percent below last year's above-average harvest of the same season.

Despite adverse weather conditions in some countries, the 2013³ aggregate cereal harvest is estimated at a record level

Harvesting of the 2013 main wet season rice and coarse grains crop was completed towards the end of the year in most countries. With most official estimates now available, FAO puts the subregion's 2013 aggregate production of cereals (including forecast for the secondary paddy harvests) at a record level of 1 233.5 million tonnes (in paddy terms) or 1.4 percent up from the previous record output in 2012. The increase in production is in line with population growth. With wheat and rice production almost unchanged, most of the growth is on

account of an increase in production of coarse grains of almost 4 percent, 322 million tonnes. Overall, the monsoon rains this year were mostly beneficial. However, localized flooding and severe weather affected several countries across southeastern Asia, preventing a potentially larger crop. Favourable weather boosted cereal production, particularly in **Bangladesh, Bhutan, China, the Democratic People's Republic of Korea, Sri Lanka and Viet Nam**, and lead to a recovery from last year's reduced harvests in **Pakistan, Myanmar, Nepal and the Republic of Korea**. On the other hand poor harvests were gathered, owing to adverse weather conditions and reduced plantings, in **Thailand and Timor-Leste**. In other countries, such as, **Cambodia, India, Indonesia, Japan, Lao People's Democratic Republic and the Philippines**, cereal production is estimated to remain more or less similar to that of the previous year.

Cereal exports projected to decrease slightly although remain much higher than average, while imports are expected to reach record level

In general, the Far East subregion is a net exporter of rice and a net importer of wheat. Despite the estimated increase in cereal production in 2013 in most countries of the subregion, the early forecast for the 2013/14 marketing year indicates a considerable increase in the subregional cereal imports at 102.1 million tonnes, up 15 percent compared to 2012/13 and 20 percent above the preceding five-year average. Total maize imports, the largest

Figure 7. Rice retail prices in selected Far East countries

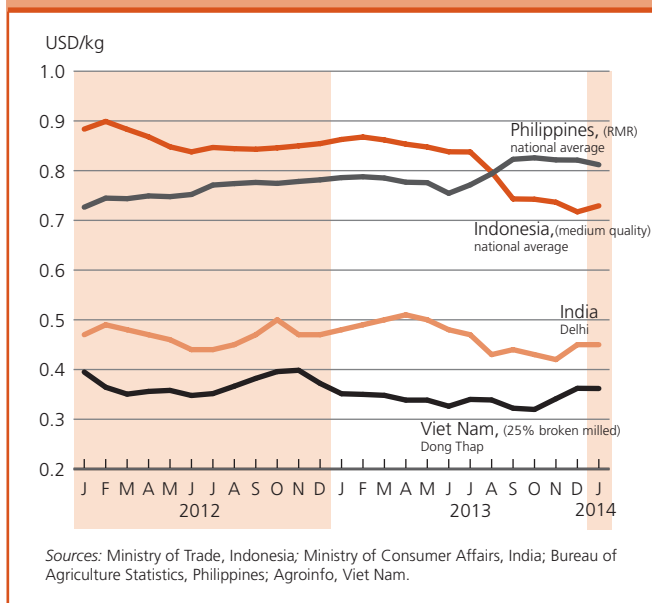
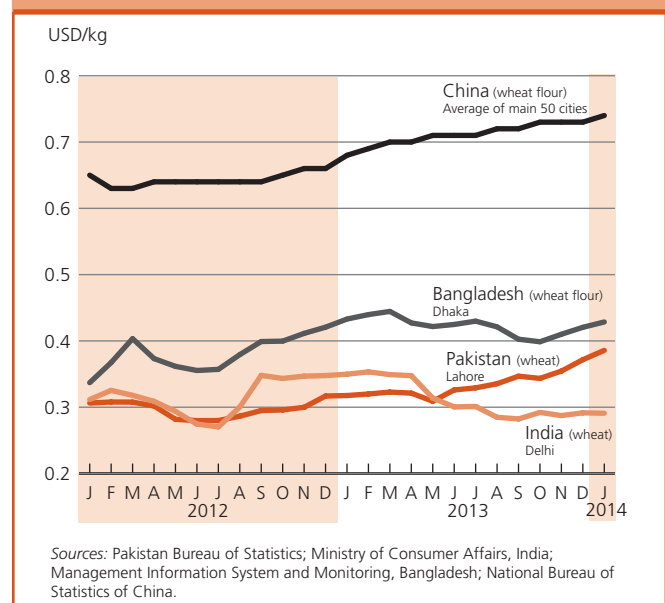


Figure 8. Wheat and wheat flour retail prices in selected Far East countries



³ Including paddy harvest of secondary season to be gathered in early 2014 in several countries.

component, are estimated at 42.1 million tonnes, an increase of 4.9 million tonnes over last year's above-average level. The increase is mainly attributed to the continued strong domestic demand for maize in China, which is forecast to reach an all-time high of 5.5 million tonnes in 2013/14 (October/September), up 2.8 million tonnes from the previous year. Similarly, total wheat imports are estimated to increase by 7.9 million tonnes, about 22.6 percent above last year's level, driven by increased import demand in **Bangladesh, Indonesia, the Philippines, Thailand, Viet Nam and Pakistan**. In **China**, strong demand for high quality wheat is seen to boost wheat purchases to 10 million tonnes during the 2013/14 marketing year (July/June), up 5.1 million tonnes from last year's level and the highest since the mid-1990s. Rice imports are expected to increase in 2014 by 9.5 percent over 2013 reflecting higher demand from Bangladesh, China, Nepal and the Philippines.

Aggregate cereal exports in 2013/14 are estimated to decrease by 2.5 percent, mainly due to an anticipated 17 percent contraction in the exportable surplus from India. Wheat exports are expected to decline to 6.6 million tonnes, 17 percent below the previous year, largely-reflecting lower exports in India due to decrease of the 2013 harvest. On the other hand, rice exports in 2014 are anticipated to increase by 3.1 percent compared to the levels in 2013. Lower estimated rice exports by India, relative to last year, are expected to be more than compensated by an increase in exports from Thailand and Viet Nam, estimated at 8.2 and 7 million tonnes, 23 and 4 percent, respectively, higher than their levels of the previous years.

Prices of rice follow mixed trends, while those of wheat remained generally stable or strengthened

Rice prices in recent months in local currencies showed generally mixed trends, decreasing in the main exporting countries, namely **Cambodia, India, Thailand and Viet Nam**, mainly reflecting generally lower import demand and good supplies from the recently completed 2013 main season bumper harvests. By contrast, localized crop damage, following unfavourable weather conditions, pushed prices up in some countries, notably **Myanmar, the Philippines and Sri Lanka**, as well as **China**, where the national average price reached a new record level in January, averaging CNY 5.92 (about USD 0.96) per kg, some 3 percent higher than a year earlier. Similarly, the average price of medium quality rice increased slightly in January in Indonesia reaching a new record in nominal terms, supported by high fuel prices.

