



# Crop Prospects and Food Situation

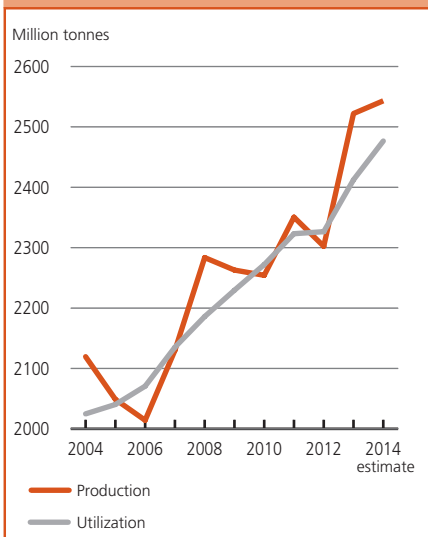
## HIGHLIGHTS

- **FAO has further raised its estimate of the 2014 world cereal production and its forecast for global cereal stocks.** Early prospects for cereal supplies in 2015/16 are mostly favourable, partly sustained by large stocks accumulated over the previous two seasons.
- **FAO's first forecast for global wheat production in 2015 indicates a likely small contraction, mostly reflecting an expected decline in Europe from last year's record output.**
- **Export prices of wheat and maize continued to decline in February, as result of ample world supplies and strong export competition.** International quotations of rice also remained under downward pressure.
- **AFRICA: In Southern and Central Africa the early 2015 production outlook remains uncertain, mostly due to adverse weather conditions, while in North Africa prospects are positive.** This follows a bumper 2014 output, reflecting strong production gains in East and southern African countries that more than compensated for a weather-depressed output in West and North Africa. Persisting conflicts in several countries have led to increasing food insecurity, in addition to lowering production prospects in the affected areas.
- **ASIA: The preliminary outlook for the 2015 winter cereal crops are generally positive, reflecting favourable weather conditions.** However, conflicts in some countries of the Near East continue to severely affect food security and disrupt agricultural activities, curbing production prospects.
- **LATIN AMERICA AND THE CARIBBEAN: The outlook for 2015 coarse grains production in South America remains favourable, despite a contraction in plantings.** In Central America, early indications in the main producer Mexico points to a good 2015 first season coarse grains production, while the cereal supply situation remains tight in the drought-affected countries of the subregion.
- **FAO estimates that globally 37 countries, including 29 in Africa, are in need of external assistance for food.**

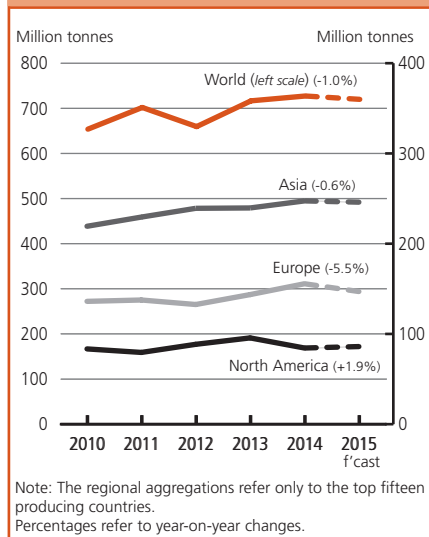
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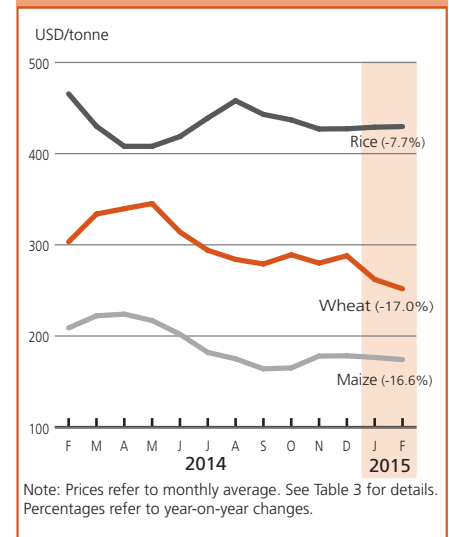
World cereal production in 2014 revised upwards, further augmenting global stocks



Wheat production in 2015 forecast to contract slightly below the record of 2014

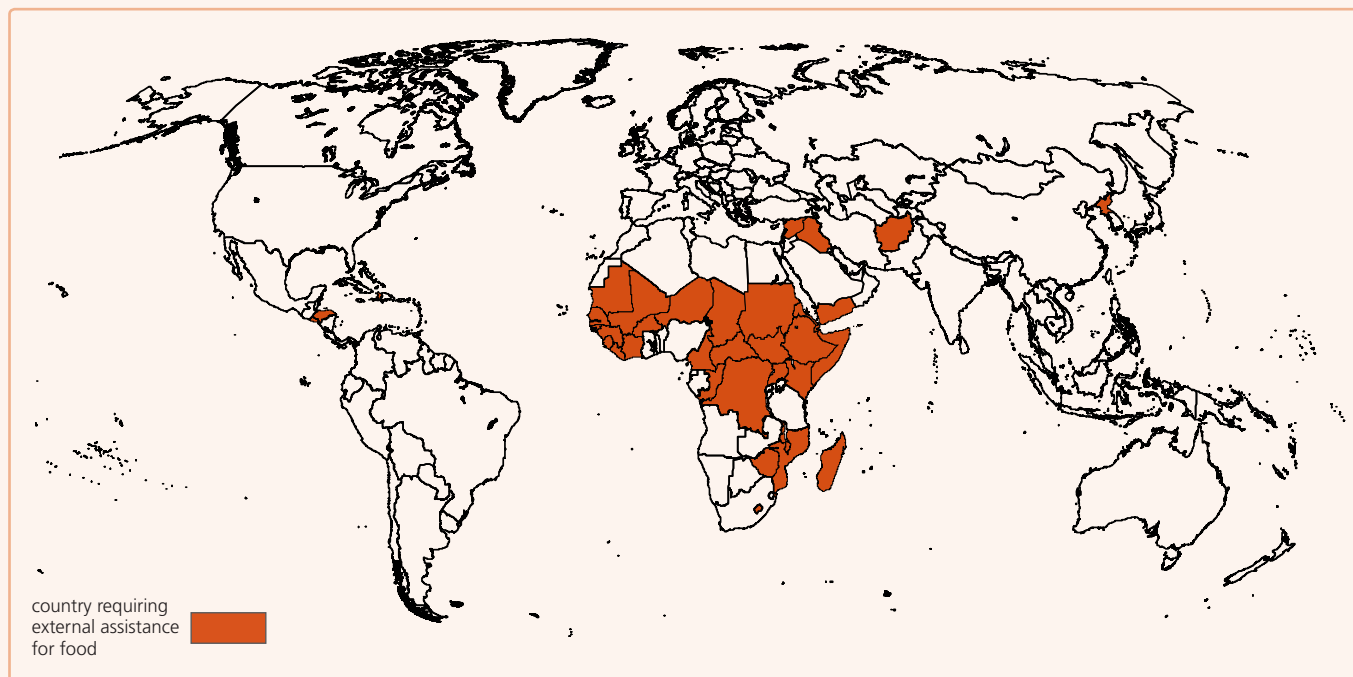


International cereal prices persist at lower levels than a year earlier



# Countries requiring external assistance for food<sup>1</sup>

World: 37 countries



## AFRICA (29 countries)

### EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/SUPPLIES

#### Central African Republic

*Conflict, displacements and below-average crop production*

- The IDP caseload, as of mid-February, was estimated at about 440 000 persons.
- In October 2014 about 1.5 million people, out of a total population of 4.6 million, were estimated to be in need of food assistance.
- Food crop production in 2014 was estimated to be 58 percent below average, despite an 11 percent increase from the sharply-reduced 2013 output.

#### Gambia

*Below-average crop production*

- Cereal production is estimated to have decreased by 54 percent in 2014 compared to the average.
- Over 331 000 people are estimated to be in Phase 3: "Crisis" and above according to the last "Cadre Harmonisé" analysis. An additional 640 000 people are estimated to be at risk of food insecurity (Phase 2: "Stressed").

#### Guinea-Bissau

*Below-average crop production*

- Cereal production was estimated to have decreased by 34 percent in 2014 compared to the average.
- Over 55 000 people are estimated to be in Phase 3: "Crisis" and above according to the last "Cadre Harmonisé" analysis. An additional 272 000 people are estimated to be at risk of food insecurity (Phase 2: "Stressed").

#### Senegal

*Below-average crop production*

- Cereal production in 2014 was estimated at 38 percent below the average.
- Over 927 000 people are estimated to be in Phase 3: "Crisis" and above according to the last "Cadre Harmonisé" analysis. An additional 2.8 million people are estimated to be at risk of food insecurity (Phase 2: "Stressed").

### WIDESPREAD LACK OF ACCESS

#### Burkina Faso

*Massive influx of refugees from Mali put additional pressure on local food supplies*

- Over 32 000 Malian refugees are estimated to be living in the country as of January 2015.

#### Chad

*Large influx of refugees puts additional pressure on local food supplies*

- Over 461 000 people from the Sudan's Darfur region, the Central African Republic and northern Nigeria, as well as the return of an estimated 340 000 Chadians, have put added pressure on local food supplies negatively affecting food security.
- Over 653 000 people are estimated to be in need of food assistance according to the last "Cadre Harmonisé" analysis.

**Djibouti**

*Inadequate pasture availability and reduced access to humanitarian assistance*

- About 160 000 people are severely food insecure, mainly in pastoral southeastern areas and in the Obock region.

**Eritrea**

*Vulnerability to food insecurity due to economic constraints*

**Guinea**

*Impact of the Ebola virus disease (EVD) outbreak*

- Disruption to markets, farming activities and livelihoods, seriously affecting the food security situation of large numbers of people.
- About 970 000 people are estimated to be severely food insecure of which the EVD impact accounts for 230 000 people.

**Liberia**

*Impact of the EVD outbreak*

- Disruption to markets, farming activities and livelihoods, seriously affecting the food security situation of large numbers of people.
- About 630 000 people are estimated to be severely food insecure of which the EVD impact accounts for 170 000 people.

**Mali**

*Droughts, floods, population displacements and insecurity in northern areas*

- Over 270 000 people are estimated to be in Phase 3: "Crisis" and above according to the last "Cadre Harmonisé" analysis.
- An additional 1.8 million people are estimated to be at risk of food insecurity (Phase 2: "Stressed").

**Mauritania**

*Influx of refugees put additional pressure on local food supplies and high food prices constrain access*

- More than 54 700 Malian refugees remain in southeastern Mauritania as of December 2014.
- Over 424 000 people are estimated to be in Phase 3: "Crisis" and above according to the last "Cadre Harmonisé" analysis.

**Niger**

*Recurrent severe food crisis*

- About 682 000 people are estimated to be in Phase 3: "Crisis" and above according to the last "Cadre Harmonisé" analysis.
- Over 37 000 Malian refugees and 100 000 Nigerian refugees are estimated to be living in the country as of January 2015.
- Severe depletion of household assets and high levels of indebtedness.

**Sierra Leone**

*Impact of the EVD outbreak*

- Disruption to markets, farming activities and livelihoods, seriously affecting the food security situation of large numbers of people.
- About 450 000 people are estimated to be severely food insecure of which the EVD impact accounts for 120 000 people.

**Zimbabwe**

*Reduced localized crop production in southern and western regions*

- An estimated 331 000 people require food assistance.
- However, the overall food security situation is stable, with a 78 percent decrease in the number of food insecure persons compared to 2013/14, mainly attributed to improved maize supplies.

**SEVERE LOCALIZED FOOD INSECURITY****Cameroon**

*Influx of refugees exacerbating food insecurity of the host communities already affected by recurrent droughts and floods*

- The number of refugees from the Central African Republic (CAR), which mainly entered East, Adamaoua and North regions, was estimated at 244 000 in mid-February 2015. About 40 000 refugees from Nigeria mainly entered the Far North region since May 2013.

*Displacement*

- Insecurity along the borders with Nigeria has led to the internal displacement of 40 000 individuals.

**Congo**

*Influx of refugees straining the already limited resources of host communities*

- As of mid-February 2015, about 24 000 refugees from the CAR are sheltering in the country.

**Côte d'Ivoire**

*Conflict-related damage to agriculture sector in recent years and lack of support services, mainly in northern regions*

**Democratic Republic of the Congo**

*Conflict and displacements in eastern provinces*

- As of December 2014, the total number of IDPs was estimated at more than 2.7 million.
- An estimated 6.5 million people are in need of urgent humanitarian assistance (December 2014).

*Floods and landslides in southern provinces*

- At least 30 000 individuals in eastern parts were affected in January 2015, raising serious food security and health concerns.

*Influx of refugees straining on already limited resources of host communities*

- As of mid-February, refugees from the CAR, mainly hosted in the northern Equateur province, were estimated at about 68 000.

**Ethiopia**

*Reduced localized crop production*

- About 3.2 million people are in need of humanitarian assistance, mainly in pastoral areas.

**Kenya**

*Reduced second season crop production and worsening pasture conditions*

- About 1.5 million people are severely food insecure, mainly located in central and northeastern counties.

**Lesotho**

*Reduced localized crop production*

- Food security conditions remain strained, with an estimated 447 760 people requiring assistance.

**Madagascar**

*Flooding and reduced crop production in southern regions*

- Passing of cyclones Chedza and Fundi in January and February caused flooding and resulted in the displacement of nearly 21 500 people.
- Food insecurity remains severe in southern regions, due to limited cereal availability, while dry weather has lowered production expectations for the 2015 crop.

**Malawi**

*Flooding and reduced localized crop production*

- Flooding, mainly in the Southern Region, caused the displacement of 230 000 people, severely aggravating food security conditions.
- An estimated 640 000 people require assistance (a sharp decline compared to the 1.5 million estimated in 2013).

**Mozambique**

*Flooding in central provinces and reduced localized crop production*

- An estimated 50 000 people were displaced by the flooding, with crop and stock losses reported, food availability is expected to be constrained.
- In addition, an estimated 150 000 people require assistance, mainly due to a reduced cereal availability. This figure is, however, approximately 60 000 below the level estimated last year.

**Somalia**

*Conflict, civil insecurity and reduced localized crop production*

- Floods affected coarse grains in Middle Shabelle, Middle Juba and Lower Juba regions.
- About 730 000 people are estimated to be in need of emergency assistance, mainly IDPs and poor households in southern and central regions.

**South Sudan**

*Conflict, civil insecurity and reduced crop production in conflict-affected areas*

- Over 1.5 million people have been internally displaced since the conflict erupted at the end of 2013.
- About 2.5 million people severely food insecure, mainly in Jonglei, Unity and Upper Nile states, due to early depleted food stocks and difficult access for aid delivery.

**Sudan**

*Conflict and civil insecurity*

- The number of people estimated to be in need of humanitarian assistance, mainly IDPs in conflict-affected areas, is set at 3.5 million.

**Uganda**

*Below-average crop production*

- About 180 000 people in Karamoja region are estimated to be severely food insecure as food stocks were depleted in February, one month earlier than usual.

ASIA (5 countries)

**EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/SUPPLIES**

**Iraq**

*Escalation of the conflict and large internal displacement*

- Over 2 million people have been displaced since January 2014.
- 1.8 million beneficiaries (IDPs, non-displaced food insecure in conflict areas and food insecure host families) are receiving food assistance.
- Internal trade restrictions and reduced access to stocks held in the areas under ISIL control.

**Syrian Arab Republic**

*Worsening civil conflict and below-average harvest*

- Wheat harvest significantly affected by conflict and drought.
- An estimated 6.8 million people are facing severe food insecurity.
- Although some international food assistance is being provided, Syrian refugees are also putting strain on other host communities in neighbouring countries.
- 2.1 million people receiving food assistance in neighbouring countries and 4.5 million within the country.

**WIDESPREAD LACK OF ACCESS**

**Democratic People's Republic of Korea**

*Economic constraints and lack of agricultural inputs*

- With a stagnant harvest in 2014 the food security situation in 2014/15 is likely to remain similar to that of the previous year, with most households estimated to have borderline and poor food consumption rates.

**Yemen**

*Conflict, poverty and high food and fuel prices*

- About 40 percent of the population is considered food insecure.
- Recovery and resilience operation replaced emergency relief assistance.

**SEVERE LOCALIZED FOOD INSECURITY**

**Afghanistan**

*Continuing conflict and population displacement*

- 2.1 million people are classified as very severely food insecure.
- Over 700 000 people are internally displaced, mostly in Helmand province.
- 1.7 million targeted with food assistance.

LATIN AMERICA AND THE CARIBBEAN (3 countries)

**EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/SUPPLIES**

**El Salvador**

*Drought-reduced maize production*

- The 2014 drought-reduced maize production is estimated at a three-year low.
- Maize import requirements are forecast at a seven-year high.

**Haiti**

*Drought-reduced cereal production*

- Drought conditions during the 2014 main first season, accounting for more than half of annual cereal production, have significantly reduced supplies of maize and rice.

**Honduras**

*Drought-reduced maize production*

- The 2014 maize production reached a 10-year low as a result of severe drought conditions during the main first season, accounting for more than half of annual production.
- Maize import requirements are forecast at a record level.

## Countries with unfavourable prospects for current crops<sup>2</sup> (total: 3 countries)

### AFRICA (3 countries)

#### Central African Republic

*The widespread conflict, which caused large scale displacements, the loss and the depletion of the households' productive assets and input shortages, is expected to severely affect the outcome of the current cropping season*



#### Namibia

*Poor rainfall since January has lowered production prospects for the 2015 crop*



#### South Africa

*Cessation of rains in February 2015, a critical month for the maize crop (to be harvested from April), resulted in a sharp decline in the 2015 production forecast from last year's bumper output*



### Key - Changes since last report (December 2014)

No change ■ Improving ▲ Deteriorating ▼ New Entry +

#### Terminology

<sup>1</sup> **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.

<sup>2</sup> **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

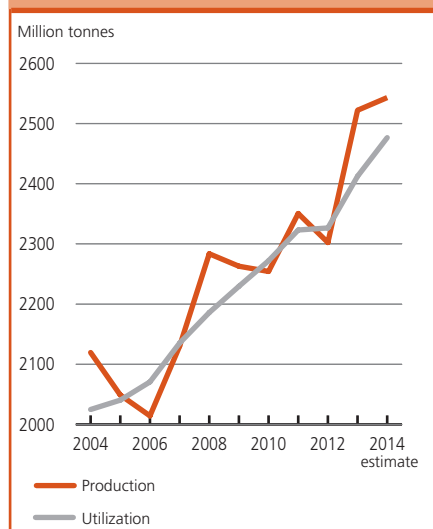
## CEREALS 2014

The latest FAO world cereal production in 2014 now stands at 2 542 million tonnes, 8 million tonnes higher than reported in February, with most of the revision corresponding to increases for wheat, mainly reflecting positive adjustments in **Canada** and **Argentina**, and coarse grains, following an upward revision in the *Commonwealth of Independent States (CIS)*, **India** and **Nigeria**. The latest 2014 global production estimate would represent a small increase of about 1 percent (20 million tonnes) compared to 2013, much of which is accounted for by wheat production gains in Argentina, the *CIS* and the **European Union (EU)**.

## WHEAT 2015

The winter wheat crop in the Northern Hemisphere is already developing or soon to come out of dormancy, which accounts for the bulk of the global output, while

Figure 1. World cereal production and utilization



spring plantings are underway in some countries. FAO's first wheat production forecast for 2015 stands at 720 million tonnes, including an early projection for the Southern Hemisphere countries that will begin planting in August. At this level, production would be 1 percent below the record output of 2014, predominantly reflecting an expected decline in *Europe*.

In *Europe*, preliminary indications in the **EU** point to a similar wheat area for the 2015 harvest compared to the high level of the previous year. As of mid-February, crop conditions were generally favourable, despite some dryness reported in eastern EU countries, and assuming yields return to average after last year's high, production is tentatively forecast to decline by 5 percent from the record output of 2014. Elsewhere in *Europe*, namely the *CIS* region, production is also forecast to decline. Cold weather and severe frost have reportedly affected nearly one-fifth of the winter crops in **the Russian Federation** and yields are therefore expected to decrease slightly from the high level of last year. Although an expansion in the total area planted (including the spring crop) is forecast, production is expected to decline to 55 million tonnes on account of the lower yields. In **Ukraine**, crop conditions are satisfactory, having received adequate snow cover during the winter months. Early forecasts point to an 8 percent drop in production, reflecting a return to average yields levels from the previous year's near-record. In *CIS in Asia*, the early official projection for **Kazakhstan** indicates a 2 percent contraction in wheat plantings, reflecting intentions to diversify production to alternative crops, including oil seeds.

