



Crop Prospects and Food Situation

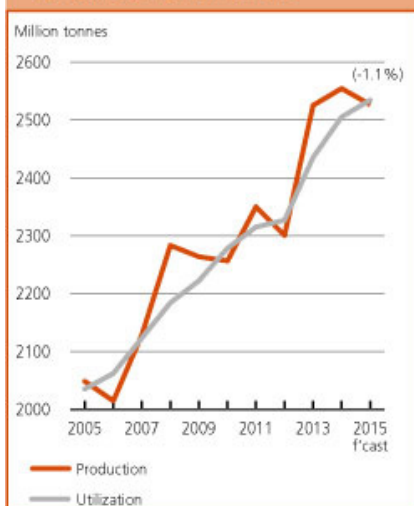
HIGHLIGHTS

- **Prospects for world cereal production in 2015 remain favourable**, despite recent adverse weather conditions in some regions and continuing concerns over El Niño, with the global cereal supply and demand outlook for 2015/16 pointing to generally stable conditions.
- **Export prices of wheat and maize generally increased in June on concerns about the impact of unfavourable weather yield potential.** By contrast, international prices of rice weakened further mainly because of weak import demand. Cereal prices in June remained well below their year-earlier levels, reflecting the continuing overall positive outlook for this year's production.
- **AFRICA: Cereal production in 2015 is forecast below last year's bumper crop**, largely reflecting a sharp reduction in Southern Africa due to adverse weather. Delayed onset of seasonal rains in West Africa has also raised concern over production prospects. Similarly, in East Africa, lower outputs are forecast due to poor rains while the food security situation in South Sudan is very alarming, especially in conflict-affected areas. A rebound in North Africa's cereal output, mainly wheat, is projected to prevent a steeper decline at the regional level, while a small increase is also forecast in Central Africa, despite persistent and disruptive conflicts.
- **ASIA: The overall cereal production outlook in 2015 remains positive, mostly on account of a record output forecast in China.** However, recent dry weather has dampened prospects in India and several countries of the Far East subregion. In the Near East, 2015 production is expected to recover from last year's drought-affected output, but escalating conflicts in Iraq, Syria and Yemen exacerbate the humanitarian crisis.
- **LATIN AMERICA AND THE CARIBBEAN: Prospects point to an above-average 2015 crop in South America, but below the bumper level of 2014.** While the outlook is also positive in Mexico, the presence of El Niño has lowered expectations in the rest of Central America; however, this year's output is still tentatively forecast to increase from the drought-affected 2014 crop.
- **FAO estimates that, globally, 34 countries, including 28 in Africa, are in need of external assistance for food.**

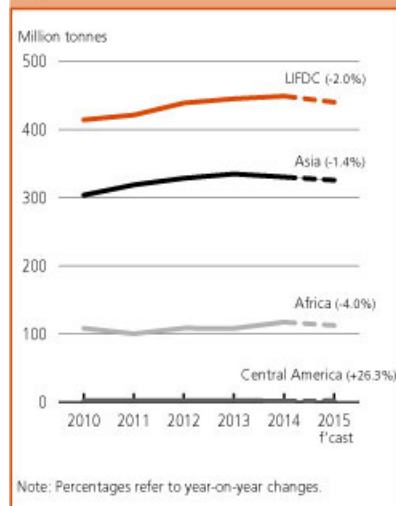
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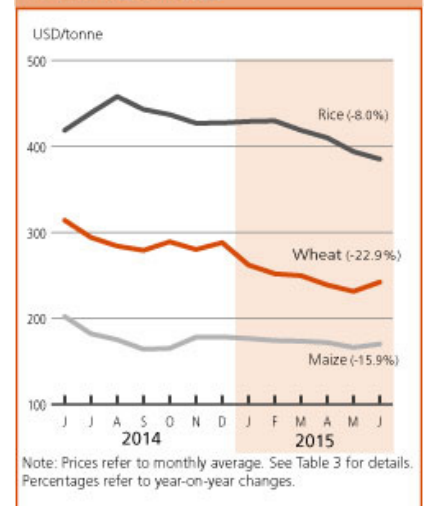
World 2015 cereal production forecast to decline but supply conditions remain stable



Poor prospects in Asia and Africa reduce 2015 LIFDC's cereal production

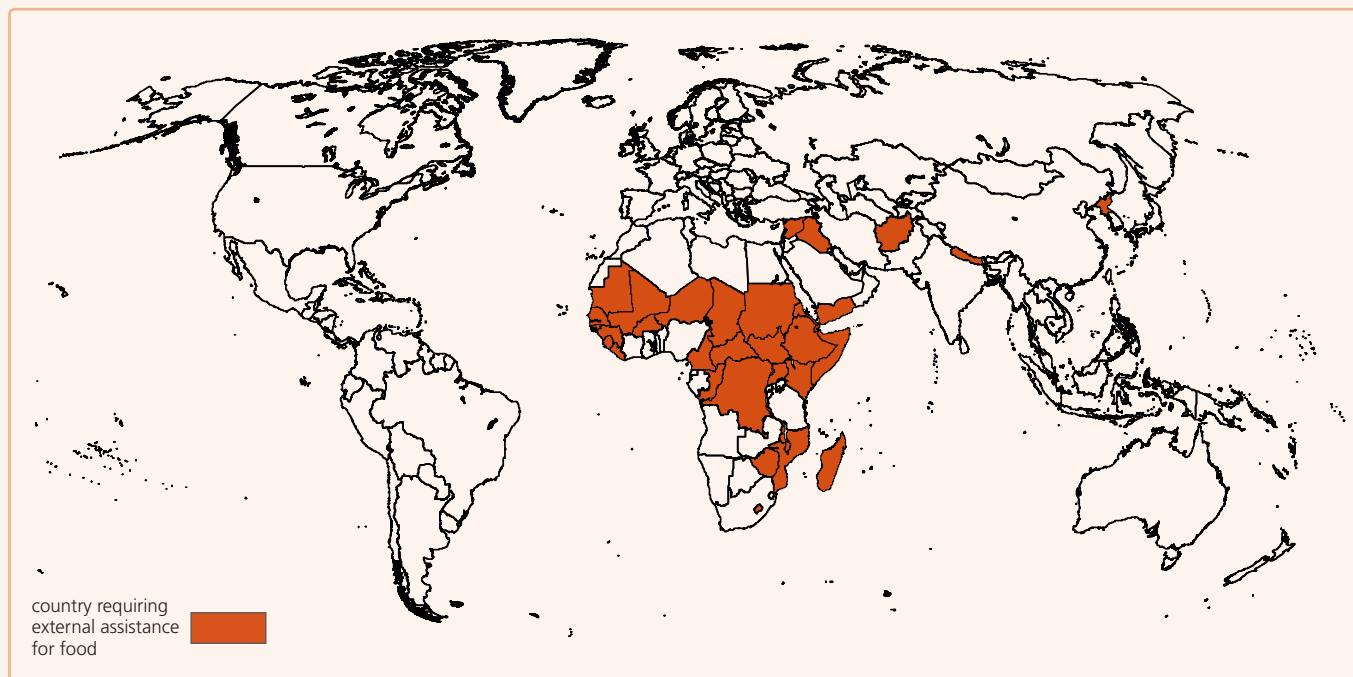


Export prices of wheat and maize increased in June; those of rice continued to ease



Countries requiring external assistance for food¹

World: 34 countries



AFRICA (28 countries)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/SUPPLIES

Central African Republic

Conflict, displacements and constraints in available supplies

- The IDP caseload, as of late May, was estimated at about 426 240 persons. In addition, floods in late April affected about 4 600 individuals.
- In April 2015 about 1 268 000 people, out of a total population of 4.6 million, were estimated to be in need of food assistance.
- The significant tightening of available supplies of animal food products has driven up the cost of animal protein.

Gambia

Below-average crop production

- Cereal production is estimated to have decreased by 28 percent in 2014 compared to the average.
- Over 178 000 people are estimated to be in Phase 3: "Crisis" and above according to the last "Cadre Harmonisé" analysis. An additional 522 000 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 126 000 people are estimated to be in Phase 3: "Crisis" and above according to the last "Cadre Harmonisé" analysis. An additional 406 000 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 20 percent below the average.
- Over 1 040 000 people are estimated to be in Phase 3: "Crisis" and above according to the last "Cadre Harmonisé" analysis. An additional 3.1 million people are estimated to be at risk of food insecurity (Phase 2: "Stressed").

Zimbabwe

Sharply-reduced 2015 maize production

- Maize production is estimated at 742 000 tonnes, 39 percent below the five-year average.
- As a result of a tight domestic supply situation, the number of people estimated to require assistance increased to 1.49 million well above the level of 2014 (564 599 people) but below the 2.2 million estimated in 2013.

WIDESPREAD LACK OF ACCESS

Burkina Faso

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

- Over 32 000 Malian refugees are estimated to be living in the country as of March 2015.
- About 371 000 people are estimated to be in need of food assistance according to the last "Cadre Harmonisé" analysis.

Chad

Large influx of refugees puts additional pressure on local food supplies

- Over 460 000 people from the Sudan's Darfur region, the Central African Republic (CAR) 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 660 000 people are estimated to be in need of food assistance according to the last "Cadre Harmonisé" analysis.

Djibouti

Inadequate pasture availability due to consecutive unfavourable rainy seasons

- 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

- EVD has had a serious negative impact on economic activities and livelihoods, gravely affecting the food security situation of large numbers of people.
- About 393 000 people are estimated to be in need of food assistance according to the last "Cadre Harmonisé" analysis.

Liberia

Impact of the EVD outbreak

- EVD has had a serious negative impact on economic activities and livelihoods, gravely affecting the food security situation of large numbers of people.
- About 722 000 people are estimated to be in need of food assistance according to the last "Cadre Harmonisé" analysis.

Mali

Droughts, floods, population displacements and insecurity in northern areas

- Over 410 000 people are estimated to be in Phase 3: "Crisis" and above according to the last "Cadre Harmonisé" analysis.
- An additional 2.7 million people are estimated to be at risk of food insecurity (Phase 2: "Stressed").

Mauritania

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

- More than 52 000 Malian refugees remain in southeastern Mauritania as of June 2015.
- Over 465 000 people are estimated to be in Phase 3: "Crisis" and above according to the last "Cadre Harmonisé" analysis.

Niger

Recurrent severe food crisis

- About 1 158 000 people are estimated to be in Phase 3: "Crisis" and above according to the last "Cadre Harmonisé" analysis.
- Over 49 000 Malian refugees and 105 000 Nigerian refugees are estimated to be living in the country as of June 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 1 092 000 people are estimated to be in need of food assistance according to the last "Cadre Harmonisé" analysis.

SEVERE LOCALIZED FOOD INSECURITY**Cameroon**

Influx of refugees exacerbating food insecurity of the host communities

- The number of refugees from the CAR, which mainly entered East, Adamaoua and North regions, was estimated at 244 000 in late May 2015. About 74 000 refugees from Nigeria mainly entered the Far North Region since May 2013.
- Insecurity along the borders with Nigeria has led to the internal displacement of 106 000 individuals.

Congo

Influx of refugees straining the already limited resources of host communities

- As of late May 2015, about 25 000 refugees from the CAR are sheltering in the country.

Democratic Republic of the Congo

Conflict and displacements in eastern provinces. Influx of refugees straining on already limited resources of host communities

- As of May 2015, the total number of IDPs was estimated at more than 3 million.
- An estimated 7 million people are in need of urgent humanitarian assistance (June 2015).
- As of late May, refugees from the CAR, mainly hosted in the northern Equateur Province, were estimated at about 97 000.

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 1.6 million people are severely food insecure, mainly located in central and northeastern counties.

Lesotho

Reduced crop production

- Food security conditions are expected to remain strained in 2015/16.
- Reflecting the slightly reduced 2015 maize output, an estimated 463 936 people require assistance, up 3 percent from last year.

Madagascar

Flooding and reduced crop production in southern regions

- Cyclones Chedza and Fundi caused flooding in early 2015, affecting approximately 265 000 people.
- Food insecurity remains severe in southern regions, due to limited cereal availability, while dry weather is expected to result in a third successive depressed cereal output in 2015 in these areas.

Malawi

Reduced crop production

- Flooding, mainly in the Southern Region, caused the displacement of 230 000 people, severely aggravating food security conditions and affecting a total of 616 000 people.
- The reduced 2015 maize production (22 percent below average) is expected to result in an increase in the number of people requiring assistance, from the low level of 2014.

Mozambique

Flooding in central provinces and reduced localized crop production

- An estimated 409 000 people were affected by floods mainly in the central Zambezia Province, with crop and stock losses reported.
- Crop production in 2015 is estimated just below last year's good output, resulting in an overall stable food security situation.

Somalia

Conflict, civil insecurity and reduced localized crop production

- 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 2 million people have been internally displaced since the conflict erupted at the end of 2013.
- About 4.6 million people are 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 1.5 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 (6 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

- Agricultural production significantly affected by conflict.
- An estimated 12.2 million people are in need of humanitarian assistance.
- 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

Dry weather affects the 2015 early and main season food crops

- Poor rains negatively impacted on the 2015 potato, wheat and barley crops, important food sources during the lean season (May-September), and adversely affected prospects of the main food crops, to be harvested from October onwards.
- If drought conditions do not improve soon, cereal production is likely to be reduced worsening the already fragile food security situation.

Yemen

Conflict, poverty, and high food and fuel prices

- The IPC indicative analysis released in June 2015 classified 10 (out of 22) governorates as facing a food insecurity "Humanitarian Emergency" (IPC Phase: 4), all affected by the ongoing armed conflict. Nine governorates were classified as facing a food security "Crisis" (IPC Phase: 3).
- Of the 12.9 million food insecure people across the country, about 6.1 million were in "Humanitarian Emergency" Phase, while 6.8 million were in "Crisis" Phase.
- The level of food insecurity increased by 21 percent compared to the previous year.

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 people targeted with food assistance.

Nepal

Impact of the April earthquake

- The earthquake that struck on 25 April resulted in huge devastation across central and western parts, adversely impacting food security of large numbers of people.
- Nearly 9 000 people were confirmed dead, some 16 800 injured and at least 500 000 homes destroyed. Losses of agricultural inputs were also recorded negatively affecting production prospects at local level.

Countries with unfavourable prospects for current crops² (total: 6 countries)

AFRICA (6 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



Ethiopia

Poor and erratically-distributed rains has lowered production prospects for the 2015 minor "belg" season crops



Kenya

Late and erratic rains affected "long-rains" cereal crop production in southern and eastern parts of the country



Somalia

Production of the 2015 "gu" season crops in central and southern areas has been affected by floods in Shabelle Region as well as by the early cessation of rains in May



Uganda

Late and erratic rains affected first season cereal crop production in central and eastern bimodal rainfall areas of the country



United Republic of Tanzania

Late and erratic rains affected "msimu" crop production in some central uni-modal rainfall areas as well as "masika" crop production in some northern bi-modal rainfall areas



Key - Changes since last report (March 2015)

No change ■ Improving ▲ Deteriorating ▼ New Entry +

Terminology

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

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

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

Global overview

CEREALS 2015

FAO's latest forecast for 2015 world cereal production stands at 2 527 million tonnes, 1.1 percent (27 million tonnes) below the 2014 record and fractionally above expectations last month, as improved prospects for coarse grains offset a cut in the rice forecast. The upgrading of the coarse grain production outlook mainly rests on a 1 percent (5 million tonnes) increase for maize to 1 007 million tonnes, reflecting larger than earlier-anticipated crops in *Europe* and *South America*, owing to improved weather conditions. The global 2015 wheat forecast remains unchanged from June at 723 million tonnes, but around 1 percent (8 million tonnes) lower than the record of 2014. The year-on-year decline is due to lower expected outputs in the **EU** and the **Russian Federation**, where yields are anticipated to return to average levels, after the exceptionally high levels achieved last year. By contrast, prospects for rice deteriorated further over the past month,

with 2015 production revised downwards by 1.2 million tonnes, largely reflecting lower expectations in *Asia*, in particular for India. As a result, global rice production is now forecast at 499 million tonnes, barely 1 percent above the 2014 outturn.

WHEAT 2015

With harvesting of the winter wheat crop underway in the Northern Hemisphere, which accounts for the bulk of the global output, FAO forecasts world wheat production at 723 million tonnes, about 1 percent lower than the record of 2014. This year's decrease rests almost entirely on an expected contraction in *Europe's* wheat output, where reduced yields in the

EU in 2015 is set to result in a 5 percent production decline from the 2014 level, despite an estimated increase in area harvested. Similarly, in the **Russian Federation** and **Ukraine**, wheat outputs are forecast to fall by 5 and 7 percent, respectively, reflecting a return to average yields from the previous year's highs. Elsewhere in *Europe*, the production outlook remains similar to that of 2014.