Nominal prices of wheat and wheat flour remained generally stable or increased in some countries. In China, the average price of wheat flour, in US dollar terms, has been increasing in recent months and in January reached a record level of USD 0.74/kg, about 9 percent above their levels a year earlier, mainly due to strong domestic demand. Similarly, in **Pakistan** prices of wheat and wheat flour in US dollar terms have been steadily increasing since June 2012 reaching record levels in most markets in January 2014, underpinned by low levels of stocks and sharp rises in fuel prices. Prices of wheat flour gradually increased between October and January

in **Bangladesh**, mainly reflecting a reduction in the quantities distributed by the Government through open market sales. In India, despite ample state reserves, prices of wheat in local currency remained generally stable or increased in most markets in January, mainly as a result of higher minimum support prices in the 2014/15 agricultural season. The Government's decision to cut the floor price for exports by 13 percent to USD 260 per tonne also provided support. Prices of wheat flour were generally stable in Sri Lanka.

Table 13. Far East cereal production and anticipated trade in 2013/14¹
(thousand tonnes)

	Avg 5-ys (2008/09 to 2012/13)	2012/13	2013/14	2013/14 over 2012/13 (%)	2013/14 over 5-yr avg (%)
Cereals - Exports	35 586	43 886	42 769	-2.5	20.2
Cereals - Imports	85 190	88 539	102 088	15.3	19.8
Cereals - Production	932 230	995 925	1 011 483	1.6	8.5
Rice-milled - Exports	26 948	29 627	30 558	3.1	13.4
Rice-milled - Imports	9 330	9 221	10 095	9.5	8.2
Rice-milled - Production	424 958	442 172	444 900	0.6	4.7
Wheat - Exports	3 431	7 894	6 590	-16.5	92.1
Wheat - Imports	33 118	34 684	42 536	22.6	28.4
Wheat - Production	227 990	243 919	244 551	0.3	7.3

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

Near East

Favourable outlook for the 2014 winter crops, except in Syria where civil insecurity hampers production

Wheat and barley crops, for harvest from June, are mostly in their final stages of dormancy in **Turkey, Iraq, the Islamic Republic of Iran** and **Afghanistan**. Climatic conditions in the region were so far generally good and assuming normal weather conditions for the remainder of the season, production prospects are generally favourable, resulting in average or above average preliminary production forecasts. Concerns over poor establishment of wheat and barley prevail in the key Turkish winter grain area of Anatolia following an unfavourably dry autumn and a cold period in December. Elsewhere in central Turkey, precipitation since early September totalled less than 25 percent of normal, diminishing soil moisture reserves for spring growth, although rains in February are slowly improving moisture reserves. Accordingly, preliminary forecasts point to a wheat production slightly below five-year average in Turkey.

In **the Syrian Arab Republic**, no crop planting information is available, although satellite based information points to concerns about potential drought conditions. The persistent civil insecurity and conflict is expected to further hamper production, as many farmers will be prevented from accessing their farmland during important stages of crop development and harvest. Lack of fuel to operate irrigation

pumps and other equipment, as well as shortage of harvesters have compounded the problem.

The subregion's cereal production in 2013 is estimated at 74.5 million tonnes, about 6 percent higher than last year, and some 10 percent higher than the preceding five-year average, supported by large production increases in Iraq and Turkey.

Increased food insecurity due to civil conflict

Civil unrest and conflict in parts of the subregion have disrupted agricultural production, trade and humanitarian aid distribution, thus negatively affecting the food security situation of a large number of people, especially the most vulnerable.

According to the Joint Food Security Rapid Need Assessment conducted in December 2013, the number of people in need of urgent food and livelihood assistance is estimated at about 6.3 million. As of mid-February 2014, the total number of registered refugees from **the Syrian Arab Republic** and individuals awaiting registration in **Jordan, Lebanon, Turkey, Iraq** and **Egypt** was close to 2.5 million. Although WFP continues providing food assistance to vulnerable Syrian populations in Jordan, Lebanon, Iraq and Turkey, resources in host communities remain under strain.

An increasingly complex humanitarian crisis has been under way in **Yemen** with conflict in the north, secessionist movements in the south and other religious movements in various parts of the country. Some 43 percent of the population is now estimated to be food insecure.

Table 14. Near East cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2011	2012	2013 estim.	2011	2012	2013 estim.	2011	2012	2013 estim.	2011	2012	2013 estim.	Change: 2013/2012 (%)
Near East	46.8	45.1	47.1	20.5	20.6	23.0	4.1	4.2	4.4	71.4	70.0	74.5	6.4
Afghanistan	3.3	5.0	4.2	0.6	0.7	0.7	0.7	0.7	0.7	4.6	6.4	5.6	-12.8
Iran (Islamic Rep. of)	13.5	13.8	14.0	4.3	4.7	4.5	2.3	2.4	2.5	20.1	20.9	21.0	0.7
Iraq	2.8	2.1	3.3	1.2	0.8	1.2	0.2	0.2	0.2	4.2	3.1	4.7	52.9
Syrian Arab Republic	3.9	2.8	2.4	0.8	1.0	1.1	0.0	0.0	0.0	4.7	3.8	3.5	-8.4
Turkey	21.8	20.1	22.1	12.5	12.4	14.5	0.9	0.9	0.9	35.2	33.4	37.5	12.3

Note: Totals and percentage change computed from unrounded data.

CIS in Asia⁴

Uncertain prospects for the 2014 winter cereal crops

Planting of the 2014 winter crops has been completed satisfactorily. The total area under cereals is confirmed to have increased in **Azerbaijan**. Official reports indicate that dormant winter wheat crops are in satisfactory condition. In **Tajikistan**, accumulated precipitation deficits could result in potential damage to rain-fed crops, especially in the southern areas of the country. However, the subregion's aggregate 2014 cereal production will depend on the outcome in **Kazakhstan**, the main producer, where the bulk of the crop will be sown only in spring. Assuming normal weather conditions, the potential cereal production of Kazakhstan is forecast around 20 million tonnes including 15 million tonnes of wheat.

Improved export availabilities in 2013/14 following the recovery in the 2013 production

The aggregate output in the subregion is estimated at about 34.89 million tonnes, 28 percent higher than last year's drought-reduced level and about 10 percent above the five-year average. Wheat production is estimated at over 28 million tonnes, representing approximately 80 percent of the aggregate cereal production. The bumper 2013 cereal harvest mainly reflects an increased production in **Kazakhstan**, the main wheat exporter in the subregion, due to improved yields as the planted area decreased for the third consecutive year to below average levels. The recovery in export availabilities has improved in 2013/14 following production rebounds in 2013.

A significant increase of 14 percent in cereal production has also been reported in **Kyrgyzstan**, though wheat production still

remained 10 percent below the five-year average. In all other CIS Asian countries, namely **Tajikistan**, **Turkmenistan**, **Uzbekistan**, **Armenia**, **Azerbaijan** and **Georgia**, this year's cereal harvests increased slightly from the 2012 level.

Prices of wheat flour remain firm at near record levels

In the wheat import-dependent countries of the subregion, prices of wheat flour remained generally unchanged in January although they decreased moderately in Tajikistan. Overall, prices remained around their high levels at the same time last year, despite the good 2013 harvests and low regional export prices. Relatively high transportation costs continued to support prices and limited further declines.

