



Crop Prospects and Food Situation

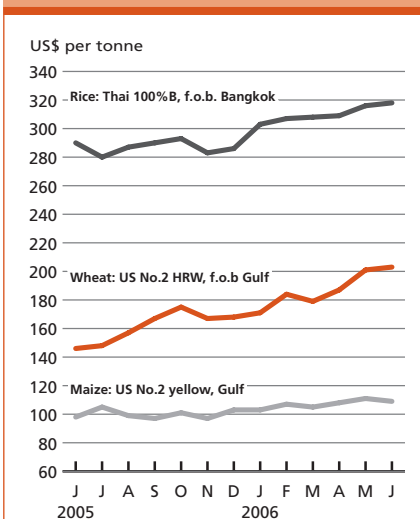
HIGHLIGHTS

- **The world cereal balance will tighten in 2006/07:** the latest forecast for cereal production in 2006 continues to show a slight decrease in global output, while utilization is expected to grow significantly. With a recovery in feed use and an expansion of industrial uses, world stocks are expected to be drawn down sharply.
- **International prices of most cereals remained firm or rose further in recent months,** supported by strong demand and tighter supply prospects.
- In the **Low-Income Food-Deficit Countries**, as a group, a modest growth in cereal output is forecast in 2006, while their imports are expected to increase after the substantial decline of 2005/06.
- In **North Africa**, cereal production recovered well from the drought-reduced crop of 2005.
- In the eastern part of the **Sahel**, seasonal rains are late and spotty. The situation in **Niger** warrants very close monitoring.
- In **Eastern Africa**, despite improved rains, emergency food assistance continues to be needed in pastoral areas of the **Horn** that were severely affected by drought in 2005. In **Kenya**, prospects for the current main cereal crop are favourable, but in **Somalia**, the outlook is poor and output is expected to be reduced for the third consecutive year.
- In **Southern Africa**, much improved coarse grain harvests were gathered in most countries affected by drought last year, and total import requirements will be sharply reduced. However, output dropped sharply in **South Africa** reflecting a large reduction in plantings, and in **Angola** due to drought in major producing areas. In **Zimbabwe**, despite a significant recovery from last year, maize production remains well below requirements.
- In **Asia**, above-average or bumper wheat crops were gathered in many countries. Early prospects for the main coarse grain and rice crops are generally favourable following a timely arrival of the monsoon in the main producing areas. The **Democratic People's Republic of Korea**, however, is still facing a large cereal deficit (see box in Asia section). In **Afghanistan**, reduced precipitation this year has compromised the rainfed wheat crop.
- In **Central America and the Caribbean**, the 2006 Atlantic hurricane season started on 1 June. Early forecasts indicate that this year the season will be again very active. In **Mexico**, another good wheat crop is in prospect.
- In **South America**, harvesting of the 2006 main coarse grain crops is well advanced in southern parts. Preliminary estimates point to about-average output at the aggregate level; the sharp recovery in **Brazil** offsetting most of the reduction elsewhere.
- In **North America**, a smaller wheat crop is being harvested in the **United States** because of reduced plantings and drought. In **Europe**, prospects are mixed with several larger crops expected in the **EU** but reductions in the **Balkans** and **CIS** countries.

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Cereal export prices



Food emergencies update

In spite of a generally satisfactory global food outlook, many countries around the world are experiencing severe food difficulties and require external assistance. In **Western Africa**, although cereal production recovered sharply last year, serious localized food insecurity is reported in several countries including **Chad, Guinea, Guinea-Bissau, Mauritania**, due mostly to lack of access to food. The situation is of special concern in **Niger**: food stocks and savings are depleted, while the 2006 rainy season start is both late and spotty. In **Central Africa**, in the **Central African Republic**, the majority of the population is facing food insecurity following disruption in production and marketing activities as a result of civil strife. In **Eastern Africa**, the food situation remains precarious in pastoral areas. Despite generally improved rains in recent months, precipitation has been irregular and some areas still need to recover from the prolonged drought. Emergency food aid continues to be needed in pastoral areas of **Ethiopia, Kenya, Somalia** and **Djibouti**, even where good rains were received, given the long time needed for rebuilding herd numbers. In **Somalia**, food aid is also needed for 150 000 people affected by severe floods in Middle Juba, Lower Juba and Gedo regions. In addition, escalation of long-running conflicts in parts of the subregion continues to exacerbate the serious food situation. In **Uganda**, the humanitarian situation of 1.45 million internally displaced people remains critical as a result of the prolonged armed conflict in northern parts. The food situation is also serious in pastoral and agropastoral areas of Karamoja district. In **Sudan**, despite a recovery in last year's cereal production, food aid is required for internally displaced persons, returnees and vulnerable population as a result of past and current conflicts. In **Southern Africa**, despite a significant improvement in the recently harvested main crops compared to last year, emergency food assistance of about 500 000 tonnes of cereals in aggregate is required. In **Lesotho, Swaziland** and **Zimbabwe**, generally inadequate production, high unemployment, low purchasing power and the cumulative impact of HIV/AIDS are the main contributing factors to food insecurity. In **Zimbabwe**, continuing hyper inflation will make millions of vulnerable people food insecure during the marketing year. In **Angola**, a recent joint FAO/WFP Crop and Food Supply Assessment Mission estimated that some 800 000 vulnerable people will continue to need food aid. Due to prolonged dry spells in southern and central parts of the country, maize production has fallen sharply. Drought in southern parts of **Madagascar** has reduced food availability, and international food assistance is needed. In the **Great Lakes region** the continuing civil strife in the **Democratic Republic**

of the Congo, has affected large numbers of people who need food assistance. Food aid is also needed in **Burundi** following the reduced first season (2006A) harvest, combined with resettlement of returnees and IDPs.