Aggregate wheat production in *North America* is anticipated to increase from the previous year's below-average output.

In **the United States of America**, preliminary forecasts indicate a small increase in production, as a return to average yields and reduced abandonment for the winter crop is anticipated to more than offset a near-5 percent contraction in the planted area, as farmers responded to lower year-on-year wheat prices. In **Canada**, production is anticipated to increase to 30 million tonnes, largely on account of an expected rebound in plantings of the major spring crop. Conditions for the minor winter crop are satisfactory.

In *Asia*, following delayed seasonal rains, the current production outlook is favourable following a return to normal weather conditions since December. In **India** and **China**, production is forecast to remain close to the record outputs of the previous year. Favourable weather and sufficient input supplies in India, including irrigated water and fertilizers, are expected to contribute to average yields in 2015 negating a small reduction in the area planted. In **Pakistan**, wheat production forecasts indicate an increase in the 2015 crop, largely reflecting higher expected yields.

In *North Africa*, weather conditions have been favourable and the early projection for **Egypt**, the largest producer in the subregion, points to a similar production to 2014's above average level.

In the Southern Hemisphere, wheat crops will be planted later in the year. In **Australia**, tentative forecasts point to a return to an average production compared to 2014's reduced output. In **Argentina**, following the previous year's bumper output, plantings in 2015 are tentatively forecast to decrease in response to lower prices.

## COARSE GRAINS 2015

In the Northern Hemisphere, the major coarse grain crops have not yet been sown; however, the season in the Southern Hemisphere is well advanced.

In *South America*, coarse grains production in 2015, mostly constituting maize, is forecast to decrease from the above-average output of the previous year but remain at a high level, reflecting lower prices and ample supplies that instigated a decrease in plantings. In **Brazil**, harvesting of the first season maize crop is underway and preliminary forecasts point to a small increase, as higher yields are expected to offset a contraction in the area planted. However, a sharp reduction in plantings for the second season is forecast to cause a fall in aggregate production by 3 percent compared to 2014. In **Argentina**, an 11 percent decrease in plantings is forecast to result in an 8 percent fall in maize production.

In *Southern Africa*, official forecasts are not yet available for all countries, however, preliminary indications point to a decline in the aggregate 2015 maize production from last year's bumper output, largely on account of adverse weather conditions. In **South Africa**, the largest producer in the subregion, maize production is expected to fall sharply by 33 percent on account of reduced yields. Elsewhere in the subregion, including in the two second biggest producers, **Zambia** and **Malawi**, production is also forecast to decrease, but remain above average.

## RICE 2014

The 2014 paddy season is soon coming to a close, as most of the secondary rice crops cultivated in the Northern Hemisphere are approaching the harvesting stage. Since last month, there have been relatively few changes in the countries' prospects for production in 2014. Overall, they have

implied a downward adjustment in world output of about 300 000 tonnes, in milled rice terms, largely driven by a 600 000 tonnes lowering of forecasts in **India**, only partly compensated by improved expectations for **the United Republic of Tanzania**, where a bumper crop was reportedly collected, and for **Nepal**, following the release of the first official forecast. At the current estimate of 495.9 million tonnes, world rice production would be 1 million tonnes short of the record achieved in 2013, representing a marginal decline of 0.2 percent. The disappointing outcome of the season mostly mirrors a poor performance of the sector in *Asia*, where a number of countries, including **India**, **Indonesia**, **Sri Lanka** and **Thailand**, endured erratic weather conditions that depressed output. Only part of these declines were compensated by increases in **Bangladesh**, **China**, **Myanmar**, **the Philippines** and **Viet Nam**, resulting in an overall 0.5 percent fall in Asian production. In the other regions, the 2014 season outcome was also negative in *Oceania*, owing to a 28 percent output contraction in **Australia**, which faced water constraints. The performance of the

sector was better in the other regions: in *Africa*, a strong recovery in **Madagascar** and **the United Republic of Tanzania** more than compensated for poor output results in a number of western African countries, underpinning the continent's production by 2 percent. In *Latin America and the Caribbean*, a modest recovery in *South America*, fostered by gains in **Brazil**, **Guyana** and **Paraguay**, was mostly behind a small increase in the region's output. Likewise, a larger volume was harvested in *Europe*, as a strong rebound of production in **the Russian Federation** more than compensated for a contraction in the **EU**. The 2014 crop results were far more buoyant in *North America*, where **the United States of America** is estimated to have garnered 16 percent more rice than in 2013.

## RICE 2015

Meanwhile, along and south of the equator, the first 2015 rice crops are already in the ground. In **Indonesia**, harvesting of the crop started in January, with some difficulties caused by floods.

**Table 1. Wheat production: leading producers<sup>1</sup>**  
(million tonnes)

	Average 2012-2014	2013	2014 estimate	2015 forecast	Change: 2015 over 2014 (%)
European Union	143.9	143.6	155.6	147.0	-5.5
China (Mainland)	123.0	121.9	126.2	126.0	-0.2
India	94.7	93.5	95.8	94.5	-1.4
United States of America	58.2	58.1	55.1	56.0	1.6
Russian Federation	49.6	52.1	59.0	55.0	-6.8
Canada	31.3	37.5	29.3	30.0	2.4
Australia	24.5	26.9	23.6	26.0	10.2
Pakistan	24.3	24.2	25.3	25.5	0.8
Turkey	20.4	22.0	19.0	21.0	10.5
Ukraine	20.7	22.3	24.0	22.0	-8.3
Iran Islamic Rep. of	13.6	14.0	13.0	13.0	0.0
Kazakhstan	12.1	14.0	12.5	13.5	8.0
Argentina	10.4	9.2	13.9	12.0	-13.7
Egypt	8.8	8.8	8.8	8.5	-3.4
Uzbekistan	6.9	6.9	7.2	7.5	4.2
<b>World</b>	<b>701.1</b>	<b>716.5</b>	<b>727.2</b>	<b>720.0</b>	<b>-1.0</b>

<sup>1</sup> Countries ranked according to average production 2012-2014.

Nonetheless, for the season as a whole, the Government is aiming to boost production by 4 percent to 46.2 million

tonnes (milled basis) through the provision of subsidized fertilizers and seeds and the improvement of irrigation infrastructure.

In addition, the Government just raised its purchasing price by 10 percent. By contrast, **Viet Nam** has announced its intention to curb rice plantings in 2015 by about 100 000 hectares, or 1 percent. So far, however, collection of the first 2015 paddy crop (winter-spring) is progressing under favourable auspices. In **Sri Lanka**, where the main crop harvest is underway, production in 2015 is foreseen to recover by 18 percent, reflecting a reconstitution of water reserves. In *Africa*, FAO forecasts only modest increases in production in **Madagascar** and **Mozambique**, amid reports of erratic weather conditions. In *South America*, excessive rains have marred prospects in **Brazil**, where, according to the Conab Fifth Crop Survey, production is to remain close to the 2014 level. Unfavourable climatic conditions or water shortages may also keep production stagnating or falling in **Argentina**, **Uruguay** and **Peru**, but, so far, prospects are positive for **Bolivia**, **Colombia**, **Ecuador**, **Guyana** and **Paraguay**, in some cases supported by high prices. In **Australia**, however, limitations of irrigation water and a return to more normal yields from the highs achieved in 2014 are officially expected to depress production by 18 percent.

**Table 2. Basic facts of world cereal situation**

(million tonnes)

	2012/13	2013/14 estimate	2014/15 forecast	Change: 2014/15 over 2013/14 (%)
<b>PRODUCTION<sup>1</sup></b>				
<b>World</b>	<b>2 300.4</b>	<b>2 523.0</b>	<b>2 541.8</b>	<b>0.7</b>
Developing countries	1 393.1	1 444.3	1 442.7	-0.1
Developed countries	907.3	1 078.7	1 099.1	1.9
<b>TRADE<sup>2</sup></b>				
<b>World</b>	<b>314.1</b>	<b>357.4</b>	<b>344.2</b>	<b>-3.7</b>
Developing countries	130.9	110.1	107.3	-2.6
Developed countries	183.2	247.3	236.9	-4.2
<b>UTILIZATION</b>				
<b>World</b>	<b>2 324.6</b>	<b>2 411.9</b>	<b>2 475.2</b>	<b>2.6</b>
Developing countries	1 492.7	1 542.5	1 583.5	2.7
Developed countries	831.9	869.4	891.8	2.6
Per caput cereal food use (kg per year)	152.0	152.8	153.1	0.2
<b>STOCKS<sup>3</sup></b>				
<b>World</b>	<b>505.4</b>	<b>580.8</b>	<b>630.5</b>	<b>8.6</b>
Developing countries	387.3	437.8	454.0	3.7
Developed countries	118.1	143.0	176.5	23.4
<b>WORLD STOCK-TO-USE RATIO (%)</b>	<b>20.9</b>	<b>23.5</b>	<b>25.4</b>	<b>8.1</b>

Note: Totals and percentage change computed from unrounded data.

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

<sup>2</sup> 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.

<sup>3</sup> 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.



## UTILIZATION 2014/15

World cereal utilization in 2014/15 is expected to reach 2 475 million tonnes, 8 million tonnes more than projected in February with most of the revision resulting from greater anticipated feed use of sorghum and barley. At the current forecast level, world cereal utilization in 2014/15 would grow by 2.6 percent (62 million tonnes) from the previous season. Total feed use of cereals is projected at 877 million tonnes, up 4 percent (34 million tonnes) from 2013/14, led by a 3.6 percent (nearly 20 million tonnes) expansion in maize feed utilization. Among the other cereals, feed use of sorghum is anticipated to increase by 10.5 percent (2.7 million tonnes), with much of the rise concentrated in **China**, where it is seen growing by 1.8 million tonnes (43 percent) from the previous season. Feed use of barley is now projected to match last season's level, at around 96 million tonnes, about 1.5 million tonnes more than earlier anticipated, due to an upward revision in China. World consumption of cereals as

food is forecast to grow by 1.4 percent (15 million tonnes) to 1 108 million tonnes in 2014/15, resulting in an average per caput intake of 153.3 kg, which is slightly above the 2013/14 figure. Food consumption of wheat is projected at 488 million tonnes, 1.3 percent higher than in the previous season, keeping the average per caput level steady at 67.6 kg. As for rice, about 416 million tonnes are currently anticipated to be consumed as food in 2014/15, 1.5 percent more than in 2013/14, fostering a small increase in the annual per caput level from 57.3 kg to 57.6 kg.

## STOCKS 2014/15

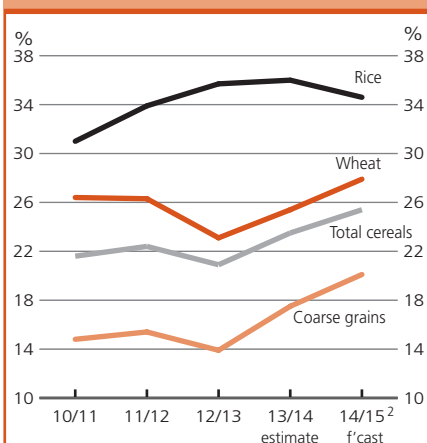
The FAO forecast for world cereal stocks by the close of the crop seasons ending in 2015 has been lifted by 1.3 percent (8 million tonnes) since February, to 631 million tonnes. The upward revision is partly explained by the more optimistic expectations about production in 2014. However, it was also the result of a review of estimates of stocks from seasons preceding 2014/15, mostly in **China** and **Ukraine**. At the current level, world cereal stocks would be as much as 8.6 percent (50 million tonnes) above their opening levels and the largest in 15 years. Given the expected sizeable build-up of inventories, the global cereal stock-to-use ratio would rise from 23.5 percent in 2013/14 to 25.4 percent in 2014/15, hitting a 13-year record. Global wheat stocks are projected at 199 million tonnes in 2015, 6 million tonnes more than previously anticipated and up 11 percent (20 million tonnes) from 2014. Total stocks of coarse grains are now set to reach 256 million tonnes, 3 million tonnes more than anticipated in February and the highest since 1986/87. Against this general tendency, the FAO forecast for global rice inventories in 2015

has been reduced by more than 1 million tonnes since last month, resulting in a 0.8 percent year-to-year decline to 176 million tonnes. This month's revision was mainly on account of **Thailand**, where the government is continuing to launch regular tenders to curtail the size of its public rice stockpile.

## TRADE 2014/15

The forecast for world cereal trade in 2014/15 has been raised by almost 3 million tonnes since the previous report to 344 million tonnes, but this would still imply a 3.7 percent (13 million tonnes) decline from the 2013/14 record. The upward revision from last month concerns coarse grains, mainly reflecting higher expected imports of sorghum by **China**. World coarse grains trade is now forecast to reach 152 million tonnes, some 23 million tonnes more than previously anticipated, but still 4 percent (7 million tonnes) below the previous season's record level. Total trade of sorghum is projected at 10 million tonnes, some 53 percent (3.5 million tonnes) higher than last season. The forecast for maize trade remains unchanged at 114.5 million tonnes and nearly 8 percent (10 million tonnes) below the 2013/14 level. Global trade in wheat is also unchanged from the previous month, at 151 million tonnes, or 3.6 percent (5.6 million tonnes) below the estimated 2013/14 record. Wheat exports by **the United States of America** are anticipated to decline the most, although smaller shipments are also likely from **India** and **Kazakhstan**. On the other hand, compared to last month, the forecast for trade in rice in 2015 (calendar year) was somewhat raised to 41.4 million tonnes, a volume still pointing to a 1.6 percent contraction from the all-time high level currently estimated for 2014.

Figure 2. Ratio of world cereal stocks to utilization<sup>1</sup>



<sup>1</sup> Compares closing stocks with utilization in following season.

<sup>2</sup> Utilization in 2014/15 is a trend value based on extrapolation from the 2003/04-2013/14 period.

## WHEAT

Export quotations of wheat declined significantly in February as ample world supplies continued to weigh on international prices. Overall, further improvements in supply prospects for the next season (2015/16) also added to the downward pressure. The benchmark US wheat (No.2 Hard Red Winter) fell by 4 percent from January to USD 252 per tonne, down 17 percent from the corresponding period last year. A strong US dollar has also had negative impacts on sales from **the United States of America**, thus contributing to the decline in export prices.

## MAIZE

Export prices of maize in February were generally weaker. The benchmark US maize (No.2, Yellow) fell slightly to USD 174 per tonne, while export values from other origins dropped at a faster rate. Large global supplies and favourable 2015 production prospects in *South America*, where harvesting has begun, put downward pressure on prices. In **the United States of America**, relatively strong export sales and forecasts pointing to a reduction in 2015 maize plantings provided some support and contained the price declines.

## RICE

International rice prices remained under pressure in February, with the FAO All Rice Price index shedding 1 percent, from the previous month, marking the sixth consecutive month of decline. The drop in the index was limited by a rebounding in fragrant rice quotations, which compensated for much of the decline that characterized the other rice types, in particular that of the higher quality Indica rice. However, the price of the Thai white rice 100%B, the benchmark quotation for international rice prices, moved marginally higher from USD 429 per tonne in January to USD 430 per tonne in February, contrary to the trends that prevailed in the other major exporting countries. The stability of prices in **Thailand** was mainly the result of offsetting domestic factors: on the one hand, the tendering of massive supplies from public rice inventories by the Thai Government, on the other, the prospects of a relatively small secondary crop to be harvested in the next few months.

Table 3. Cereal export prices\*

(USD/tonne)

	2014					2015	
	Feb.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.
<b>United States</b>							
Wheat <sup>1</sup>	303	279	289	280	289	262	252
Maize <sup>2</sup>	209	164	165	178	178	176	174
Sorghum <sup>2</sup>	224	174	189	197	217	231	230
<b>Argentina<sup>3</sup></b>							
Wheat	328	248	242	252	251	254	241
Maize	218	166	171	179	197	184	178
<b>Thailand<sup>4</sup></b>							
Rice, white <sup>5</sup>	465	444	437	427	427	429	430
Rice, broken <sup>6</sup>	311	336	345	338	331	329	331

\*Prices refer to the monthly average.

<sup>1</sup> No.2 Hard Red Winter (Ordinary Protein) f.o.b. Gulf.

<sup>2</sup> No.2 Yellow, Gulf.

<sup>3</sup> Up river, f.o.b.

<sup>4</sup> Indicative traded prices.

<sup>5</sup> 100% second grade, f.o.b. Bangkok.

<sup>6</sup> A1 super, f.o.b. Bangkok.

# Low-Income Food-Deficit Countries food situation overview<sup>1</sup>

## Early forecasts are mixed for 2015 cereal production in LIFDCs

In the Northern Hemisphere Low-Income Food-Deficit Countries (LIFDCs) harvesting of the 2015 winter crops will begin in April and prospects are generally positive. While in the Southern Hemisphere, the main season summer crops are maturing under mixed weather conditions and are expected to be harvested from March.

In *Asia*, early forecasts for 2015 indicate a small wheat production gain in **Pakistan** from the record output of the previous year, mostly on account of higher expected yields. In **India**, the largest producing LIFDC, production is expected to remain close to the high level of last year, reflecting adequate input supplies and generally favourable weather. In the *Near East*, production prospects for the winter crops in **Afghanistan** are uncertain, as a result of below-average cumulative precipitation up until mid-February.

In *Africa*, the production outlook is uncertain in several countries of *Southern Africa*. Erratic weather, including floods in **Madagascar**, **Malawi** and **Mozambique**, and dry conditions at the start of the season contributed to lower production expectations. Overall, the 2015 production is anticipated to decrease compared to the bumper level of the previous year, but remain above-average. In *Eastern* and *Central Africa*, planting of the main 2015 season crops is about to start. Persistent insecurity in parts of the region, notably in **the Central African**

**Republic (CAR)**, continues to affect the agriculture sector, adversely impacting the cropping activities and access to inputs.

## Cereal production revised upwards in 2014, exceeding the good harvest of the previous year

The latest FAO estimate for LIFDCs' 2014 cereal production stands at 442.4 million tonnes, about 3.3 million tonnes higher than the previous estimate in December 2014. The upward adjustment mainly reflects positive revisions in **Nigeria**, the largest cereal producer in *Africa*. At this level, the 2014 LIFDCs' output is slightly higher than the previous year, with a sharp increase in *Africa* marginally outweighing a contraction in *Asia*, which contributes nearly 75 percent to the aggregate output.

In *Africa*, 2014 production is estimated to have increased by 6 percent compared to the previous year, with most of the gains attributed to improved outputs in *Western* and *Southern Africa*. **Sudan's** sharp recovery in coarse grains output also significantly contributed to the production gain. Despite the higher aggregate output in *Western Africa*, reduced harvests, with the exception of **Mali**, were estimated in the Sahelian countries due to adverse weather. These smaller harvests were, however, more than compensated by production gains in coastal countries, notably **Nigeria**. In *Eastern Africa*, with the sharp rebound in **the Sudan** more than offsetting the below-average output in **Kenya**, production was up 9 percent compared to the good harvests of 2013. Erratic rains in *Central Africa* pushed production down to a below-

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

	2012/13	2013/14 estimate	2014/15 forecast	Change: 2014/15 over 2013/14 (%)
<b>Cereal production<sup>1</sup></b>	<b>437.9</b>	<b>441.6</b>	<b>442.4</b>	<b>0.2</b>
<i>excluding India</i>	197.9	198.3	205.3	3.5
<b>Utilization</b>	<b>454.0</b>	<b>467.6</b>	<b>473.5</b>	<b>1.3</b>
Food use	373.3	382.7	388.3	1.5
<i>excluding India</i>	183.5	187.9	191.5	1.9
Per caput cereal food use (kg per year)	0.1	0.1	0.2	0.1
<i>excluding India</i>	0.1	0.1	0.1	0.5
Feed	29.4	30.7	31.8	3.4
<i>excluding India</i>	21.6	22.7	23.6	4.2
<b>End of season stocks<sup>2</sup></b>	<b>88.2</b>	<b>89.5</b>	<b>91.2</b>	<b>2.0</b>
<i>excluding India</i>	38.8	37.5	39.2	4.5

<sup>1</sup> Data refer to calendar year of the first year shown.