In **Kazakhstan**, wheat prices remained unchanged in recent months and were more than one-third down from their year-earlier levels, reflecting ample supplies after a recovery in production, coupled with a weaker pace in trade activity. In **Tajikistan**, wheat flour prices declined in January, reflecting the decrease in recent months of export quotations in Kazakhstan, the country's main source of imports. A recent decline in fuel prices, following the delivery of duty-free oil from **the Russian Federation** also put downward pressure on prices. However, transportation costs still remain high, limiting further declines in prices. Overall, wheat flour prices were as much as 20 percent down from their near-record levels of a year earlier. In **Kyrgyzstan**, wheat flour prices remained unchanged in January, despite lower export quotations in the regional export markets and adequate supplies from the good 2013 harvest. Overall, prices were slightly below their high levels at the same time last year. The depreciation of the local currency and

increased transportation costs, in spite of a recent decline in fuel prices, contributed to maintaining prices relatively high. Prices of mutton and beef, important staples in the country, increased in the past two months and were generally above their year-earlier levels. In **Georgia**, which normally imports 80 to 90 percent of its wheat consumption needs, mainly from the Russian Federation, average prices of wheat flour increased slightly in January

Table 15. CIS in Asia cereal production

(million tonnes)

	Wheat			Coarse grains			Total cereals ¹			
	2011	2012	2013 estim.	2011	2012	2013 estim.	2011	2012	2013 estim.	Change: 2013/2012 (%)
CIS in Asia	33.9	21.4	28.4	6.2	5.1	5.7	40.8	27.3	34.9	27.8
Armenia	0.2	0.2	0.2	0.2	0.2	0.2	0.4	0.4	0.4	-1.6
Azerbaijan	1.6	2.0	2.1	0.8	0.8	0.7	2.4	2.8	2.8	1.6
Georgia	0.1	0.1	0.1	0.4	0.4	0.4	0.5	0.5	0.5	-0.2
Kazakhstan	22.7	9.8	16.3	3.5	2.2	2.8	26.5	12.4	19.5	57.1
Kyrgyzstan	0.9	0.6	0.8	0.7	0.7	0.8	1.6	1.4	1.5	14.3
Tajikistan	0.7	0.8	0.8	0.2	0.2	0.2	1.0	1.1	1.1	-0.1
Turkmenistan	1.3	1.2	1.3	0.1	0.1	0.1	1.5	1.4	1.5	7.1
Uzbekistan	6.3	6.7	6.9	0.4	0.4	0.4	6.9	7.3	7.5	2.2

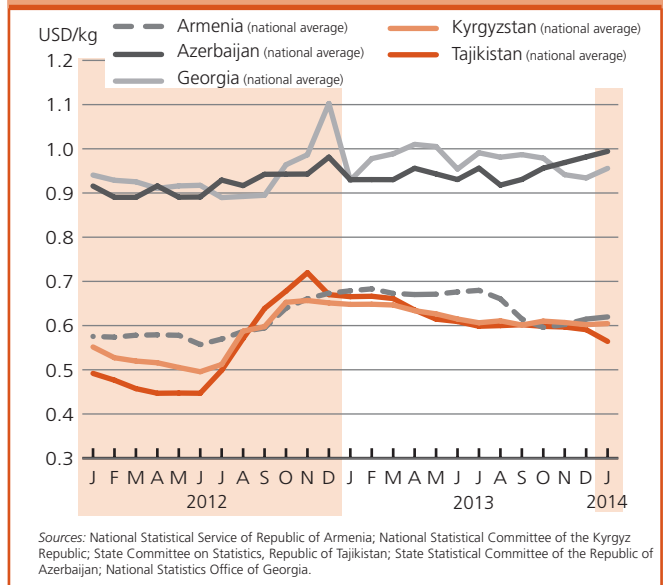
Note: Totals and percentage change computed from unrounded data.

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

⁴ Georgia is no longer a member of CIS but its inclusion in this group is maintained for the time being.

and were above their year-earlier levels. Prices of staple potatoes surged in the past two months and in January they were double their values in the corresponding period last year. This reflects lower imports and reduced 2013 production, after crops in the Samtskhe–Javakheti region, an important growing area, were negatively affected by unfavourable weather conditions during the growing season. In **Armenia**, prices of wheat flour strengthened in January and remained close to their high levels of a year earlier, despite good availabilities from the 2013 wheat harvest. Prices of potatoes, another staple in the country, rose markedly in December and January, mainly due to increased exports. In **Azerbaijan**, prices of wheat flour continued to increase marginally in December, mainly reflecting increased transport costs following a rise in fuel prices at the beginning of the month, which also led to higher prices of potatoes. However, prices of wheat and wheat products remained at the same level of December 2012, as a result of adequate supplies from the 2013 wheat harvest and high imports during the season.

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

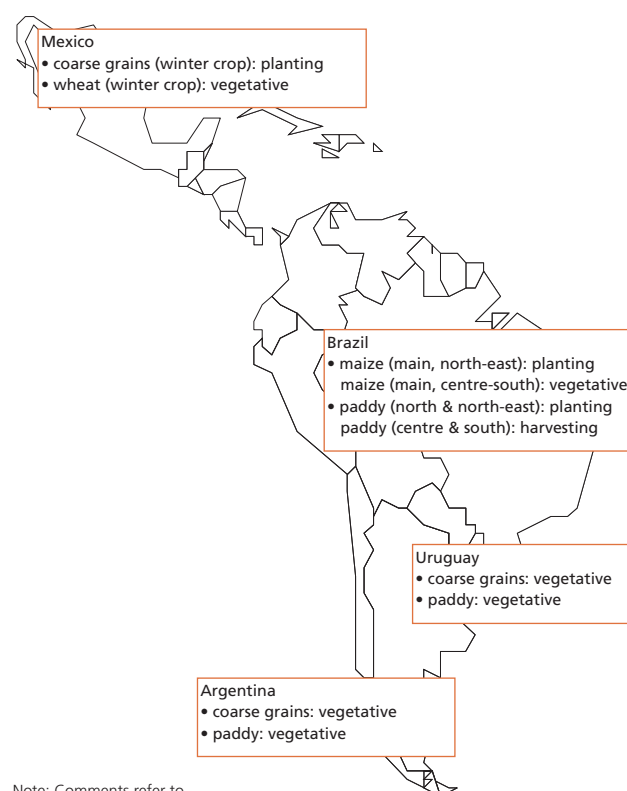


Latin America and the Caribbean

Central America and the Caribbean Cereal production to increase slightly in 2013

Harvesting of the 2013 cereal crops has just been completed, while sowing of the 2014 first season maize crop has just been concluded in Mexico under favourable weather conditions. Sowing of the 2014 cereal crops for the rest of the subregion will not begin until May. Following above-average first and second season harvests in the subregion, FAO estimates cereal production for 2013 at over 42 million tonnes, 3 percent up from the previous year's level. The increase in cereal production reflects a strong recovery in maize production. In **Mexico**, the subregion's main producer, the cereal output is estimated at a record level of 34 million tonnes (in paddy terms), slightly up from last year's above-average production, mainly reflecting improved yields of the maize crop, which was estimated at 22.4 million tonnes. Production of wheat was estimated at 3.4 million tonnes, 5 percent higher than in 2012, following a return to normal planting levels.

Elsewhere in the subregion, in **Honduras** and **Nicaragua**, the 2013 main season maize harvests recovered significantly from the previous year's reduced levels leading to above average aggregate 2013 cereal productions. In **Haiti** and **the Dominican Republic** after a year without hurricanes and excessive rains, cereal production recovered from the low production in 2012. In **El Salvador** and **Guatemala**, cereal output was estimated at near record levels, as a result of facilitated access to improved seeds and fertilizer under both governments' agricultural support programme.