In contrast to the more subdued outlook in *Europe*, aggregate wheat production in *North America* is projected to increase from the previous year's below-average level. In the **United States of America**, a return to average yields and reduced abandonment for the winter crop are expected to contribute to

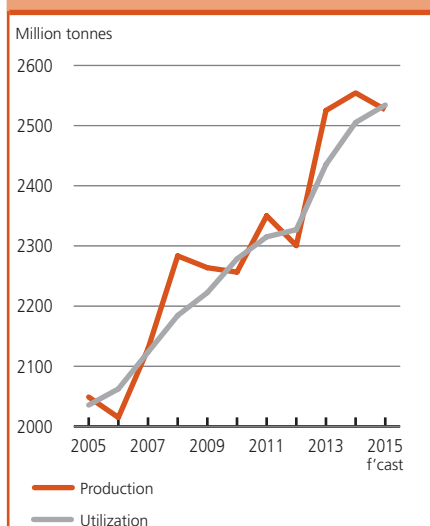
Table 1. World cereal production¹
(million tonnes)

	2013	2014 estimate	2015 forecast	Change: 2015 over 2014 (%)
Asia	1 124.1	1 116.1	1 135.1	1.7
Far East	1 016.8	1 016.7	1 029.9	1.3
Near East	74.0	67.7	73.7	9.0
CIS in Asia	33.2	31.7	31.5	-0.8
Africa	163.2	172.9	165.3	-4.4
North Africa	36.0	32.5	35.2	8.3
West Africa	49.9	52.5	52.1	-0.7
Central Africa	4.7	4.7	4.8	2.0
East Africa	43.7	48.6	46.2	-5.0
Southern Africa	28.9	34.6	27.0	-21.8
Central America and Caribbean	41.3	42.1	43.9	4.3
South America	176.8	177.7	176.8	-0.5
North America	498.0	490.9	482.0	-1.8
Europe	481.3	518.4	486.5	-6.1
EU	304.3	326.9	307.8	-5.9
CIS in Europe	163.0	177.5	165.6	-6.7
Oceania	40.5	36.2	36.9	1.8
World	2 525.1	2 554.3	2 526.5	-1.1
Developing countries	1 448.4	1 451.0	1 468.0	1.2
Developed countries	1 076.8	1 103.3	1 058.5	-4.1
- wheat	715.5	731.2	723.4	-1.1
- coarse grains	1 312.9	1 328.4	1 303.8	-1.9
- rice (milled)	496.7	494.7	499.3	0.9

Note: Totals and percentage change computed from unrounded data.

¹ Includes rice in milled terms.

Figure 1. World cereal production and utilization



a 5 percent production gain from the low level of 2014. In **Canada**, with planting of the main spring wheat crop completed in June, production is foreseen to increase to 30 million tonnes, 3 percent up from the near-average 2014 harvest, on account of an increase in the spring durum crop offsetting a reduced winter wheat output.

In *Asia*, aggregate 2015 wheat production is anticipated to rise marginally, reflecting larger outputs in **China** and **Turkey** that should more than compensate for a sharp contraction in **India**. Larger plantings, coupled with favourable weather conditions, are attributed to the record harvests forecasts in **China** and **Pakistan**, up 1 and 4 percent, respectively, from 2014. By contrast, India's 2015 wheat crop is estimated to decline by 5 percent (5 million tonnes) from the 2014 record due to crop damage caused by heavy rains, strong winds and hail. In the *Near East*, overall prospects are favourable, mainly reflecting an anticipated production rebound in **Turkey** from last year's drought-affected crop, following favourable weather.

In *North Africa*, despite excessively hot weather in May that weighed on production prospects, an above-average 2015 aggregate wheat crop is still forecast, up 11 percent from the reduced 2014 output. The increase is mainly driven by a strong recovery in **Morocco** and a small increase in **Egypt**.

In the Southern Hemisphere, with the wheat crop to be harvested later in the year, prospects point to small reductions in 2015. This reflects mostly lower expectations in *South America*, attributable to a price-induced reduction in plantings, notably in **Argentina**, and a below-average crop in **Australia**.

COARSE GRAINS 2015

FAO's latest forecast for 2015 world coarse grain production is put at 1 304 million tonnes, a marginal improvement from the previous forecast in June, but still

2 percent below the record of 2014.

The year-on-year decline is largely the result of a projected contraction in global maize output to 1 007 million tonnes. An expected decrease in *Europe* accounts for the bulk of this reduction, driven by a 7 percent fall in the **EU**, where yields are forecast to return to near-average levels from last year's highs. Lower outputs in **the Russian Federation** and **Ukraine** are also forecast in 2015, further contributing to the tempered outlook.

In *South America*, coarse grain production in 2015, mostly maize, is forecast just below the previous year's good level. The reduction is mainly the result of a lower output in **Argentina**, following a price-induced decrease in plantings, more than offsetting a larger than previously foreseen maize crop in **Brazil**.

In *Southern Africa*, an acute production decline is estimated for the 2015 maize harvest, owing to a prolonged dry period. Most of the decrease relates to a 30 percent decline in **South Africa**, the largest producer in the subregion, while lower outputs were also estimated in **Malawi** and **Zambia**, the second and third biggest producers in the subregion.

The maize harvest in *North America* is expected to commence in September. It accounts for about one-third of the global output. Current prospects indicate a likely 4 percent decrease in **the United States of America**, resulting from an anticipated contraction in the area harvested compared to 2014. Somewhat lessening the impact, **Canada's** maize production is forecast to rise by 7 percent, attributed to larger plantings.

World barley production in 2015 is forecast at 142 million tonnes, revised marginally downwards from earlier forecasts, now standing 1 percent below the 2014 level. The reduction is driven by a 7 percent decrease in *Europe*, mostly in **the Russian Federation** and the **EU**, outweighing larger expected harvests in *Asia*, *South America* and *North America*.

RICE 2015

At this time of the year, the 2015 paddy season is well advanced in the Southern Hemisphere and is approaching a critical stage of development north of the equator, where several countries have already concluded sowing their main crops. FAO reduced its global production forecast by about 1.2 million tonnes, from the previously reported figure in June, to 499.3 million tonnes in milled rice equivalent. The recent month-on-month revisions mainly concern *Asian* producers, many of which were afflicted by a belated onset of the rainy season and/or below-normal rainfalls. Among these, **India** is now expected to harvest 103.5 million tonnes, 1.4 million tonnes less than earlier anticipated, reflecting official predictions of a precipitation shortfall in July, which may damage the "*kharif*" (main) crop. Production prospects also deteriorated in **the Democratic Republic of Korea**, where crops are suffering from a lingering drought and high temperatures; in **Nepal**, on late and weak monsoon rains; and in **the Philippines**, mostly on expectations of rainfall deficits in the coming months under the influence of El Niño. The outlook for **Thailand** also worsened somewhat, as the lingering drought is likely to impair the development of the main crop. By contrast, **Indonesia's** official production forecast was raised by 1.6 million tonnes to an all time high of 47.6 million tonnes, reflecting a larger area sown than earlier anticipated and the favourable development of crops in the first half of the year, combined with positive expectations for the rest of the season. In the *Americas*, production in **the United States of America** was revised down following the official cut in the rice coverage, while severe drought problems beset crop prospects in **Costa Rica**, **Cuba** and **Haiti**. By contrast, official production estimates in **Argentina**, **Brazil** and **Uruguay** were raised, as favourable weather resulted in better yields than

originally anticipated. In the other regions, the 2015 production forecasts have changed little since last month, although they were raised somewhat for the **EU** and **Australia**.

Based on the current outlook, world rice production would be 4.6 million tonnes, or 0.9 percent, above the disappointing 2014 season. The modest upturn in world output from last year mainly rests on expectations of increases in *Asia*, in particular **China**, **India**, **Indonesia** and **Sri Lanka**. Production in **China**, which so far witnessed normal weather conditions, is seen rising by 0.7 percent to 142.5 million tonnes, supported by continuing yield increases. Output is also anticipated to recover somewhat in **India**, where the pattern of the monsoon has been relatively favourable so far, especially if compared with the 2014 season. As a result, **India** is now anticipated to garner 103.5 million tonnes of rice in 2015, 0.9 percent above the disappointing 2014 result. Despite concerns about the possible incidence of planting delays, conditions in **Indonesia** have been, so far, favourable to paddy crops, with the country now expected to record a 6.6 percent output gain. Similarly, **Sri Lanka** already harvested a much increased “*maha*” (main) crop, with production over the full 2015 season expected to surpass the 2014 drought-reduced level by 21.3 percent. Although **Thailand**'s central region is reported under the grip of a severe drought, production in the country is expected to recover somewhat from the poor 2014 results, while remaining well below the past five-year average. On the other hand, belated rainfalls, widespread drought problems or low prices are expected to result in a contraction of output, especially in **Bangladesh**, **the Republic of Korea**,

the Democratic People's Republic of Korea, **Nepal**, **Pakistan**, **the Philippines** and **Viet Nam**. In *Africa*, prospects are generally positive, with output forecast to grow by 0.8 percent, after the excellent 3.4 percent registered in 2014. Although still conditional on a normal unfolding of the season in the coming months, larger crops are expected to be harvested across the region in 2015, with the possible exceptions of **Egypt**, where low prices and a tightening of water use policies may depress plantings; **Malawi** and **Mozambique**, because of floods; **Nigeria**, on declining yields from to the

highs achieved last season; and **Zambia** on late and poorly-distributed rainfall. In the *Americas*, **the United States of America** may incur in a 6.8 percent decline in output, mainly reflecting a contraction in plantings, while production may rise by 2 percent for the whole of *Latin America and the Caribbean*, driven by sizeable increases in **Brazil** and a recovery in **Colombia** and **Peru**, more than compensating anticipated declines in **Argentina**, **Cuba** and, especially, **Venezuela**. In *Europe*, a return to normal yields is behind the expectations of a small increase in the **EU**'s output.

Table 2. Basic facts of world cereal situation

(million tonnes)

	2013/14	2014/15 estimate	2015/16 forecast	Change: 2015/16 over 2014/15 (%)
PRODUCTION ¹				
World	2 525.1	2 554.3	2 526.5	-1.1
Developing countries	1 448.4	1 451.0	1 468.0	1.2
Developed countries	1 076.8	1 103.3	1 058.5	-4.1
TRADE ²				
World	359.3	362.4	358.1	-1.2
Developing countries	111.1	109.4	111.8	2.1
Developed countries	248.3	253.0	246.3	-2.7
UTILIZATION				
World	2 435.3	2 505.2	2 534.2	1.2
Developing countries	1 566.2	1 620.3	1 648.4	1.7
Developed countries	869.1	884.9	885.7	0.1
Per caput cereal food use (kg per year)	152.0	152.2	152.3	0.1
STOCKS ³				
World	603.1	645.1	631.3	-2.1
Developing countries	462.5	471.9	460.7	-2.4
Developed countries	140.6	173.2	170.6	-1.5
WORLD STOCK-TO-USE RATIO (%)	24.1	25.5	24.7	-3.3

Note: Totals and percentage change computed from unrounded data.

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

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

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

UTILIZATION 2015/16

FAO's forecast for world cereal utilization in 2015/16 has been raised marginally since June. The most notable revision concerns the estimates of maize feed use, which have been adjusted upward in both the 2014/15 and 2015/16 marketing seasons. At 2 534 million tonnes, world cereal consumption is anticipated to grow by 1.2 percent (30 million tonnes) from the 2014/15 estimated level. More than half of this increase corresponds to coarse grains, the utilization of which is foreseen to rise by 1.4 percent to 1 306 million tonnes, underpinned by a greater maize usage for feed, especially in **Brazil, China and the United States of America**. The forecast for rice utilization in 2015/16 has been cut slightly since last month and is now foreseen in the order of 507 million tonnes or 7 million tonnes more than in 2014/15, with much of the year-to-year increase corresponding to food. The volume of cereals destined to direct

human consumption is projected to rise by 1.2 percent (13 million tonnes), compared to 2014/15, which would lead to a stable cereal per caput food intake of 152.4 kg per year.

STOCKS 2015/16

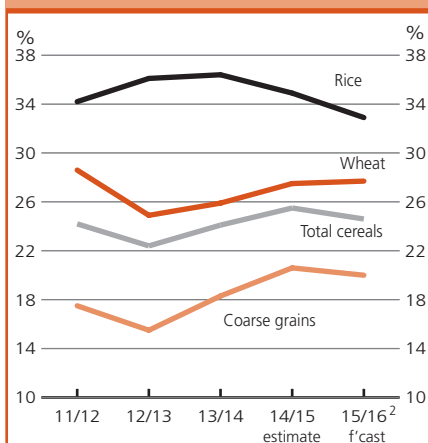
The FAO forecast for world cereal stocks by the close of the 2016 cropping seasons has been lowered by 3 million tonnes since the previous report to 631 million tonnes, mostly on account of wheat. Based on the latest forecast, world cereal inventories would be down 2.1 percent (14 million tonnes) from their high opening levels, with rice mainly responsible for the reduction. Based on the latest stock and utilization forecasts, the global cereal stock-to-use ratio would drop to 24.6 percent, one percentage point less than in 2014/15, but still above average. World wheat inventories are now put at around 198 million tonnes, unchanged from their opening levels, but 4 million tonnes lower than previously reported in June, with the bulk of the reduction arising in the **EU, India and Indonesia**. As for coarse grains, global inventories are forecast marginally higher than last month, as most upward adjustments to end-of-season stocks, especially for **Brazil, China and Ukraine**, where offset by reductions in **Australia and the United States of America**. Compared with last year, coarse grain stocks are now predicted to decline by 2 percent (5 million tonnes) to 264 million tonnes. Although the forecast for world rice carryovers in 2016 has been raised somewhat since June, they are still expected to drop by 4 percent (8 million tonnes) from last

year to 169 million tonnes, with much of the load-off concentrated in major exporting countries.

TRADE 2015/16

Global trade in cereals in the 2015/16 marketing season is forecast at 358 million tonnes, 1.2 percent (4 million tonnes) below the 2014/15 estimate, but 7 million tonnes higher than previously reported in June, with most of the upward adjustments associated with coarse grains. International trade in coarse grains (July/June) in 2015/16 is now forecast at 165 million tonnes, 4 percent (almost 7 million tonnes) more than earlier anticipated, but still some 2 percent (3 million tonnes) less than in the previous season. Higher maize exports by **Argentina, the Russian Federation and the United States of America** are the main reason for this month's upward revision. However, the volumes of world trade in barley and sorghum have also been raised since June, mainly on expectations of increased purchases by **China**. World wheat trade in 2015/16 (July/June) is forecast at 151 million tonnes, close to the previous season's level and around 1 million tonnes more than predicted last month on higher anticipated sales by the **EU, the Russian Federation and Ukraine**. Rice trade in 2016 (January/December) is now expected to be in the order of 42.1 million tonnes, in milled rice equivalent, about 400 000 tonnes less than anticipated in June, and virtually unchanged compared to last year. All exporters are expected to step up their rice deliveries in 2016, except India, where a tightening of supplies and growing domestic requirements are foreseen to result in a 20 percent contraction in rice shipments.

Figure 2. Ratio of world cereal stocks to utilization¹



¹ Compares closing stocks with utilization in following season.
² Utilization in 2015/16 is a trend value based on extrapolation from the 2004/05-2014/15 period.

WHEAT

Export prices of wheat generally increased in June, after steadily declining in the past several months. The benchmark US wheat (No.2 Hard Red Winter) price averaged USD 242 per tonne, 5 percent higher than in May, but still more than 20 percent lower than in June last year. The increase reflects harvest delays and concerns about crop quality of the 2015 wheat crop, due to heavy rain in key-growing areas of **the United States of America**. Worries about the impact of dry conditions on

crop yield potential in **Canada** and the **EU** provided further support. By contrast, in **the Russian Federation** and **Ukraine**, wheat export prices declined for the fifth consecutive month in June, reflecting overall favourable production prospects for the 2015 wheat crop, currently being harvested, and also limited trade activity.

MAIZE

International prices of maize also rose in June, with the international benchmark US maize (No.2, Yellow) price averaging

USD 170, slightly up from May. This mainly reflected excessive rains in June which slowed planting progress early in the month and caused some deterioration in crop conditions in the main producing areas of **the United States of America**. Slow export demand and ample global supplies, however, prevented further price increases. In general, maize export prices were well-below their levels of June last year.

RICE

In June, the FAO All Rice Price Index (2002-2004=100) fell for the tenth consecutive month, shedding 1 percent from May. The market weakness was pervasive, dominating all market segments and virtually all origins. Among the various segments, aromatic rice prices were again under the strongest pressure, falling by 1.7 percent on large production surpluses and continued weak import demand. Prices of "*indica*" and "*japonica*" rice also edged lower. In **Thailand**, the benchmark Thai 100%B white rice was down 9 points, or 2.2 percent, reflecting the general tendency of falling rice prices in the country, which only spared the fully broken Thai A1 super. Prices also softened in **India** and **Viet Nam** as well as in the *Americas*.

Table 3. Cereal export prices*

(USD/tonne)

	2014					2015	
	Jun.	Jan.	Feb.	Mar.	Apl.	May	Jun.
United States							
Wheat ¹	314	262	252	250	239	231	242
Maize ²	202	176	174	173	172	166	170
Sorghum ²	220	231	230	226	223	217	224
Argentina³							
Wheat	365	254	241	228	225	228	226
Maize	204	184	178	169	168	168	173
Thailand⁴							
Rice, white ⁵	419	429	430	419	410	394	385
Rice, broken ⁶	313	329	331	330	333	326	327

*Prices refer to the monthly average.

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

² No.2 Yellow, Gulf.

³ Up river, f.o.b.

⁴ Indicative traded prices.

⁵ 100% second grade, f.o.b. Bangkok.

⁶ A1 super, f.o.b. Bangkok.

Low-Income Food-Deficit Countries food situation overview¹

Reduced cereal production forecast for LIFDCs in 2015

FAO's latest 2015 production forecast for Low-Income Food-Deficit Countries (LIFDCs) stands at 440 million tonnes, 2 percent below the bumper 2014 crop. The decrease this year rests on lower production prospects in much of *Asia* and *Africa*.