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

<sup>1</sup> **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 1 945 in 2011). The current 2014 FAO list has been recently revised, with seven countries graduating, these are: **Cambodia, Egypt, Indonesia, Iraq, Kiribati, Lao People's Democratic Republic** and **Zambia**. Of these, Cambodia, Lao PDR and Zambia graduated from the list on the basis of net food-exporter criterion, while the other four (Egypt, Indonesia, Iraq and Kiribati) graduated based on income criterion. For full details see: <http://www.fao.org/countryprofiles/lifdc/en/>

**Table 5. Cereal production<sup>1</sup> of LIFDCs**  
(million tonnes)

	2012	2013	2014 estimate	Change: 2014 over 2013 (%)
<b>Africa (37 countries)</b>	<b>107.7</b>	<b>105.1</b>	<b>111.9</b>	<b>6.4</b>
Eastern Africa	41.8	40.6	44.3	9.1
Southern Africa	10.6	9.8	11.4	16.2
Western Africa	50.6	50.0	51.5	3.2
Central Africa	4.6	4.7	4.6	-2.8
<b>Asia (13 countries)</b>	<b>328.4</b>	<b>334.4</b>	<b>329.0</b>	<b>-1.6</b>
CIS in Asia	9.6	10.1	10.1	0.1
Far East	311.5	317.0	311.6	-1.7
- India	240.0	243.3	237.1	-2.5
Near East	7.3	7.3	7.2	-0.7
<b>Central America (3 countries)</b>	<b>1.9</b>	<b>2.1</b>	<b>1.5</b>	<b>-28.5</b>
<b>Oceania (2 countries)</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>8.8</b>
<b>LIFDC (55 countries)</b>	<b>437.9</b>	<b>441.6</b>	<b>442.4</b>	<b>0.2</b>

Note: Totals and percentage change computed from unrounded data.

<sup>1</sup> Includes rice in milled terms.

average level, while the continuing socio-political crisis and widespread insecurity in the **CAR** further contributed to the reduced cereal output. However, the CAR registered a strong rebound in cassava production, helping partly to stabilize overall food production.

In *Asia*, production is estimated to have decreased by nearly 2 percent compared to the previous year, principally on account of a 3 percent decline in **India**, following unfavourable monsoon rains. India's output in 2014 is still estimated at an above-average level. In **Bangladesh** and **the Philippines**, cereal production is estimated at record levels reflecting favourable weather and adequate input supplies that supported higher yields in 2014. Elsewhere in the region, production remained largely stagnant, except for a sharp recovery in **Mongolia** to a record level.

Maize production in *Central America* is estimated to have declined sharply, following an unusually early and extended dry period. Outputs from the main first season harvests in **Honduras** and **Nicaragua** decreased sharply to below-average levels, and even a favourable secondary season production was not sufficient to compensate for these declines. In **Haiti**, similarly poor weather resulted in a depressed cereal production.

### Cereal imports for 2014/15 forecast close to last year's level

Following the recent upward revisions in *Central America*, the *Far East* and the *Near East* subregions, the aggregate import requirement of LIFDCs for the 2014/15 marketing year stands at 55 million tonnes (including rice in milled terms). At this level the import forecast would remain

similar to the volume of the previous year, however, there are notable changes at the subregional level. The largest year-on-year increase is expected in the *Far East*, particularly from **Nepal** and **Sri Lanka** on account of reduced 2014 rice outputs, and in **Bangladesh** reflecting higher wheat requirements. Similarly, a 12 percent increase is forecast in *Central America*, reflecting considerably lower cereal production in all LIFDCs of the subregion, namely **Haiti**, **Honduras** and **Nicaragua**. In *Central Africa* and the *Near East*, smaller domestic harvests in most countries resulted in higher import requirements. By contrast, considerably lower imports, a decrease of 19 percent to 2.4 million tonnes, are estimated in *Southern Africa*, due to improved 2014 cereal harvests in **Madagascar**, **Malawi**, **Mozambique** and **Zimbabwe**. In *CIS Asia* and *Eastern Africa* reduced imports are forecast this year, mainly reflecting the bumper 2014 harvests in **Uzbekistan** and **the Sudan**. Elsewhere, in *Oceania* and *Western Africa*, cereal purchases are estimated to remain similar to that of 2013/14.

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

	2013 or 2014  Actual imports	2014/15 or 2015			
		Requirements <sup>1</sup>		Import position <sup>2</sup>	
		Total imports:	of which food aid	Total imports:	of which food aid pledges
<b>Africa (37 countries)</b>	<b>30 858</b>	<b>30 146</b>	<b>1 249</b>	<b>2 115</b>	<b>161</b>
Eastern Africa	9 145	8 844	718	1 108	114
Southern Africa	2 986	2 419	113	908	28
Western Africa	16 607	16 704	268	100	19
Central Africa	2 121	2 179	150	0	0
<b>Asia (13 countries)</b>	<b>21 462</b>	<b>22 235</b>	<b>497</b>	<b>5 500</b>	<b>20</b>
CIS in Asia	3 978	3 853	1	1 719	0
Far East	11 322	11 914	345	3 297	5
Near East	6 162	6 467	151	484	15
<b>Central America (3 countries)</b>	<b>1 957</b>	<b>2 185</b>	<b>98</b>	<b>488</b>	<b>1</b>
<b>Oceania (2 countries)</b>	<b>450</b>	<b>458</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Total (55 countries)</b>	<b>54 727</b>	<b>55 024</b>	<b>1 844</b>	<b>8 103</b>	<b>182</b>

Note: Totals computed from unrounded data.

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

<sup>2</sup> Estimates based on information available as of early February 2015.

# Regional reviews

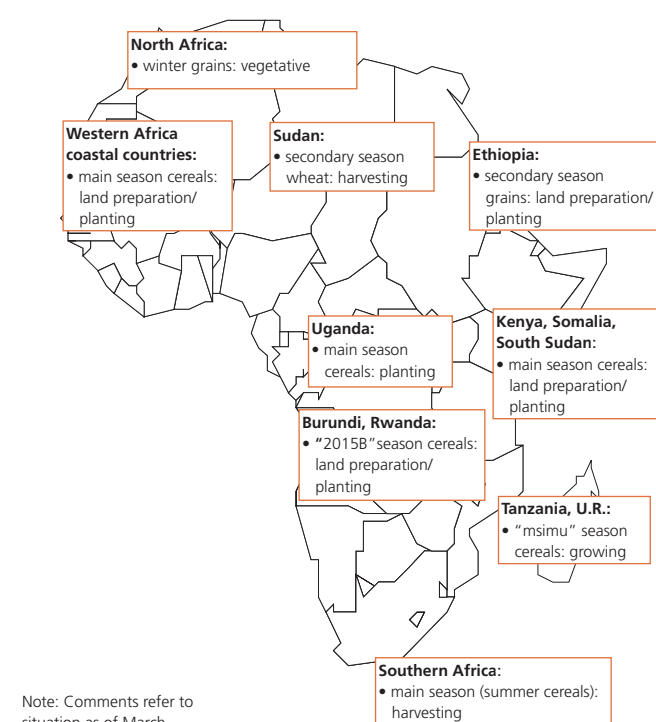
## NORTH AFRICA

### Good early prospects for the 2015 winter crops

In *North Africa*, early prospects for the 2015 winter wheat and coarse grains crops, to be harvested from May, are favourable. Despite below-normal temperatures, no freezes were reported in the major growing areas. An unusually wet autumn in southern parts of **Morocco** guaranteed sufficient moisture, despite temporary dryness in early February. Abundant rains in January 2015 in **Tunisia**, **Algeria** and northern **Morocco** eliminated moisture deficits that developed earlier in the growing season in autumn 2014. In northern **Tunisia**, where dry autumn weather conditions hindered planting activities, January rains created suitable conditions to conclude sowing of the winter crops. In **Libya**, in addition to widespread fuel shortages, farmers reported that security concerns prevented them from seed purchases. In **Egypt**, reports indicate average meteorological conditions, resulting in a preliminary wheat production forecast of 8.5 million tonnes.

### Slightly below-average outturn of the 2014 cereal harvest

The aggregate output of the 2014 cereal crops, harvested between July and October 2014, was estimated at 34.6 million tonnes, about 9 percent down on 2013 and 7 percent below the previous five-year average. Wheat production, which accounts for just over half of the aggregate cereal output, is estimated at 17.8 million tonnes, 12 and 5 percent lower than 2013 and the five-year average, respectively. **Tunisia** gathered a total cereal crop of 2.5 million tonnes (90 percent higher than the drought-affected crop in 2013 and 25 percent up on the five-year average) owing to timely rains. By contrast, in **Morocco**, dry conditions in the autumn of 2013 slowed down wheat planting



Note: Comments refer to situation as of March.

with about 15 percent less land planted to cereals compared to the previous year. Yield gains, associated with improved weather conditions later in the season, did not offset the area decline, resulting in a near-30 percent drop in cereal production in 2014 compared to the exceptionally high harvest of almost 10 million tonnes in 2013. In **Algeria**, at 3.3 million tonnes, the cereal crop in 2014 is some 30 percent lower than the average 2013 output, due to rainfall deficits in eastern Algeria, which produces most of the domestic supply. **Egypt's** cereal harvest, estimated at 21.4 million tonnes, is on par with the previous year's near-average crop.

**Table 7. North Africa cereal production**  
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			Change: 2014/2013 (%)
	2012	2013	2014 estim.	2012	2013	2014 estim.	2012	2013	2014 estim.	2012	2013	2014 estim.	
<b>North Africa</b>	<b>18.0</b>	<b>20.3</b>	<b>17.8</b>	<b>11.7</b>	<b>11.5</b>	<b>10.7</b>	<b>6.0</b>	<b>6.1</b>	<b>6.0</b>	<b>35.8</b>	<b>37.9</b>	<b>34.6</b>	<b>-8.8</b>
Algeria	3.4	3.3	2.0	1.6	1.6	1.3	0.0	0.0	0.0	5.0	4.9	3.3	-32.4
Egypt	8.8	8.8	8.8	7.8	6.5	6.6	5.9	6.1	6.0	22.5	21.4	21.4	0.0
Morocco	3.9	7.0	5.1	1.4	2.9	1.9	0.1	0.0	0.0	5.3	9.9	7.1	-29.0
Tunisia	1.8	1.0	1.7	0.8	0.3	0.8	0.0	0.0	0.0	2.6	1.3	2.5	89.1

Note: Totals and percentage change computed from unrounded data.

## Imports expected to decline slightly in 2014/15

Cereal import requirements for 2014/15 are expected to be about 4 percent lower than the previous year. The subregion will still import about 24.6 million tonnes of wheat in 2014/15, slightly above the average of the previous five years. *North African* countries rely heavily on wheat imports from the international market to cover their consumption needs.

## Decreasing food inflation across the subregion

In **Algeria**, the annual food inflation rate decreased from over 5 percent in September 2014 to about 4 percent in December 2014. In **Tunisia**, annual food inflation declined from around 6 percent in October 2014 to 4 percent in December 2014. In **Morocco**, the annual food inflation rate reached 1.5 percent in December 2014, although average food inflation for 2014 was negative. In **Egypt**, the annual food and beverage inflation rate was about 10 percent in January 2015. In **Libya**, inflation decreased from almost 16 percent in 2011 to about 3 percent in 2014 due to high subsidies, currency stability and subdued growth. Insecurity-induced supply chain disruptions are likely to contribute to increased inflation in 2015 in the country.

**Egypt** is progressing on rolling out of the ration card system for food subsidies. Subsidized bread continues to be sold at the same price of EGP 0.05 per loaf (free market price of EGP 0.35 per loaf) with a maximum of five loaves of bread per person. Bakers are no longer allowed to buy wheat flour at subsidized prices but will be reimbursed by the Government based on sales data gathered from the smart cards. The new ration card system, introduced so far in 17 out of Egypt's 29 provinces, provides citizens with 20 private and Government-procured products, including meat. It aims to provide more balanced diets to the poor by extending the choice of commodities and to contribute to fiscal consolidation. Reports indicate that overall consumption in the areas where smart cards were already introduced decreased between 15 and 35 percent.

## WESTERN AFRICA

### Poor outturn of agricultural production in 2014 in large parts of the subregion

There is little agricultural activity in this period, except for limited cultivation of some off-season crops. Planting of main season crops are expected to begin with the start of the rainy season from March.

In 2014, adverse weather conditions led to a significant drop in production in large parts of the Sahel, notably in the countries located in western parts of the subregion. Cereal production is estimated to have dropped by 81 percent in **Cabo Verde**, 52 percent in **the Gambia**, 39 percent in **Guinea-Bissau** and 30 percent in **Senegal**. Large areas of **Chad**, **Mauritania** and **Niger** were also affected. In addition to the decline in cereal production, pasture conditions were severely affected in the pastoral and agro-pastoral zones of these countries. By contrast, weather conditions were more favourable in the coastal countries along the Gulf of Guinea, notably in **Nigeria**, the largest producer in the subregion, compensating the drop in production in the Sahelian countries.

In Ebola-affected countries, farming activities have been disrupted by labour shortages due to the direct and behavioural effects of the outbreak, with severe negative impact on crop yields in the affected areas. Production of rice, the main staple crop in the Mano River Region, is estimated to have declined by 4, 8 and 12 percent, respectively, in **Guinea**, **Sierra Leone** and **Liberia**. However, the relatively low level of impact at the national level masks the subnational production and food security impacts. For example, in the severely affected counties of Liberia, such as Lofa and Margibi, losses of paddy crop are estimated in the order of 20 percent.

The 2014 aggregate cereal production in the subregion, estimated at about 56.6 million tonnes, is about 3 percent above 2013's above-average output.

### Coarse grain prices are declining or stable in most countries

Cereal markets are relatively well integrated in *Western Africa* with price levels in several countries determined to a large extent by developments in some key regional markets. Reflecting increased supplies from last year's above-average regional harvest, coarse grain prices

**Table 8. Western Africa cereal production**  
(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals <sup>1</sup>			
	2012	2013	2014 estim.	2012	2013	2014 estim.	2012	2013	2014 estim.	Change: 2014/2013 (%)
<b>Western Africa</b>	<b>42.5</b>	<b>41.1</b>	<b>42.8</b>	<b>12.7</b>	<b>13.8</b>	<b>13.6</b>	<b>55.3</b>	<b>55.0</b>	<b>56.6</b>	<b>2.8</b>
Burkina Faso	4.6	4.6	4.3	0.3	0.3	0.3	4.9	4.9	4.6	-4.8
Chad	3.0	2.2	2.5	0.2	0.4	0.2	3.2	2.6	2.7	2.0
Ghana	2.4	2.2	2.3	0.5	0.6	0.6	2.9	2.7	2.9	5.7
Mali	4.7	3.5	4.6	1.9	2.2	2.3	6.7	5.7	6.9	19.9
Niger	5.3	4.3	4.0	0.1	0.1	0.1	5.3	4.3	4.1	-5.3
Nigeria	16.5	18.4	19.5	4.4	4.7	4.9	20.9	23.2	24.4	5.5

Note: Totals and percentage change computed from unrounded data.

<sup>1</sup> Total cereals includes wheat, coarse grains and rice (paddy).

have remained mostly stable or continued to decline in recent months in both Sahelian and coastal countries.

In the Sahel belt, coarse grain prices in January remained stable or continued to decline in **Niger, Burkina Faso** and **Mali**. Stable or declining millet and sorghum prices were also reported in December in most markets of **Chad**. Overall, prices of locally-produced sorghum and millet were well below their year-earlier levels. Similarly, coarse grains prices remained stable or declined significantly in December in coastal areas, notably in **Nigeria** where maize prices decreased by 20 percent between October and December in the main northern Kano market after several months of stability. Stable or declining maize prices were also observed recently in other coastal countries, including **Benin** and **Togo**. In the latter country, maize prices were still 47 percent below last year's level in Lomé, the capital city, although they remained virtually unchanged at the end of the year.

In countries affected by Ebola, **Liberia, Sierra Leone** and **Guinea**, prices of local rice declined further in December and remained mostly stable in January. Prices of imported rice remained unchanged or decreased. The downward trend in prices of local rice is driven mostly by increased supplies from the recently-completed 2014 harvests combined with subdued demand due to the impact of the Ebola Virus Disease (EVD) on economic activities and income.

### Food security affected by the EVD outbreak and civil insecurity

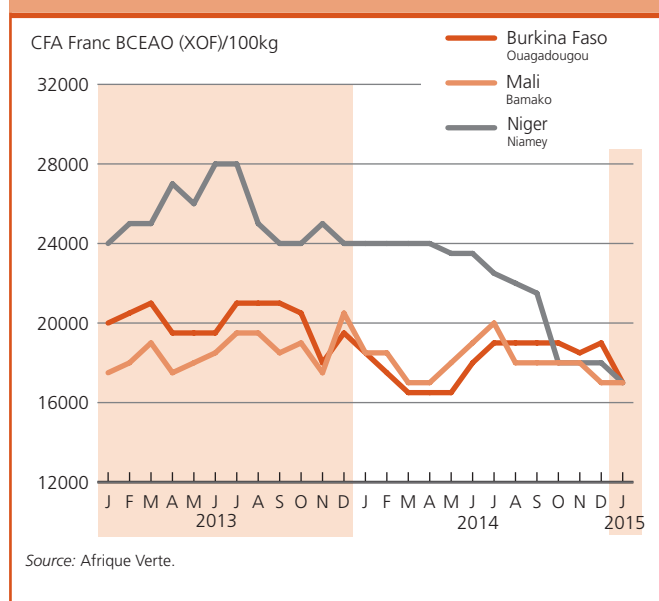
In spite of the relatively low impact of EVD on agricultural production at national level, its impact on economic activities and

livelihoods in **Guinea, Liberia** and **Sierra Leone** has severely affected household food security in the main affected areas. The disruption of food chains due to the closing of markets, road blocks and quarantines, restricted cross border trading, as well as changes in traders' behaviour due to the fear of Ebola significantly reduced the income of EVD-affected communities both for producers, consumers and traders. Income generating activities typically led by women, such as small traders, have been particularly affected. The ban on bush meat has also deprived many households of an important source of nutrition and income. According to the World Bank's revised estimates, 2014 Gross Domestic Product (GDP) growth fell drastically in Guinea to 0.5 percent from 4.5 percent expected before the Ebola crisis. Similarly, GDP growth fell by more than half, from 5.9 percent to 2.2 percent in Liberia and from 11.3 percent to 4.0 percent in Sierra Leone. Access to food for many households is being constrained by disruption of livelihoods and loss of income combined. Over half a million people are facing food insecurity due to the Ebola epidemic in the three countries including 170 000 in Liberia, 120 000 in Sierra Leone and 230 000 in Guinea.

All three countries are net cereal importers with Liberia the most reliant on external supplies (up to 80 percent) to satisfy domestic consumption requirements. Cereal import requirements in 2015 are estimated at 445 000, 440 000 and 300 000 tonnes, respectively, for **Guinea, Liberia** and **Sierra Leone**. Rice accounts for the bulk of the imports. Based on the forecast for commercial imports, Liberia has about 90 000 tonnes, Sierra Leone about 55 000 and Guinea about 44 000 tonnes of uncovered gaps. These deficits are expected to be covered with international food assistance and/or additional budgetary allocations by the governments. The significant impact of Ebola on export earnings is expected to have compromised the countries' ability to pay for their cereal import requirements.

The continuing civil conflict in **the CAR, Mali** and northern **Nigeria** has resulted in large population displacement. Following the escalating civil insecurity and conflict in northern **Nigeria**, the humanitarian situation continues to deteriorate resulting in an increasing number of refugees in neighbouring countries. There are over 1.5 million Internally Displaced Persons (IDPs) in the six states of the Northeast, while several thousand have sought refuge in neighbouring countries (Cameroon, Chad and Niger). Over 100 000 people are estimated to have left Nigeria for the Diffa region of **Niger**, while about 80 000 people have taken refuge in northern **Cameroon**, as of early February. An additional 17 000 Nigerians have recently fled to **Chad** and the rate of population displacement is increasing according to UN-OCHA. The escalating conflict has also disrupted commodity movements leading to higher prices and volatility in parts. The crisis is also likely to affect crop production this year in several regions.

Figure 3. Millet prices in selected Western African markets



Similarly, in **Chad**, civil conflict in **the Sudan**, **the CAR**, **Nigeria** and **Libya**, has increased the number of refugees and returnees. Over 110 000 people are estimated to have left the CAR for Chad in 2014, in addition to the Nigerians who fled to Chad in recent weeks. Overall, over 450 000 refugees are estimated to be currently living in Chad, while about 340 000 Chadians have returned to their country. The refugee crisis has exacerbated an already fragile food situation.