Cereal imports to rise in 2013/14

Despite the anticipated higher cereal production this year, cereal imports are estimated to rise by almost 21 percent in 2013/14 marketing year (July/June) to about 28 million tonnes in 2013/14. The increase is driven by the strong demand for maize from the feed industry, particularly in **Mexico**, **El Salvador** and **Panama**.

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

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2011	2012	2013 estim.	2011	2012	2013 estim.	2011	2012	2013 estim.	2011	2012	2013 estim.	Change: 2013/2012 (%)
Central America & Caribbean	3.6	3.3	3.4	29.6	35.0	35.8	2.9	2.7	2.9	36.1	41.0	42.1	2.7
El Salvador	0.0	0.0	0.0	0.9	1.1	1.1	0.0	0.0	0.0	0.9	1.1	1.1	2.3
Guatemala	0.0	0.0	0.0	1.7	1.7	1.8	0.0	0.0	0.0	1.8	1.8	1.8	2.4
Honduras	0.0	0.0	0.0	0.6	0.6	0.6	0.0	0.1	0.1	0.7	0.7	0.7	5.3
Mexico	3.6	3.3	3.4	24.7	30.2	30.8	0.2	0.2	0.2	28.5	33.6	34.4	2.2
Nicaragua	0.0	0.0	0.0	0.7	0.5	0.6	0.4	0.4	0.4	1.1	1.0	1.0	3.5
South America	25.5	16.8	19.2	106.0	120.8	137.0	26.4	24.9	25.2	157.8	162.5	181.4	11.6
Argentina	14.5	8.2	9.2	32.8	31.2	37.8	1.7	1.6	1.6	49.1	41.0	48.6	18.6
Brazil	5.7	4.4	5.7	59.0	74.1	83.5	13.6	11.6	11.8	78.3	90.1	101.1	12.2

Note: Totals and percentage change computed from unrounded data.

Cereal prices generally stable and low

In Central America, prices of white maize, the main staple in the subregion, remained mostly stable in January as a result of the good supplies from the 2013 production. In **Guatemala**, however, maize prices increased by 8 percent from December to January, ahead of the third season harvest scheduled to start in the second half of February in the main producing northern region. Nonetheless, similar to the rest of the subregion, prices remained well below last year's levels. In **Mexico**, white maize prices changed little in January and remained low. Prices have been in a declining trend in the past two years reflecting consecutive satisfactory outputs and in January 2014 were significantly below their year-earlier levels.

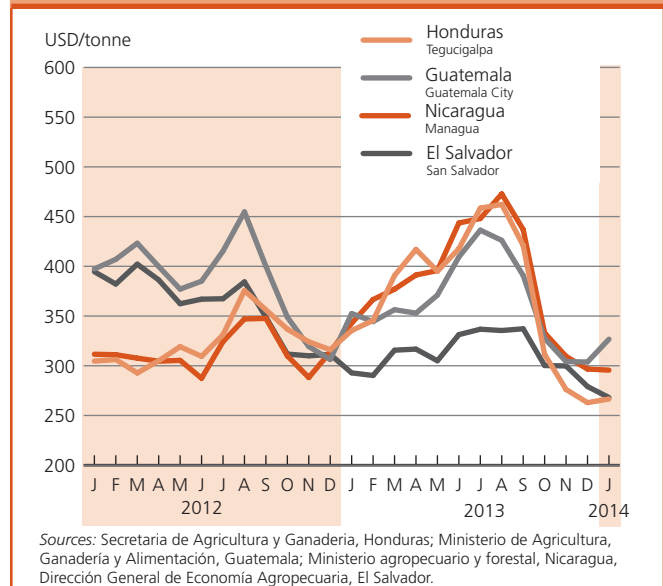
In **Haiti**, prices of the main food staple imported rice strengthened in January in some markets, notably in the capital Port-au-Prince. While rice export quotations from the United States, the country's main source of imports, were stable in January, the increase in domestic rice prices reflects the depreciation of the local currency with respect to the US dollar, resulting in higher import costs.

South America

The 2014 maize production forecast to remain at high levels

In the main producing countries of South America, prospects for the 2014 maize crops are generally favourable. Good precipitations in January prevented any significant yield reductions due to dry weather conditions at the end of 2013. In **Brazil** early forecast for the 2014 aggregate maize crop point to a slight decline in production - from last year's record level - to almost 76 million tonnes, mainly due to an expectation of lower plantings for the second season crop, which is currently underway. Conditions for the first season maize crop, about to be harvested, are favourable as good precipitation in January prevented any significant declines in yields after dry weather most of December. In **Argentina** harvesting of the 2014 maize crop is scheduled for March. Heavy rains in late January and the first half of February, following a previous dry spell, may have arrived too late to prevent yield reductions, but FAO's preliminary forecast put production above the five-year average at 24 million tonnes, well below the bumper harvest of last year. The lower forecast mainly reflects a reduction of 7 percent from last year's record plantings. In **Bolivia** despite severe flooding in the northern department of Beni, the overall prospects for this year's "de verano" season remain favourable, since the most important cereal producing departments have not been severely affected and the abundant rains may have benefited the developing crops in parts. At the moment of the severe flooding, the 2014 main "de verano" season maize crop was in an advance vegetative state, while harvesting of the rice crop had just begun.

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



Cereal production in 2013 estimated at a record level despite severe wheat crop losses

Despite the effects of adverse weather on the wheat crop, the subregion's 2013 aggregate cereal production is estimated at a record high of 173 million tonnes, or more than 20 percent higher than the regions five-year average. The increase reflects bumper 2013 maize crops, in **Argentina, Brazil, Paraguay** and **Uruguay** as a result of higher plantings and yields.

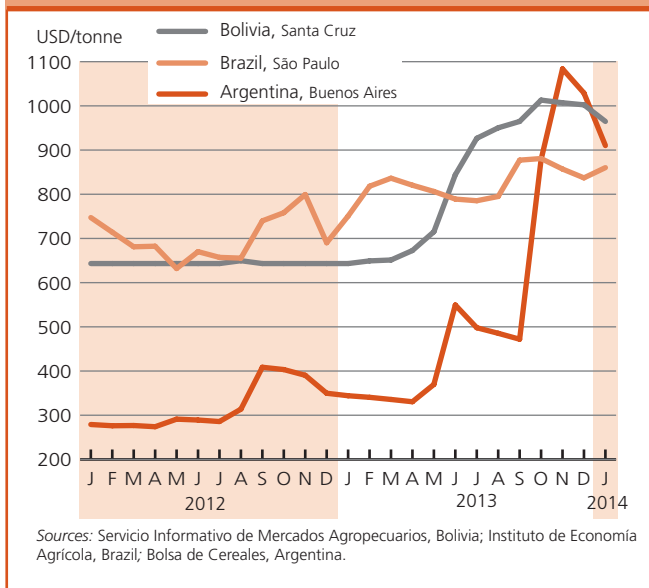
The 2013 wheat production recovered from the previous year's sharply reduced level. However, at a little more than 19 million tonnes, production still remained below the five-year average for the second consecutive year. This reflects sharp contractions in wheat production in Paraguay and losses in Brazil and Argentina due to frosts and dry weather.