In *Asia*, harvesting of the winter crops, mostly wheat and barley, is nearing completion. The 2015 preliminary regional production forecast stands at 325.5 million tonnes, about 1.4 percent lower than last year. The bulk of the decrease is largely the result of an anticipated reduced wheat output in **India**, on account of unfavourable weather that lowered yield expectations. Elsewhere in the *Far East*, reductions are forecast in **Nepal**, following

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

	2013/14	2014/15 estimate	2015/16 forecast	Change: 2015/16 over 2014/15 (%)
Cereal production¹	445.0	448.9	440.0	-2.0
<i>excluding India</i>	201.8	210.6	205.1	-2.6
Utilization	473.4	483.6	488.0	0.9
Food use	382.3	389.3	394.6	1.4
<i>excluding India</i>	189.0	194.1	197.0	1.5
Per caput cereal food use (kg per year)	0.1	0.1	0.1	0.1
<i>excluding India</i>	0.1	0.1	0.1	0.1
Feed	35.9	38.1	39.0	2.3
<i>excluding India</i>	23.4	25.1	25.3	0.7
End of season stocks²	90.8	90.2	80.5	-10.8
<i>excluding India</i>	40.5	42.8	39.2	-8.3

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

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

the strong earthquake in April, and in **the Democratic People's Republic of Korea**, where dry weather negatively

impacted on crops. By contrast, aggregate production in the *Near East* is forecast at a slightly higher level than the previous year following improved weather. In *CIS in Asia*, current 2015 prospects point to an above-average production, similar to 2014.

In *Africa*, the overall 2015 production outlook is unfavourable, with all regions except *Central Africa* expecting reduced harvests compared to the good levels of last year. In *Southern Africa*, aggregate cereal production is forecast to decline by 17 percent following dry weather in early 2015. Similarly, in *East Africa*, late and erratic rains since the start of the cropping season in March impaired the production outlook, resulting in an anticipated 5 percent decline; however, the 2015 harvest is still anticipated to remain above average. In *West Africa*, with planting of the 2015 crop completed in May, FAO's early forecast

Table 5. Cereal production¹ of LIFDCs (million tonnes)

	2013	2014 estimate	2015 forecast	Change: 2015 over 2014 (%)
Africa (37 countries)	108.1	117.2	112.5	-4.0
East Africa	43.6	48.6	46.2	-5.0
Southern Africa	9.9	11.5	9.5	-17.2
West Africa	49.9	52.5	52.1	-0.7
Central Africa	4.7	4.6	4.7	2.0
Asia (13 countries)	334.7	330.2	325.5	-1.4
CIS in Asia	10.2	10.2	10.2	0.7
Far East	317.2	312.6	307.8	-1.5
- India	243.2	238.4	234.1	-1.8
Near East	7.3	7.3	7.4	1.4
Central America (3 countries)	2.2	1.6	2.0	26.3
Oceania (2 countries)	0.0	0.0	0.0	0.0
LIFDC (55 countries)	445.0	448.9	440.0	-2.0

Note: Totals and percentage change computed from unrounded data.

¹ Includes rice in milled terms.

¹ **The Low-Income Food-Deficit Countries (LIFDCs)** group includes net food deficit countries with annual per caput income below the level used by World Bank to determine eligibility for IDA assistance (i.e. USD 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/>

points to an aggregate crop marginally below last year's above-average level, mainly reflecting uncertain prospects in eastern parts of the subregion owing to below-average precipitation. In *Central Africa*, despite persistent insecurity in parts of the subregion that has continued to adversely affect the agricultural section, favourable rains have buoyed 2015 production prospects, mainly in **Cameroon**, and the subregional output is expected to increase by 2 percent.

In *Central America*, with planting of the first main 2015 cereal crop completed in June, production prospects are uncertain, due to the presence of the El Niño phenomenon, which is correlated with reduced seasonal rains. As a result, the 2015 cereal production in *Central America* is tentatively forecast

at a below-average level, but higher than the drought-reduced output of the previous year.

Cereal imports in 2015/16 forecast to remain close to last year's high level

Aggregate cereal imports of LIFDCs in the 2015/16 marketing years are forecast at 57 million tonnes (including rice in milled terms), similar to last year's high level. While total imports are projected to remain unchanged, notable variations are expected at the subregional level. The largest year-on-year increase is anticipated in *Southern Africa*, mostly the result of higher maize requirements for **Zimbabwe**, due to a considerable decline in the 2015 harvest. Similarly, higher imports are foreseen in *West Africa*, reflecting

expectations of a smaller domestic harvest in **Nigeria**. In *Central Africa*, cereal imports are forecast to increase marginally as a result of a lower cereal output in **Cameroon**. By contrast, a small decrease is foreseen in the *Far East* subregion, with cereal requirements from the large importing countries of **Bangladesh** and **the Philippines** projected to decline by 14 and 6 percent, respectively, from last year's high level. Elsewhere, in *Central America*, *CIS in Asia* and *Oceania*, cereal purchases are anticipated to remain close to the levels of 2014/15.

For the 2014/15 marketing year, the aggregate cereal import level was revised upwards by nearly 4 percent to 57.1 million tonnes, compared to the previous estimate in March 2015, mainly reflecting an increase in the *Far East*.

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

	2013/14 or 2014	2014/15 or 2015				2015/16 or 2016	
		Requirements ¹		Import position ²		Requirements ¹	
	Actual imports	Total imports:	of which food aid	Total imports:	of which food aid pledges	Total imports:	of which food aid
Africa (37 countries)	31 027	29 838	1 219	8 584	496	30 516	1 127
East Africa	9 199	8 806	725	3 539	393	8 702	668
Southern Africa	3 027	2 616	67	1 510	34	3 081	39
West Africa	16 627	16 270	277	3 116	57	16 525	268
Central Africa	2 174	2 145	151	420	12	2 208	151
Asia (13 countries)	22 395	24 689	323	12 060	43	23 842	487
CIS in Asia	3 996	3 877	1	3 194	0	3 825	1
Far East	11 717	14 165	256	7 046	22	13 440	335
Near East	6 682	6 647	66	1 820	21	6 577	151
Central America (3 countries)	1 881	2 090	98	807	5	2 125	98
Oceania (2 countries)	455	463	0	74	0	467	0
Total (55 countries)	55 758	57 080	1 640	21 525	543	56 950	1 712

Note: Totals computed from unrounded data.

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

² Estimates based on information available as of early June 2015.

Regional reviews

NORTH AFRICA

Above-average production prospects for 2015 cereal crops

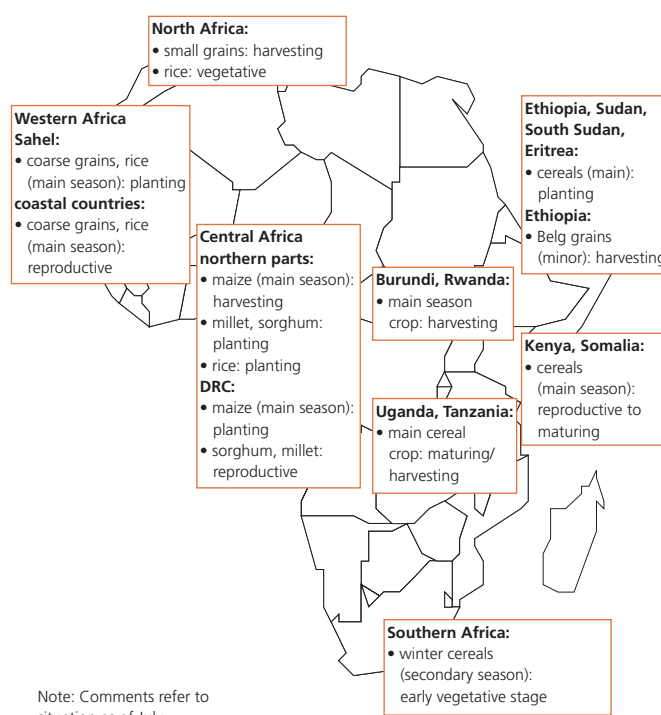
Harvesting of the 2015 winter cereal crops started in May/June in most countries of the subregion. Although favourable weather conditions with timely rains prevailed earlier in the season, excessive hot weather (up to 45 degrees Celsius) affected the region in early May 2015. Heat-related damages to late developing wheat in early grain-filling stages were reported in **Algeria** and **Tunisia**.

Nevertheless, early forecasts indicate an overall above-average cereal crop at the subregional level, driven by a large recovery of almost 2 million tonnes of wheat production in **Morocco** compared to the drought-stricken 2014 harvest and a small production increase in **Egypt**. In **Algeria**, despite unfavourable weather, the cereal harvest is expected to be up on last year but below the five-year average. By contrast, owing to the heat damage, production in **Tunisia** is expected to decrease compared to 2014.

Overall, FAO's preliminary forecast puts the subregion's aggregate wheat output at 19.7 million tonnes, about 11 percent up on last year's below-average crop and 8 percent higher than the five-year average. The barley crop is put at about 4.4 million tonnes, 13 percent above last year and just slightly above the average.

Cereal import requirements expected to decline slightly in 2015/16

North African countries rely heavily on wheat imports from the international market to cover their consumption needs, with **Egypt** being the world's largest importer. Due to above-average prospects for 2015 crops in several countries, the subregional import requirement for the 2015/16 marketing year (July/June) is forecast at a slightly lower level than in the previous year.



Mixed trends in food inflation

Trends in food inflation during the past several months were mixed, with increases in **Egypt**, decreases in **Algeria** and relatively stable rates in **Morocco** and **Tunisia**. In **Egypt**, the annual food and beverage inflation rate in May 2015 reached about 15 percent driven by volatile food and vegetable prices compared to 10 percent in January 2015. In **Algeria**, the May 2015 food and beverage inflation rate stood at 7 percent on yearly basis. The annualized rate of food inflation started increasing in October 2014 reaching over 9 percent mainly due to a doubling potato prices and 15-25 percent increases in prices of vegetables, poultry and eggs. In **Morocco**, food inflation increased by 2.3 percent in 12 months until the end of May 2015. In **Tunisia**, the year-on-year food and beverage prices inflation rate in May 2015 was recorded at 8 percent, about the same as last year.

Table 7. North Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	Change: 2015/2014 (%)
North Africa	20.3	17.6	19.7	11.5	10.8	11.5	6.1	6.0	6.0	37.9	34.4	37.1	7.7
Algeria	3.3	2.0	2.4	1.6	1.3	1.5	0.0	0.0	0.0	4.9	3.3	3.9	18.0
Egypt	8.8	8.8	9.0	6.5	6.6	6.8	6.1	6.0	5.9	21.4	21.4	21.7	1.4
Morocco	7.0	5.1	7.0	2.9	1.9	2.7	0.0	0.0	0.1	9.9	7.1	9.8	38.3
Tunisia	1.0	1.5	1.1	0.3	0.8	0.3	0.0	0.0	0.0	1.3	2.3	1.4	-38.4

Note: Totals and percentage change computed from unrounded data.

WEST AFRICA

Mixed prospects for 2015 cereal crops

Planting of the first 2015 maize crop, to be harvested from July, was completed in May in southern parts of the coastal countries along the Gulf of Guinea. Planting of coarse grains is progressively moving northwards in these countries with the onset of the rains. Early prospects are mixed in the coastal countries. In most of the Sahelian zone, where planting usually starts in June/July seasonably dry conditions prevailed. In the western part of the subregion, including **Guinea, Liberia** and **Sierra Leone**, rains and soil moisture have been generally adequate due to widespread and abundant precipitations since the beginning of the cropping season. By contrast, below-average precipitation and vegetation indexes were registered in several parts of the eastern countries, notably in central **Nigeria, Ghana, Togo** and **Benin**. Rainfall distribution so far is only partially in line with the joint forecast by the African Centre of Meteorological Applications for Development (ACMAD) and the Agrhymet Centre. According to the forecast, there is an increased probability of below-normal rainfall between June and September for **Guinea, Liberia, Sierra Leone** and parts of **Côte d'Ivoire** and **Nigeria**, while above-average precipitation is anticipated in **Senegal**, and parts of the **Gambia, Mauritania, Mali** and **Burkina Faso**.

Above-average cereal harvest gathered in 2014

The latest official estimates put the 2014 aggregate cereal production in the nine Sahelian countries at some 21 million tonnes, about 7 percent higher than both 2013 and the five-year average. However, a significant drop in production was recorded in large parts of the Sahel belt, notably in the countries located in western parts of the subregion. Cereal

production, compared to the five-year average) is estimated to have dropped by 83 percent in **Cabo Verde**, 28 percent in **the Gambia**, 33 percent in **Guinea-Bissau** and 17 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. However, the drop in production in the western Sahel was more than offset by good crops in the major producing countries, notably **Mali** and the coastal countries along the Gulf of Guinea, including **Nigeria**, translating into an above-average output at the subregional level. Thus, the aggregate 2014 cereal production in *West Africa* is estimated at about 57.6 million tonnes, 5 percent above the previous year.

Coarse grain prices generally continued to follow normal seasonal patterns

Reflecting adequate subregional supplies, following the last year's above-average harvest, prices of locally-grown cereals (millet, sorghum and maize), the main staples in the subregion, have been mostly stable in recent months in both Sahelian and coastal countries. Although coarse grain prices seasonally increased in the last months in some countries, prices remained generally stable and lower than a year ago.

In the Sahel belt, coarse grain prices remained mostly stable in recent months in **Burkina Faso, Niger** and **Mali**, although slight-to-moderate increases were observed in May in some markets, notably for millet in Ouagadougou (Burkina Faso) and sorghum in Niamey (Niger). Millet and sorghum prices also remained generally stable in most markets of **Chad**.

In coastal countries, significant maize price increases were observed in April in **Benin** and **Togo** after several consecutive months of stability. By contrast, maize prices declined slightly in April in **Nigeria**, continuing trends of the previous months,

driven by good supplies from the 2014 harvest. Overall, coarse grain prices persisted at levels lower than those of a year earlier in the most countries of the subregion. The main exception is **Ghana** where food prices are on the rise, largely on amount of a steep depreciation of the Ghana Cedi. The consumer price inflation rate more than tripled over the last three years.

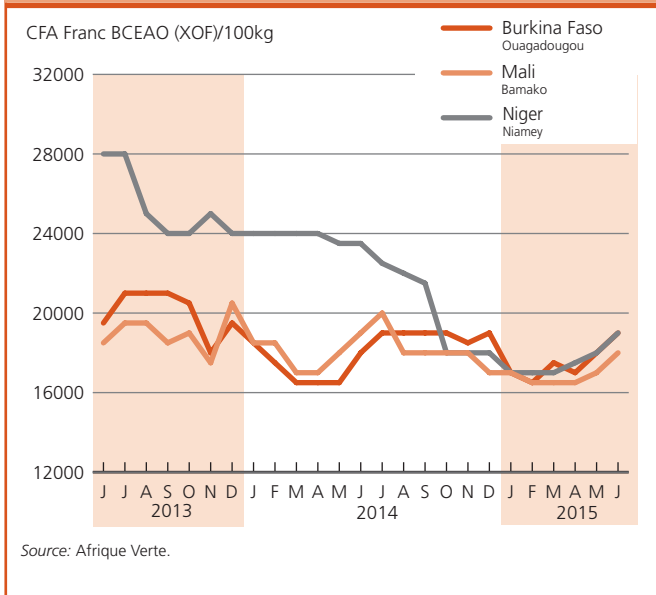
Table 8. West Africa cereal production
(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals ¹			
	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	Change: 2015/2014 (%)
West Africa	41.1	43.5	43.0	13.8	14.0	14.2	55.0	57.6	57.3	-0.5
Burkina Faso	4.6	4.1	4.0	0.3	0.3	0.4	4.9	4.5	4.4	-2.3
Chad	2.2	2.4	2.5	0.4	0.3	0.3	2.6	2.7	2.8	0.6
Ghana	2.2	2.2	2.2	0.6	0.6	0.6	2.7	2.8	2.8	-0.4
Mali	3.5	4.8	4.5	2.2	2.2	2.3	5.7	7.0	6.8	-2.9
Niger	4.3	4.8	4.7	0.0	0.1	0.1	4.3	4.9	4.8	-1.0
Nigeria	18.4	19.5	19.2	4.7	4.9	4.8	23.2	24.4	24.1	-1.4

Note: Totals and percentage change computed from unrounded data.

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

Figure 3. Millet prices in selected West African markets



In the countries affected by the Ebola Virus Disease (EVD), while a considerable recovery of marketing activities was observed in **Liberia**, significant market disruptions continued in **Sierra Leone**. Markets have remained open and functional in **Guinea**. Rice prices have remained mostly stable in all three countries.

Food security affected by civil insecurity and infectious disease outbreaks

In spite of the above-average 2014 cereal harvest, humanitarian assistance is still needed in several parts, mostly due to the continuing civil conflict in northern **Nigeria** and the **Central African Republic (CAR)** that has resulted in large population displacement in the subregion. Specifically, the escalation of the conflict in northern **Nigeria** has resulted in increasing population displacements in the neighbouring countries of **Cameroon, Chad** and **Niger**. Over 105 500 people are estimated to have left Nigeria for the Diffa Region of Niger, while nearly 55 000 people have taken refuge in northern Cameroon, as of May 2015. Over the past few weeks, according to OCHA, an additional 27 000 Nigerians fled to Chad. Similarly, in **Chad**, civil conflict in the Sudan, the CAR, Nigeria and Libya, has increased the number of refugees and returnees. Overall, over 460 000 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.

The second most significant shock to the agriculture and food sectors has been the EVD outbreak, which has severely affected **Guinea, Liberia** and **Sierra Leone**. Liberia was declared Ebola-free on 9 May 2015, but new cases continue to be confirmed every week in Guinea and Sierra Leone and both governments have maintained states of health emergency. As of 17 June 2015, there have been a total 27 305 confirmed, probable and suspected EVD cases with 11 169 reported deaths. In spite of the relatively low impact of EVD on the 2014 agricultural production at the national level, its impact on economic activities and livelihoods has severely affected household food security. 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, has significantly reduced the income of EVD-affected communities including producers, consumers and traders. Specifically, income generating activities typically led by women, such as small trading, have been hit hard and the ban on bush meat has also deprived many households of an important source of nutrition and income. This has, in turn, negatively impacted on the food security situation of large numbers of people in the affected countries. Overall, according to the latest "Cadre Harmonisé" analysis, about 2.2 million people, including 395 000 in Guinea, 720 000 in Liberia and 1.1 million in Sierra Leone, are currently estimated to be in Phase 3: "Crisis" and above and are in need of urgent assistance.