Moreover, most Sahelian countries have been struck by successive severe food crises in recent years that have had very adverse, longer-term impacts on households' assets and savings. Rising food insecurity is likely in 2015 in **Cabo Verde**, **the Gambia**, **Guinea-Bissau** and **Senegal** due to last year's steep decline in cereal production. Over 3.6 million people are estimated to be in Phase 3: "Crisis" and above in the Sahel region and need urgent assistance according to the latest "Cadre Harmonisé" analysis. An additional 11.8 million people are estimated to be at risk of food insecurity (Phase 2: "Stressed").

## CENTRAL AFRICA

### The 2015 main cropping season is about to start; uncertain prospects in the CAR due to persistent civil insecurity

In *Central Africa*, planting of the 2015 main season maize crops, due for harvest from July, will begin in March. 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 were already inadequate. As a result, a reduced crop production for the third consecutive year is likely. FAO is assisting the 2015 agricultural campaign, including strengthening its seeds and tools distribution. In southern **Democratic Republic of the Congo (DRC)**, where the rainfall pattern is similar to *Southern Africa*, planting of the secondary season maize crop, to be harvested from May, is underway.

### Satisfactory 2014 harvests estimated in most countries of the subregion expect in the CAR

In **the CAR**, harvesting of the 2014 main season cereal crops was completed between last September and October. According to the findings of a joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM) last August-September, the 2014 aggregate production of food crops increased by 11 percent from the sharply reduced 2013 output, but still remained 58 percent below the pre-crisis five-year average (2008-2012). Last year's aggregate outcome is mainly driven by a significant increase in cassava production (+45 percent), while the cereal output declined by about 54 percent from 2013. The ongoing socio-political crisis and widespread insecurity severely disrupted agricultural and marketing activities, and caused the depletion of already inadequate households' productive assets. This, coupled with erratic rainfall in western parts, as well as some pest attacks, led to a reduction in the planted area by 23 percent. FAO and NGO partners helped to avert a major food crisis, by providing crop production support to a total of 111 750 vulnerable households.

In **Cameroon**, both the main and the secondary season maize crops in bi-modal areas of the Centre and the South, respectively, harvested in October and January, were negatively affected by erratic and below-average rainfall. By contrast, in northern uni-modal areas, where sorghum and millet crops are predominantly grown, harvesting was completed in November and crops benefited from adequate rainfall. In **the DRC**, the harvest of the main 2014 season maize crops in central regions was completed in November in the north, while in southern parts it has been recently concluded. According to remote sensing analysis, adequate rains were received in most parts of the country, reflected in generally average vegetation conditions during the main cropping season that began in June 2014 in northern provinces. As a result, a good 2014 cereal production is expected. In **the Congo** and **Gabon**, harvesting of the main season maize crop normally starts in December, but some delays may have occurred in both countries due to a late onset of seasonal rains which may have affected planting operations. Earlier in the

year, the secondary season maize crop, harvested in June-July, benefited from adequate rainfall throughout the growing period. However, in both countries, the bulk of the national cereal requirement is met through imports.

The 2014 subregional cereal production, estimated at 4.8 million tonnes, is about 3 percent below the previous year.

**Table 9. Central Africa cereal production**  
(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals <sup>1</sup>			
	2012	2013	2014 estim.	2012	2013	2014 estim.	2012	2013	2014 estim.	Change: 2014/2013 (%)
<b>Central Africa</b>	<b>4.3</b>	<b>4.4</b>	<b>4.2</b>	<b>0.5</b>	<b>0.5</b>	<b>0.6</b>	<b>4.9</b>	<b>4.9</b>	<b>4.8</b>	<b>-2.6</b>
Cameroon	2.8	2.9	2.8	0.2	0.2	0.2	3.0	3.1	3.0	-2.8
Central African Rep.	0.2	0.1	0.1	0.0	0.0	0.0	0.2	0.1	0.0	-54.2
Dem.Rep.of the Congo	1.2	1.3	1.2	0.3	0.3	0.3	1.6	1.6	1.6	1.0

Note: Totals and percentage change computed from unrounded data.

<sup>1</sup> Total cereals includes wheat, coarse grains and rice (paddy).



## High inflation rates

In **the CAR**, the average inflation rate, which surged from a low 1.5 percent in 2013 to 9 percent in 2014, mainly as a result of increased food price inflation, is forecast to decline slightly to 7 percent in 2015, mainly due to falling oil prices. However, constraints to agricultural production due to insecurity will continue to underpin high food prices and general inflation. In **the DRC**, rates of inflation, which increased from a low of 1 percent in 2013 to 2.4 percent in 2014 due to a slight loosening of monetary policy, are forecast to continue to increase, reaching 4 percent in 2015, owing to domestic demand pressure that reflects sustained economic growth. In **Gabon**, the average inflation rate, at a low 0.5 percent in 2013, increased to 4.7 percent in 2014, mainly reflecting increasing food prices. For instance, prices of imported wheat, the most important staple, increased in the capital, Libreville, by 32 percent between January and December 2014, mainly due to the removal of price control measures. In 2015, the inflation rate is forecast to decline to 2.5 percent due to lower oil prices and a reduction in government spending. In **Cameroon** and **the Congo** inflation rates are forecast to remain around a low of 2-3 percent in 2015.

## Serious food insecurity due to conflict and increased refugee caseload

Continued civil insecurity in **the CAR** and in eastern **DRC** has resulted in massive population displacements and hindered access to food for the affected population. Large numbers of refugees from the CAR sought refuge in neighbouring **Cameroon** and the **DRC**, straining on the already limited resources of the hosting communities. In addition, since January, heavy rains in southern DRC caused floods which affected thousands of people, exacerbating the already precarious food security situation.

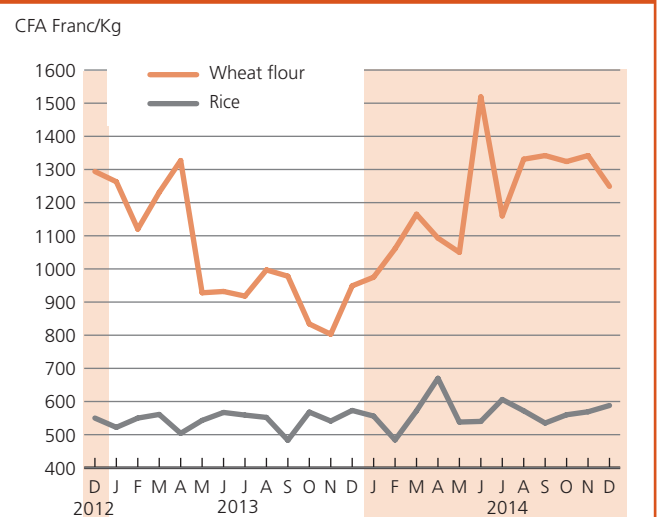
In **the CAR**, according to the latest Integrated Food Security Phase Classification (IPC)<sup>2</sup> from October 2014, about 1.5 million people (out of a total population of 4.6 million), are in need of urgent assistance. The areas most affected by food insecurity are Ouham, Nana Grebizi and Kemo prefectures in the northwest. A joint assessment carried out by FAO, Government agencies and NGOs between 18 November and 2 December 2014 in pastoral areas of Ouham-Pende, Nana-Mambere and Mambere-Kadéï prefectures in the west, indicates that persisting and widespread violence has resulted in high food insecurity levels, disruption of livestock transhumance, cattle theft, division of families and poor agricultural sales. At the national level, the percentage of households with inadequate food consumption increased from 15 to 26 percent, and the recourse to negative coping strategies, such as domestic and productive asset sales, school dropout and illegal activities, intensified. In early February 2015, the IDP

caseload, estimated at 440 000, was about half the number at the peak of the crisis in early 2014, but increased by 8 percent since October due to recent episodes of violence.

In **the DRC**, according to the IPC conducted in December 2014, the number of people in acute food insecurity and livelihood crisis (IPC Phases 3: "Crisis" and 4: "Emergency") was estimated at about 6.5 million, 3 percent down from the previous figure estimated earlier in 2014. The number of individuals affected by "Emergency" levels of food insecurity is approximately 523 000. The areas most affected by "Emergency" food insecurity levels are located in the provinces of Katanga (Manono, Mitwaba and Pweto), Maniema (Punia), South Kivu (Shabunda), Province Orientale (Irumu) due to armed conflicts, which resulted in massive population displacement disrupting their livelihoods, and in Equateur (Boende) due to the epidemic caused by the hemorrhagic fever with Ebola virus.

As of December 2014, the IDP caseload was estimated at more than 2.7 million, 4 percent up from the estimate in June 2013, including more than 600 000 newly-displaced persons in 2014. The IDPs are mainly located in conflict-affected Oriental, Maniema, North Kivu, South Kivu and Katanga provinces. In addition, in parts of Katanga province heavy rains in January caused floods and landslides that resulted in severe damage to infrastructure and crops, and affected at least 30 000 individuals, raising serious food security and health concerns. This adds up to the 104 000 people affected by floods between April and December 2014, which also resulted in the loss of 7 400 hectares of crops. As of mid-February,

Figure 4. Retail prices in Libreville, Gabon



Source: Ministère de l'Economie et de la Prospective.

<sup>2</sup> The **Integrated Food Security Phase Classification (IPC)** brings together a set of standardized tools that aims at providing a universal measure to classify the severity and magnitude of food insecurity. For further information please visit: <http://www.ipcinfo.org/>

the **DRC** was hosting about 68 000 refugees from the **CAR**, mainly located in the northern Equateur and Oriental provinces.

In **Cameroon**, four regions (East, North, Adamaoua and Far North) are highly affected by the crises in neighbouring **Nigeria** and the **CAR**, hosting more than 280 000 refugees (241 000 from the CAR, 39 000 from Nigeria) as of late January 2015. In addition, insecurity along the borders with **Nigeria** has led to the internal displacement of 40 000 Cameroonians. The refugee and IDP populations put additional pressure on scarce resources and poor basic services in their host communities exacerbating existing vulnerabilities. In January 2015, the number of food insecure was estimated at 1.08 million individuals (of which 244 000 suffer from severe food insecurity and 821 000 are affected by moderate food insecurity) three times higher than two years before. The two worst hit regions are the North and Far North, where the food situation was already precarious due to recurrent climatic shocks that have depleted households' productive assets and eroded their resilience capacity. These regions currently host 75 percent of the total food insecure (more than 800 000 individuals) and record the highest rates of severe food insecurity (14 percent). More than 30 000 refugee children are suffering from malnutrition, and malnutrition rates have sharply increased over the last year, with a surge of more than 40 percent of severe cases compared to 12 months earlier.

## EASTERN AFRICA

### Reduced 2014 secondary season cereal production in Kenya, northern United Republic of Tanzania and southern Somalia

Harvesting of the 2014/15 secondary season crops is almost over, 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 the late onset and

erratic distribution of the October to December "short rains", especially over the eastern part of the subregion.

In bi-modal rainfall areas of **Kenya**, a well below-average "short rains" cereal harvest is expected, with particularly poor prospects in southeastern and coastal marginal agricultural areas, where rains had a late onset, with below-average amounts along the season, and ended earlier than usual. In these areas, where the "short rains" harvest accounts for about 70 percent of the total annual crop production, current maize output is expected to be about 40-50 percent below average. Similarly, in northeastern bi-modal rainfall areas of the **United Republic of Tanzania**, the "vuli" maize production is forecast to be about 50 percent of the average due to erratic and insufficient rains, as well as a significant reduction in planted area.

Similarly in **Somalia**, cereal production prospects are unfavourable in most southern areas, where "deyr" rains were generally late and below average over the major cropping areas of Gedo, Middle Juba, Lower Juba, Lower Shabelle and Hiran. A substantial reduction in cereal plantings has also been reported as many farmers opted to plant more profitable cash crops, such as sesame. In addition, heavy rains in eastern **Ethiopian** highlands in late October caused significant floods along the Juba and Shabelle rivers, affecting standing maize and sorghum crops in some districts of Middle Shabelle, Middle Juba and Lower Juba regions. However, as a result of recession cultivation in these areas, a good off-season crop production, mainly sesame, maize and cowpeas, is expected to be harvested by March 2015.

By contrast, over most western parts of the subregion, seasonal rains were good, with an early start of the rainy season in August and abundant and well-distributed rainfall in October and November. Rains generally ceased early in December, enhancing crop drying and benefiting harvesting activities. Accordingly, cereal production is estimated at average to above-average levels for the 2014 second season harvests in bi-modal areas of southcentral **Uganda**, as well as for the 2015A season harvests in **Rwanda** and **Burundi**.

Despite unfavourable prospects for the secondary season output in some countries, the aggregate 2014 cereal output for the subregion is estimated at a record 45.5 million tonnes, about 9 percent above the previous year and over 17 percent above the last five-year average. Except for **Kenya**, all countries of the subregion gathered average to above-average cereal harvests in 2014, with

**Table 10. Eastern Africa cereal production**  
(million tonnes)

	Wheat			Coarse grains			Total cereals <sup>1</sup>			
	2012	2013	2014 estim.	2012	2013	2014 estim.	2012	2013	2014 estim.	Change: 2014/2013 (%)
<b>Eastern Africa</b>	<b>3.9</b>	<b>4.4</b>	<b>4.7</b>	<b>36.3</b>	<b>34.5</b>	<b>37.5</b>	<b>42.7</b>	<b>41.6</b>	<b>45.5</b>	<b>9.4</b>
Ethiopia	2.9	3.4	3.5	15.8	16.1	16.3	18.8	19.7	20.0	1.4
Kenya	0.4	0.5	0.5	3.9	3.7	3.0	4.5	4.3	3.6	-16.3
Sudan	0.3	0.2	0.5	4.9	2.6	7.4	5.2	2.9	7.9	175.8
Tanzania U.R.	0.1	0.1	0.1	6.2	6.5	6.2	8.1	8.7	8.9	2.6
Uganda	0.0	0.0	0.0	3.3	3.3	3.3	3.5	3.5	3.5	0.6

Note: Totals and percentage change computed from unrounded data.

<sup>1</sup> Total cereals includes wheat, coarse grains and rice (paddy).

the sharpest increase being recorded in **the Sudan**, where cereal production is estimated at a record high level due to abundant and well-distributed rains, as well as relatively better security conditions that enabled proper planting and harvesting activities.

### Land preparation underway for the 2015 main season crops

The 2015 main rainy season normally begins from late February to early March in large parts of *Eastern Africa*. In anticipation, land preparation for the main season cereal crops 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 bi-modal rainfall areas of **South Sudan** (Western Equatoria State) and southern **Uganda**.

In **the United Republic of Tanzania**, planting of the 2015 "msimu" crops, to be harvested in May/June, has been completed in January in central and southern uni-modal rainfall areas, following the timely onset of the rainy season in November. Well above-average rainfall amounts since early 2015 have benefitted crop development, although an outbreak of armyworms in Dodoma, Singida and Morogoro central districts needs to be promptly controlled to avoid it spreading southwards.

### Poor pasture conditions persist in parts of Kenya, Somalia and Ethiopia

In most pastoral areas, grazing resources have seasonally deteriorated since December when rains stopped. In particular, an alarming situation is reported in pastoral areas of northeastern and central **Kenya**, as well as southern and central **Somalia** where "short rains" have been late and extremely poor in terms of rainfall amounts and distribution. As a result, trekking distances have generally increased, livestock body conditions range from fair to poor and milk production is generally below average. In these areas, pasture conditions and water availability are expected to deteriorate further during the current dry season, until the start of the 2015 "long rains", expected in March. Well below-average pasture conditions are also reported in southern parts of SNNPR, Oromia and Somali regions in **Ethiopia**.

### Relatively low cereal prices in most countries of the subregion

By the end of 2014, cereal prices generally declined as the main season harvests increased supplies. With the exception of most markets in **Somalia** and despite some increases in January, current prices are generally at low levels, due to adequate domestic supplies and sustained regional trade flows from surplus to deficit areas.

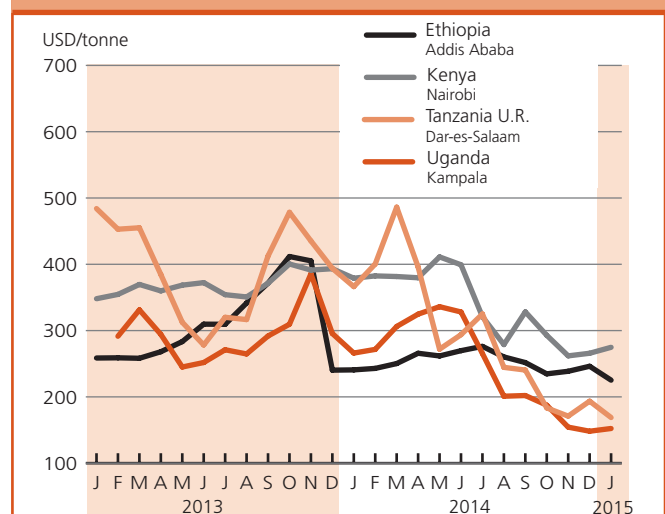
In **Kenya**, wholesale maize prices decreased by 25-40 percent during the last six months of 2014 in most markets. The adequate availability of 2015 "long rains" season crops, coupled with substantial imports from Uganda and the United Republic of

Tanzania, have increased supplies, exerting downward pressure on prices. Similarly, in **the United Republic of Tanzania** and **Uganda**, prices of maize decreased by 35-50 percent since June/July 2014 as a result of the good harvests gathered in 2014. In both countries, despite the sustained export flow to neighbouring countries, maize prices in January were about 35-50 percent below the level of one year before. In **Ethiopia**, prices of coarse grains declined significantly during the last six months, especially in markets located in main producing areas, due to the subsequent commercialization of "belg" and "meher" season crops.

In **Somalia**, prices of sorghum declined by about 20 percent between November 2014 and January 2015 in most markets located in main producing areas. By contrast, prices of maize remained firm in Lower Shabelle due to the below-average crop performance. Overall, prices of coarse grains in January were up to 75 percent higher than 12 months earlier, due to the lingering effects of consecutive seasons of below-average production and trade disruptions caused by civil conflict. In **the Sudan**, prices of sorghum and millet declined by 20-50 percent between October 2014 and January 2015 following the record output obtained at the end of last year. In Khartoum, prices of imported wheat declined by about 13 percent between September 2014 and January 2015, partly due to increased availability of other cereals.

In **South Sudan**, prices of sorghum declined in December 2014 by about 10 percent in Juba and Wau markets as the main season harvest increased supplies and major trade routes reopened since the start of the dry season. Sorghum prices remained relatively high in most markets in conflict-affected areas, although significant declines (between 20 and 40 percent) have been recorded in Renk,

Figure 5. Maize prices in selected Eastern African markets



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

Malakal and Rumbek due to the better functioning of local markets, following reduced incidences of clashes and improved road access.

### Food security improves, but large numbers of people still depend on food assistance

Food security conditions continued to improve as the bulk of the 2014 main season crops and the second season crops became available for local consumption. However, food stocks are quickly running out in localized areas that harvested a below-average production at the end of 2014, such as northeastern Amhara and Tigray regions and the lowlands of East Hararghe zone in Oromia region in **Ethiopia**, central Rift Valley region of Dodoma and Singida in **the United Republic of Tanzania**, conflict-affected states of Greater Upper Nile in **South Sudan**, as well as most agro-pastoral areas of Karamoja region in **Uganda**. During the coming months, food security conditions are expected to deteriorate in most areas that are currently harvesting below-average secondary season crops. High food insecurity conditions are reported in several pastoral and agro-pastoral areas of the subregion, where the lean season is peaking just before the expected start of the 2015 “long rains” season in March/April. Most food insecure pastoral households are concentrated in northeastern counties of Marsabit, Wajir, Garissa and Isiolo counties in **Kenya**, in northeastern areas of Afar and southern Oromia (Borena zone) regions in **Ethiopia** and in Hiran region in **Somalia**.

Despite widespread improved food security conditions across the subregion, the current aggregate number of people in need of humanitarian assistance remains high at 11 million (including 3.5 million in **the Sudan**, 3.2 million in **Ethiopia**, 2.5 million in **South Sudan**, 1.5 million in **Kenya**, 730 000 in **Somalia**, 180 000 in Karamoja region of **Uganda** and 160 000 in **Djibouti**). Most households facing acute food insecurity conditions are concentrated in conflict-affected areas of Darfur, South Kordofan and Blue Nile states in **the Sudan**, in the Greater Upper Nile in **South Sudan** as well as in parts of southern **Somalia**. In these areas, the number of IDPs is currently estimated at a high of 4.8 million people.