Wheat flour prices remained at high levels in January, those of maize generally low

In South America, domestic wheat flour prices persisted at high levels in several countries of the subregion, despite marked declines in the price of the grain with completion of the 2013 harvests. In **Brazil**, flour prices strengthened further in January reaching all-time highs, while in **Argentina** quotations declined marginally, in local currency terms, and were almost three times higher than a year earlier. In both countries, flour prices were supported by local millers still mostly operating with the higher priced old crop and at reduced capacity because of low stocks. In **Uruguay**, where a good wheat crop was gathered, flour prices remained at near record levels, one-third above those in January 2013, as a result of strong regional export demand.

In **Bolivia**, which normally imports two-thirds of its consumption requirements, mainly from Argentina, flour prices in January were still 46 percent above their year-earlier levels despite some declines. By contrast, in **Chile, Peru and Ecuador**, wheat flour prices weakened or remained stable and were lower than a year earlier reflecting imports from non-Mercosur (Southern Common Market) countries, mainly the United States and Canada. Maize prices remained relatively unchanged in several countries of the subregion, including Argentina, Brazil, Colombia and Peru where they were significantly below their levels of a year earlier reflecting the 2013 record harvests, ample regional export supplies and low prices in the international markets. However, in Ecuador, maize prices surged in January following a significant reduction in imports due to last year's bumper crop, coupled with sustained demand from the feed industry. Despite the sharp increase last month, maize prices remained unchanged relative to January 2012. In Bolivia, which is normally self-sufficient in maize, prices rose by more than one-third in January in the main Santa Cruz market almost doubling their levels of a year earlier, reflecting reduced supplies due to the poor 2013 maize production.

Figure 11. Wholesale wheat flour prices in selected countries in South America



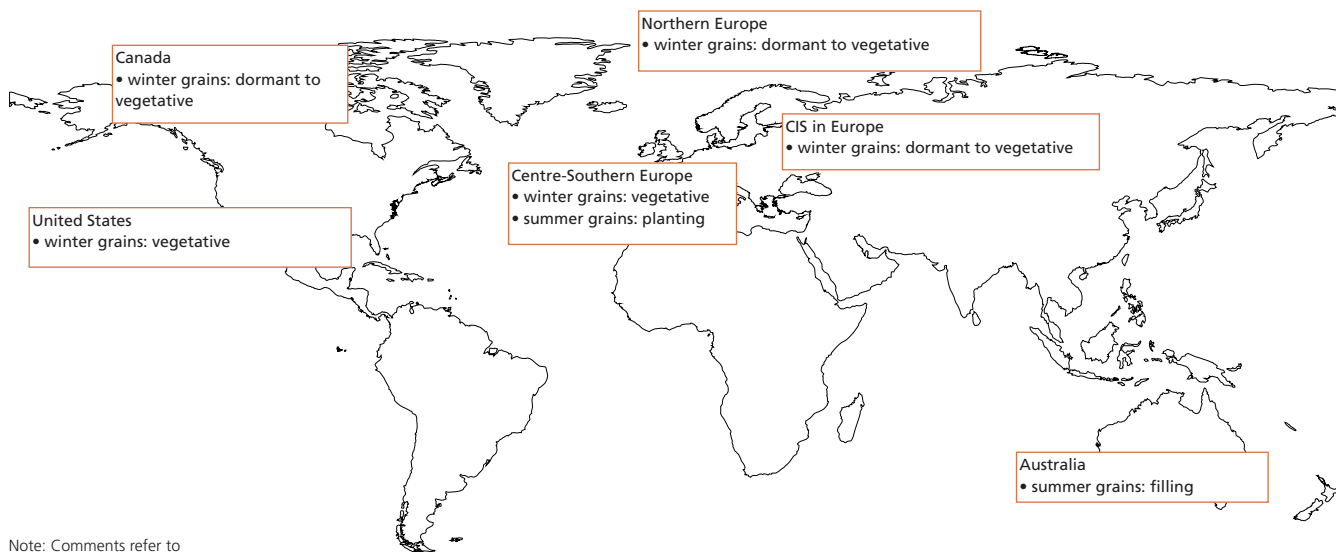
North America, Europe and Oceania

North America

Mixed prospects for United States winter wheat

Prospects for the **United States** winter wheat crop are mixed. For the hard red winter crop in the northern and middle Great Plains, conditions remain generally satisfactory despite some deterioration in recent weeks due to extreme cold and dryness.

In the southern Plains, persisting dryness remains a concern for the development of crops as they start to come out of dormancy in the coming weeks. For the white winter wheat, which normally accounts for about 15 to 20 percent of the total winter wheat, extreme drought in the main producing areas, notably Washington State, is likely to have an impact on outcome of this year's crop. However, at this early stage, there are still many variables that can influence the final output of wheat in 2014. Although the official USDA Winter



Wheat Seeding report in January put the total planted area of winter wheat for the 2014 harvest down 3 percent from the previous year at 16.9 million hectares, an improvement in winter survival rates after last year's exceptionally poor level could see the final harvested area of winter wheat increase. For spring wheat, factors such as the survival rate of winter crops, weather conditions at planting time, and price prospects for wheat relative to other crops will all influence the planted area. At this early stage, based on the area and current condition of the winter crop and assuming a normal spring crop season the country's aggregate wheat output in 2014 is tentatively forecast at 60 million tonnes, 3.5 percent up from the previous year.

In **Canada**, conditions for the minor winter wheat crop are favourable. The main crop will be sown later this spring and plantings are expected to decline after the ten-year high last year.

Europe

European Union

Wheat area up and growing conditions mostly favourable

In the **European Union**, the wheat area for the 2014 harvest is estimated up by 4 percent. The EU has experienced warmer than usual temperatures during the winter so far, and winter wheat is overall in good condition. Poor winter hardiness caused by mild temperatures in the early winter in northern Europe has been recovered, and protective snow cover remains satisfactory in eastern parts, so significant frost damage is not currently a concern. However, in late January, heavy rainfall affected many western parts of Europe and yield potential may already be irreversibly affected in the worst hit areas where fields are waterlogged, notably in the United Kingdom. Based

on the current area estimate and assuming yields around the recent average, the EU's total wheat output in 2014 is tentatively forecast at 145 million tonnes, 1.8 percent up from the previous year's level.

CIS in Europe

Early prospects for the 2014 winter cereal crops are favourable

In **the Russian Federation** and **Ukraine**, the two main exporters of the subregion, winter cereal crops are reported to be generally in satisfactory condition, despite excessive rains and sowing delays in autumn. Moderate snowpack provided dormant winter wheat with sufficient protection against freeze damage. In the Russian Federation, official estimates indicated wheat plantings of 25 million hectares and early forecasts point to an output of 50 million tonnes. Overall, the preliminary forecasts for cereal production is put at 86-87 million tonnes, marginally above the last five-year average. In Ukraine, according to official information, winter wheat for 2014 harvest were planted on 6.3 million hectares and winter barley on 1.2 million hectares. Taking into account the current conditions of winter crops in the country as well as further favourable spring cropping season, early forecast of Ukrainian's 2014 cereal production points to about 60 million tonnes including 19 million tonnes of wheat. In **Moldova**, as well as in **Belarus**, crops are also reported in generally good conditions.