Moreover, since December 2014, HPAI (avian influenza) has been affecting several poultry farms and live bird markets in **Nigeria, Burkina Faso, Niger, Côte d'Ivoire** and **Ghana**. As of early June, over 1.7 million chickens died or were culled as a result of the disease in the five affected countries. The disease is already causing major economic losses in the poultry sector and could severely impact on the livelihoods of the local communities and threaten hundreds of thousands of poultry farmers and sellers, thus jeopardizing commercial poultry production and seriously impeding regional and international trade and market opportunities.

In addition, 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. As a result of the various shocks mentioned above, over 7.3 million people are estimated to be in Phase 3: "Crisis" and above in West Africa (less Nigeria) and need urgent assistance according to the latest "Cadre Harmonisé" analysis. An additional 26.6 million people are estimated to be at risk of food insecurity (Phase 2: "Stressed").

CENTRAL AFRICA

Persistent conflicts continue to adversely affect prospects for 2015 cereal crops in CAR and parts of DRC

Harvesting of the main season maize crop is about to start in the central and southern parts of **Cameroon** and the **CAR**. In **Cameroon**, weather conditions have been generally favourable in the central and southern bi-modal rainfall maize cropping areas. In the uni-modal north, where sorghum and millet are predominantly grown and are usually sown in May-June and harvested from October, early season dryness in May, which caused a delay in planting operations, was followed by adequate rains in June. In the **CAR**, despite favourable weather conditions prevailing from March until the first dekad of June, continuing civil insecurity is expected to negatively affect the prospects of the current cropping season following a significant reduction in area planted due to the abandonment of a substantial number of farms. The Ministry of Agriculture and FAO, together with other partners are providing crop production support to vulnerable households across the country. FAO has so far secured funding to assist about 97 800 households, of the planned 150 000 households, through the distribution of seeds and farming tools.

In the **DRC**, the harvest of the second season crops is almost complete in the centre and in the south, while it is about to start in the north. According to the FAO satellite-based Agricultural Stress Index (ASI), vegetation conditions are generally favourable in most cropping areas. In the **Republic of Congo** and **Gabon**, where the harvest of the second season crops has just started, adequate rainfall was generally received during the cropping season. However, in both of these countries, the bulk of the national cereal utilization requirement is imported.

High inflation rates continue in conflict-affected areas

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, the livestock and fishing sectors due to insecurity will continue to underpin high food prices and general inflation. For instance, access to certain types of foods such as meat has significantly deteriorated for local populations due to the sharp reduction in livestock numbers, as the sudden tightening of available supplies of animal food products has driven up prices of sources of animal proteins.

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. In 2015, the inflation rate is forecast to decline to 2.5 percent due to lower oil prices and a reduction in Government spending. For instance, prices of imported wheat, the most important staple, started to increase in early 2014 after the removal of price control measures, peaked in June and remained high and volatile thereafter. In May 2015, prices of wheat flour in the capital, Libreville, were 41 percent higher than in January 2014. In **Cameroon** and the **Republic of Congo** inflation rates are forecast to remain around a low of 2-3 percent in 2015.

Grave food security situation persists due to conflict, refugee caseload and increased stress on host communities

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. As of late May, more than 460 000 refugees from the **CAR** have sought refuge in neighbouring Cameroon (244 000), the DRC (97 000), Chad (94 000) and the Republic of Congo (25 000) straining on the already limited resources of the hosting communities. The IDP caseload in CAR was estimated at 426 240, (representing about 9.3 percent of the total population), including about 36 930 in Bangui. In addition, in late April, storms in Ouham and Mambere-Kadei provinces resulted in extensive flooding and severe damage to residential buildings and IDP shelters, affecting about 4 600 individuals. Since 2013 in **DRC**, the escalation of civil conflict, especially in the

Table 9. Central Africa cereal production
(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals ¹			
	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	Change: 2015/2014 (%)
Central Africa	4.4	4.3	4.4	0.5	0.6	0.5	4.9	4.9	5.0	1.9
Cameroon	2.9	2.8	2.9	0.2	0.2	0.2	3.1	3.0	3.1	3.0
Central African Rep.	0.1	0.1	0.1	0.0	0.0	0.0	0.2	0.1	0.1	0.0
Dem.Rep.of the Congo	1.3	1.3	1.3	0.3	0.3	0.3	1.6	1.6	1.6	0.0

Note: Totals and percentage change computed from unrounded data.

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

eastern provinces, severely damaged local livelihood systems and caused massive displacement. As of May 2015, the IDP caseload was estimated at more than 3 million, 11 percent up from the estimate in September 2014. The IDPs are mainly located in conflict-affected Oriental, Maniema, North Kivu, South Kivu and Katanga provinces. In the first quarter of 2015 (January to March), 337 057 new people were displaced in these eastern conflict-affected provinces of which 60 percent of these IDPs were located in North Kivu. According to UNHCR, around 80 percent of the IDPs are hosted by families and communities, putting added strain on host communities' resources, who are already facing chronic poverty, limited livelihood opportunities, social services (health, sanitation, education) and are likely to be further pushed into unsustainable coping mechanisms and livelihood strategies.

Furthermore, conflict in neighbouring **Burundi** and **Nigeria** has further exacerbated the already precarious food security situation. About 10 000 individuals moved to **DRC** from Burundi since mid-April due to the election-related conflict. Insecurity along the borders with Nigeria has led to the internal displacement of 106 000 people in **Cameroon**.

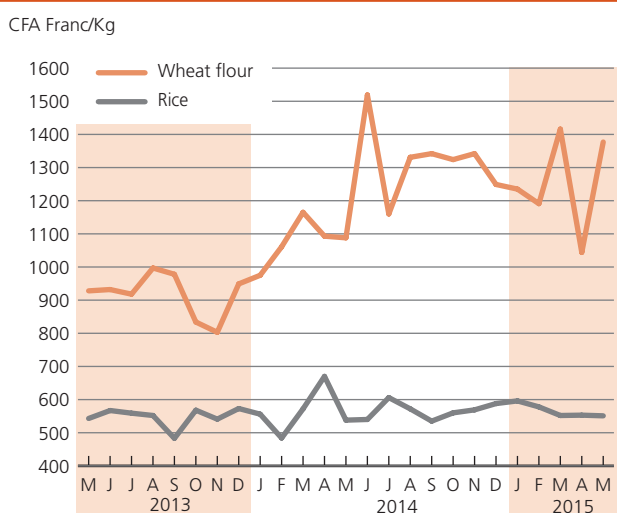
In the **CAR**, according to the Integrated Food Security Phase Classification (IPC)² in April 2015, about 1 268 000 people (out of a total population of 4.6 million), are in need of urgent assistance (IPC Phase 3: "Crisis" and IPC Phase 4: "Humanitarian Emergency"). The number of people in need of assistance in

rural areas is slightly higher (1 426 000). About 19 percent of the people in rural areas are in IPC Phase "Crisis" and about 12 percent are in IPC Phase "Humanitarian Emergency". Additional food security indicators show a deterioration of the situation compared to a year earlier. For instance, according to a recent rapid assessment, the percentage of households with inadequate food consumption stood at 36 percent in March 2015, compared to 26 percent in October 2014.

In the **DRC**, according to the latest available IPC food security analysis, that covers the period December 2014 to June 2015, the number of people in acute food insecurity and livelihood crisis (IPC Phase 3: "Crisis" and IPC Phase 4: "Humanitarian Emergency") was estimated at about 6.5 million. The IPC analysis of this current cycle compared to those of June 2014 (zones in the East) and December 2013 (entire country), shows that there was an overall reduction of 0.5 million people classified under "Crisis" (Phase: 3) and an increase by about 523 000 people for those under "Humanitarian Emergency" (Phase: 4). The acute food insecurity has risen in South Irumu (Orientale Province) and in Djera (Equateur Province).

In May 2015, the number of food insecure in **Cameroon** was estimated at 1.1 million. The regions most affected by food insecurity are Far North (545 000 individuals) and North (277 000 individuals). About 20 percent of the total number of food insecure individuals has been classified as severely food insecure. Refugees are severely affected by food insecurity: 75 percent of them have been classified as food insecure, of which 20 percent as severely food insecure and totally relying on humanitarian assistance. Incidence of food insecurity among host communities is estimated at 15 percent, which is lower but still of concern.

Figure 4. Retail prices in Libreville, Gabon



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

EAST AFRICA

Mixed production prospects in 2015

The 2015 main season harvests started on time and are almost complete in southern highlands of **the United Republic of Tanzania** as well as in **Rwanda** and **Burundi** (2015B season), with overall favourable production prospects. By contrast, delayed rains, by up to three dekads, in southern and eastern **Kenya**, central and northern United Republic of Tanzania and bi-modal rainfall areas of central and eastern **Uganda**, resulted in delayed harvesting, that started in July, with a forecast of average to below-average outputs. In southern **Somalia**, harvesting of the 2015 "gu" season crops is underway and

² 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/>

below-average levels of output are forecast due to floods in Shabelle's riverine areas and the early cessation of rains in May in most agro-pastoral areas. In **Ethiopia**, harvesting of minor "belg" season crops has just started, with about a month delay, and production is expected to be far below average due to poor and erratically-distributed rains. In bi-modal rainfall areas of **South Sudan's** Greenbelt, the first season harvest is expected to start in August and production prospects are generally favourable following an early start of the rainy season that induced farmers to increase plantings.

In most northern parts of the subregion, including **Ethiopia**, western **Kenya**, **the Sudan** and northern uni-modal rainfall areas of **South Sudan**, planting of the 2015 main season crops, to be harvested between October and December, is well underway. Reductions in plantings are reported in Ethiopia, where poor "belg" rains in April/May affected planting of long-cycle "meher" crops, as well as in the conflict-affected Greater Upper Nile region of South Sudan. According to latest meteorological forecasts, rains are expected to be favourable until the end of August in high yield cropping areas of **Kenya** and **Ethiopia**, in southern and central **South Sudan**, northern **Uganda** (except the Karamoja Region) as well as along the coastline of southern **Somalia**.

In most pastoral areas of the subregion, severe dry weather conditions prevailed between March and May. Latest available satellite images show significant soil moisture deficits in southeastern and northern pastoral areas of **Ethiopia** (mainly Somali and Afar regions), parts of **Djibouti**, coastal **Eritrea**, northwestern **Somalia** and northwestern **Kenya** (Turkana, Samburu and Marsabit counties). In these areas, livestock have not yet fully returned from dry season grazing areas, with negative consequences on milk availability for most households. The current below-average rangeland conditions are expected to lead to a rapid deterioration of pasture and water availability during the June to September dry season, with consequent deterioration of livestock body conditions and productivity.

Cereal prices increased seasonally in most countries

Prices of coarse grains have been increasing seasonally in most countries of the subregion since early 2015, as the lean season progressed and supplies from previous harvests decreased.

In **the United Republic of Tanzania** and **Uganda**, maize prices increased sharply between February and May, almost doubling in main urban markets. In both countries, normal seasonal patterns were compounded by unfavourable prospects for the current season as well as increased export demand from **Kenya** and **South Sudan**. In June, prices declined in both countries by about 20-25 percent as newly-harvested crops increased supplies. In **Kenya**, maize prices increased in recent months despite substantial imports from neighbouring countries, as seasonal patterns were compounded by below average "short-rains" crops harvested last February. Between March and June, maize prices increased in Nairobi and Nakuru markets, located in a key growing area of the Rift Valley, by about 50 percent.

In **Ethiopia**, wholesale prices of maize were generally stable until May and started to increase in June by 10-20 percent, due to the progress of the lean season, coupled with unfavourable prospects for the "belg" season crops. Similarly, in Addis Ababa, prices of wheat and red sorghum increased in June by 8 and 13 percent, respectively, while prices of white sorghum and teff were stable. In **Somalia**, despite the commercialization of the "deyr" crops, prices of coarse grains remained firm or increased during the first semester of 2015. Currently, prices are generally at high levels, mainly due to the lingering effects of consecutive seasons of below-average production, trade disruptions caused by civil conflict and to the scaling down of humanitarian assistance operations. Between January and May 2015, prices of sorghum increased in the capital, Mogadishu, by 25 percent, while they remained firm in Baidoa, located in the sorghum belt. Prices of maize increased in Mogadishu and in Marka, located in the important maize-producing region of the Lower Shabelle district, by about 12 percent over the same period.

In **the Sudan**, prices of locally-produced sorghum and millet were stable at low levels in most monitored markets in the first semester of 2015, due to the abundant availabilities from the record 2014 cereal production. In Al Fashir (North Darfur State) and Kadugli (South Kordofan State) prices of sorghum increased by about 25 percent

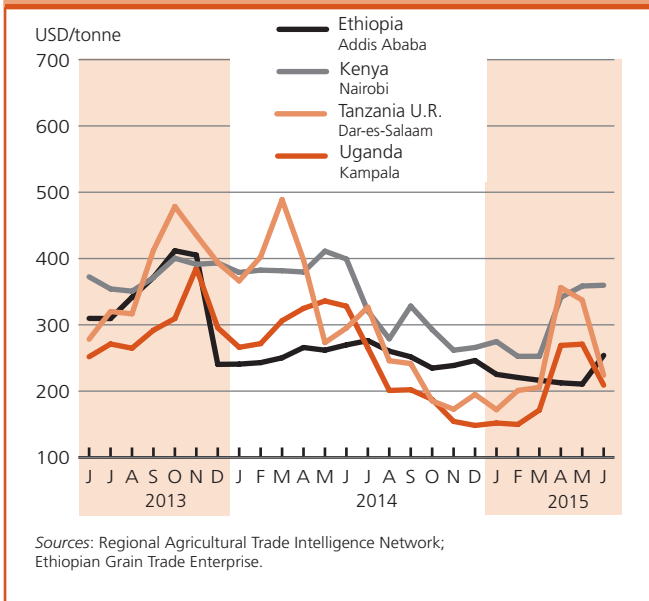
Table 10. East Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Total cereals ¹			
	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	Change: 2015/2014 (%)
East Africa	4.9	5.3	5.3	36.8	41.1	38.7	44.6	49.8	47.4	-4.8
Ethiopia	4.0	4.2	4.2	18.5	19.2	19.1	22.6	23.6	23.4	-0.8
Kenya	0.5	0.4	0.4	3.7	3.0	3.4	4.3	3.5	4.0	12.5
Sudan	0.2	0.5	0.5	2.6	7.4	5.8	2.9	7.9	6.3	-19.8
Tanzania U.R.	0.1	0.1	0.1	6.5	6.2	6.0	8.8	8.9	8.7	-2.4
Uganda	0.0	0.0	0.0	3.3	3.3	3.1	3.5	3.5	3.4	-4.4

Note: Totals and percentage change computed from unrounded data.

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

Figure 5. Maize prices in selected East African markets



due to trade disruptions caused by the escalation of conflict. In **South Sudan**, in most markets located in areas not directly affected by the conflict.

Prices of locally-produced coarse grains, started to seasonally increase in January 2015, with a significant acceleration, 40-50 percent, between March and April in Juba, Aweil and Wau markets. In conflict-affected areas, cereal prices are up to two to three times more than in Juba. In addition, prices of other important crops such as sesame and groundnuts have also increased significantly.

Alarming food security conditions in conflict-affected areas of South Sudan

Areas affected by conflict and displacements exhibit the highest levels of food insecurity in the subregion. The situation is particularly alarming in **South Sudan** with the number of severely food insecure people; almost doubling since the beginning of the year, to an estimated 4.6 million, just after the main season harvest. The greater Upper Nile, where the 2015 lean season started two months early in February, hosts most of the estimated food insecure people. Escalated clashes in early May have also caused additional displacements and damages to local livelihoods, increasing the risk of famine, especially among the displaced and host community households. In **the Sudan**, harsh food security conditions are reported among IDPs in conflict-affected states of Darfur, South Kordofan, Blue Nile and West Kordofan. In particular, renewed tribal conflicts mostly driven by competition over natural resources and cattle raiding, erupted in early May in Darfur, causing a new displacement of nearly 24 000 people.

Although food security conditions started to improve in parts of **Somalia**, southern **Kenya**, **Uganda**, **Rwanda**, **Burundi** and **the United Republic of Tanzania**, as newly-harvested crops became available for consumption, the aggregate number of people in need of humanitarian assistance remains high at about 11.6 million (including 4.6 million in **South Sudan**, 2.9 million in **Ethiopia**, 1.6 million in **Kenya**, 1.4 million in the **Sudan**, 730 000 in **Somalia**, 180 000 in Karamoja Region of **Uganda** and 160 000 in **Djibouti**). On the other hand, food security is expected to seasonally worsen until October in “meher”-dependant areas of **Ethiopia**, western **Kenya**, **the Sudan** and northern bi-modal areas of **South Sudan** as food stocks from previous harvests dwindle and the lean season peaks before the next harvest starts.

Since April/May, large-scale movements of displaced people within the subregion has raised serious concerns about the food security of refugees as well as host communities, whose already limited resources are expected to be further strained. In fact, the renewed fighting in northern **South Sudan** in early May significantly fueled the flow of refugees, with about 55 000 new arrivals in **Ethiopia**, **the Sudan** and **Uganda**. Since the end of March 2015, over 100 000 people left **Burundi** for **Rwanda**, **the United Republic of Tanzania** and **DRC** due to political tensions ahead of the local elections. At the same time, about 35 000 people of mixed nationalities arrived in **Djibouti** and **Somalia** fleeing from **Yemen**'s political crisis. As most refugees in receiving countries have limited livelihood opportunities, they rely almost entirely on international food assistance to meet their nutritional needs.