## SOUTHERN AFRICA

### Mixed 2015 production prospects due to dry spells and floods

Harvesting of the main 2015 cereal crops will commence in April. Despite mixed production prospects at country level, an above-average aggregate cereal output, but lower than the bumper 2014 harvest, is foreseen in 2015. Late and subsequently uneven seasonal rains in the last quarter of 2014 delayed plantings and hindered early crop development. While rains improved from mid-December, excessive precipitation in mid-January and the passing of Cyclone Chedza caused flooding in parts of **Malawi**, **Mozambique** and **Madagascar**. Forecasts for March and April indicate a higher probability of normal to above-normal rains, but an increased likelihood of below normal rains is expected in southwestern areas, including some parts of the large producing provinces of **South Africa**.

In **South Africa**, the largest grain producer in the subregion, moisture deficits affected crop conditions in parts of Free State and Northwest provinces, which contributes to nearly two-thirds of the national output. Prospects are now poor with early forecasts pointing to a 35 percent decrease in white maize yields (commercial sector) in 2015 compared to the above-average crop of the previous year. Although resumption of rains in late February somewhat helped improve conditions, preliminary forecasts (including the non-commercial sector) point to an aggregate 2015 maize crop of around 10 million tonnes, well below the bumper production of 2013.

The heavy rains in January resulted in floods across several countries in eastern parts of the subregion. An estimated 87 000, 64 000 and 87 000 hectares of cropped land were flooded in central areas of **Mozambique**, southern parts of **Malawi** and in several regions of eastern and western **Madagascar**, respectively. Assessments are still ongoing to determine the full extent of the damage and assistance is being provided,

**Table 11. Southern Africa cereal production**  
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2012	2013	2014 estim.	2012	2013	2014 estim.	2012	2013	2014 estim.	2012	2013	2014 estim.	Change: 2014/2013 (%)
<b>Southern Africa</b>	<b>2.2</b>	<b>2.2</b>	<b>2.1</b>	<b>24.1</b>	<b>23.8</b>	<b>29.4</b>	<b>5.1</b>	<b>4.2</b>	<b>4.5</b>	<b>31.4</b>	<b>30.3</b>	<b>36.0</b>	<b>19.0</b>
<b>- excl. South Africa</b>	<b>0.3</b>	<b>0.4</b>	<b>0.3</b>	<b>10.8</b>	<b>10.9</b>	<b>13.9</b>	<b>5.1</b>	<b>4.2</b>	<b>4.5</b>	<b>16.2</b>	<b>15.4</b>	<b>18.7</b>	<b>21.3</b>
Madagascar	0.0	0.0	0.0	0.4	0.4	0.4	4.6	3.6	4.0	5.0	4.0	4.3	8.8
Malawi	0.0	0.0	0.0	3.7	3.8	4.1	0.1	0.1	0.1	3.8	3.9	4.2	7.8
Mozambique	0.0	0.0	0.0	1.8	1.8	2.2	0.3	0.4	0.3	2.2	2.2	2.5	13.3
South Africa	1.9	1.9	1.8	13.3	13.0	15.6	0.0	0.0	0.0	15.2	14.9	17.3	16.7
Zambia	0.3	0.3	0.2	2.9	2.6	3.4	0.0	0.0	0.0	3.2	2.9	3.6	24.5
Zimbabwe	0.0	0.0	0.0	1.1	1.0	1.7	0.0	0.0	0.0	1.2	1.0	1.8	77.4

Note: Totals and percentage change computed from unrounded data.

including the supply of seeds for secondary season crops, to be harvested from August. This is expected to partly mitigate the localized crop losses if the secondary season performs satisfactorily. Elsewhere in the subregion, the improved rains since December helped reverse early seasonal water deficits and crop conditions are generally favourable. However, in northern **Namibia** and southern areas of **Angola** and **Madagascar**, poor rains continued in January and February resulting in an extended dry period that is likely to result in localized crop losses and lower cereal production.

### Lower imports estimated in 2014/15 on account of favourable domestic supplies

Total maize imports for the 2014/15 marketing year (generally May/April) are forecast at 0.9 million tonnes (excluding South Africa), well below the previous year's level of 1.4 million tonnes, reflecting the larger domestic maize harvests in 2014. As of February 2015, with two months of the marketing year remaining, approximately two-thirds of the import requirements were satisfied. **South Africa** has supplied the bulk of the needs to the importing countries, accounting for nearly 90 percent of the total maize imports in the subregion. Similar to last year, large volumes of yellow maize from South Africa were exported to *Asia*, approximately 1 million tonnes in 2014/15, as of February.

Imports of wheat, of which the subregion is a deficit producer, are estimated to remain comparatively stable in 2014/15. While rice imports were estimated at a slightly lower level compared to the previous year, reflecting reduced needs in **Madagascar** on account of the partial recovery in domestic production.

For the subsequent 2015/16 marketing year (May/April), exports are forecast to decrease significantly from **South Africa**, given current production forecasts. Current supply positions may cover some of the requirements in the subregion but alternative sources of supplies from within and outside the subregion may still be required. The availabilities of alternative export supplies in *Southern Africa* will largely depend on the outturn in **Zambia**, which has become a distant second exporter; current crop prospects in Zambia are satisfactory, while the country also holds large stocks with a significant export surplus. South Africa is also likely to import yellow maize to stabilize national supplies.

### Maize prices remain below their year-earlier values but some sharp increases were observed in 2015

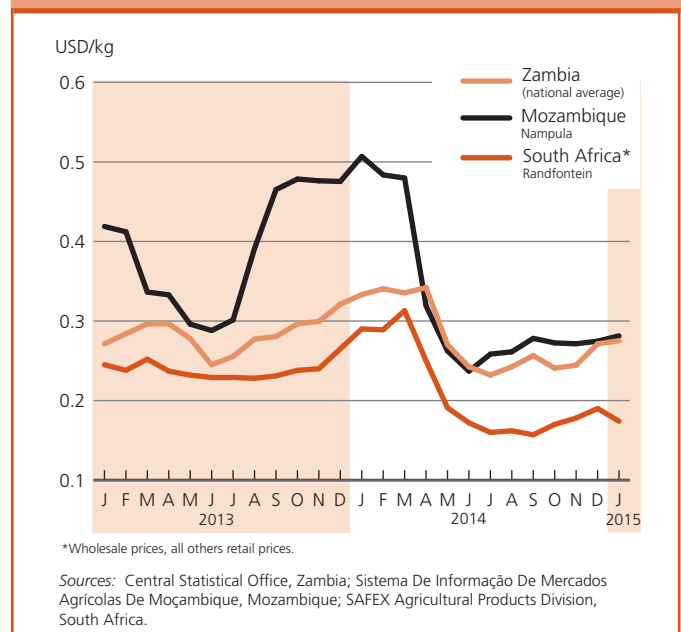
Prices of the main staple maize have generally remained below their year-earlier levels, on account of the improved supply conditions in 2014/15. Since January, prices have generally increased seasonally, although the more-than-adequate supplies in the subregion have tempered stronger monthly gains.

In **South Africa**, despite a small dip in January, prices continued their increasing trend that began in October 2014, rising rapidly in February, as markets responded to the dry conditions and worsening crop prospects. Prices in February 2015, however, still remained below their year-earlier levels. In **Malawi** and **Mozambique**, maize prices have generally been increasing seasonally in the first two months of 2015, however, reflecting the larger supplies in 2014/15 prices are below the previous year. Disruption to trade flows in the areas affected by flooding, particularly in southern Malawi and central areas of Mozambique are expected to exert some short-term upward price pressure. However, in Malawi the appreciation of the currency and a further reduction in fuel prices in 2015 are expected to help stem inflationary pressure. In **Zambia**, seasonal price gains remained muted, as more-than-adequate supplies following a record 2014 harvest, as well as the downward revision of fuel prices by the Government in mid-January 2015, contributed to curtailing larger rises.

### Floods cause deterioration in food security conditions

The January floods in **Malawi**, **Madagascar** and **Mozambique** resulted in a large number of displaced people, as well as crop and livestock losses, adversely impacting on food security and increasing the number of people in need of assistance. In total, an estimated 234 000 persons were displaced, with the majority located in the Zambezia Province of Mozambique and in Malawi's Southern Region. Although cropped areas

Figure 6. White maize prices in selected Southern African markets



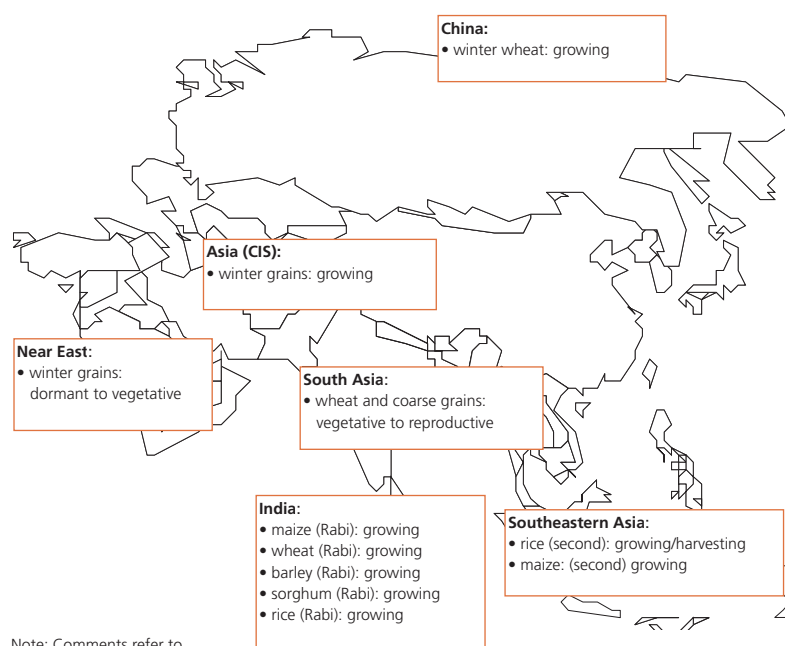
affected by the floods do not represent a large share at the national level, localized losses, particularly in areas where secondary season crops are not feasible, are expected to cause an acute reduction in cereal supplies, negatively impacting on food availability in 2015/16. Governments and UN agencies have responded to the floods, providing direct food assistance and agriculture provisions. However, funding of the response programmes has not yet been fully met and this may disrupt some operations.

Elsewhere in the subregion, food security conditions are generally stable, on account of the adequate maize supplies and lower year-on-year prices, however, a high prevalence of food insecurity was recorded in southern **Madagascar** following successive seasons of reduced cereal harvests. According to the national vulnerability assessments, conducted in June-July 2014, there was a 56 percent decrease in the number of people requiring food assistance in 2014/15 compared to the high level of the previous year (excluding **Angola, Madagascar** and **South Africa**).

## FAR EAST

### Good prospects for the 2015 main wheat and secondary rice crops

The 2014/15 winter crops (including the mostly irrigated winter wheat and secondary rice crops), to be harvested from April onwards, are in the growing stages in most countries. Although the start of the season was characterized by overall below-average rains, which somewhat delayed planting of the winter wheat, secondary rice and other crops, precipitation returned to more normal patterns from December, improving moisture conditions and benefitting early crop development. In **China**, FAO forecasts the 2015 aggregate wheat production (including the ongoing winter and the forthcoming spring seasons) at 126 million tonnes, similar to last year's record output. In **India**, favourable rainfall since December, after below-average rains during October and November, improved prospects for the 2015 wheat crop. Adequate irrigation water supplies, availability of fertilizers and other inputs are expected to benefit yields this season, which are forecast to increase and compensate for an estimated 3 percent contraction in the area sown. As a result, the "Second Advance Estimate" from the Ministry of Agriculture points to a 2015 winter wheat "rabi" crop of 95.8 million tonnes, similar to last year's record output. In **Pakistan**, the 2015 wheat production forecast stands at about 26 million tonnes, a record



Note: Comments refer to situation as of March.

level, reflecting an expected improvement in yields on account of favourable weather conditions, and adequate supplies of irrigation water and fertilizers.

Harvesting of the 2014/15 rice crop began in December, with the bulk to be collected from March onwards. Prospects are good in **Bangladesh, China, the Philippines** and **Viet Nam**. In **Sri Lanka**, the 2015 "maha" season paddy output is expected to recover from last year's drought-reduced level, reaching 2.7 million tonnes. This mainly reflects favourable rainfall from October to January over eastern, central and northwestern

**Table 12. Far East cereal production**

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2012	2013	2014 estim.	2012	2013	2014 estim.	2012	2013	2014 estim.	2012	2013	2014 estim.	Change: 2014/2013 (%)
<b>Far East</b>	<b>243.9</b>	<b>244.3</b>	<b>252.1</b>	<b>307.7</b>	<b>324.5</b>	<b>317.9</b>	<b>662.2</b>	<b>670.8</b>	<b>667.3</b>	<b>1 213.8</b>	<b>1 239.5</b>	<b>1 237.3</b>	<b>-0.2</b>
Bangladesh	1.3	1.3	1.3	2.3	2.3	2.4	50.8	51.5	52.4	54.3	55.1	56.1	1.7
Cambodia	0.0	0.0	0.0	1.0	0.9	0.8	9.3	9.4	9.2	10.2	10.3	10.0	-2.7
China	120.8	121.9	126.2	214.7	228.0	224.8	205.9	205.2	208.1	541.5	555.1	559.1	0.7
India	94.9	93.5	95.9	39.9	43.2	38.2	157.9	160.0	154.6	292.6	296.6	288.6	-2.7
Indonesia	0.0	0.0	0.0	19.4	18.5	19.1	69.1	71.3	70.6	88.4	89.8	89.7	-0.1
Japan	0.9	0.8	0.8	0.2	0.2	0.2	10.7	10.8	10.5	11.7	11.8	11.6	-1.6
Korea Rep. of	0.0	0.0	0.0	0.2	0.2	0.2	5.4	5.6	5.6	5.6	5.8	5.9	1.0
Myanmar	0.2	0.2	0.2	1.7	1.9	1.9	27.7	28.3	28.9	29.6	30.4	31.0	2.1
Nepal	1.8	1.9	1.9	2.3	2.6	2.8	4.5	5.0	4.8	8.7	9.6	9.5	-0.8
Pakistan	23.5	24.2	25.3	4.8	5.1	5.1	8.3	10.2	10.1	36.6	39.5	40.5	2.4
Philippines	0.0	0.0	0.0	7.4	7.3	7.8	18.1	18.8	19.1	25.5	26.2	26.9	2.9
Thailand	0.0	0.0	0.0	5.1	5.0	5.0	38.0	36.8	36.1	43.1	41.9	41.1	-1.9
Viet Nam	0.0	0.0	0.0	4.8	5.2	5.2	43.7	44.0	45.0	48.5	49.2	50.2	1.9

Note: Totals and percentage change computed from unrounded data.

**Table 13. Far East cereal production and anticipated trade in 2014/15<sup>1</sup>**  
(thousand tonnes)

	Avg 5-yrs (2009/10 to 2013/14)			2014/15 over 2013/14	2014/15 over 5-yr avg
	2013/14	2013/14	2014/15	(%)	(%)
Cereals - Exports	39 623	49 322	44 409	-10.0	12.1
Cereals - Imports	90 912	104 479	106 357	1.8	17.0
Cereals - Production	956 689	1 016 297	1 015 300	-0.1	6.1
Rice-milled - Exports	29 203	34 348	33 213	-3.3	13.7
Rice-milled - Imports	10 348	12 347	11 107	-10.0	7.3
Rice-milled - Production	431 514	447 548	445 282	-0.5	3.2
Wheat - Exports	4 630	7 766	6 060	-22.0	30.9
Wheat - Imports	34 854	38 619	36 664	-5.1	5.2
Wheat - Production	233 672	244 261	252 137	3.2	7.9

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

major rice growing areas. By contrast, in **Thailand**, below-average rains between November and mid-February, limited water availability for irrigation, and coupled with generally low prices at sowing time, resulted in lower plantings. Pending a more detailed assessment of the damages due to dry weather, FAO forecasts the 2014/15 secondary season paddy production in Thailand at 9 million tonnes, 8 percent below the good level of 2014. In **India**, a combination of below average rains at the start of the season and reduced plantings, resulted in a secondary season output of 20.2 million tonnes, 11 percent below the corresponding season of 2013.

### The 2014 aggregate cereal output estimated close to last year's record, with a larger wheat crop almost compensating for reduced rice and maize production

Harvesting of the 2014 main season paddy and coarse grains crops has been concluded. FAO's latest forecast for the 2014 subregional aggregate cereal production has been revised upwards by 1.7 million tonnes since December, to 1 237 million tonnes (rice in paddy terms), similar to last year's record. A higher wheat crop in 2014 is estimated, which is likely to almost compensate for the expected production declines in rice and maize. Area and yield losses, following irregular monsoon rains and unfavourable weather conditions during the main season, resulted in reduced cereal harvests in **Cambodia, India, Laos, Thailand** and **Sri Lanka**. By contrast, gains in national aggregate cereal outputs are recorded in **Bangladesh, Bhutan, Myanmar, Pakistan** and **Timor-Leste**, as a result of an overall area expansion, and in **the Philippines** and **Viet Nam** reflecting higher yields, following generally favourable weather conditions. In other countries of the subregion, namely **Republic of Korea, Democratic People's Republic of Korea (DPRK)**, **China, Malaysia, Indonesia** and **Nepal**, the 2014

aggregate cereal outputs are estimated to be close to the levels of 2013. At the subregional level production of paddy rice, accounting for about 55 percent of the total cereal output, is forecast at 667.3 million tonnes, slightly below last year's record. The bulk of the contraction is expected to come from **India**, the world's second largest rice producer, where the irregular monsoon rains, coupled with localized floods in July and September, depressed yields of the main "kharif" season rice crop. Including the ongoing 2014/15 "rabi" secondary crop, India's 2014 aggregate rice production is officially forecast at 154.6 million

tonnes, 3 percent below the 2013 record output. In the **DPRK** and **Sri Lanka**, dry weather and reduced irrigation water supplies resulted in considerable declines in rice outputs, which are officially estimated at 2.6 and 3.5 million tonnes, 9 and 25 percent, respectively, lower than the good harvests in 2013.

The 2014 aggregate subregional maize production is estimated to have decreased slightly to 290.6 million tonnes, reflecting reduced outputs in **India** and **China**. By contrast, the subregional 2014 wheat crop has been revised upwards somewhat since December to a record level of 252.1 million tonnes.

### Cereal exports forecast to decrease considerably but remain well above average, while imports forecast at record levels

In general, the *Far East* subregion is a net exporter of rice and net importer of wheat. Mainly reflecting higher imports forecast for coarse grains in **China**, the aggregate cereal imports in the 2014/15 marketing year are projected to increase slightly compared to 2013/14 and reach a record level of 106.4 million tonnes. Total coarse grains imports, the largest component, are projected at 58 million tonnes, an increase of 3.2 million tonnes over last year's record. This is attributed to considerably higher barley and sorghum imports from China, which are forecast to reach an all-time high of 5.6 and 6.4 million tonnes in 2014/15 (October/September), up 50 and 54 percent from the previous year, respectively. With higher demand from the feed industries, private buyers are increasingly importing sorghum and barley as a substitute to maize. Unlike maize, sorghum and barley are not subject to the annual Tariff Rate Quota (TRQ) restrictions and import prices of these crops are considerably lower than the price of locally-produced maize. By contrast, total wheat imports are forecast to decrease by 2 million tonnes during the 2014/15 marketing year (July/June), as a result of lower wheat imports from China, given the 2014 record harvest and large



carryover stocks. Likewise, aggregate rice imports are set at 11.1 million tonnes, some 10 percent below last year's level but still 7 percent above the preceding five-year average.

Aggregate cereal exports in 2014/15 are forecast to decrease by 10 percent from the previous year's record level, mainly due to an anticipated 5.6-million tonne contraction in the exportable surplus from **India**. Exports of rice (milled basis) in 2015 are anticipated to decrease slightly compared to the previous year but remain considerably above the five-year average. Significantly lower estimates for rice exports from India are expected to be partially compensated by an increase in volumes from **Thailand** and **Viet Nam**.