Above-average 2013 cereal production

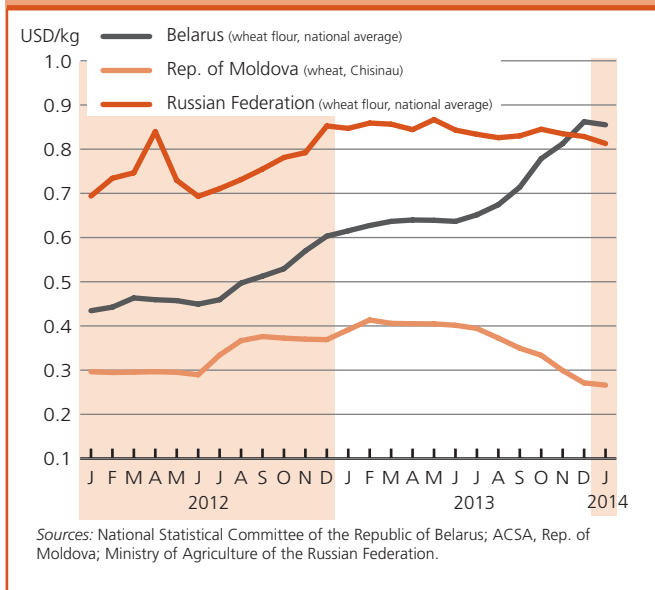
With the exception of **Belarus**, cereal outputs have increased significantly from last year's drought affected harvests, mainly reflecting favourable weather conditions during the cropping seasons. In aggregate, the subregion's output is estimated at 159 million tonnes, 28 percent above last year's level and

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

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2011	2012	2013 estim.	2011	2012	2013 estim.	2011	2012	2013 estim.	2011	2012	2013 estim.	Change: 2013/2012 (%)
North America	79.7	88.9	95.5	347.1	310.9	398.6	8.4	9.1	8.6	435.2	408.8	502.7	23.0
Canada	25.3	27.2	37.5	23.0	24.5	28.8	0.0	0.0	0.0	48.3	51.7	66.3	28.2
United States	54.4	61.7	58.0	324.0	286.3	369.8	8.4	9.1	8.6	386.9	357.0	436.3	22.2
Europe	223.6	193.1	223.4	236.2	222.2	250.6	4.4	4.4	4.0	464.2	419.6	478.0	13.9
Belarus	2.1	2.1	2.0	5.7	6.7	6.3	0.0	0.0	0.0	7.7	8.8	8.2	-6.1
EU	137.6	132.6	142.5	149.1	143.6	160.1	3.2	3.1	2.9	290.0	279.3	305.4	9.4
Russian Federation	56.2	37.7	52.1	34.2	29.6	35.8	1.1	1.1	0.9	91.5	68.4	88.8	29.8
Serbia	2.1	1.9	2.5	7.0	6.7	6.6	0.0	0.0	0.0	9.0	8.6	9.1	5.4
Ukraine	22.3	15.8	21.5	33.4	29.9	37.3	0.2	0.2	0.2	55.9	45.9	59.0	28.6
Oceania	30.2	22.8	27.3	12.7	12.3	14.3	0.7	0.9	1.2	43.6	36.0	42.8	18.9
Australia	29.9	22.5	27.0	12.1	11.8	13.8	0.7	0.9	1.2	42.7	35.1	41.9	19.4

Note: Totals and percentage change computed from unrounded data.

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



12 percent higher than the five-year average. In **the Russian Federation**, the 2013 cereal output is put at 88.8 million tonnes (rice in paddy terms) or 30 percent up on 2012. The wheat exportable surplus of the country is foreseen at about 14.5 million tonnes in 2013/14. In **Ukraine**, cereal production is estimated at 28 percent above last year's level, and 24 percent above the five-year average. It is expected that cereal exports, will just exceed 29 million tonnes, 30 percent above the previous year's volume. In 2013, the cereal harvest of **the Republic of Moldova** is estimated at about 3 million tonnes, a recovery from the previous year's reduced output and the highest level

in the past ten years. An above-average cereal harvest was gathered in Belarus.

Wheat flour prices easing

Export prices of wheat in **the Russian Federation** and **Ukraine** eased somewhat in January, after increases in previous months, reflecting a slowdown in export sales and generally favourable prospects for the 2014 crop.

Oceania

Australia 2013 winter grain crop recovers sharply

The recently completed 2013 wheat harvest in **Australia** is officially estimated at 27 million tonnes, some 20 percent up from the previous year's crop. Barley production also recovered significantly in 2013, rising by almost about 30 percent to reach 9.5 million tonnes. A bumper winter grain crop in Western Australia and above-average production in South Australia and Victoria offset reduced harvests in Queensland and New South Wales where crops were adversely affected by an extreme heat wave during the summer. The extreme hot and dry conditions in these two latter mentioned states have also severely impacted the country's 2014 summer coarse grains production outlook. Between them, these states account for virtually all the sorghum and maize production; planted areas decreased sharply and yields are also expected to be well below average as a result of the adverse conditions.

Early indications for the 2014 wheat crop, which will be planted from April to June, point towards some decline from the 2013 good level; the area planted to wheat is tentatively expected to remain unchanged but yields are assumed to return to average after bumper levels in some parts last year.

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Table A1. Global cereal supply and demand indicators

	Average 2006/07 - 2010/11	2009/10	2010/11	2011/12	2012/13	2013/14
1. Ratio of world stocks to utilization (%)						
Wheat	24.7	29.0	26.6	26.4	23.0	25.4
Coarse grains	15.7	16.9	14.7	15.3	13.8	17.8
Rice	28.0	29.8	30.9	33.8	35.8	35.9
Total cereals	20.8	23.0	21.5	22.3	20.9	23.7
2. Ratio of major grain exporters' supplies to normal market requirements (%)						
	120.7	124.5	115.9	118.3	108.2	121.5
3. Ratio of major exporters' stocks to their total disappearance (%)						
Wheat	17.5	21.7	20.8	18.1	14.3	16.0
Coarse grains	13.0	15.5	10.6	10.7	8.3	12.8
Rice	20.3	21.6	20.7	25.2	28.5	28.0
Total cereals	16.9	19.6	17.4	18.0	17.0	18.9
	Annual trend growth rate 2003-2012	2009	2010	Change from previous year		2013
4. Changes in world cereal production (%)						
	2.2	-0.8	-0.4	4.3	-2.0	9.0
5. Changes in cereal production in the LIFDCs (%)						
	2.8	-0.2	7.6	1.7	4.2	-0.1
6. Changes in cereal production in the LIFDCs less India (%)						
	3.1	4.9	7.2	-2.0	5.2	0.2
	Average 2007-2011	2010	Change from previous year (%)			2014*
7. Selected cereal price indices:						
Wheat	184.9	10.6	31.8	-4.8	-5.0	-17.1
Maize	194.8	12.0	57.6	2.2	-12.9	-32.8
Rice	232.2	-10.0	6.6	-4.6	0.8	-1.9

Notes:

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

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

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

Normal market requirements for major grain exporters are defined as the average of domestic utilization plus exports in the three preceding seasons.

Disappearance is defined as domestic utilization plus exports for any given season.

Price indices: The wheat price index has been constructed based on the IGC wheat price index, rebased to 2002-2004=100; For maize, the U.S. maize No.2 Yellow (delivered U.S. Gulf ports) with base 2002-2004=100; For rice, the FAO Rice Price Index, 2002-2004=100, is based on 16 rice export quotations.