SOUTHERN AFRICA

Sharp decline in 2015 maize production

Harvesting of the main 2015 cereal crops is almost complete. The aggregate 2015 maize production, which accounts for nearly 80 percent of the subregional cereal output, is forecast at 20.6 million tonnes, about 26 percent (7.3 million tonnes) below the bumper 2014 output and down 15 percent from the five-year average. All countries of the subregion are estimated to have smaller crops this year, with sharp declines in the large producing countries of **South Africa**, **Malawi** and **Zambia**.

The reduced 2015 maize output is mainly the result of irregular seasonal rains (October 2014-April 2015) and an extended dry spell in February and March 2015, during a critical maize development period that adversely impacted on yields and the area harvested. Accounting for the bulk of the subregional decrease, **South Africa**'s maize production is estimated at 10.5 million tonnes, 4.4 million below the above-average 2014 output. The decrease largely reflects a steep 33 percent reduction in yields (commercial sector) due to water deficits, from the high level of the previous year.

In **Zimbabwe**, maize production is estimated at 0.74 million tonnes, about 50 percent below the good 2014 harvest. Poor rains in southern and western regions, which do not constitute the main producing areas, resulted in widespread crop losses and low yields, causing a sharp drop in production in these areas. While smaller decreases were estimated in the more productive northeastern regions preventing a steeper production decline at the national level. **Zambia** and **Malawi's** 2015 maize harvests are estimated to be a significant 21 and 26 percent below 2014's record outputs, with extended dry spells in southern parts adversely affecting yields, while localized flooding in January further contributed to crop losses, particularly in Malawi. In **Mozambique**, the maize crop fared better than in neighbouring countries, on account of comparatively more favourable weather conditions, and as a result production is estimated at about 1.8 million tonnes, only 5 percent below 2014's level. In **Angola**, an extended dry period in southern parts, following favourable rains at the start of the season, resulted in localized crop losses and reduced cereal production, mostly impacting sorghum and millet crops. However, maize production is estimated at an above-average level, but below the good 2014 output, owing to generally favourable rains in the main maize-producing central regions.

The rainfall deficits also had a severe impact on maize production in the import-dependent countries of **Lesotho, Namibia, Botswana** and **Swaziland**, with declines ranging from 13 to 43 percent compared to the previous year's good harvests. Rice production in **Madagascar** is preliminarily estimated to have registered a second consecutive annual increase from the sharply reduced 2013 output. Despite the anticipated improvement, 2015 production is still forecast at a below-average level, owing to dry weather in southern parts and irregular rains in large producing central regions, including flooding in coastal areas caused by Cyclone Chedza.

Aggregate 2015 sorghum and millet production is forecast 25 percent below 2014, as a result of the poor performance

of seasonal rains. Rainfall deficits also adversely affected water availability and pastures, raising concerns about a deterioration in livestock conditions in the coming months.

Maize imports forecast to double in 2015/16

Reflecting the well below-average 2015 maize production, import requirements in the 2015/16 marketing year (generally May/April), are forecast to double from the below-average volume of 2014/15. The bulk of the increase is expected from **South Africa**, with imports forecast at 600 000 tonnes, mainly consisting of yellow maize used in the feed industry, compared to negligible volumes in the previous year; 65 000 tonnes of yellow maize from Argentina have already been imported. In **Zimbabwe**, maize imports are forecast to reach close to 0.7 million tonnes, approximately double the reduced level of the previous year. In anticipation of the tight domestic supply situation, the Government lifted the import ban earlier in 2015 that was imposed in the previous year. **Malawi** is also expected to increase imports slightly to bolster national supplies. Larger import volumes are similarly forecast in the deficit-producing countries of **Botswana, Lesotho, Namibia** and **Swaziland**, which are normally reliant on South African grain supplies.

South Africa normally covers the bulk of the subregion's import requirement, however, maize exports, mostly yellow, are forecast to decline in 2015/16 on account of the low 2015 harvest. Large carryover stocks from the bumper 2014 harvest partly offset the impact of this year's low production and helped to maintain sufficient export quantities that are expected to still satisfy the needs of **Botswana, Lesotho, Namibia** and **Swaziland**. Given the reduced export availabilities in South Africa, alternative sources are expected to be needed for other countries, notably **Zimbabwe**. Within the subregion, **Zambia** is forecast to export about 0.8 million tonnes in 2015/16, largely owing to the large carryover stocks from the record 2014 harvest, with Zimbabwe likely to be the main destination for the bulk of this volume.

Table 11. Southern Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	Change: 2015/2014 (%)
Southern Africa	2.2	2.0	2.0	23.9	29.4	21.9	4.2	4.6	4.7	30.3	36.1	28.6	-20.8
- excl. South Africa	0.4	0.3	0.3	10.9	13.9	10.8	4.2	4.6	4.6	15.4	18.8	15.8	-16.0
Madagascar	0.0	0.0	0.0	0.4	0.4	0.4	3.6	4.0	4.1	4.0	4.3	4.5	3.4
Malawi	0.0	0.0	0.0	3.8	4.1	3.0	0.1	0.1	0.1	3.9	4.2	3.1	-25.1
Mozambique	0.0	0.0	0.0	1.8	2.2	2.0	0.3	0.4	0.4	2.2	2.6	2.4	-5.1
South Africa	1.9	1.8	1.8	13.0	15.6	11.0	0.0	0.0	0.0	14.9	17.3	12.8	-26.0
Zambia	0.3	0.2	0.2	2.6	3.4	2.7	0.0	0.0	0.0	2.9	3.7	3.0	-19.3
Zimbabwe	0.0	0.0	0.0	1.0	1.7	0.8	0.0	0.0	0.0	1.0	1.8	0.9	-50.4

Note: Totals and percentage change computed from unrounded data.

Prices of maize decreased seasonally, but remain under upward pressure

Prices of maize generally decreased seasonally during April-July reflecting augmented supplies from the nearly-completed harvest. In **Malawi, Mozambique** and **Zambia**, grain prices exhibited declining trends since March pressured by new supplies, despite the estimated below-average crops. However, the seasonal decreases began later than historical patterns, due to delayed harvesting in some locations. Prices in Mozambique (June) and Malawi (May) remain higher than their year earlier levels, Zambian maize prices (June) are marginally below the levels of the previous year.

In **South Africa**, strong price increases persisted in June, as markets continued to respond to the tight supply outlook in 2015/16. Prices of white maize increased faster than those of yellow, reflecting a steeper estimated production decline; in June,

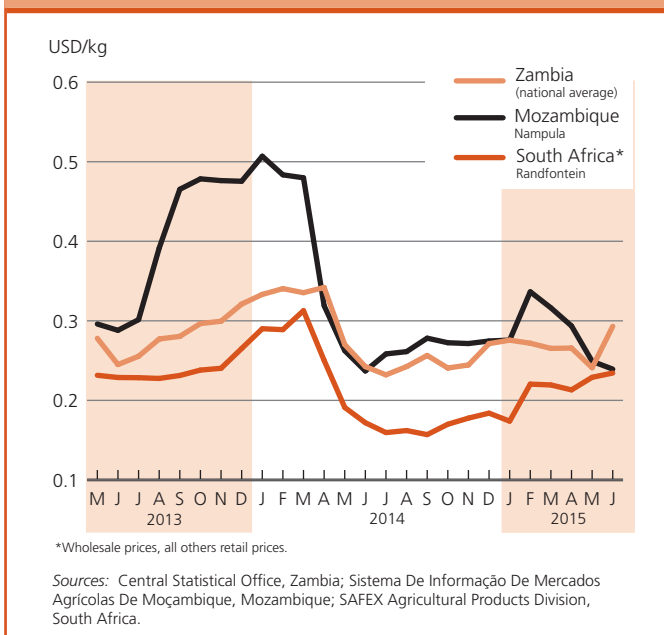
prices were 54 percent above their year-earlier levels compared to 26 percent for yellow maize. In the import-dependent countries of **Namibia** and **Lesotho**, maize meal prices continued to rise, largely reflecting the increased cost of importing from South Africa, their main supplier, and unfavourable domestic production prospects. However, in **Swaziland**, maize meal prices remained stable, due to the regulated price structure.

Food security expected to worsen significantly due to poor crop production

The number of people assessed to be food insecure decreased drastically in 2014 compared to the previous year, reflecting improved maize access and availability from the bumper 2014 harvests. However, with the estimated sharp decrease in 2015 production, the food insecure population is anticipated to rise, reversing the gains of last year. Although results from all the national vulnerability assessments are not yet available, which will provide more details on the supply situation and the food assistance requirements in 2015/16, early indications already point to a severe worsening of the food security situation in southern areas of **Zimbabwe, Angola, Malawi** and **Madagascar**, and northern regions of **Namibia**. The recently released vulnerability assessment from Zimbabwe indicates that an estimated 1.49 million people require assistance in 2015/16, well above the level of the previous year (564 599 people), but below the 2.2 million estimated in 2013.

Previously, flooding earlier in 2015 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. Approximately 1.8 million people were affected by the floods, the majority located in **Malawi** where an estimated 616 000 persons required food assistance between April and July. Significant numbers of flood-affected people were estimated in **Mozambique** (about 409 000), mainly in the Zambezia Province, and **Madagascar** (approximately 265 000). Governments and UN agencies responded to the floods, providing direct food assistance and agriculture provisions.

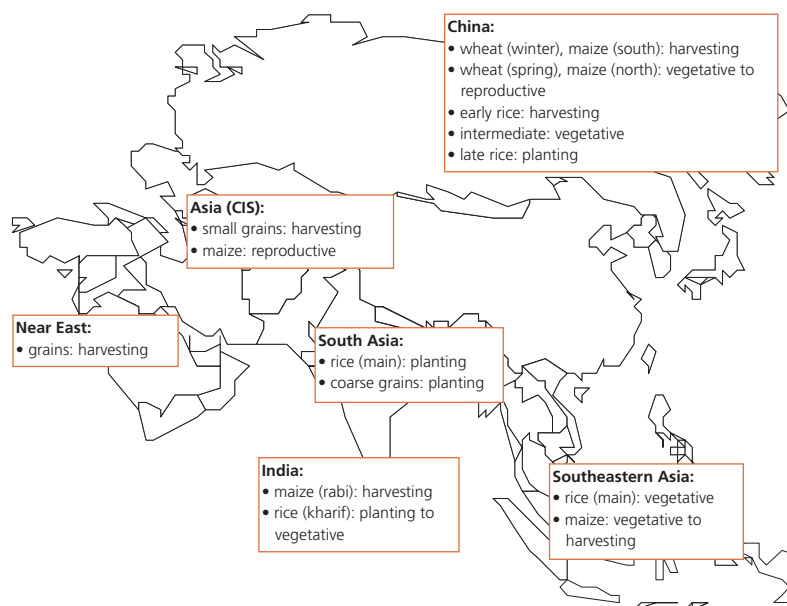
Figure 6. White maize prices in selected Southern African markets



FAR EAST

Wheat production in 2015 forecast to decline slightly

Harvesting of the winter crops, mainly wheat and barley, and the first season rice crop, is almost complete throughout the subregion. FAO's latest estimate for the subregion's aggregate 2015 wheat production, including the forecast of the minor spring wheat crop, stands at 249.9 million tonnes, almost 3 million tonnes or 1.2 percent below the record level of 2014. The overall decline is attributed to lower wheat production in **India**, which is officially estimated at 90.8 million tonnes, a decrease of 5 percent compared to the bumper level of the previous year. This is mainly the result of an estimated reduction in yields following heavy rains, strong winds and localized hail in early March over the northern and central main wheat-producing states, including Haryana, Rajasthan, Punjab, Uttar Pradesh and Madhya Pradesh, which affected the wheat crop in the final stages of development. At the subregional level, India's projected production decline is partly compensated by estimated record wheat harvests in **China** and **Pakistan**, officially estimated at 127.3 and 27 million tonnes, respectively, reflecting a slight increase in area planted, as well as higher yields on account of favourable weather conditions. Similarly, higher plantings boosted wheat production to record



Note: Comments refer to situation as of July.

levels in **Bangladesh** and **Mongolia**. By contrast, in **Nepal** a strong earthquake in April and unfavourable weather during the cropping season caused a 4 percent wheat production decline, estimated at 1.8 million tonnes. In **the Democratic People's Republic of Korea**, a significant reduction in plantings, due to a shortage of seeds and reduced yields, following a severe dry spell at the final crop development stage between April and May, resulted in a 30 percent drop in the 2015 wheat production to 40 000 tonnes.

Table 12. Far East cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	Change: 2015/2014 (%)
Far East	244.3	252.8	249.9	325.1	320.1	331.7	670.7	665.1	672.1	1 240.0	1 238.0	1 253.7	1.3
Bangladesh	1.3	1.3	1.4	2.6	2.6	2.7	51.5	52.4	52.0	55.4	56.3	56.0	-0.5
Cambodia	0.0	0.0	0.0	0.9	0.5	0.5	9.4	9.3	9.4	10.3	9.9	9.9	0.3
China	121.9	126.2	127.3	228.0	225.3	236.0	205.2	208.2	209.5	555.1	559.7	572.8	2.3
India	93.5	95.9	90.8	43.1	40.0	40.6	160.0	153.8	155.2	296.5	289.6	286.7	-1.0
Indonesia	0.0	0.0	0.0	18.5	19.1	20.6	71.3	70.8	75.6	89.8	90.0	96.2	6.9
Japan	0.8	0.9	0.9	0.2	0.2	0.2	10.8	10.5	10.5	11.8	11.6	11.6	-0.3
Korea Rep. of	0.0	0.0	0.0	0.2	0.2	0.2	5.6	5.6	5.5	5.8	5.9	5.7	-3.2
Myanmar	0.2	0.2	0.2	1.9	2.0	2.1	28.3	28.9	29.2	30.4	31.1	31.5	1.3
Nepal	1.9	1.9	1.8	2.6	2.6	2.5	5.0	4.8	4.6	9.6	9.3	8.9	-4.3
Pakistan	24.2	26.0	27.0	5.6	5.2	5.2	10.2	10.5	10.3	40.0	41.7	42.4	1.7
Philippines	0.0	0.0	0.0	7.3	7.8	7.2	18.8	18.9	18.4	26.2	26.6	25.6	-3.8
Thailand	0.0	0.0	0.0	5.0	5.0	5.0	36.8	34.3	34.7	41.8	39.3	39.7	1.1
Viet Nam	0.0	0.0	0.0	5.2	5.2	5.0	44.0	45.0	44.7	49.2	50.2	49.7	-1.0

Note: Totals and percentage change computed from unrounded data.

Mixed prospects for 2015 first season rice crop

Harvesting of the early-planted 2014/15 secondary rice (dry season) in the Northern Hemisphere and the 2015 main rice crop, in the southern countries of the continent, namely **Indonesia, Sri Lanka, Timor-Leste** and **Viet Nam**, is almost complete. The 2015 production outlook is favourable in **Cambodia** and **China**, mainly due to overall good weather, ample supplies of irrigation water and other agricultural inputs, including seeds and fertilizers. In **Sri Lanka**, the 2015 main "maha" season is officially estimated at 2.7 million tonnes, a 19 percent recovery from the drought-reduced 2014 crop, on account of increased plantings compared to last year's low level. In **Viet Nam**, favourable rains and adequate irrigation water supplies in the major growing areas of the Red River Delta in the north and the Mekong River Delta in the south, are expected to result in a good 2015 main winter/spring paddy crop officially estimated at 20.7 million tonnes, close to the record of 2014. Dry conditions in the minor central producing areas, namely Central Highlands and Central Coastal provinces, are expected to result in lower yields in these areas. By contrast, in **Thailand**, the 2014/15 secondary season rice production is expected to decline by 26 percent from last year's good level to 7.2 million tonnes following prolonged dry weather which limited water supplies for irrigation. In **India**, the official estimate for the "rabi" crop was revised downwards, now estimated at 19.4 million tonnes, 15 percent below the corresponding season of 2013/14, due to lower plantings and reduced yields, owing to low availability of irrigation water.

Early forecasts for 2015 aggregate cereal harvest uncertain due to El Niño

The bulk of the 2015 main season rice and coarse grains crops, to be harvested from September, is normally planted between May and July. Over northern and southern *Asia*, rains have been generally favourable benefiting planting activities for the main season crops, while several countries, namely **Cambodia, the Democratic People's Republic of Korea, the Lao People's Democratic Republic, the Philippines, Thailand** and **Viet Nam**, experienced well below-average precipitation during the same period, which has led to severe soil moisture deficits in parts. The current dry weather may be attributed to the development of the El Niño phenomenon, which is associated with reduced rains in southeast *Asia*. The consensus of weather prediction

models indicate that the current moderate El Niño phenomenon may strengthen further in the second half of 2015 and possibly into the winter months of 2016. However, no precise quantitative association between the occurrence of El Niño and its impact on agricultural production can be deduced. Its impact on crops very much depends on the timing and intensity of the phenomenon.

Overall, FAO tentatively sets the 2015 aggregate cereal production for the *Far East* subregion at 1 254 million tonnes, close to last year's bumper level. This includes an aggregate 2015 paddy production of 672.1 million tonnes, similar to last year's slightly reduced level. However, given that the bulk of the 2015 paddy and coarse grain crops are currently being planted, the situation could change as the season progresses.

Cereal trade expected to decrease slightly in 2015/16

The *Far East* subregion is a net exporter of rice and net importer of wheat. Aggregate cereal imports of the 2015/16 marketing years are expected to decrease slightly compared to 2014/15, but remain considerably above the five-year average. The expected decrease in imports mainly reflects lower forecasts for maize and barley in **China**, which are foreseen to fall by 25 percent and 13 percent, respectively, from last year's record level, owing to anticipated bumper harvests and large carryover stocks. Similarly, 2016 aggregate rice imports are expected to decrease by 3 percent to 11.6 million tonnes.