### Rice prices generally unchanged, while those of wheat flour showed mixed trends

Domestic rice prices, in local currencies, remained stable in January and were generally lower than a year earlier in most countries. This reflects weak trade activity, coupled with ongoing government procurement programmes that offset the downward pressure on prices due to the good 2014 main harvests. In **Viet Nam**, prices have been declining since October, mainly due to good supplies from the 10th Month harvest, completed by December, as well as the beginning of the 2014/15 main season winter/spring crop. By contrast, rice prices strengthened

in the past months and were above their year-earlier values in **Myanmar**, as a result of strong border trade with **China**, and in **Indonesia**, where they continued to rise to record levels, supported by a contraction of the 2014 output and the higher procurement price. In **Sri Lanka**, rice prices decreased slightly in January, with the recently-started 2015 main "maha" season harvest estimated at a good level. However, prices remained at near-record levels after steady increases in the previous months on account of last year's sharply reduced production.

Prices of wheat flour showed generally mixed trends in January in local currencies. They increased in **China**, where the national average price reached a record level in January, averaging CNY 4.76 (about USD 0.76) per kg, some 6 percent higher than a year earlier, due to low availabilities of high quality wheat. To limit the rise in prices, the Government released stocks in late January. In **Bangladesh**, wheat prices rose markedly mainly as a result of reduced quantities distributed by the Government through Open Market Sales (OMS), following lower public imports in the previous months. By contrast, quotations of wheat and wheat flour declined in the past months in **Pakistan** and were generally below their values in January of last year, reflecting good supplies from the 2014 record production. In **India**, prices of wheat remained unchanged in January, due to adequate supplies following last year's record harvest.

Figure 7. Rice retail prices in selected Far East countries

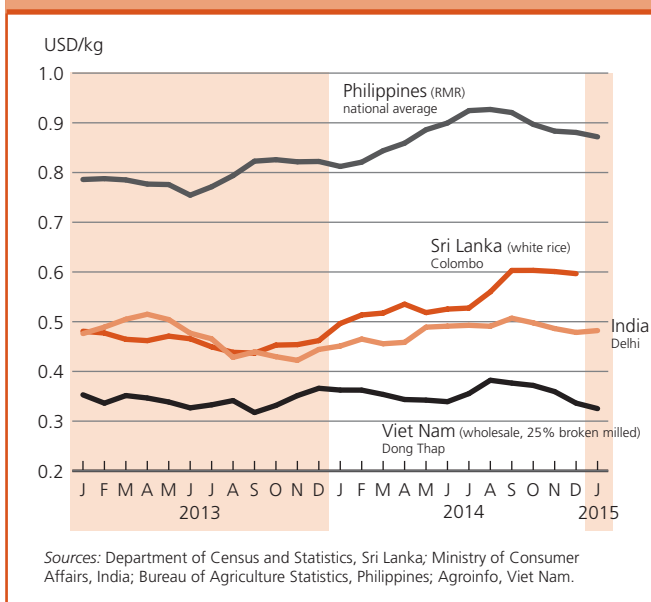
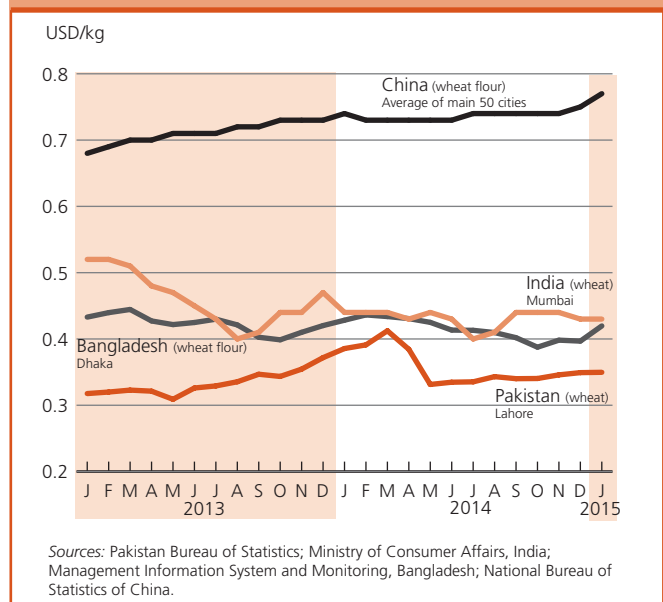


Figure 8. Wheat and wheat flour retail prices in selected Far East countries



## NEAR EAST

**Mixed outlook for the 2015 winter crops**

Wheat and barley crops, for harvest from June, are mostly in their final stages of dormancy throughout the region. Climatic conditions in **the Islamic Republic of Iran** and **Turkey** were so far generally good with abundant moisture. Assuming normal weather conditions for the remainder of the season, preliminary forecasts of wheat production in the Islamic Republic of Iran and Turkey are estimated at above-average levels of 13.5 and 21 million tonnes, respectively. While weather conditions in **Iraq** and **the Syrian Arab Republic** were similarly favourable, the ongoing conflict and lack of inputs are seriously hampering agricultural activities. In **Yemen**, land preparation for the sowing of the main sorghum and millet crops to be harvested towards the end of the year, is about to start.

On the other hand, in **Afghanistan** current prospects for winter crops are uncertain given below-average cumulative precipitation up until mid-February and lower-than-usual snow cover reported in northern and eastern areas. Snow runoff from the mountains is estimated to provide over 80 percent of the irrigation water. As of mid-February, eastern and southeastern parts of the country remain well supplied with moisture. Rainfed wheat producing areas in the north and south have also received below-average rains, although rains later in the season still can overturn the outcome.

**Slightly above-average crop gathered in 2014, still above-average import requirement**

Aggregate cereal production in 2014 is estimated at 69.1 million tonnes, about 9 percent lower than the record crop last year, and some 4 percent below the preceding five-year average. The decrease is attributed to drought conditions affecting the main regional producers (**Turkey**), coupled with conflict escalation in parts (**Syrian Arab Republic** and **Iraq**).

The total subregional cereal import requirement in the 2014/15 marketing year (July/June) is forecast at some 66 million tonnes, 8 percent up on the previous year. Wheat constitutes almost half of these imports and at approximately 30 million tonnes, accounts for an increase of about 10 percent on the previous year and about 25 percent compared to the five-year average. Coarse grains, mostly barley and maize, are imported mainly for animal feed.

**Divergent trends in food inflation**

Food price inflation resumed a decreasing trend in many countries, driven by decreasing international prices; although in some countries prices remained high. Decreases were reported in **Jordan**, **Iraq** (surveyed governorates) and **Turkey**. In **Jordan**, the year-on-year inflation rate reached 1.14 percent in December 2014 compared to an average of 5.6 percent in 2013, following the gradual removal of fuel subsidies that put upward pressure on prices. In **Iraq**, due to challenging security conditions, the governorates of Anbar, Nineveh, Kirkuk and Salah Al-Deen were excluded from the calculation of the price indices in December 2014. In the rest of the country, the food inflation rate decreased by 0.8 percent on a yearly basis. In **Turkey**, figures from January 2015 indicate an annual food inflation rate of 10.9 percent compared to a peak of 14.7 percent in May 2014.

On the other hand, food price inflation increased in Afghanistan, the Islamic Republic of Iran and Yemen. In **Afghanistan**, the food component of the Consumer Price Index (CPI) increased by 3.5 percent, while the non-food component decreased by 4 percent. Compared to last year, bread and cereals recorded an increase of 3.5 percent, while the largest increase was recorded by fresh and dried fruits (over 13 percent). In **the Islamic Republic of Iran**, the latest official information indicates the food and beverages price inflation index at 13.8 percent, on yearly basis for the month of Azar (22 November–21 December 2014) compared to 4.2 percent in the month of Khordad (22 May–21 June 2014). In **Yemen**, the latest information available (October 2014) indicates that food inflation stood at 3.5 percent, up from 2.2 percent in September 2014.

**Table 14. Near East cereal production**  
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2012	2013	2014 estim.	2012	2013	2014 estim.	2012	2013	2014 estim.	2012	2013	2014 estim.	Change: 2014/2013 (%)
<b>Near East</b>	<b>45.6</b>	<b>48.0</b>	<b>43.0</b>	<b>20.8</b>	<b>23.1</b>	<b>21.2</b>	<b>4.7</b>	<b>4.9</b>	<b>4.9</b>	<b>71.1</b>	<b>76.1</b>	<b>69.1</b>	<b>-9.2</b>
Afghanistan	5.1	5.2	5.1	0.8	0.7	0.7	0.7	0.8	0.8	6.6	6.7	6.6	-0.5
Iran (Islamic Rep. of)	13.8	14.0	13.0	4.7	4.5	4.5	2.8	2.9	3.0	21.3	21.4	20.4	-4.4
Iraq	2.4	3.3	3.0	0.8	1.2	1.2	0.4	0.4	0.4	3.5	4.9	4.5	-7.1
Syrian Arab Republic	2.8	2.4	1.9	1.0	1.1	0.8	0.0	0.0	0.0	3.8	3.5	2.6	-24.6
Turkey	20.1	22.1	19.0	12.4	14.5	13.0	0.9	0.9	0.8	33.4	37.5	32.8	-12.4

Note: Totals and percentage change computed from unrounded data.

Across the subregion, stable prices prevailed for subsidized food commodities, such as bread and cereals in **Iraq, Jordan, Saudi Arabia** and **Lebanon** (local flat bread only). Food inflation is driven by prices of seasonal products, such as vegetables, which are set freely.

### Food security conditions worsen, mostly 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.

In **the Syrian Arab Republic**, as of mid-February 2015, over 3.8 million refugees are registered in the region covering Egypt, Iraq, Jordan, Lebanon and Turkey. The WFP emergency food assistance to the people affected by unrest within the country has been scaled-up to reach 4.5 million by December 2015, compared to 4.25 million in 2014. WFP assistance in neighbouring countries is to reach more than 2.1 million beneficiaries by December 2015, compared to 2.68 million in 2014, focusing on the most vulnerable groups. Although WFP continues to provide food assistance to vulnerable Syrian populations in the region, resources in host communities remain under strain.

In **Iraq**, an estimated 3 million people are displaced internally, nearly 2 million of whom have been displaced since January 2014. Many of these people have been repeatedly displaced, specifically in the governorates of Anbar, Ninevah, Salahedin and Diyala. At the moment, there are reports of deteriorating access to drinking water, as well as basic food items and other essential non-food items. The WFP Emergency Operation (EMOP) to populations affected by the Iraq crisis supports 1.8 million individuals in need of food.

In **Yemen**, persistent conflict continues to displace households in central areas of the country. Preliminary findings from the 3rd Comprehensive Food Security Survey (CFSS 2014) in Yemen show that an estimated 10.6 million people, over 41 percent of the total population, are currently unable to meet their basic food needs. Of these, 5.6 million are moderately food insecure and 5 million people are severely food insecure, suffering from levels

of hunger where external food assistance is generally required. The majority (84 percent) of the total food insecure people live in rural areas, and around 2.5 million food producers (e.g. farmers, pastoralists, fishermen and agricultural wage labourers) are also classified as food insecure. WFP replaced its emergency operation with a recovery and resilience programme to promote food and nutrition security.

In **Afghanistan**, the overall food security situation has been generally stable owing to above-average harvests in the last three years (2012-2014). Above-average temperatures and limited precipitation, which are negatively affecting agricultural production prospects, have facilitated market access beyond the beginning of the lean period, normally January–April. As the lean season progresses, Banghis Province in the northeast of the country could move from IPC Phase 2: “Stressed” to Phase 3: “Crisis”. The WFP emergency food assistance which reached over 900 000 beneficiaries in 2013 was replaced by a Protracted Relief and Recovery Operation from 1 January 2014 to 31 December 2016, and is expected to reach 3.7 million beneficiaries.

## CIS IN ASIA<sup>3</sup>

### Overall favourable prospects for the 2015 winter wheat and barley crops

The 2015 winter cereals, mainly wheat and barley, are at the dormant stage in most countries. Overall, remote-sensed data indicates near-average precipitation (snow and rainfall) between October and mid-February, which maintained favourable soil moisture conditions for winter crops to break dormancy in spring.

**Table 15. CIS in Asia cereal production**  
(million tonnes)

	Wheat			Coarse grains			Total cereals <sup>1</sup>			
	2012	2013	2014 estim.	2012	2013	2014 estim.	2012	2013	2014 estim.	Change: 2014/2013 (%)
<b>CIS in Asia</b>	<b>21.4</b>	<b>26.2</b>	<b>24.6</b>	<b>5.1</b>	<b>6.4</b>	<b>6.0</b>	<b>27.3</b>	<b>33.4</b>	<b>31.4</b>	<b>-6.0</b>
Armenia	0.2	0.3	0.3	0.2	0.2	0.2	0.4	0.5	0.5	1.4
Azerbaijan	2.0	2.1	1.9	0.8	0.9	0.9	2.8	3.0	2.8	-7.0
Georgia	0.1	0.1	0.1	0.4	0.4	0.4	0.5	0.5	0.4	-10.1
Kazakhstan	9.8	14.0	12.5	2.2	3.3	3.2	12.4	17.6	16.1	-8.7
Kyrgyzstan	0.6	0.8	0.7	0.7	0.8	0.6	1.4	1.6	1.3	-17.9
Tajikistan	0.8	0.8	0.8	0.2	0.3	0.3	1.1	1.1	1.1	0.1
Turkmenistan	1.2	1.4	1.2	0.1	0.1	0.1	1.4	1.6	1.3	-14.3
Uzbekistan	6.7	6.9	7.2	0.4	0.4	0.4	7.3	7.5	7.8	4.0

Note: Totals and percentage change computed from unrounded data.

<sup>1</sup> Total cereals includes wheat, coarse grains and rice (paddy).

<sup>3</sup> Georgia is no longer a member of CIS but its inclusion in this group is maintained for the time being.

The aggregate area planted to winter wheat is estimated close to the levels of the previous year in most countries. By contrast, in **Kyrgyzstan** and in **Azerbaijan**, the total area planted to wheat in 2015 is estimated to have decreased. In **Kazakhstan**, accounting for more than half of the subregion's aggregate cereal output, the bulk of the wheat and barley crops will be planted from May to June. According to the early official projection, the area planted to wheat in 2015 is expected to decrease by 2 percent to 12.2 million hectares, reflecting plans to shift land to more profitable oilseed and forage crops.

### The 2014 cereal production is estimated to have declined

The 2014 aggregate cereal production is estimated at 31.4 million tonnes, 6 percent below the bumper harvest in 2013. Production of wheat, accounting for almost 80 percent of the subregion's total cereal output, declined by 1.6 million tonnes or 6 percent from 2013. The bulk of the decrease is accounted for by a 10 percent drop in **Kazakhstan** to 12.5 million tonnes, following abnormally cold weather and heavy snowfall in October 2014, which delayed spring wheat harvesting in northern parts of the country and negatively affected both yields and the quality of the wheat crop. Similarly, adverse weather conditions during the cropping season, coupled with shortages of irrigation water, resulted in lower wheat outputs in **Azerbaijan**, **Georgia**, **Kyrgyzstan** and **Turkmenistan**. By contrast, the 2014 wheat production increased to a record level of 7.2 million tonnes in **Uzbekistan**, attributed to record yields, due to favourable weather conditions during the growing season and use of improved seeds. The 2014 coarse grains output, consisting mainly of barley, is estimated to have decreased by 5 percent from the previous year to 6 million tonnes.

### Cereal exports forecast to decrease considerably in the 2014/15 marketing year, while imports expected to stay close to last year's level

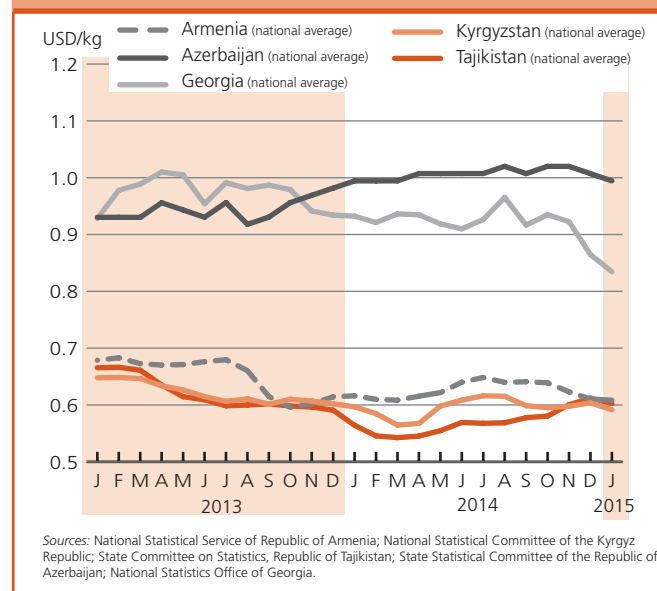
In general, **Kazakhstan** is the main wheat exporter in *CIS Asia*, while other countries rely on imports to satisfy their domestic requirements. Aggregate cereal exports in the 2014/15 marketing year (July/June) are forecast at 6.8 million tonnes, 22 percent below the high level of the previous year. The decrease is anticipated to come from lower wheat exports from Kazakhstan, which are forecast to fall by 24 percent to 5.9 million tonnes, given the reduced production in 2014. The subregion's total

cereal import requirement during the 2014/15 marketing year is forecast to stay close to last year's level, in spite of the reduced domestic outputs, mainly on account of sufficient carryover stocks in importing countries.

### Domestic prices of wheat and wheat flour remained at record or near-record levels

In **Kazakhstan**, export quotations remained unchanged for the third consecutive month in January, but were significantly higher compared to the same period last year, due to a reduced 2014 output and the poor quality of the wheat crop. In the import-dependent countries of **Tajikistan** and **Kyrgyzstan**, domestic prices of wheat and wheat flour, in local currency, remained generally unchanged, mirroring trends of export prices in Kazakhstan, their main supplier of wheat, but were at record or near-record levels in local currencies. Similarly, in **Armenia**, the national average price of wheat flour (high grade) reached a record level in January, averaging AMD 444 (about USD 0.9) per kg, some 15 percent higher than a year earlier. Prices in these countries have been underpinned by higher export quotations, the depreciation of national currencies and higher domestic fuel costs, in spite of lower international prices.

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



## CENTRAL AMERICA AND THE CARIBBEAN

### Wheat production in 2014 higher than last year

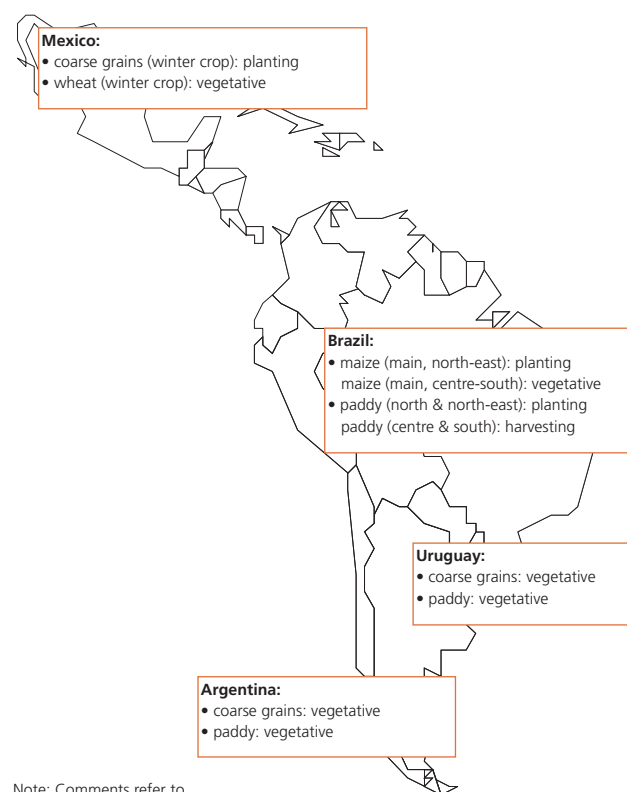
In **Mexico**, virtually the only wheat producer in the subregion, production in 2014 (including the autumn-winter and minor spring-summer seasons) was estimated almost 10 percent up from last year's below-average level. The increase mainly reflects an expansion in the area planted.

Planting of the main wheat 2015 autumn-winter season was virtually finished in February and early official forecasts indicate an increase in the area planted by 7.5 percent over last year's level for the same season. Preliminary forecasts for the 2015 wheat crop point to a production close to last year's high level.