*January-February average.

Table A2. World cereal stocks¹
(million tonnes)

	2009	2010	2011	2012	2013 estimate	2014 forecast
TOTAL CEREALS	492.9	522.9	501.0	519.4	505.1	578.5
Wheat	161.5	190.8	185.7	180.9	159.0	179.3
held by:						
- main exporters ²	49.7	55.4	51.6	43.4	37.0	41.4
- others	111.8	135.4	134.1	137.5	122.0	137.9
Coarse grains	200.2	194.6	170.1	177.2	171.1	220.0
held by:						
- main exporters ²	86.3	87.7	62.6	59.0	46.9	79.5
- others	113.9	106.9	107.5	118.2	124.2	140.5
Rice (milled basis)	131.3	137.6	145.2	161.3	175.0	179.1
held by:						
- main exporters ²	36.1	33.4	33.3	41.4	47.6	48.5
- others	95.2	104.2	111.9	119.9	127.4	130.6
Developed countries	178.0	191.4	152.7	149.3	116.5	158.0
Australia	6.6	7.4	9.5	7.3	4.5	5.9
Canada	13.0	13.6	11.2	9.4	8.0	18.8
European Union	48.4	45.7	32.5	32.7	25.7	34.2
Japan	4.6	4.8	4.8	4.9	5.2	5.4
Russian Federation	18.1	21.2	18.0	15.2	7.5	11.4
South Africa	2.5	3.1	4.0	2.5	2.3	1.4
Ukraine	8.0	6.7	5.1	10.7	6.4	7.3
United States	65.9	75.9	57.3	49.3	44.2	59.0
Developing countries	314.9	331.5	348.3	370.1	388.6	420.5
Asia	260.0	275.7	285.3	304.8	331.0	355.2
China	154.9	163.7	167.1	172.1	188.0	207.6
India	39.1	35.5	38.3	45.6	49.4	49.9
Indonesia	6.4	8.3	10.4	12.4	13.6	13.7
Iran (Islamic Republic of)	3.2	6.0	4.7	3.5	8.3	9.5
Korea, Republic of	2.8	3.8	4.3	4.2	4.3	3.9
Pakistan	3.8	4.2	2.9	3.6	2.3	2.2
Philippines	4.1	4.3	3.3	2.6	3.1	3.1
Syrian Arab Republic	3.9	4.7	3.7	3.4	2.8	2.1
Turkey	4.1	4.2	4.2	5.2	4.2	5.1
Africa	25.3	30.3	34.8	37.2	35.0	32.4
Algeria	2.7	3.6	3.9	4.3	5.0	5.2
Egypt	5.6	6.6	5.9	8.1	5.7	6.0
Ethiopia	0.8	1.5	1.9	1.9	2.1	2.4
Morocco	1.4	3.1	4.0	4.6	3.4	3.9
Nigeria	1.3	1.2	1.4	1.3	0.8	1.2
Tunisia	1.5	1.5	0.8	0.8	1.2	1.0
Central America	6.2	4.4	6.0	4.7	5.0	6.5
Mexico	4.2	2.4	3.7	2.3	2.5	3.9
South America	23.0	20.8	21.9	23.0	17.3	26.1
Argentina	3.7	2.3	5.9	5.6	3.2	4.6
Brazil	12.7	11.8	8.5	8.9	5.8	12.1

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

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

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

Table A3. Selected international prices of wheat and coarse grains
(USD/tonne)

	Wheat			Maize		Sorghum
	US No.2 Hard Red Winter Ord. Prot. ¹	US Soft Red Winter No.2 ²	Argentina Trigo Pan ³	US No.2 Yellow ²	Argentina ³	US No.2 Yellow ²
Annual (July/June)						
2003/04	161	149	154	115	109	118
2004/05	154	138	123	97	90	99
2005/06	175	138	138	104	101	108
2006/07	212	176	188	150	145	155
2007/08	361	311	318	200	192	206
2008/09	270	201	234	188	180	170
2009/10	209	185	224	160	168	165
2010/11	316	289	311	254	260	248
2011/12	300	256	264	281	269	264
2012/13	348	310	336	311	278	281
Monthly						
2012 - February	297	262	263	279	267	268
2012 - March	294	259	260	280	270	266
2012 - April	279	255	252	273	256	242
2012 - May	279	252	251	269	246	219
2012 - June	288	250	263	268	238	234
2012 - July	352	318	314	330	285	293
2012 - August	362	332	335	328	294	296
2012 - September	372	341	336	323	278	286
2012 - October	373	339	332	320	274	290
2012 - November	374	346	345	324	294	289
2012 - December	359	325	360	310	288	288
2013 - January	348	311	362	303	294	287
2013 - February	329	297	358	303	283	288
2013 - March	323	286	346	309	276	297
2013 - April	324	279	324	282	242	261
2013 - May	329	277	315	295	257	254
2013 - June	321	270	310	300	264	246
2013 - July	311	257	302	282	241	232
2013 - August	315	251	281	238	221	219
2013 - September	312	258	300	209	219	217
2013 - October	333	289	344	201	207	204
2013 - November	317	274	353	199	207	196
2013 - December	301	267	340	197	212	207
2014 - January	288	248	330	198	215	216
2014 - February	303	261	328	209	218	224

Sources: International Grains Council and USDA.

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

² Delivered United States Gulf.

Table A4a. Cereal import requirements of Low-Income Food-Deficit Countries¹, 2013/14 or 2014 estimates
(thousand tonnes)