Aggregate cereal exports in 2015/16 are forecast to decrease slightly from last year's average level, primarily due to a projected 18 percent drop in the exportable surplus from **India**. With regard to rice, the subregion's largest exported cereal, exports in 2016 are anticipated to remain close to the reduced level of 2015. Lower exports in India are expected to be offset by increased exports from Thailand and Viet Nam.

Table 13. Far East cereal production and anticipated trade in 2015/16¹
(thousand tonnes)

	Avg 5-yrs (2010/11 to 2014/15)	2014/15	2015/16	2015/16 over 2014/15 (%)	2015/16 over 5-yr avg (%)
Cereals - Exports	42 447	43 725	42 759	-2.2	0.7
Cereals - Imports	98 684	118 473	115 623	-2.4	17.2
Cereals - Production	982 879	1 016 733	1 029 866	1.3	4.8
Rice-milled - Exports	31 267	33 633	33 478	-0.5	7.1
Rice-milled - Imports	10 860	12 001	11 583	-3.5	6.7
Rice-milled - Production	438 414	443 848	446 460	0.6	1.8
Wheat - Exports	5 471	5 425	4 290	-20.9	-21.6
Wheat - Imports	36 391	38 443	38 547	0.3	5.9
Wheat - Production	239 547	252 806	249 883	-1.2	4.3

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

Prices of rice and wheat flour generally stable

Domestic rice prices, in local currencies were generally stable in June. In India, downward pressure from the recently-harvested 2014/15 secondary season crops was offset by a decline in output following unfavourable weather and a recent increase in the Minimum Support Price. In **Indonesia** and **the Philippines**, average prices of rice showed little change in June despite good availabilities from the 2015 first season crop harvests, due to ongoing government purchases. Similarly, in **China**, procurement programmes contributed to maintain stable rice prices. In **Sri Lanka**, prices remained relatively unchanged for the third consecutive month in June and were only slightly higher than their year-earlier levels. Price declines were reported in **Bangladesh**, with good supplies from the 2015 “boro” and the onset of the “aus” harvests, and in exporters **Viet Nam** and **Thailand**, mainly as a result of sluggish export demand. By contrast, rice prices continued to increase in **Myanmar** and reached record highs in June, averaging MMK 440.4 (about USD 0.39) per kg, some 16 percent higher than a year earlier, mainly underpinned by strong export demand, coupled with the depreciation of the national currency since mid-April.

Wheat and wheat flour prices, in local currencies, remained unchanged in June and were below their levels at the same time last year. In **Pakistan**, the ongoing procurement purchases, and in **India** a reduction in this year’s output provided support to prices and offset the downward pressure from the recently-completed 2015 main season harvests.

Figure 7. Rice retail prices in selected Far East countries

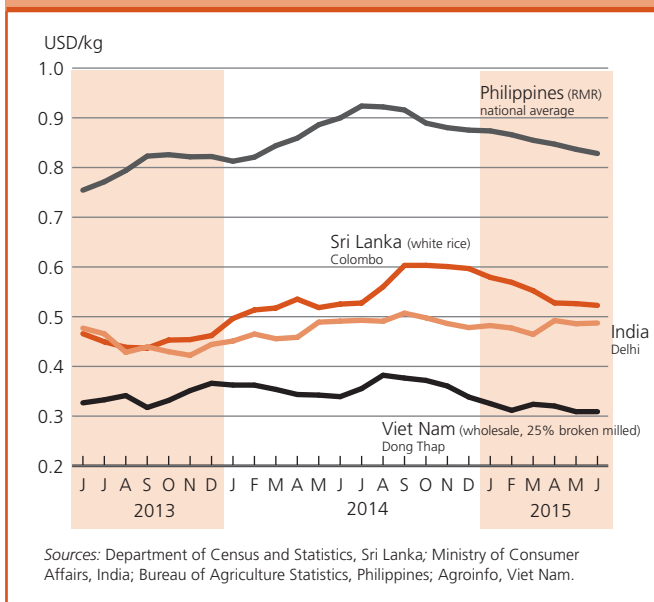
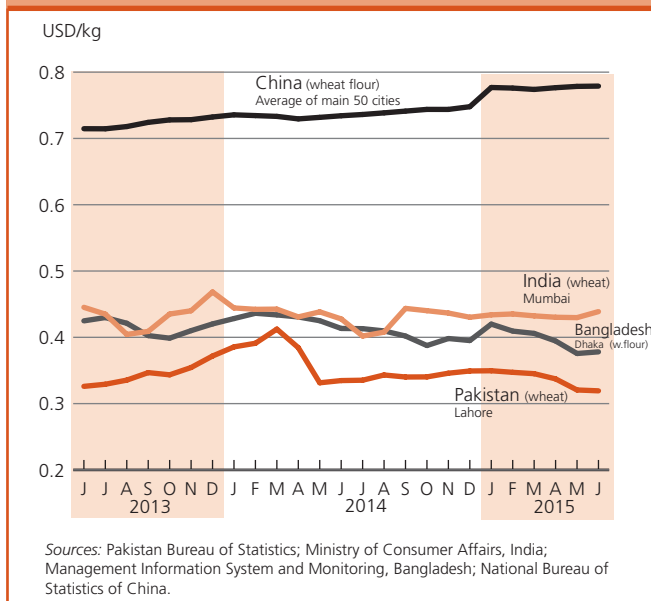


Figure 8. Wheat and wheat flour retail prices in selected Far East countries



NEAR EAST

Above-average wheat production forecast in 2015

Harvesting of the 2015 winter wheat and barley crops is almost complete and the early estimate indicates a wheat crop of about 47.2 million tonnes, 8 percent above last year’s below-average output, and some 3 percent above the five-year average. The production increase is mostly attributed to **Turkey** where abundant precipitation, heavy rains and adequate mountain snow, resulted in a good recovery in yields compared to the drought-stricken 2014 harvest. Plantings are estimated to have increased slightly compared to 2014, as farmers switched from cotton to milling wheat in the southeast part of the country. First estimates from the Turkish Statistical Institute indicate an 18 percent increase in cereal production in 2015, compared to last year, to about 38 million tonnes. The forecast includes 22.5 million tonnes of wheat (18 percent increase on last year) and 15 million tonnes of coarse grains (16 percent increase). In the **Islamic Republic of Iran**, the second biggest wheat producer in the subregion after Turkey, the 2015 production of 13 million tonnes is similar to last year but slightly below the five-year average. In **Afghanistan**, despite limited snow cover in northern and eastern Afghanistan up to mid-February 2015, an above-average wheat harvest of 5.4 million tonnes is forecast in 2015, slightly more than last year’s bumper crop.

In the **Syrian Arab Republic**, the ongoing conflict and lack of inputs (such as improved seeds, fertilizer and fuel), damage to agricultural machinery, irrigation systems and storage facilities, together with disruptions in electricity supplies, continue to seriously hamper agricultural production. Nevertheless, despite lack of inputs, production is expected to recover somewhat from last year's drought-stricken crop owing to favourable distribution of the rains. The FAO/WFP Crop and Food Security Assessment Mission (CFSAM) was conducted in May 2015, with the report anticipated to be issued in July 2015. Similarly, a below-average wheat production of 2.8 million tonnes is expected in **Iraq**.

The subregion both exports and imports grain. Wheat import requirements for the 2015/16 marketing year are forecast at 29.7 million tonnes, 8 percent below last year and 15 percent above the five-year average.

Iraq, Syrian Arab Republic and Yemen continue to face an escalating humanitarian crisis

In **Iraq**, as of March 2015, there were about 3 million people displaced, of whom nearly 2 million have been displaced since January 2014. Many of these people have been repeatedly displaced, with the conflict continuing to negatively affect food security conditions of the Iraqi population. One out of four IDP households is using negative coping strategies. Food security conditions are likely to deteriorate with a large number of IDPs putting strain on hosting communities, in particular as a large share of IDPs have fled towards cities in the Kurdish Region of Iraq. As of early May 2015, almost 2 500 000 Syrian refugees have sought refuge in northern Iraq, particularly in Erbil, Dohuk and Sulaymaniyah since the start of the conflict in the Syrian Arab Republic. Around 40 percent of the Syrian refugees are residing in eight camps in the Kurdistan Region of Iraq, while some 60 percent have integrated in host communities. The World Food Programme Emergency Operation (WFP-EMOP) to populations affected by the Iraq crisis supports 1.8 million individuals in need of food assistance up to December 2015. The WFP also continues

to provide food assistance to vulnerable Syrian refugees in Jordan, Lebanon, Iraq and Turkey with voucher assistance, food packages and school feeding.

In **Yemen**, during the last several months the humanitarian situation has sharply deteriorated, not only at urban centres where the conflict is more intense but also in the rural areas affecting agricultural livelihoods. The Integrated Food Security Phase Classification (IPC) indicative analysis released in June 2015 by FAO, WFP, the Government and other partners, classified 10 (out of 22) governorates (Saa'da, Aden, Abyan, Shabwa, Hajjah, Hodeidah, Taiz, Lahj, Al Dhale'e and Al Baida) as facing a food insecurity "Emergency" (IPC Phase 4), all affected by the ongoing armed conflict. Nine governorates were classified as facing a food security "Crisis" (IPC Phase 3): Amran, Dhamar, Sana'a, Sana'a city, Ibb, Mareb, Rayma, Al Mahweet, Al Jawf. Of the 12.9 million food insecure people across the country, about 6.1 million were in "Emergency" Phase, while 6.8 million were in "Crisis" Phase. The level of food insecurity increased by 21 percent compared to the previous year. With the rapid escalation of the conflict and insecurity, the disruption of markets, employment opportunities and rural livelihoods, the food security situation is expected to deteriorate further.

In the **Syrian Arab Republic**, the continued conflict which began in March 2011 has raised serious concerns over the state of food security in the country and in the region. As of late March 2015, about 4 million refugees are registered in the region covering Egypt, Iraq, Jordan, Lebanon and Turkey. The WFP emergency food assistance to the conflict-affected population within the country is scaled up to 4.5 million by December 2015, from 4.25 million in 2014. WFP assistance in neighbouring countries is to reach more than 2.1 million beneficiaries by December 2015, down from 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.

Table 14. Near East cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	Change: 2015/2014 (%)
Near East	48.0	43.7	47.2	23.1	21.0	23.5	4.6	4.7	4.8	75.7	69.4	75.5	8.8
Afghanistan	5.2	5.4	5.4	0.7	0.7	0.7	0.8	0.8	0.8	6.7	6.9	6.9	0.5
Iran (Islamic Rep. of)	14.0	13.0	13.0	4.5	4.5	4.6	2.5	2.6	2.7	20.9	20.1	20.2	0.7
Iraq	3.3	3.5	2.8	1.2	1.2	1.1	0.5	0.5	0.5	5.0	5.1	4.3	-15.7
Syrian Arab Republic	2.4	1.9	2.6	1.1	0.8	1.1	0.0	0.0	0.0	3.5	2.6	3.7	42.6
Turkey	22.1	19.0	22.5	14.5	12.9	15.0	0.9	0.8	0.9	37.5	32.8	38.4	17.1

Note: Totals and percentage change computed from unrounded data.

CIS IN ASIA³

Cereal production forecast at an average level in 2015

Planting of the 2015 spring cereal crops is complete in the subregion, while winter crops, mainly wheat and barley, are currently being harvested. The 2015 aggregate cereal production (including the winter and spring seasons) is forecast at 31.7 million tonnes, similar to the last year's level and the five-year average.

In **Kazakhstan**, the major cereal producer of the subregion, the 2015 cereal output is preliminarily forecast at 16.1 million tonnes, a minor decrease compared to the previous year's average level. The wheat output, is put at 12.5 million tonnes, a slight decrease of 4 percent compared to 2014's output. The drop is mainly due to a contraction in the area planted following a shift to more profitable crops, including oilseeds.

In the Caucasus subregion (**Armenia**, **Azerbaijan** and **Georgia**), the early forecast points to an average cereal production, as a result of favourable weather conditions since the beginning of the cropping season. In **Kyrgyzstan**, despite some weather-related concerns, the 2015 cereal output is expected to remain at around 1.4 million tonnes, similar to last's year level. An average output is also expected in **Tajikistan** following favourable precipitation for rain fed crops and adequate water irrigation availabilities.

In **Turkmenistan** and **Uzbekistan**, the outlook for the 2015 cereal harvest, mainly wheat, is favourable and production is expected at levels above the five-year average, reflecting higher plantings and yields.

Imports in 2014/15 remained unchanged

Except for **Kazakhstan**, the countries of the subregion are heavily dependent on cereal imports, mainly wheat. Among them, three are classified as LIFDCs, namely **Kyrgyzstan**, **Tajikistan** and **Uzbekistan**. Aggregate imports of the just-finished 2014/15 marketing year (July/June), are estimated at 6.9 million tonnes, marginally higher than the previous year's level and some 4 percent above the preceding five-year average. The difference from the previous year is mainly attributed to higher wheat imports by **Kyrgyzstan**, which increased by almost 13 percent to 610 000 tonnes, followed by **Armenia** with a rise of nearly 9 percent to 250 000 tonnes. These increases offset a 10 percent decline in wheat imports in **Uzbekistan**.

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

	Wheat			Coarse grains			Total cereals ¹			
	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	Change: 2015/2014 (%)
CIS in Asia	26.4	25.1	24.8	6.4	6.0	6.1	33.5	32.0	31.7	-0.8
Armenia	0.3	0.3	0.3	0.2	0.2	0.2	0.5	0.5	0.5	-2.4
Azerbaijan	2.1	1.9	2.0	0.9	0.8	0.9	3.0	2.7	2.8	2.9
Georgia	0.1	0.1	0.1	0.4	0.3	0.3	0.5	0.4	0.4	1.2
Kazakhstan	14.0	13.0	12.5	3.3	3.2	3.2	17.6	16.6	16.1	-3.0
Kyrgyzstan	0.8	0.7	0.7	0.8	0.7	0.7	1.6	1.4	1.4	0.7
Tajikistan	0.9	0.8	0.8	0.3	0.3	0.3	1.2	1.1	1.1	0.8
Turkmenistan	1.4	1.2	1.3	0.1	0.1	0.1	1.6	1.4	1.5	7.3
Uzbekistan	6.9	7.2	7.3	0.4	0.4	0.4	7.5	7.8	7.9	0.7

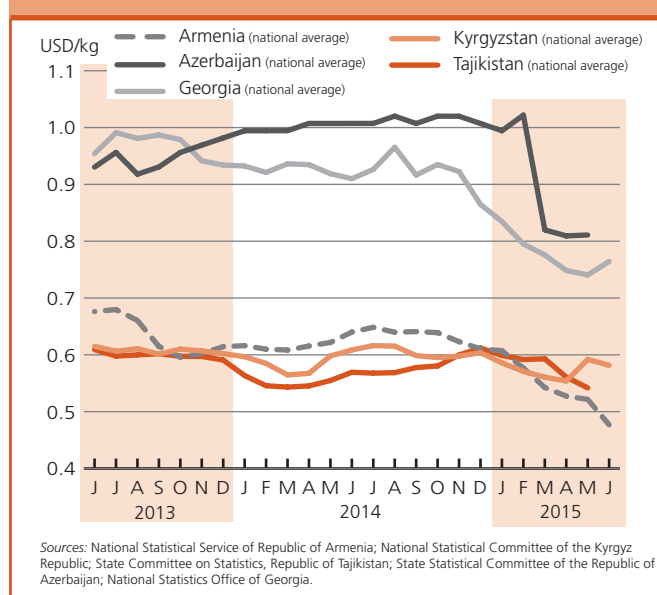
Note: Totals and percentage change computed from unrounded data.

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

Wheat prices are stable, but higher than the previous year

In importing countries of the subregion, prices of the main staple, wheat flour, remained overall unchanged in June but at levels above those of the year earlier, especially in **Tajikistan** and **Kyrgyzstan**, after sustained increases in the past year due to the depreciation of the national currencies. In **Kazakhstan**, wheat export quotations in June stayed relatively stable, as a result of reduced import demand from neighbouring countries due to the beginning of the 2015 wheat harvest.

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



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

CENTRAL AMERICA AND THE CARIBBEAN

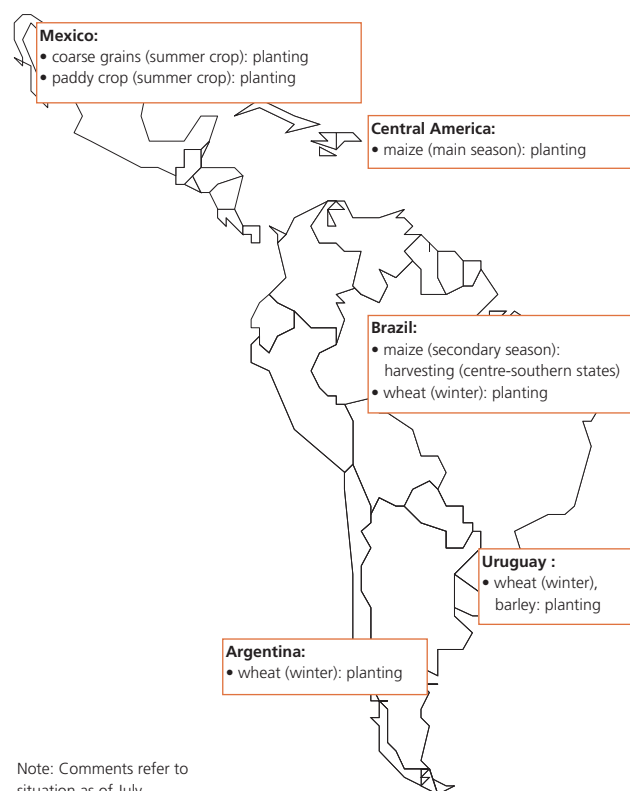
Wheat production in 2015 estimated at near-record level

In **Mexico**, virtually the only wheat producer in the subregion, the 2015 wheat harvest is almost concluded. Preliminary estimates put this year's production at a near-record level of 4.1 million tonnes (including the autumn-winter and minor spring-summer seasons). The increase mainly reflects an expansion in the area planted, driven by high local demand and resulting higher yields.