### Maize production in 2014 at a record level reflecting a bumper crop in Mexico

FAO estimates the subregion's aggregate 2014 maize production at a record level of 28 million tonnes. This mainly reflects another bumper crop in **Mexico**, which represents about 85 percent of the subregion's maize production, officially estimated at 24 million tonnes, a new record. Planting of the secondary 2015 autumn-winter season maize crop in Mexico is virtually complete, and early official forecasts indicate only a slight reduction in the area planted, with production forecast to be close to last year's high level for the corresponding season.

Excluding Mexico, however, the aggregate (first and second season) 2014 maize production in the rest of the subregion is estimated at a sharply reduced level, as a result of crop losses caused by an extended and severe drought, period known as "canicula", during the main first season (May to September), which accounts for 60 percent of annual production. Aggregate maize production is estimated some 11 percent down from



Note: Comments refer to situation as of March.

2013 and below the subregion's five-year average. The largest production declines were estimated in **El Salvador, Guatemala, Honduras** and **Nicaragua**.

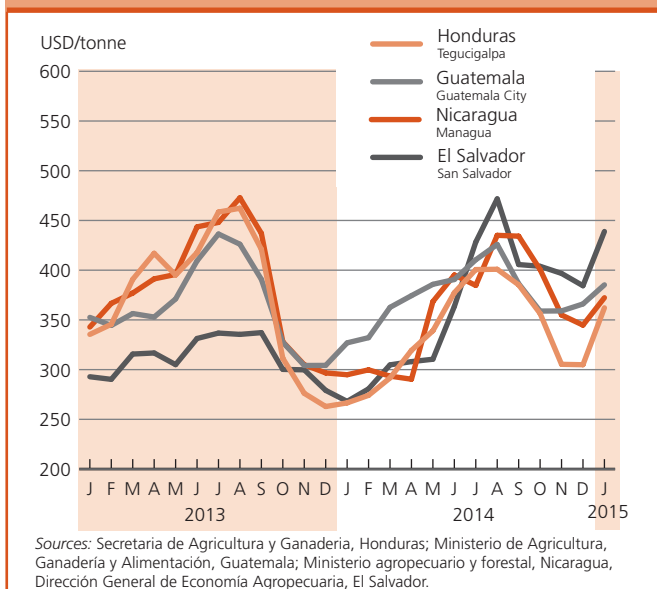
In **Haiti**, aggregate cereal production for 2014 is estimated almost 40 percent below the previous year's bumper crop at 367 000 tonnes (paddy rice), well below the country's five-year average. The sharp production decline largely reflects low precipitation during July and August in the main producing regions of the country, which significantly affected maize and rice yields.

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

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2012	2013	2014 estim.	2012	2013	2014 estim.	2012	2013	2014 estim.	2012	2013	2014 estim.	Change: 2014/2013 (%)
<b>Central America &amp; Caribbean</b>	<b>3.3</b>	<b>3.4</b>	<b>3.7</b>	<b>35.0</b>	<b>35.9</b>	<b>36.5</b>	<b>2.8</b>	<b>3.0</b>	<b>2.9</b>	<b>41.1</b>	<b>42.2</b>	<b>43.0</b>	<b>2.0</b>
El Salvador	0.0	0.0	0.0	1.1	1.0	1.0	0.0	0.0	0.0	1.1	1.1	1.0	-7.5
Guatemala	0.0	0.0	0.0	1.8	1.9	1.9	0.0	0.0	0.0	1.8	1.9	1.9	2.6
Honduras	0.0	0.0	0.0	0.6	0.6	0.4	0.1	0.1	0.1	0.7	0.7	0.5	-28.4
Mexico	3.3	3.4	3.7	30.2	30.7	31.8	0.2	0.2	0.2	33.6	34.3	35.7	4.3
Nicaragua	0.0	0.0	0.0	0.5	0.6	0.4	0.4	0.4	0.4	0.9	1.0	0.8	-17.9
<b>South America</b>	<b>16.3</b>	<b>19.2</b>	<b>24.6</b>	<b>121.2</b>	<b>140.5</b>	<b>135.4</b>	<b>24.0</b>	<b>24.6</b>	<b>24.7</b>	<b>161.5</b>	<b>184.2</b>	<b>184.7</b>	<b>0.3</b>
Argentina	8.0	9.2	13.9	31.2	40.9	39.9	1.6	1.6	1.6	40.8	51.7	55.4	7.1
Brazil	4.4	5.7	6.2	74.1	83.5	81.7	11.6	11.8	12.1	90.1	101.1	100.0	-1.1

Note: Totals and percentage change computed from unrounded data.

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



### Cereal imports forecast at high levels in 2014/15

Cereal imports for the 2014/15 marketing year (July/June) are forecast to remain close to last year's high level of 27 million tonnes and well above the subregion's five-year average. However, in countries affected by drought-reduced production, **El Salvador, Guatemala, Honduras** and **Nicaragua**, the aggregate cereal imports are forecast at near-record levels, reaching almost 3.9 million tonnes.

### White maize prices rose markedly in January, prices of red beans still at high levels

White maize prices in January increased in most countries of the subregion and were well above their levels of a year earlier. After declining in the previous months with the harvest of the 2014/15 secondary season (September to December), prices increased in January reflecting tight market supplies due to the drought-reduced main season (May to September) harvest. Maize prices are not expected to decline until August with the harvest of the 2015 main season. In **Haiti**, maize meal prices in January increased significantly in all markets, reflecting a 2014 drought-reduced main season harvest. By contrast, in **Mexico**, white maize prices reached a four-year low in January following two consecutive years of bumper crops.

Red bean prices, the second most important staple in the subregion, showed mixed trends in January. Prices fell moderately in **Honduras** and **Nicaragua**, with the second season harvest entering into the market, but remained almost twice their levels

of a year earlier reflecting tight market supplies due to reduced aggregate productions in the past two years. By contrast, in **El Salvador**, which imports significant volumes of red beans from Nicaragua, prices spiked in January after declining sharply in the previous months with the new harvest. A lower-than-anticipated production during the second season and tight regional supplies underpinned the higher prices, which were more than double their year-earlier levels.

## SOUTH AMERICA

### The 2015 maize production forecast to remain at bumper levels despite lower plantings

Early official forecasts for 2015 yellow maize production point to an output remaining at a bumper level in the main producers, **Argentina** and **Brazil**, despite a reduction in plantings that mainly reflects low prices and ample stocks in the market. In **Brazil**, where the harvest of the 2015 first season maize crop has begun, early official forecasts point to an increase in production from the same season last year, due to higher-than-anticipated yields that are expected to offset lower plantings. Output for the second 2015 Safrina maize crop, to be harvested from May, is also expected to remain relatively high despite sharply reduced sowings. The 2015 aggregate (first and second season) maize production, however, is expected to decrease by 3 percent from last year's high level but still remain above the country's five-year average. In **Argentina**, early official forecasts point to an 11 percent reduction in plantings, which could result in a reduction of 2015 yellow maize production of at least 8 percent.

### Coarse grains production in 2014 remains close to record levels

FAO estimates that the 2014 coarse grains output reached 135 million tonnes, only 3.6 percent below last year's record level. The slight decrease in the output mainly reflects higher-than-anticipated yields which offset lower sowings in main producers, **Brazil** and **Argentina**. By contrast, in **Chile, Colombia** and **Peru**, adverse weather during 2014 contributed to sharply reduced coarse grains harvests. However, better-than-expected productions in **Bolivia** helped maintain a high subregional production.

The subregion's 2014 rice (paddy) crop was estimated at almost 25 million tonnes, around the previous year's high level and above the five-year average. This mainly reflects good harvests in **Brazil, Guyana** and **Paraguay**, which compensated for declines elsewhere in the subregion.

### The 2014 wheat output recovers from low levels of previous years

The subregion's aggregate output recovered sharply in 2014 increasing more than 50 percent from the 2013 reduced levels and above average. The recovery in wheat production reflects a significant increase in sowings, particularly in main producers, **Argentina** and **Brazil**, in response to high prices at the beginning of the season. In **Paraguay**, the 2014 wheat crop, concluded in November, was also estimated to be close to the previous year's record level reaching more than 8 million tonnes. The sharp increases in production in the subregion's main producing countries off-set the lower 2014 outputs obtained in main importers **Chile**, **Bolivia** and **Peru**.

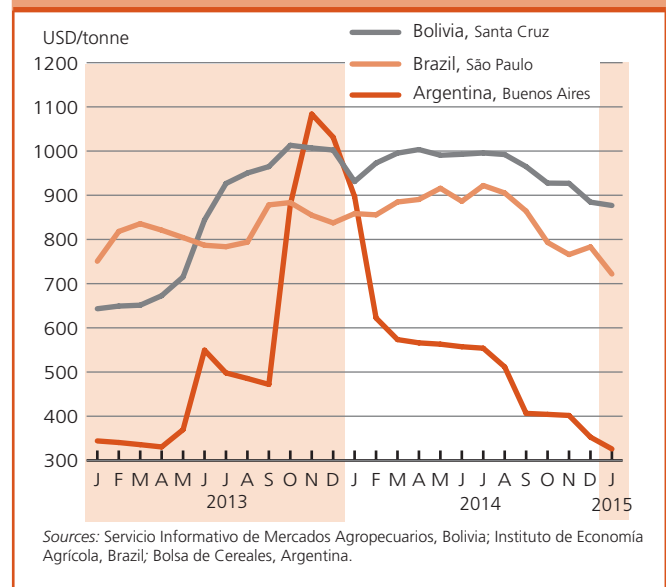
### Wheat flour prices declined further in January and were relatively low, those of maize followed mixed trends but were generally higher than a year earlier

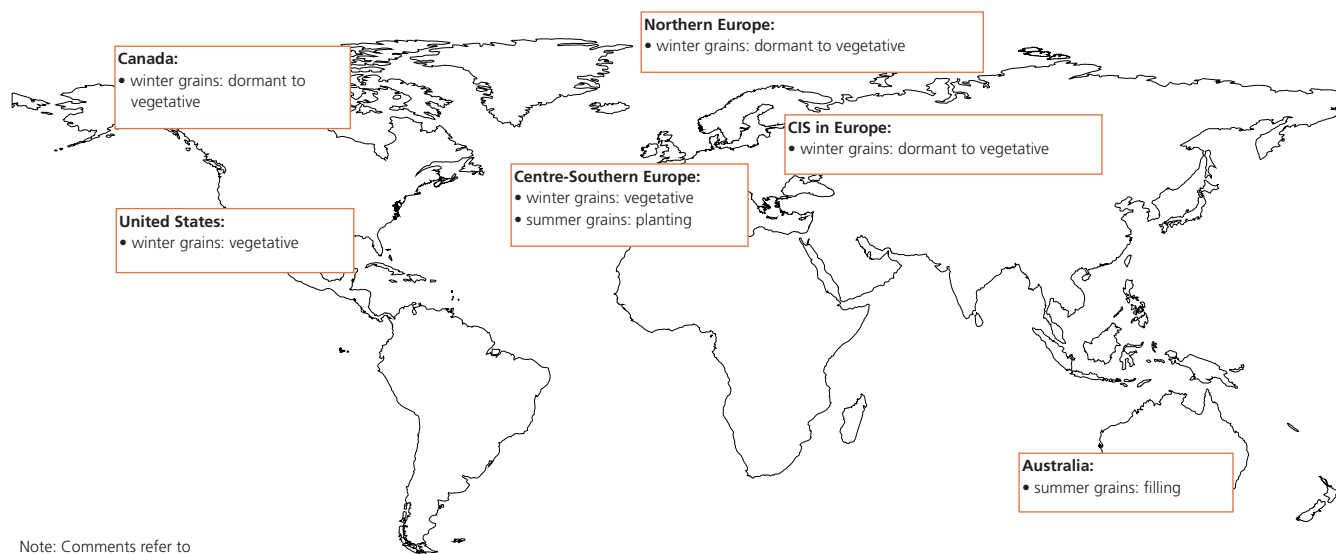
Wheat flour prices in January continued their declining trend of the previous months reflecting the arrival into the market of the just completed 2014 harvests. In **Argentina**, the major producer and exporter of the subregion, prices were at a 16-month low and well below their peaks of a year earlier. In the importing countries, **Brazil** and **Bolivia**, prices were considerably lower than their year-earlier levels reflecting trends in Argentina and above-average 2014 domestic wheat crops. In **Peru**, which also imports wheat from other origins, prices remained stable and were slightly below their levels in January last year, in national currency.

Yellow maize prices followed mixed trends in January but remained generally higher than a year earlier reflecting declines in the 2014 outputs and the depreciation of national currencies in recent months, particularly in importing countries. In the major exporting countries, in **Brazil**, domestic prices in January

were stable but higher than a year earlier in local currency. In **Argentina**, prices declined and were lower than their levels in January last year reflecting the 2014 bumper crop. Maize prices in the importing countries of **Chile** and **Colombia**, strengthened in January and were above their levels of a year earlier, mainly due to sharply reduced 2014 outputs and the weakening of the national currencies in relation to the US dollar. In **Peru**, although prices weakened somewhat in January due to significant increases in imports, they were still one-quarter above their year-earlier levels. By contrast, in **Ecuador**, yellow maize prices in January spiked, increasing 10 percent from December, but remained well below their values of a year earlier. The increase in prices is being supported by limited imports coupled with strong demand.

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





Note: Comments refer to situation as of March.

## NORTH AMERICA

### The United States of America winter wheat area reduced and there are concerns over adverse weather

Early prospects for the 2015 wheat crop in **the United States of America** are uncertain. Overall, winter wheat plantings are officially reported down 5 percent from the previous year, largely due to planting delays and crops suffering from weather adversities in some parts. The condition of the hard red winter wheat crop is reported to have deteriorated in past weeks due to lack of protective snow cover and expanding drought, while the lack of snow cover and cold temperatures have also been

a concern for crops in some soft red wheat areas. However, as spring wheat planting decisions are influenced by the state of the winter wheat crop post-winter, the reduced winter plantings and any eventual above-average winter crop abandonment could be compensated by increased spring wheat planting. Thus, at this early stage, assuming normal spring weather conditions, the overall wheat area for harvest could remain close to last year's level and the country's aggregate wheat output in 2015 is tentatively forecast at 56 million tonnes, compared to 55 million tonnes in 2014. 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 increase after a reduced area last year, reflecting low stock levels and good price prospects for durum.

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

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2012	2013	2014 estim.	2012	2013	2014 estim.	2012	2013	2014 estim.	2012	2013	2014 estim.	Change: 2014/2013 (%)
<b>North America</b>	<b>88.5</b>	<b>95.6</b>	<b>84.4</b>	<b>310.2</b>	<b>396.3</b>	<b>399.4</b>	<b>9.1</b>	<b>8.6</b>	<b>10.0</b>	<b>407.7</b>	<b>500.5</b>	<b>493.9</b>	<b>-1.3</b>
Canada	27.2	37.5	29.3	24.5	28.8	22.0	0.0	0.0	0.0	51.7	66.4	51.3	-22.8
United States	61.3	58.1	55.1	285.6	367.4	377.4	9.1	8.6	10.0	356.0	434.1	442.6	1.9
<b>Europe</b>	<b>193.1</b>	<b>225.5</b>	<b>246.3</b>	<b>219.4</b>	<b>253.2</b>	<b>266.2</b>	<b>4.4</b>	<b>4.0</b>	<b>4.1</b>	<b>416.9</b>	<b>482.7</b>	<b>516.5</b>	<b>7.0</b>
Belarus	2.1	2.0	2.5	6.7	6.2	6.6	0.0	0.0	0.0	8.8	8.2	9.1	11.4
EU	132.6	143.6	155.6	143.9	159.0	167.8	3.2	2.9	2.8	279.6	305.4	326.2	6.8
Russian Federation	37.7	52.1	59.0	29.5	36.6	41.0	1.1	0.9	1.0	68.2	89.6	101.0	12.7
Serbia	1.9	2.7	2.4	3.9	6.6	7.2	0.0	0.0	0.0	5.8	9.3	9.6	3.0
Ukraine	15.8	22.3	24.0	29.9	40.4	39.5	0.2	0.1	0.1	45.9	62.8	63.6	1.3
<b>Oceania</b>	<b>23.2</b>	<b>27.2</b>	<b>23.9</b>	<b>12.1</b>	<b>14.6</b>	<b>11.4</b>	<b>0.9</b>	<b>1.2</b>	<b>0.9</b>	<b>36.2</b>	<b>43.0</b>	<b>36.2</b>	<b>-15.9</b>
Australia	22.9	26.9	23.6	11.5	14.0	10.8	0.9	1.2	0.8	35.3	42.1	35.3	-16.2

Note: Totals and percentage change computed from unrounded data.



## EUROPE

**European Union****Wheat area up and growing conditions mostly favourable**

In the **European Union (EU)**, early indications suggest that the wheat area for the 2015 harvest will remain virtually unchanged from the previous year's relatively high level and the crop is reported to be in generally good condition and well developed reflecting mild winter conditions. At this early stage, assuming yields return to average levels after last year's highs, production is tentatively forecast to decline by some 5 percent.

**CIS in Europe****Early prospects for the 2015 winter cereal crops are mixed**

The 2014/15 winter crops, mainly wheat and barley, are at the dormant stage over much of the subregion. Overall, average to near-average temperature and precipitation since October have maintained adequate soil moisture for crops expected to break dormancy in spring. However, crop prospects at the country level are mixed. In **the Russian Federation**, cold weather and severe frost during winter months, reportedly affected some 20 percent of the winter crops particularly in Central, Southern and Volga Federal districts and production is expected to decline from last year's high level of the corresponding season. Considering current conditions of the winter crop and assuming that the spring output will partially compensate for the projected decrease in the winter season's production, FAO preliminarily forecasts the Russian Federation's 2015 aggregate wheat production at 55 million tonnes. This is some 7 percent below last year's bumper level but 12 percent higher than the five-year average. In **Ukraine**, in spite of cold weather in parts, the 2015 wheat crop is mostly reported in satisfactory condition having received adequate snow cover, which avoided the risk of winterkill, with the exception of some regions in the south. At this early stage, FAO's preliminary forecast puts the 2015 wheat production for Ukraine at 22.5 million tonnes, some 8 percent below last year's record level, as yields are projected to return to average after the previous year's record. In **the Republic of Moldova** and **Belarus**, the outlook for the winter cereals is generally favourable.

**The aggregate 2014 cereal output is estimated at a record**

With most official estimates now available, FAO puts the subregion's 2014 aggregate cereal production at 176 million tonnes, an improvement of 8 percent over the good level of 2013. This reflects considerably higher 2014 wheat and barley outputs that are estimated to have more than compensated for a decline in maize production. The subregional wheat output, accounting for half of the total cereal production, is estimated at a record level of 86.6 million tonnes. The bulk of the increase, in absolute terms, is expected from **the Russian Federation**, where the 2014 wheat production is estimated at 59 million tonnes, up 13 percent from the previous year's good level. This is mainly attributed to higher yields, following favourable weather conditions throughout the cropping season and continued Government support. Similarly, favourable weather conditions boosted wheat production to a near-record level in **Ukraine**, officially estimated at 24 million tonnes. Production of barley, another major staple crop in the subregion, is estimated at 31 million tonnes, 6 million tonnes more than the previous year, with major improvements originating from the Russian Federation (+4.6 million tonnes) and Ukraine (+1.4 million tonnes). By contrast, the aggregate maize production is estimated to have decreased, reflecting lower production in all countries of the subregion, where below-average rains during the cropping season depressed yields considerably.

**Cereal exports forecast to reach a record level in 2014/15**

Due to the good cereal harvests in 2014 in most countries, aggregate cereal exports in the 2014/15 marketing year (July/June) are forecast to reach a record level of 60.7 million tonnes, 5 percent up compared to 2013/14. Much of the increase, in absolute terms, is on account of higher wheat and barley exports from **Ukraine**, forecast at near-record levels of 11.5 and 4.2 million tonnes, 21 and 70 percent respectively higher than their levels of the previous year. Similarly, a larger output in 2014 is expected to contribute to boosting wheat and barley exports from **the Russian Federation**. By contrast, the subregion's 2014/15 maize shipments are projected to decrease by a significant 11 percent from the previous year's record level, primarily because of a 9 percent drop in the exportable surplus from Ukraine, following their reduced harvest in 2014.