	2012/13 or 2013				2013/14 or 2014			
	Marketing year	Commercial purchases	Food aid	Total commercial and aid	Total import requirements (excl. re-exports)	Total commercial and aid	Food aid allocated, committed or shipped	Commercial purchases
AFRICA		38 463.5	1 376.0	39 839.5	43 921.2	8 244.9	40.4	8 204.5
North Africa		13 778.0	0.0	13 778.0	16 571.0	6 262.1	0.0	6 262.1
Egypt	July/June	13 778.0	0.0	13 778.0	16 571.0	6 262.1	0.0	6 262.1
Eastern Africa		6 815.0	717.5	7 532.5	8 185.2	703.4	21.0	682.4
Burundi	Jan./Dec.	139.8	13.9	153.7	160.0	0.0	0.0	0.0
Comoros	Jan./Dec.	59.5	0.0	59.5	63.0	0.0	0.0	0.0
Djibouti	Jan./Dec.	93.0	7.7	100.7	98.0	0.9	0.9	0.0
Eritrea	Jan./Dec.	399.0	7.0	406.0	434.0	0.0	0.0	0.0
Ethiopia	Jan./Dec.	265.1	461.0	726.1	666.0	3.3	3.3	0.0
Kenya	Oct./Sept.	1 946.5	44.5	1 991.0	2 260.0	187.3	1.7	185.6
Rwanda	Jan./Dec.	120.3	0.7	121.0	78.0	0.0	0.0	0.0
Somalia	Aug./July	348.8	89.1	437.9	520.0	10.3	10.3	0.0
Sudan	Nov./Oct.	2 124.9	52.8	2 177.7	2 594.0	159.1	2.9	156.2
Uganda	Jan./Dec.	389.5	36.4	425.9	470.0	0.0	0.0	0.0
United Rep. of Tanzania	June/May	928.6	4.4	933.0	842.2	342.5	1.9	340.6
Southern Africa		2 014.1	231.0	2 245.1	2 425.6	1 181.2	15.0	1 166.2
Lesotho	April/March	261.0	5.0	266.0	218.0	97.1	1.2	95.9
Madagascar	April/March	319.3	26.6	345.9	448.0	40.7	10.2	30.5
Malawi	April/March	87.0	18.2	105.2	114.6	122.3	0.3	122.0
Mozambique	April/March	762.2	120.8	883.0	855.0	635.0	3.0	632.0
Zambia	May/April	24.0	1.0	25.0	25.0	0.0	0.0	0.0
Zimbabwe	April/March	560.6	59.4	620.0	765.0	286.1	0.3	285.8
Western Africa		14 018.5	256.3	14 274.8	14 698.4	98.2	4.4	93.8
Coastal Countries		10 550.9	106.6	10 657.5	11 152.5	0.1	0.1	0.0
Benin	Jan./Dec.	433.0	14.0	447.0	462.0	0.0	0.0	0.0
Côte d'Ivoire	Jan./Dec.	1 717.2	7.8	1 725.0	1 775.0	0.0	0.0	0.0
Ghana	Jan./Dec.	938.9	6.1	945.0	975.0	0.1	0.1	0.0
Guinea	Jan./Dec.	456.8	20.2	477.0	437.0	0.0	0.0	0.0
Liberia	Jan./Dec.	340.0	44.0	384.0	414.0	0.0	0.0	0.0
Nigeria	Jan./Dec.	6 320.0	0.0	6 320.0	6 720.0	0.0	0.0	0.0
Sierra Leone	Jan./Dec.	100.0	14.0	114.0	104.0	0.0	0.0	0.0
Togo	Jan./Dec.	245.0	0.5	245.5	265.5	0.0	0.0	0.0
Sahelian Countries		3 467.6	149.7	3 617.3	3 545.9	98.1	4.3	93.8
Burkina Faso	Nov./Oct.	446.9	7.2	454.1	425.0	8.7	0.6	8.1
Chad	Nov./Oct.	118.2	59.6	177.8	181.0	3.3	2.4	0.9
Gambia	Nov./Oct.	192.0	20.5	212.5	215.5	0.1	0.0	0.1
Guinea-Bissau	Nov./Oct.	148.1	6.2	154.3	154.3	0.4	0.4	0.0
Mali	Nov./Oct.	199.6	11.6	211.2	258.2	36.9	0.0	36.9
Mauritania	Nov./Oct.	457.0	13.5	470.5	464.0	21.6	0.2	21.4
Niger	Nov./Oct.	431.7	30.2	461.9	465.0	0.9	0.0	0.9
Senegal	Nov./Oct.	1 474.1	0.9	1 475.0	1 382.9	26.2	0.7	25.5
Central Africa		1 837.9	171.2	2 009.1	2 041.0	0.0	0.0	0.0
Cameroon	Jan./Dec.	878.3	1.8	880.1	897.0	0.0	0.0	0.0
Cent.Afr.Rep.	Jan./Dec.	39.7	11.3	51.0	65.0	0.0	0.0	0.0
Congo	Jan./Dec.	303.2	7.8	311.0	312.0	0.0	0.0	0.0
Dem.Rep.of the Congo	Jan./Dec.	599.7	150.3	750.0	750.0	0.0	0.0	0.0
Sao Tome and Principe	Jan./Dec.	17.0	0.0	17.0	17.0	0.0	0.0	0.0

Table A4b. Cereal import requirements of Low-Income Food-Deficit Countries¹, 2013/14 or 2014 estimates
(thousand tonnes)

	2012/13 or 2013			2013/14 or 2014				
	Marketing year	Commercial purchases	Food aid	Total commercial and aid	Total import requirements (excl. re-exports)	Total commercial and aid	Food aid allocated, committed or shipped	Commercial purchases
ASIA		32 183.5	591.5	32 775.0	34 820.4	9 887.3	12.6	9 874.7
Cis in Asia		3 616.5	3.7	3 620.2	3 393.2	1 758.4	0.0	1 758.4
Kyrgyzstan	July/June	508.5	3.7	512.2	465.2	237.4	0.0	237.4
Tajikistan	July/June	1 088.0	0.0	1 088.0	912.0	472.4	0.0	472.4
Uzbekistan	July/June	2 020.0	0.0	2 020.0	2 016.0	1 048.6	0.0	1 048.6
Far East		18 771.1	421.7	19 192.8	20 320.2	7 556.0	12.3	7 543.7
Bangladesh	July/June	1 808.5	133.0	1 941.5	2 980.0	979.4	3.4	976.0
Bhutan	July/June	72.6	0.0	72.6	66.1	0.0	0.0	0.0
Cambodia	Jan./Dec.	35.3	2.1	37.4	37.4	1.2	1.2	0.0
D.P.R. of Korea	Nov./Oct.	192.5	206.1	398.6	340.1	7.2	1.4	5.8
India	April/March	116.6	0.5	117.1	171.2	64.1	0.0	64.1
Indonesia	April/March	10 622.1	1.0	10 623.1	10 204.1	4 942.8	0.0	4 942.8
Lao, P.D.R.	Jan./Dec.	23.3	1.6	24.9	24.9	0.2	0.2	0.0
Mongolia	Oct./Sept.	115.8	0.0	115.8	155.8	9.0	0.0	9.0
Nepal	July/June	530.1	1.7	531.8	621.8	2.5	2.5	0.0
Philippines	July/June	4 151.0	40.0	4 191.0	4 687.0	1 549.4	3.4	1 546.0
Sri Lanka	Jan./Dec.	1 103.3	35.7	1 139.0	1 031.8	0.2	0.2	0.0
Near East		9 795.9	166.1	9 962.0	11 107.0	572.9	0.3	572.6
Afghanistan	July/June	1 151.0	101.0	1 252.0	2 097.0	263.3	0.0	263.3
Iraq	July/June	5 194.9	15.1	5 210.0	5 240.0	309.3	0.0	309.3
Yemen	Jan./Dec.	3 450.0	50.0	3 500.0	3 770.0	0.3	0.3	0.0
CENTRAL AMERICA		1 771.5	101.2	1 872.7	1 934.4	499.2	2.9	496.3
Haiti	July/June	597.7	82.4	680.1	724.1	97.3	1.5	95.8
Honduras	July/June	762.2	16.0	778.2	795.0	235.6	0.0	235.6
Nicaragua	July/June	411.6	2.8	414.4	415.3	166.3	1.4	164.9
OCEANIA		441.9	0.0	441.9	446.9	0.0	0.0	0.0
Kiribati	Jan./Dec.	8.7	0.0	8.7	8.7	0.0	0.0	0.0
Papua New Guinea	Jan./Dec.	390.2	0.0	390.2	395.2	0.0	0.0	0.0
Solomon Islands	Jan./Dec.	43.0	0.0	43.0	43.0	0.0	0.0	0.0
TOTAL		72 860.4	2 068.7	74 929.1	81 122.9	18 631.4	55.9	18 575.5

Source: FAO

¹ The Low-Income Food-Deficit (LIFDC) group of countries includes net food deficit countries with annual per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. USD 1 915 in 2010); for full details see <http://www.fao.org/countryprofiles/lifdc.asp>.

² Estimates based on information as of early February 2014.

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This report is based on information available as of early February 2014.

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