Record 2015 maize production forecast in Mexico, but presence of El Niño impairs prospects in rest of subregion

FAO's first and preliminary estimate of the subregion's aggregate 2015 maize production shows an increase of 5 percent to 29.6 million tonnes compared to last year's output. This mainly reflects a larger maize production in **Mexico**, which accounts for about 85 percent of the subregion's total cereal output. Official forecasts indicate a record maize crop of 25 million tonnes, mainly reflecting an increase in the area planted.

Excluding Mexico, prospects for the 2015 maize crop (first and second season) are uncertain, owing to the presence of the El Niño phenomenon, which is correlated with reduced rains and drought conditions. Planting of the main "de primera" season, which represents between 40 and 60 percent of the total maize output in **El Salvador, Guatemala, Honduras** and **Nicaragua**, has concluded. At this point no official estimates are available. However, delayed rains and drought conditions negatively affected planting operations at the start of the season in May, and this may have resulted in a reduction in the area sown.



Cereal imports estimated at high levels in 2014/15

Cereal imports in the 2014/15 marketing year (July/June) are estimated to have reached a record of 27.8 million tonnes and well above the subregion's five-year average. This figure represents higher maize and rice imports, particularly by countries affected by drought-reduced harvests in 2014, including **El Salvador, Guatemala, Honduras** and **Nicaragua**.

Table 16. Latin America and Caribbean cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	Change: 2015/2014 (%)
Central America & Caribbean	3.4	3.7	4.1	35.9	36.5	37.9	3.2	2.9	2.9	42.4	43.1	44.9	4.3
El Salvador	0.0	0.0	0.0	1.0	1.0	1.0	0.0	0.0	0.0	1.1	1.0	1.0	7.3
Guatemala	0.0	0.0	0.0	1.9	1.9	1.9	0.0	0.0	0.0	1.9	1.9	1.9	-1.1
Honduras	0.0	0.0	0.0	0.6	0.4	0.6	0.1	0.1	0.1	0.7	0.5	0.6	23.9
Mexico	3.4	3.7	4.1	30.7	31.8	32.8	0.2	0.2	0.2	34.3	35.7	37.1	3.9
Nicaragua	0.0	0.0	0.0	0.6	0.4	0.6	0.5	0.5	0.5	1.1	0.9	1.1	16.0
South America	19.2	24.7	23.7	141.2	136.4	136.2	24.3	24.8	25.3	184.7	185.8	185.2	-0.3
Argentina	9.2	13.9	12.0	40.9	39.9	39.1	1.6	1.6	1.6	51.7	55.4	52.6	-5.0
Brazil	5.7	6.2	7.3	83.5	81.7	82.0	11.8	12.1	12.5	101.1	100.0	101.9	1.9

Note: Totals and percentage change computed from unrounded data.

White maize prices remain well above their levels of last year

In June, white maize prices were well above their levels of a year ago in most countries of the subregion, largely caused by tighter supplies following the drought-reduced 2014 harvests. In **El Salvador** and **Honduras**, after two months of slight declines, white maize prices increased in June. In contrast, prices fell in June in **Nicaragua** after two months of continuous increases, but still remained well above their levels of June 2014. In **Guatemala**, the second largest producer in the subregion, white maize price decreases eased in June and were well below their levels of a year earlier, reflecting large supplies from the good 2014 output and adequate flow of imports from Mexico. In **Mexico**, prices of white maize in June remained stable, as a result of the Government's price support measures.

Bean prices increased in most *Central American* countries, with the exception of Nicaragua. In **El Salvador**, the main importer of the subregion, prices rose sharply in June after remaining stable the previous month, and were slightly above their levels of the previous year. In **Honduras**, red bean prices rose for the second consecutive month in June, but prices, however, were well below their levels of a year earlier. In **Nicaragua**, prices of beans declined in June after a sharp increase the previous month, with imports from Ethiopia and the United States of America exerting downward pressure; red bean prices were one-third below their level of June 2014. In **Guatemala**, where black beans are mainly produced and consumed, prices continued to seasonally increase, as new supplies will not enter the market until September with the start of the next harvest. Black bean prices were at the same

level as a year ago. In **Mexico**, black bean prices continued to remain unchanged for a third consecutive month in June, and were below their June 2014 levels, reflecting abundant supplies from the bumper 2014 harvest.

SOUTH AMERICA

Maize production in 2015 estimated at bumper level, but lower than the 2014 output

Early official estimates for 2015 maize production point to a bumper output in the main producers, **Argentina** and **Brazil**, which together account for about 90 percent of the subregional output, despite a price-induced contraction in plantings. In Brazil, production prospects improved as the season progressed and maize production is currently forecast at 79 million tonnes. At this level, production is above the 2014 level and close to record. In Argentina, 2015 maize production, with the harvest completed in June, is estimated at 31 million tonnes, 6 percent below last year's record but still well above the country's five-year average. Aggregate main production in 2015 is forecast at 176.8 million tonnes, 1 percent below the bumper output in 2014.

Wheat crop forecast at high level in 2015 despite anticipated reductions in plantings

After a strong recovery of production in 2014, which has resulted in near-record low prices, sowings for the 2015 wheat crop are anticipated to be reduced in **Argentina** the subregion's main producer and exporter. Early and preliminary forecasts for Argentina point to an area sown of 4.2 million hectares well below last year's level; however, if weather is favourable and historical yields are obtained, prospects are for production to reach 12 million tonnes. In **Brazil** and **Uruguay**, the subregion's second and third most important wheat producers, similar trends hold with the area expected to remain close to last year's levels and production well above the five-year average. On aggregate, early forecasts point to a 2015 wheat output of 23.7 million tonnes for the subregion, or less than 4 percent below last year's level but well above the five-year average for the subregion.

Wheat flour and yellow maize prices were stable or declined in June, rice prices followed mixed trends

Wheat flour prices in June remained unchanged or declined in most countries of the subregion and were generally well below their levels of a year earlier. The exception to this trend is **Brazil**, where wheat flour prices surged in June to their highest level in seven months supported by reduced imports in the previous months, as the continued depreciation of the local currency has

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

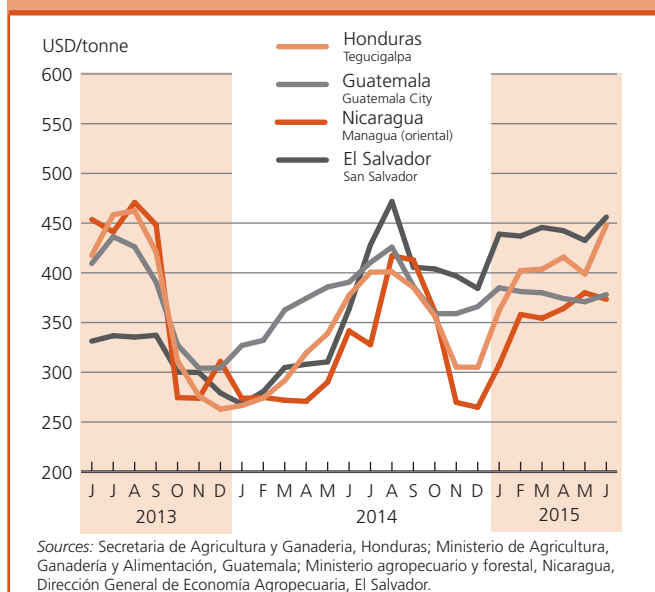
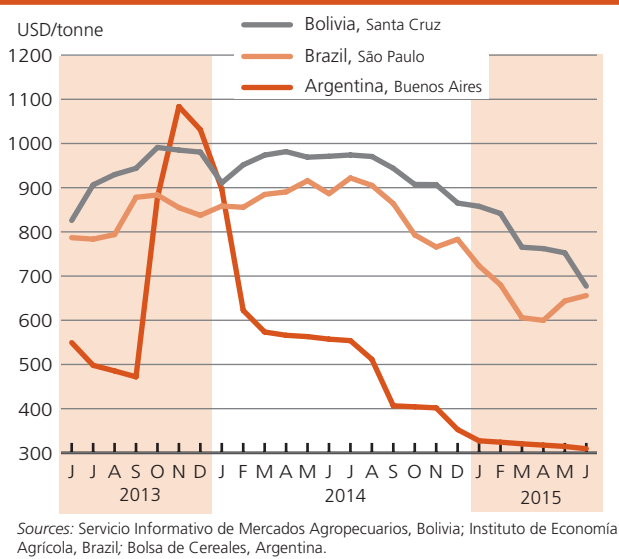
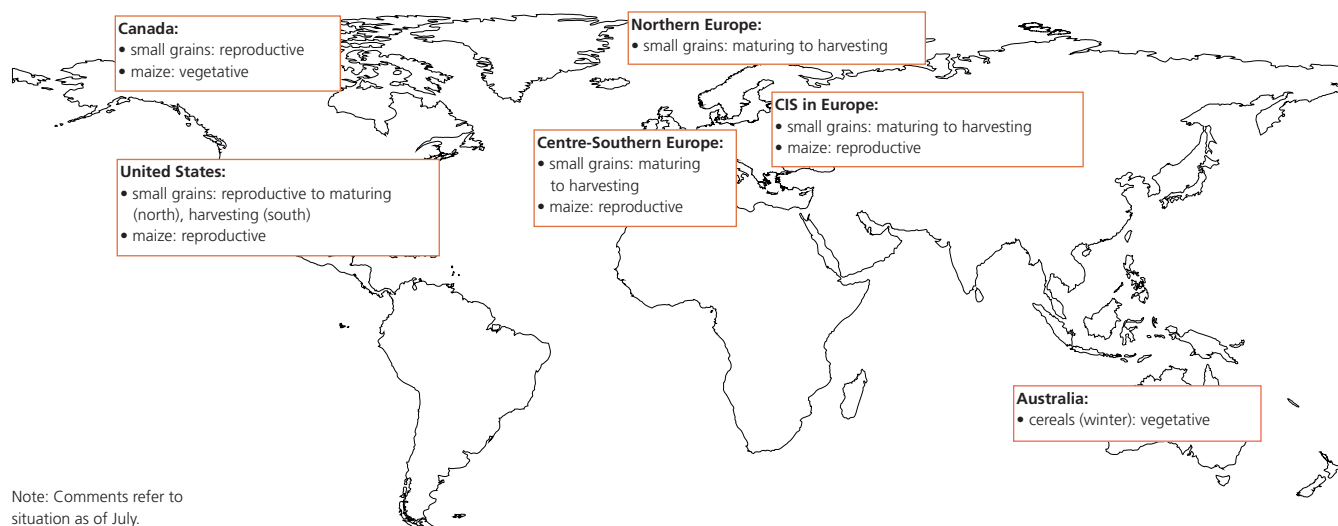


Figure 11. Wholesale wheat flour prices in selected countries in South America



significantly increased their costs, as well as a shortage of high quality milling wheat. In **Colombia**, while wheat flour prices remained stable in June in all markets, they are still above last year's level. By contrast, prices declined in **Argentina, Bolivia, Chile, Peru** and **Uruguay** and were significantly below their levels of a year earlier, reflecting ample stocks in the market from the good harvests of 2014 and adequate import levels.

Yellow maize prices in June continued to decrease for the second consecutive month in most countries of the subregion, pressured by high availabilities from the 2015 harvest, which is anticipated at good levels, prices were also well below their levels of a year earlier. The exception to this trend was **Colombia**, where prices followed mixed trends in major markets, particularly in the market of Medellín where they have increased for a second consecutive month while they continue to remain relatively unchanged in other markets. However, prices remain well above their year-earlier levels supported by the weak local currency. By contrast prices declined in June and were well below their June 2014 levels in **Argentina, Brazil, Chile** and **Peru**.



NORTH AMERICA

Favourable 2015 wheat prospects

In the **United States of America**, with harvesting of the winter crop underway, aggregate wheat production is forecast at 57.7 million tonnes, nearly 5 percent up on 2014. Compared to the previous year, the winter wheat crop fared better, and despite a 5 percent decline in plantings and some dryness in the winter months, higher yields due to improved weather conditions are expected to result in a 9 percent production increase in 2015. Spring wheat plantings were completed in June and the area is estimated to be close to last's year level. Planting of the maize crop is complete and conditions are generally favourable, though there is some concern over excessive rains in June. The early 2015 production forecast points to a decrease, mostly reflecting a reduction in the area planted compared to 2014.

In **Canada**, the forecast for aggregate 2015 wheat production stands at 30.1 million tonnes, up 2.7 percent from the near-average 2014 output, reflecting an expected larger spring durum crop that is expected to more than offset a reduction in the small winter wheat crop. For maize, production is forecast to rise by 7 percent, attributed to larger plantings.

EUROPE

European Union Cereal production expected to decline in 2015

In the **European Union (EU)**, 2015 wheat production is forecast at 148.5 million tonnes, 5 percent down from the record 2014 crop. With the harvested area expected to remain virtually unchanged from the previous year's level, the reduction is mostly on account of

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

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	Change: 2015/2014 (%)
North America	95.6	84.4	87.8	396.3	399.4	387.6	8.6	10.0	9.4	500.5	493.9	484.8	-1.8
Canada	37.5	29.3	30.1	28.8	22.0	24.5	0.0	0.0	0.0	66.4	51.3	54.6	6.4
United States	58.1	55.1	57.7	367.4	377.4	363.1	8.6	10.0	9.4	434.1	442.6	430.3	-2.8
Europe	225.5	247.7	234.9	253.2	268.2	249.1	4.1	4.0	4.1	482.8	519.9	488.1	-6.1
Belarus	2.0	2.5	2.4	6.2	6.6	6.3	0.0	0.0	0.0	8.2	9.1	8.7	-4.2
EU	143.6	156.2	148.5	158.9	169.0	157.5	2.9	2.9	2.9	305.4	328.1	309.0	-5.8
Russian Federation	52.1	59.7	56.5	36.6	41.7	38.6	0.9	1.0	1.1	89.6	102.5	96.2	-6.1
Serbia	2.7	2.4	2.2	6.6	7.2	6.5	0.0	0.0	0.0	9.3	9.6	8.7	-9.8
Ukraine	22.3	24.1	22.5	40.5	39.5	36.0	0.1	0.1	0.1	62.9	63.7	58.6	-8.0
Oceania	25.6	24.0	23.9	14.1	11.7	12.5	1.2	0.8	0.7	40.9	36.5	37.1	1.7
Australia	25.3	23.7	23.6	13.5	11.1	11.9	1.2	0.8	0.7	40.0	35.6	36.2	1.7

Note: Totals and percentage change computed from unrounded data.

a return to average yields from the high levels of last year. Similarly, coarse grain production, mostly maize, is forecast at 157.5 million tonnes, 7 percent below the good level of the previous year, reflecting reduced yields from the high levels achieved last year.

CIS in Europe

Cereal production forecast to fall in 2015, but remains above average

In all European CIS countries (Belarus, the Republic of Moldova, the Russian Federation and Ukraine), sowing of the 2015 spring crops is complete and the winter cereal crop is expected to be harvested from July.

FAO's latest forecast for the 2015 subregion's aggregate cereal production stands at 166 million tonnes, 7 percent below the previous year's all-time high level but almost 14 percent higher than the five-year average. The production of wheat, the main staple of the subregion, is expected at 82.4 million tonnes, some 6 percent below the record level of last year and 13 percent above the five-year average.

In **the Russian Federation**, the 2015 winter cereal crop, mainly wheat and barley, benefitted from mild weather in March and adequate rainfall from April to early June, mostly in southern growing areas, improving soil moisture and partly compensating for a dry period during the autumn and winter. The aggregate cereal production, mainly wheat, is tentatively forecast at 96.1 million tonnes, 6 percent lower compared to the last year's bumper level but 16 percent higher than the five-year average. FAO forecasts wheat production at 56.5 million tonnes, 5 percent lower than last year's record level but still 14 percent up compared to the five-year average, as a result of a slight reduction in yields, compensated by an increase in the area planted to winter crops.

In **Ukraine**, after severe dryness experienced in the autumn, the 2015 winter cereal crops, mainly wheat, rye and barley, benefitting from good rains in April and May, are reportedly in satisfactory conditions. Sowing of spring cereals, mainly maize, finished in June with a reduced planted area caused partly by high input costs. FAO's latest forecast puts the 2015 aggregate cereal production at 58.5 million tonnes, 8 percent below the 2014 record but still 11 percent above the five-year average. The 2015 wheat output is anticipated at 22.5 million tonnes, down from the last year's record level. Production of both barley and maize is also expected to decrease by more than 10 percent, due to lower plantings and yields compared to the high levels in 2014.

In **Belarus**, the outlook for 2015 cereal production is largely positive. After a mild winter, most of the country benefitted from adequate and timely rains, although slightly drier-than-similar conditions were recorded in southern eastern provinces (Mogilev, Gomel and Brest). The area planted to cereals (winter and spring seasons) is estimated at a near-average level of 2.6 million hectares with winter cereal plantings accounting for about 45 percent of the total. The aggregate 2015 cereal output is forecast at around

8.7 million tonnes, which is 4 percent lower than last year's level but still 8 percent above the five-year average.

In **the Republic of Moldova**, the total area planted to cereals in 2015 is anticipated to increase from the high level of the previous year as a result of the Government's continuous support to agriculture production. FAO preliminarily forecasts the 2015 maize and wheat outputs at similar levels to the previous year.