**Domestic prices of wheat and wheat flour increased further or remained unchanged in January, but at record or near-record levels**

In **the Russian Federation** and **Ukraine**, domestic prices of wheat and wheat flour in local currencies continued to increase in January to record highs, supported by the sharp depreciation of the national currencies in the past three months. However, in US dollar terms prices declined considerably. By contrast, wheat export prices in these countries remained relatively unchanged reflecting low trade activity, and were below their year-earlier

levels due to good availabilities from last year's bumper wheat output. In **the Republic of Moldova** and **Belarus**, domestic wheat prices remained unchanged in recent months.

OCEANIA

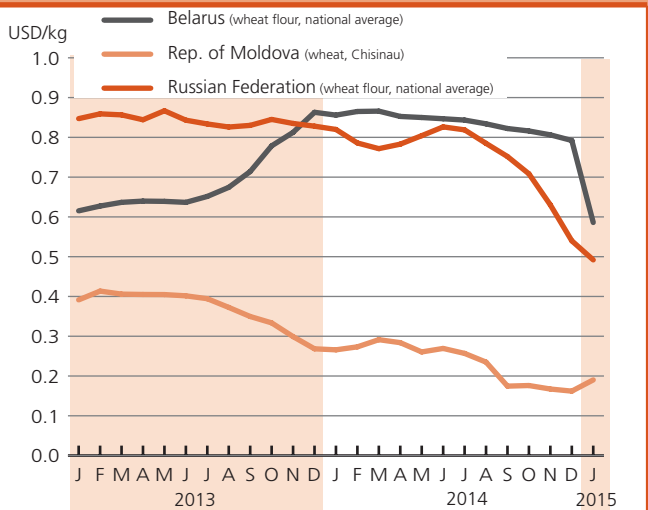
**Australia 2014 winter grain crop reduced by unfavourable weather**

The latest official estimate of the recently-completed 2014 wheat harvest in **Australia** stands at 23.6 million tonnes, slightly up from expectations in January but still 12 percent lower than the previous year's crop. Output fell in all major producing states reflecting a sharp drop in yields from the previous year's good levels due to adverse weather. Barley production also fell significantly in 2014 by almost 18 percent to just under 8 million tonnes.

Prospects for the 2015 summer crop have improved since unfavourable seasonal conditions in spring. Average to above-average rainfall was received in the summer cropping regions in New South Wales and Queensland in December 2014 and January 2015, improving yield prospects of crops already planted and allowing the possibility for further planting of summer crops in some areas. The area planted to sorghum, the main summer cereal crop, is forecast to increase by 23 percent and yields are expected to increase compared with the previous year.

The 2015 wheat crop will be planted from April to June. At this early stage, the area planted is tentatively expected to remain unchanged, but if yields recover from the weather-reduced levels in 2014, this could lead to a larger crop in 2015.

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



Sources: National Statistical Committee of the Republic of Belarus; ACSA, Rep. of Moldova; Ministry of Agriculture of the Russian Federation.

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**Table A1. Global cereal supply and demand indicators**  
(percent)

	Average 2007/08 - 2011/12	2010/11	2011/12	2012/13	2013/14	2014/15
<b>1. Ratio of world stocks to utilization</b>						
Wheat	25.2	26.4	26.3	23.1	25.4	27.9
Coarse grains	15.9	14.8	15.4	13.9	17.5	20.1
Rice	30.0	31.0	33.9	35.7	36.0	34.6
Total cereals	21.5	21.6	22.4	20.9	23.5	25.4
<b>2. Ratio of major grain exporters' supplies to normal market requirements</b>						
	121.1	124.5	115.8	118.2	108.0	122.0
<b>3. Ratio of major exporters' stocks to their total disappearance</b>						
Wheat	18.3	20.7	18.0	14.1	14.3	16.4
Coarse grains	12.9	10.7	10.8	8.4	11.4	14.7
Rice	21.9	20.7	25.0	28.2	26.5	23.8
Total cereals	17.7	17.4	17.9	16.9	17.4	18.3
	Annual trend growth rate 2004-2013	2010	Change from previous year			2014
			2011	2012	2013	
<b>4. Changes in world cereal production</b>						
	2.2	-0.4	4.3	-2.1	9.7	0.8
<b>5. Changes in cereal production in the LIFDCs</b>						
	1.1	8.8	2.0	4.2	0.9	0.3
<b>6. Changes in cereal production in the LIFDCs less India</b>						
	-0.8	9.5	-3.0	6.4	0.2	3.9
	Average 2008-2012	2011	Change from previous year			2015*
			2012	2013	2014	
<b>7. Selected cereal price indices:</b>						
Wheat	191.1	31.8	-4.8	-4.9	-6.6	-10.8
Maize	220.5	57.6	2.2	-12.9	-25.8	-13.9
Rice	247.0	6.6	-4.6	0.8	0.8	-4.7

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, the Russian Federation, Ukraine and the United States of America; major coarse grain exporters are Argentina, Australia, Brazil, Canada, the EU, the Russian Federation, Ukraine and the United States of America; major rice exporters are India, Pakistan, Thailand, the United States of America 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 stocks<sup>1</sup>**  
(million tonnes)

	2010	2011	2012	2013	2014 estimate	2015 forecast
<b>TOTAL CEREALS</b>	<b>523.4</b>	<b>500.8</b>	<b>521.0</b>	<b>505.4</b>	<b>580.8</b>	<b>630.5</b>
<b>Wheat</b>	<b>189.8</b>	<b>184.6</b>	<b>180.5</b>	<b>158.4</b>	<b>178.7</b>	<b>198.6</b>
held by:						
- main exporters <sup>2</sup>	55.2	51.2	42.7	36.1	39.8	45.5
- others	134.6	133.4	137.8	122.3	138.9	153.1
<b>Coarse grains</b>	<b>195.7</b>	<b>170.8</b>	<b>178.5</b>	<b>171.3</b>	<b>222.1</b>	<b>255.7</b>
held by:						
- main exporters <sup>2</sup>	87.7	62.8	59.5	47.8	70.8	90.8
- others	108.0	108.0	119.0	123.5	151.3	164.9
<b>Rice (milled basis)</b>	<b>137.8</b>	<b>145.4</b>	<b>162.0</b>	<b>175.7</b>	<b>180.0</b>	<b>176.2</b>
held by:						
- main exporters <sup>2</sup>	33.4	33.3	41.3	47.2	46.7	42.0
- others	104.4	112.1	120.7	128.5	133.3	134.2
<b>Developed countries</b>	<b>191.7</b>	<b>153.3</b>	<b>150.4</b>	<b>118.1</b>	<b>143.0</b>	<b>176.5</b>
Australia	7.5	9.7	7.8	5.2	6.6	5.4
Canada	13.6	11.2	9.4	8.2	14.3	8.7
European Union	45.7	32.5	32.7	25.8	33.5	46.1
Japan	4.8	4.8	4.8	5.3	4.9	5.3
Russian Federation	21.2	18.0	15.2	7.6	8.5	13.7
South Africa	3.1	4.0	2.5	2.3	1.6	3.0
Ukraine	6.8	5.3	10.9	6.6	8.8	9.6
United States	75.9	57.3	49.3	44.2	51.4	69.4
<b>Developing countries</b>	<b>331.7</b>	<b>347.5</b>	<b>370.6</b>	<b>387.3</b>	<b>437.8</b>	<b>454.0</b>
<b>Asia</b>	<b>275.5</b>	<b>284.6</b>	<b>305.4</b>	<b>331.8</b>	<b>368.3</b>	<b>379.8</b>
China	164.1	167.6	172.6	188.9	220.1	233.3
India	35.5	38.3	45.6	49.4	52.0	52.0
Indonesia	8.3	10.4	12.4	13.5	13.6	12.6
Iran (Islamic Republic of)	5.0	3.6	2.1	6.6	7.6	8.6
Korea, Republic of	3.8	4.3	4.2	4.0	4.3	4.2
Pakistan	4.8	3.4	5.4	3.7	3.6	3.9
Philippines	4.3	3.3	2.6	3.1	2.7	3.1
Syrian Arab Republic	4.7	3.8	3.4	2.6	2.2	1.3
Turkey	3.7	3.6	4.2	4.3	5.6	5.0
<b>Africa</b>	<b>30.3</b>	<b>34.6</b>	<b>37.1</b>	<b>34.5</b>	<b>37.1</b>	<b>36.8</b>
Algeria	3.5	4.0	4.7	5.4	6.9	6.2
Egypt	6.8	5.8	7.9	6.0	6.6	6.1
Ethiopia	1.4	1.4	1.6	1.4	1.0	1.2
Morocco	3.1	4.0	4.6	3.4	6.1	5.1
Nigeria	1.2	1.4	1.3	0.8	1.2	1.3
Tunisia	1.5	0.8	0.8	1.3	1.1	1.4
<b>Central America</b>	<b>4.9</b>	<b>6.7</b>	<b>5.4</b>	<b>5.7</b>	<b>6.7</b>	<b>7.1</b>
Mexico	2.4	3.7	2.3	2.6	3.3	3.6
<b>South America</b>	<b>20.6</b>	<b>21.1</b>	<b>22.2</b>	<b>14.9</b>	<b>25.4</b>	<b>30.0</b>
Argentina	2.1	5.5	4.9	2.1	6.4	8.7
Brazil	11.9	8.4	9.1	5.6	11.3	14.1

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

<sup>1</sup> 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.

<sup>2</sup> Major wheat exporters are Argentina, Australia, Canada, the EU, Kazakhstan, the Russian Federation, Ukraine and the United States of America; major coarse grain exporters are Argentina, Australia, Brazil, Canada, the EU, the Russian Federation, Ukraine and the United States of America; major rice exporters are India, Pakistan, Thailand, the United States of America 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. <sup>1</sup>	US Soft Red Winter No.2 <sup>2</sup>	Argentina Trigo Pan <sup>3</sup>	US No.2 Yellow <sup>2</sup>	Argentina <sup>3</sup>	US No.2 Yellow <sup>2</sup>
<b>Annual (July/June)</b>						
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
2013/14	318	265	335	217	219	218
<b>Monthly</b>						
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
2014 - March	334	285	340	222	226	228
2014 - April	340	281	361	224	229	226
2014 - May	345	271	372	217	224	223
2014 - June	314	235	365	202	204	220
2014 - July	294	218	287	182	192	203
2014 - August	284	219	270	175	181	183
2014 - September	279	204	248	164	166	174
2014 - October	289	223	242	165	171	189
2014 - November	280	236	252	178	179	197
2014 - December	289	261	251	178	197	217
2015 - January	262	233	254	176	184	231
2015 - February	252	221	241	174	178	230

Sources: International Grains Council and USDA.

<sup>1</sup> Delivered United States f.o.b. Gulf.

<sup>2</sup> Delivered United States Gulf.

<sup>3</sup> Up River f.o.b.

**Table A4a. Cereal import requirements of Low-Income Food-Deficit Countries<sup>1</sup>, 2014/15 or 2015 estimates**  
(thousand tonnes)

	2013/14 or 2014				2014/15 or 2015			
	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
<b>AFRICA</b>		<b>29 529.2</b>	<b>1 329.0</b>	<b>30 858.2</b>	<b>30 146.2</b>	<b>2 115.1</b>	<b>160.5</b>	<b>1 954.6</b>
<b>Eastern Africa</b>		<b>8 306.7</b>	<b>837.8</b>	<b>9 144.5</b>	<b>8 844.0</b>	<b>1 107.5</b>	<b>113.9</b>	<b>993.6</b>
Burundi	Jan/Dec	125.5	9.9	135.4	145.0	0.0	0.0	0.0
Comoros	Jan/Dec	58.0	0.0	58.0	63.0	0.0	0.0	0.0
Djibouti	Jan/Dec	151.8	8.7	160.5	151.0	0.0	0.0	0.0
Eritrea	Jan/Dec	416.7	0.0	416.7	427.0	0.0	0.0	0.0
Ethiopia	Jan/Dec	546.2	305.6	851.8	1 070.0	0.0	0.0	0.0
Kenya	Oct/Sep	2 465.3	108.6	2 573.9	2 600.0	288.0	18.8	269.2
Rwanda	Jan/Dec	140.8	3.4	144.2	140.0	0.0	0.0	0.0
Somalia	Aug/Jul	431.5	99.3	530.8	580.0	12.1	6.0	6.1
Sudan	Nov/Oct	2 731.7	222.6	2 954.3	2 360.0	413.7	87.5	326.2
Tanzania U.R.	Jun/May	810.2	48.3	858.5	865.0	393.7	1.6	392.1
Uganda	Jan/Dec	429.0	31.4	460.4	443.0	0.0	0.0	0.0
<b>Southern Africa</b>		<b>2 872.7</b>	<b>113.4</b>	<b>2 986.1</b>	<b>2 419.1</b>	<b>908.1</b>	<b>27.7</b>	<b>880.4</b>
Lesotho	Apr/Mar	166.0	7.0	173.0	218.6	144.9	1.6	143.3
Madagascar	Apr/Mar	553.0	17.4	570.4	510.0	38.8	6.4	32.4
Malawi	Apr/Mar	210.0	4.1	214.1	112.2	80.1	12.2	67.9
Mozambique	Apr/Mar	1 179.0	75.0	1 254.0	1 095.0	430.5	0.9	429.6
Zimbabwe	Apr/Mar	764.7	9.9	774.6	483.3	213.8	6.6	207.2
<b>Western Africa</b>		<b>16 375.5</b>	<b>231.1</b>	<b>16 606.6</b>	<b>16 704.1</b>	<b>99.5</b>	<b>18.9</b>	<b>80.6</b>
<b>Coastal Countries</b>		<b>12 626.5</b>	<b>129.0</b>	<b>12 755.5</b>	<b>12 723.5</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>
Benin	Jan/Dec	448.0	14.0	462.0	487.0	0.0	0.0	0.0
Côte d'Ivoire	Jan/Dec	1 816.9	3.6	1 820.5	1 820.5	0.0	0.0	0.0
Ghana	Jan/Dec	1 045.0	5.0	1 050.0	1 055.0	0.0	0.0	0.0
Guinea	Jan/Dec	655.6	6.9	662.5	512.5	0.0	0.0	0.0
Liberia	Jan/Dec	310.0	70.0	380.0	447.0	0.0	0.0	0.0
Nigeria	Jan/Dec	7 720.0	0.0	7 720.0	7 720.0	0.0	0.0	0.0
Sierra Leone	Jan/Dec	296.0	29.0	325.0	356.0	0.0	0.0	0.0
Togo	Jan/Dec	335.0	0.5	335.5	325.5	0.0	0.0	0.0
<b>Sahelian Countries</b>		<b>3 749.0</b>	<b>102.1</b>	<b>3 851.1</b>	<b>3 980.6</b>	<b>99.5</b>	<b>18.9</b>	<b>80.6</b>
Burkina Faso	Nov/Oct	403.2	11.8	415.0	430.0	5.9	1.2	4.7
Chad	Nov/Oct	100.0	42.2	142.2	149.6	18.5	15.8	2.7
Gambia	Nov/Oct	204.9	0.6	205.5	232.5	0.0	0.0	0.0
Guinea-Bissau	Nov/Oct	59.4	4.9	64.3	94.3	1.6	1.6	0.0
Mali	Nov/Oct	308.8	6.4	315.2	261.2	10.1	0.0	10.1
Mauritania	Nov/Oct	501.2	10.8	512.0	469.0	28.6	0.3	28.3
Niger	Nov/Oct	455.4	18.1	473.5	478.0	0.0	0.0	0.0
Senegal	Nov/Oct	1 716.1	7.3	1 723.4	1 866.0	34.8	0.0	34.8
<b>Central Africa</b>		<b>1 974.3</b>	<b>146.7</b>	<b>2 121.0</b>	<b>2 179.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>
Cameroon	Jan/Dec	944.4	2.6	947.0	982.0	0.0	0.0	0.0
Cent.Afr.Rep.	Jan/Dec	53.9	21.1	75.0	75.0	0.0	0.0	0.0
Congo	Jan/Dec	309.6	2.4	312.0	315.0	0.0	0.0	0.0
Dem.Rep.of the Congo	Jan/Dec	649.7	120.3	770.0	790.0	0.0	0.0	0.0
Sao Tome and Principe	Jan/Dec	16.7	0.3	17.0	17.0	0.0	0.0	0.0

Source: FAO

<sup>1</sup> The Low-Income Food-Deficit Countries (LIFDCs) group 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 1 945 in 2011); for full details see <http://www.fao.org/countryprofiles/lifdc>

<sup>2</sup> Estimates based on information as of early February 2015.

**Table A4b. Cereal import requirements of Low-Income Food-Deficit Countries<sup>1</sup>, 2014/15 or 2015 estimates**  
(thousand tonnes)

	2013/14 or 2014				2014/15 or 2015			
	Marketing year	Actual imports			Total import requirements (excl. re-exports)	Import position <sup>2</sup>		
Commercial purchases		Food aid	Total commercial and aid	Total commercial and aid		Food aid allocated, committed or shipped	Commercial purchases	
<b>ASIA</b>		<b>21 090.8</b>	<b>370.8</b>	<b>21 461.6</b>	<b>22 234.5</b>	<b>5 500.2</b>	<b>19.9</b>	<b>5 480.3</b>
<b>Cis in Asia</b>		<b>3 977.9</b>	<b>0.2</b>	<b>3 978.1</b>	<b>3 853.2</b>	<b>1 719.3</b>	<b>0.0</b>	<b>1 719.3</b>
Kyrgyzstan	Jul/Jun	565.9	0.2	566.1	626.2	240.9	0.0	240.9
Tajikistan	Jul/Jun	1 022.0	0.0	1 022.0	1 060.0	473.7	0.0	473.7
Uzbekistan	Jul/Jun	2 390.0	0.0	2 390.0	2 167.0	1 004.7	0.0	1 004.7
<b>Far East</b>		<b>11 103.0</b>	<b>218.5</b>	<b>11 321.5</b>	<b>11 914.3</b>	<b>3 297.4</b>	<b>4.7</b>	<b>3 292.7</b>
Bangladesh	Jul/Jun	3 746.6	74.4	3 821.0	3 930.0	1 200.7	3.0	1 197.7
Bhutan	Jul/Jun	77.1	0.0	77.1	77.8	0.0	0.0	0.0
D.P.R. of Korea	Nov/Oct	269.9	70.2	340.1	407.0	26.2	1.7	24.5
India	Apr/Mar	131.0	0.0	131.0	113.9	25.0	0.0	25.0
Mongolia	Oct/Sep	120.8	0.0	120.8	105.8	9.8	0.0	9.8
Nepal	Jul/Jun	520.7	1.1	521.8	571.8	1.2	0.0	1.2
Philippines	Jul/Jun	5 188.1	45.9	5 234.0	5 137.0	2 034.5	0.0	2 034.5
Sri Lanka	Jan/Dec	1 048.8	26.9	1 075.7	1 571.0	0.0	0.0	0.0
<b>Near East</b>		<b>6 009.9</b>	<b>152.1</b>	<b>6 162.0</b>	<b>6 467.0</b>	<b>483.5</b>	<b>15.2</b>	<b>468.3</b>
Afghanistan	Jul/Jun	1 841.0	101.0	1 942.0	2 047.0	483.5	15.2	468.3
Yemen	Jan/Dec	4 168.9	51.1	4 220.0	4 420.0	0.0	0.0	0.0
<b>CENTRAL AMERICA</b>		<b>1 870.4</b>	<b>86.8</b>	<b>1 957.2</b>	<b>2 185.1</b>	<b>488.1</b>	<b>1.4</b>	<b>486.7</b>
Haiti	Jul/Jun	606.3	79.8	686.1	725.1	72.3	0.0	72.3
Honduras	Jul/Jun	824.2	5.8	830.0	970.0	269.6	0.1	269.5
Nicaragua	Jul/Jun	439.9	1.2	441.1	490.0	146.2	1.3	144.9
<b>OCEANIA</b>		<b>450.2</b>	<b>0.0</b>	<b>450.2</b>	<b>458.2</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>
Papua New Guinea	Jan/Dec	415.2	0.0	415.2	415.2	0.0	0.0	0.0
Solomon Islands	Jan/Dec	35.0	0.0	35.0	43.0	0.0	0.0	0.0
<b>TOTAL</b>		<b>52 940.6</b>	<b>1 786.6</b>	<b>54 727.2</b>	<b>55 024.0</b>	<b>8 103.4</b>	<b>181.8</b>	<b>7 921.6</b>

Source: FAO

<sup>1</sup> The Low-Income Food-Deficit Countries (LIFDCs) group 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 1 945 in 2011); for full details see <http://www.fao.org/countryprofiles/lifdc><sup>2</sup> Estimates based on information as of early February 2015.





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