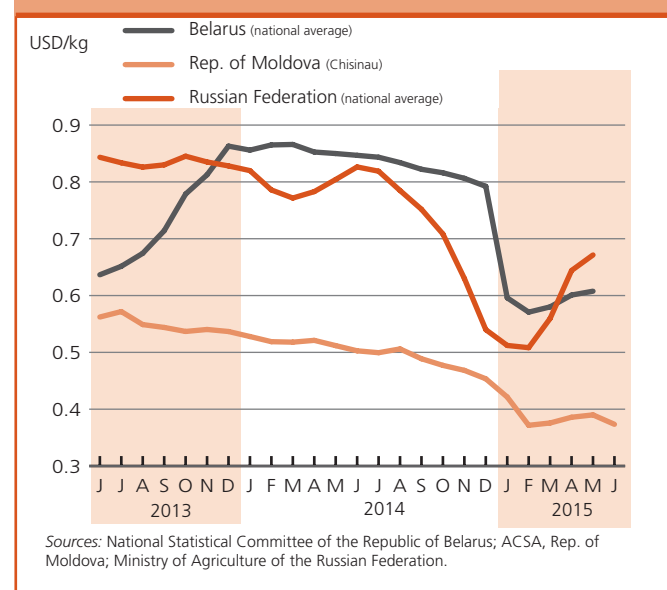
Cereal exports increase in 2014/15

Aggregate cereal exports for the 2014/15 marketing year (July/June), mainly wheat and maize, are estimated at 64.5 million tonnes, some 5 million tonnes above the previous year's level, as a result of the record 2014 cereal harvest which resulted in significant exportable surpluses for **the Russian Federation** and **Ukraine**. The potential surplus for export of **the Russian Federation** and **Ukraine** is estimated at 29.8 and 33.6 million tonnes, respectively. Total wheat exports in 2014/15 are up at 32.2 million tonnes, more than 13 percent higher compared to the 2013/14 marketing year, whereas maize exports declined by 13 percent to 21.4 million tonnes.

Domestic prices of wheat and wheat flour generally stable, while export prices of wheat products declined in June

In **the Russian Federation**, domestic prices of wheat and wheat flour were stable in June, after the declines of the previous months and were slightly above their values at the same time in 2014. In **Ukraine**, prices dropped further in June with the approach of the new harvest and ample availabilities from the 2014 record output, but they remained 30-50 percent higher than their year-earlier values. In these countries,

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



export prices of milling wheat declined for the fourth consecutive month in June, mainly reflecting favourable production prospects for the 2015 winter wheat crop, about to be harvested. Overall, export prices of wheat were one-third below their levels of a year earlier.

OCEANIA

Cereal production in Australia forecast to rise in 2015 from last year's reduced level

The outlook for the 2015 cereal crop in **Australia** remains overall favourable, with production forecast to increase

by 1.7 percent to 36.2 million tonnes. Wheat prospects in Western Australia are generally positive following above-average rainfall in autumn and a marginal expansion in wheat plantings, while lower yields are predicted in eastern and southern states, due to unfavourable rains. The presence of El Niño, which is normally associated with reduced precipitation in these areas, could change the current outlook. However, higher production in Western Australia is anticipated to largely offset reductions in southern and eastern states, and overall wheat production is forecast at 23.6 million tonnes, 0.4 percent down from 2014. Production of barley is expected to increase in 2015 to 8.3 million tonnes due to larger plantings.

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

	Average 2008/09 - 2012/13	2011/12	2012/13	2013/14	2014/15	2015/16
1. Ratio of world stocks to utilization						
Wheat	27.4	28.6	24.9	25.9	27.5	27.7
Coarse grains	17.4	17.5	15.5	18.3	20.6	20.0
Rice	32.1	34.2	36.1	36.4	34.9	32.9
Total cereals	23.3	24.2	22.4	24.1	25.5	24.6
2. Ratio of major grain exporters' supplies to normal market requirements						
	119.6	118.6	108.1	121.4	122.6	119.5
3. Ratio of major exporters' stocks to their total disappearance						
Wheat	18.9	18.2	13.7	13.7	15.7	16.7
Coarse grains	12.6	11.1	8.6	11.2	14.5	13.5
Rice	23.9	25.0	28.6	26.9	23.2	19.0
Total cereals	18.5	18.1	16.9	17.3	17.8	16.4
	Annual trend growth rate 2005-2014	2011	Change from previous year			
			2012	2013	2014	2015
4. Changes in world cereal production						
	2.5	4.2	-2.1	9.8	1.2	-1.1
5. Changes in cereal production in the LIFDCs						
	0.6	1.7	4.1	1.4	0.9	-1.6
6. Changes in cereal production in the LIFDCs less India						
	-1.0	-3.6	6.2	1.5	4.4	-1.9
	Average 2008-2012	2011	Change from previous year			
			2012	2013	2014	2015*
7. Selected cereal price indices:						
Wheat	191.1	31.8	-4.8	-4.9	-6.6	-19.5
Maize	220.5	57.6	2.2	-12.9	-25.8	-18.9
Rice	247.0	6.6	-4.6	0.8	0.8	-7.3

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-June average.

Table A2. World cereal stocks¹
(million tonnes)

	2011	2012	2013	2014	2015 estimate	2016 forecast
TOTAL CEREALS	537.8	563.1	544.5	603.1	645.1	631.3
Wheat	195.5	196.4	173.4	185.5	198.2	197.5
held by:						
- main exporters ²	52.4	43.9	37.8	41.8	47.5	50.3
- others	143.1	152.5	135.6	143.7	150.7	147.2
Coarse grains	196.4	204.0	193.8	235.3	269.6	264.4
held by:						
- main exporters ²	62.8	59.5	47.6	69.2	91.1	84.6
- others	133.6	144.5	146.2	166.1	178.5	179.8
Rice (milled basis)	145.9	162.8	177.2	182.3	177.2	169.4
held by:						
- main exporters ²	33.3	41.3	47.7	47.2	41.1	34.0
- others	112.6	121.5	129.5	135.1	136.1	135.4
Developed countries	159.1	153.8	118.1	140.6	173.2	170.6
Australia	10.9	9.0	6.7	6.9	6.6	6.4
Canada	11.2	9.4	8.2	15.0	9.9	8.3
European Union	32.5	32.7	25.8	33.5	44.6	47.0
Japan	4.8	4.9	5.3	4.7	4.9	5.0
Russian Federation	20.2	16.4	5.9	5.3	7.5	8.0
South Africa	4.0	2.5	2.3	1.6	3.2	2.4
Ukraine	5.9	10.4	6.1	8.3	10.2	8.9
United States	57.3	49.3	44.2	51.4	71.2	68.7
Developing countries	378.7	409.3	426.4	462.5	471.9	460.7
Asia	314.7	343.6	369.7	390.5	393.2	388.2
China	196.9	211.4	228.3	247.3	252.2	257.6
India	40.3	47.4	51.7	50.3	47.4	41.3
Indonesia	8.8	9.7	10.4	10.3	10.3	11.6
Iran (Islamic Republic of)	3.9	2.6	5.8	6.0	6.6	6.0
Korea, Republic of	4.3	4.2	4.0	4.3	4.2	4.4
Pakistan	3.4	5.5	3.7	3.9	4.3	3.8
Philippines	3.3	2.6	3.1	2.6	3.5	3.6
Syrian Arab Republic	3.8	3.4	2.6	2.3	1.5	1.5
Turkey	3.6	4.2	4.3	5.7	5.4	5.9
Africa	35.2	38.0	35.7	39.1	38.8	34.1
Algeria	4.0	4.7	5.2	6.6	5.8	5.2
Egypt	5.8	7.9	6.1	6.7	6.4	5.6
Ethiopia	1.9	2.1	1.6	2.1	2.3	2.0
Morocco	4.0	4.6	3.4	6.0	5.3	5.5
Nigeria	1.4	1.3	0.8	1.2	1.3	1.1
Tunisia	0.8	0.8	1.3	1.1	1.2	1.1
Central America	6.8	5.5	5.8	6.8	7.2	6.8
Mexico	3.7	2.3	2.6	3.3	3.6	3.2
South America	21.6	21.8	14.9	25.7	32.3	31.1
Argentina	5.5	4.9	2.1	5.9	8.5	6.5
Brazil	8.4	9.1	5.6	11.3	14.2	15.1

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

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

² Major wheat exporters are Argentina, Australia, Canada, the EU, Kazakhstan, 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. ¹	US Soft Red Winter No.2 ²	Argentina Trigo Pan ³	US No.2 Yellow ²	Argentina ³	US No.2 Yellow ²
Annual (July/June)						
2003/04	161	149	154	115	109	118
2004/05	154	138	123	97	90	99
2005/06	175	138	138	104	101	108
2006/07	212	176	188	150	145	155
2007/08	361	311	318	200	192	206
2008/09	270	201	234	188	180	170
2009/10	209	185	224	160	168	165
2010/11	316	289	311	254	260	248
2011/12	300	256	264	281	269	264
2012/13	348	310	336	311	278	281
2013/14	318	265	335	217	219	218
2014/15	266	221	246	173	177	210
Monthly						
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
2015 - March	250	219	228	173	169	226
2015 - April	239	209	225	172	168	223
2015 - May	231	199	228	166	168	217
2015 - June	242	211	226	170	173	224

Sources: International Grains Council and USDA.

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

² Delivered United States Gulf.

³ Up River f.o.b.

Table A4a. Cereal import requirements of Low-Income Food-Deficit Countries¹, 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
AFRICA		29 858.1	1 168.7	31 026.8	29 837.6	8 584.1	496.0	8 088.1
East Africa		8 473.0	726.2	9 199.2	8 805.7	3 538.8	393.3	3 145.5
Burundi	Jan/Dec	125.5	9.9	135.4	145.6	1.6	1.6	0.0
Comoros	Jan/Dec	57.7	0.0	57.7	71.0	11.2	0.0	11.2
Djibouti	Jan/Dec	156.8	8.7	165.5	151.0	88.4	0.8	87.6
Eritrea	Jan/Dec	416.7	0.0	416.7	427.0	145.1	0.0	145.1
Ethiopia	Jan/Dec	535.4	181.9	717.3	550.0	181.8	24.4	157.4
Kenya	Oct/Sep	2 555.3	108.6	2 663.9	2 957.2	930.0	65.5	864.5
Rwanda	Jan/Dec	141.3	3.4	144.7	140.0	2.1	0.0	2.1
Somalia	Aug/Jul	446.5	99.3	545.8	575.0	218.2	26.3	191.9
Sudan	Nov/Oct	2 741.7	230.9	2 972.6	2 395.9	1 132.9	247.2	885.7
Tanzania U.R.	Jun/May	810.2	48.3	858.5	950.0	797.4	27.5	769.9
Uganda	Jan/Dec	485.9	35.2	521.1	443.0	30.1	0.0	30.1
Southern Africa		2 963.9	63.4	3 027.3	2 616.3	1 510.1	33.5	1 476.6
Lesotho	Apr/Mar	166.0	7.0	173.0	224.6	164.4	2.0	162.4
Madagascar	Apr/Mar	553.0	17.4	570.4	555.0	98.0	9.3	88.7
Malawi	Apr/Mar	210.0	4.1	214.1	114.2	134.7	12.7	122.0
Mozambique	Apr/Mar	1 251.0	25.0	1 276.0	1 221.0	835.9	2.2	833.7
Zimbabwe	Apr/Mar	783.9	9.9	793.8	501.5	277.1	7.3	269.8
West Africa		16 394.1	232.4	16 626.5	16 270.4	3 115.5	57.2	3 058.3
Coastal Countries		12 420.5	129.5	12 550.0	12 248.0	2 252.5	9.7	2 242.8
Benin	Jan/Dec	441.5	10.0	451.5	467.0	104.9	0.0	104.9
Côte d'Ivoire	Jan/Dec	1 766.1	4.4	1 770.5	1 720.5	513.0	5.1	507.9
Ghana	Jan/Dec	892.0	8.0	900.0	900.0	195.6	2.1	193.5
Guinea	Jan/Dec	654.9	7.6	662.5	512.0	93.9	2.5	91.4
Liberia	Jan/Dec	310.0	70.0	380.0	447.0	55.1	0.0	55.1
Nigeria	Jan/Dec	7 720.0	0.0	7 720.0	7 520.0	1 195.8	0.0	1 195.8
Sierra Leone	Jan/Dec	296.0	29.0	325.0	356.0	27.8	0.0	27.8
Togo	Jan/Dec	340.0	0.5	340.5	325.5	66.4	0.0	66.4
Sahelian Countries		3 973.6	102.9	4 076.5	4 022.4	863.0	47.5	815.5
Burkina Faso	Nov/Oct	493.6	11.8	505.4	485.0	45.6	1.2	44.4
Chad	Nov/Oct	100.0	42.2	142.2	144.6	53.9	29.2	24.7
Gambia	Nov/Oct	209.9	0.6	210.5	222.5	25.9	0.5	25.4
Guinea-Bissau	Nov/Oct	69.4	4.9	74.3	94.3	6.8	2.5	4.3
Mali	Nov/Oct	358.8	6.4	365.2	343.1	114.1	4.4	109.7
Mauritania	Nov/Oct	506.2	10.8	517.0	458.3	102.3	0.5	101.8
Niger	Nov/Oct	495.4	18.1	513.5	508.6	36.2	7.3	28.9
Senegal	Nov/Oct	1 740.3	8.1	1 748.4	1 766.0	478.2	1.9	476.3
Central Africa		2 027.1	146.7	2 173.8	2 145.2	419.7	12.0	407.7
Cameroon	Jan/Dec	996.2	2.6	998.8	947.0	215.7	0.0	215.7
Cent.Afr.Rep.	Jan/Dec	53.9	21.1	75.0	75.0	4.9	0.3	4.6
Congo	Jan/Dec	309.6	2.4	312.0	315.0	117.7	1.0	116.7
Dem.Rep.of the Congo	Jan/Dec	649.7	120.3	770.0	790.0	79.4	10.5	68.9
Sao Tome and Principe	Jan/Dec	17.7	0.3	18.0	18.2	2.0	0.2	1.8

Source: FAO

¹ 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>

² Estimates based on information as of early June 2015.

Table A4b. Cereal import requirements of Low-Income Food-Deficit Countries¹, 2014/15 or 2015 estimates
(thousand tonnes)

	Marketing year	2013/14 or 2014 Actual imports			2014/15 or 2015 Import position ²			
		Commercial purchases	Food aid	Total commercial and aid	Total import requirements (excl. re-exports)	Total commercial and aid	Food aid allocated, committed or shipped	Commercial purchases
ASIA		22 126.1	268.5	22 394.6	24 688.8	12 060.1	42.6	12 017.5
Cis in Asia		3 995.9	0.2	3 996.1	3 877.2	3 193.8	0.3	3 193.5
Kyrgyzstan	Jul/Jun	565.9	0.2	566.1	636.2	453.5	0.3	453.2
Tajikistan	Jul/Jun	1 030.0	0.0	1 030.0	1 069.0	877.4	0.0	877.4
Uzbekistan	Jul/Jun	2 400.0	0.0	2 400.0	2 172.0	1 862.9	0.0	1 862.9
Far East		11 533.3	183.2	11 716.5	14 164.6	7 045.9	21.8	7 024.1
Bangladesh	Jul/Jun	3 946.6	74.4	4 021.0	4 230.0	2 455.5	12.9	2 442.6
Bhutan	Jul/Jun	82.9	0.0	82.9	86.0	3.6	0.0	3.6
D.P.R. of Korea	Nov/Oct	269.9	70.2	340.1	431.0	68.3	6.2	62.1
India	Apr/Mar	125.2	0.0	125.2	136.1	50.7	0.0	50.7
Mongolia	Oct/Sep	120.8	0.0	120.8	111.8	30.5	0.0	30.5
Nepal	Jul/Jun	585.7	1.1	586.8	631.8	132.9	1.5	131.4
Philippines	Jul/Jun	5 223.4	10.6	5 234.0	6 737.0	3 975.3	0.5	3 974.8
Sri Lanka	Jan/Dec	1 178.8	26.9	1 205.7	1 800.9	329.1	0.7	328.4
Near East		6 596.9	85.1	6 682.0	6 647.0	1 820.4	20.5	1 799.9
Afghanistan	Jul/Jun	2 226.0	16.0	2 242.0	2 247.0	804.1	15.2	788.9
Yemen	Jan/Dec	4 370.9	69.1	4 440.0	4 400.0	1 016.3	5.3	1 011.0
CENTRAL AMERICA		1 793.9	87.1	1 881.0	2 090.1	807.0	4.6	802.4
Haiti	Jul/Jun	588.0	80.1	668.1	710.1	111.8	0.0	111.8
Honduras	Jul/Jun	765.0	5.8	770.8	940.0	475.4	3.3	472.1
Nicaragua	Jul/Jun	440.9	1.2	442.1	440.0	219.8	1.3	218.5
OCEANIA		455.2	0.0	455.2	463.2	73.8	0.0	73.8
Papua New Guinea	Jan/Dec	420.2	0.0	420.2	420.2	68.6	0.0	68.6
Solomon Islands	Jan/Dec	35.0	0.0	35.0	43.0	5.2	0.0	5.2
TOTAL		54 233.3	1 524.3	55 757.6	57 079.7	21 525.0	543.2	20 981.8

Source: FAO

¹ 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>² Estimates based on information as of early June 2015.

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This report is based on information available as of mid-June 2015.

Enquiries may be directed to:

Global Information and Early Warning System on Food and Agriculture (GIEWS)
Trade and Markets Division (EST)
Food and Agriculture Organization of the United Nations (FAO)
Viale delle Terme di Caracalla
00153 Rome - Italy
Direct Facsimile: 0039-06-5705-4495
E-mail: GIEWS1@fao.org

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