In **Asia**, drought has devastated the Baluchistan and Sindh provinces of **Pakistan**, causing serious water and food shortages. In Pakistan-controlled Kashmir, some 11 000 people are at risk from landslides after heavy rains. Several provinces in **Western and North China** have experienced a prolonged drought that has affected the food security of vulnerable groups. In the **Philippines**, the long-standing internal conflict in the southern island of Mindanao has resulted in a precarious food situation and dire living conditions in the areas concerned. Renewed fighting in early July has displaced at least 32 000 people. In **Nepal**, food aid is being provided to some 225 000 people in the central and western parts of the country, affected by severe drought during the 2005/06 winter. Over 1 million people in the Yogyakarta and central Java provinces of **Indonesia** became homeless after the severe earthquake of 27 May 2006. The food security situation in **Timor-Leste** is significantly affected by recent civil unrest, which displaced some 15 percent of the country's total population. Food aid is still needed in **Mongolia** after several years of unfavourable winter conditions and summer drought. Despite another relatively good production expected in 2006 in the **Democratic People's Republic of Korea**, the country still needs to import large amounts of cereals, and chronic food insecurity is likely to remain widespread. In **Afghanistan**, many vulnerable households, returning refugees, internally displaced persons and female-headed households continue to require food assistance as a result of the persistent civil conflict. Food aid is also needed for households affected by a drought-reduced crop this year.

In **Central America**, food aid is being provided to households affected by a series of natural disasters in **El Salvador, Guatemala, Honduras** and **Nicaragua**. In **Haiti**, emergency food aid is required for the population in the drought-prone North-West region and in the capital city as a result of insecurity and civil strife. In **South America**, situations of localized food insecurity are reported in some areas of **Bolivia, Colombia** and **Ecuador** following intense precipitations at the beginning of the year causing severe flooding with losses of food and cash crops. In **Europe**, in the **Russian Federation** civil strife and military operation in Chechnya continue to take its toll on the population at large. Thousands of internally displaced persons and refugees in the neighbouring states continue to require emergency assistance.

Global cereal supply and demand brief

World cereal balance to become tighter in 2006/07

Latest indications point to a tightening of the overall cereal supply/demand situation in the new 2006/07 marketing season. Cereal production in 2006 is forecast to decrease slightly, which coupled with an anticipated stronger growth in total cereal utilization, driven by a recovery in feed use and continued expansion in industrial use, would imply a sharp drawdown in stocks. With prospects for world trade in 2006/07 to stay at around the same high level as in the previous season, international prices of most cereals are likely to remain strong in the new season.

Cereal production to decrease slightly again in 2006

As the 2006 cereal seasons progress around the globe, latest data continue to point to a slight decrease in world cereal production to 2 020 million tonnes, about 1 percent or 18 million tonnes below the latest estimate of output in the previous year. However, at this level, world cereal output would still be the third highest on record, and above the five-year average.

FAO now forecasts world wheat output in 2006 at about 615 million tonnes, 1.5 percent down from 2005. This represents the second consecutive decline after the record crop of almost 632 million tonnes in 2004, but an output still well above the average of the past five years. The bulk of the reduction this year is expected in the United States, the Russian Federation and Ukraine. These decreases, along with several smaller reductions expected in such other important wheat producers as Canada, India, Pakistan and Romania, would more than offset the increases that are expected this year. The main producers where larger crops are expected

in 2006, include Argentina, China, the EU and North Africa, mostly due to more favourable climatic conditions than for the previous season.

World production of coarse grains in 2006 is now forecast by FAO at about 980 million tonnes, down 1.3 percent from 2005 but still above the average of the past five years. Latest estimates confirm significantly smaller outputs in two major producing countries in the southern hemisphere – namely Argentina and South Africa - where crops have

already been harvested. However, the bulk of this year's decrease is expected to be accounted for by the United States, where the forecast is tentative as crops are still some way off harvesting, but the planted area is estimated to have been reduced by 4 percent in favour of less input-intensive crops, such as soybeans. The overall decrease in global output this year comes despite increased production in some other major producing countries, including Brazil, Mexico and several main producers in Asia, Europe and North Africa.

The ongoing 2006 paddy season is already well-advanced in countries located south of or along the equator, as some had already harvested their main paddy crop by May. Among northern hemisphere countries, the main 2006 crops are still at

Table 1: World cereal¹ production (million tonnes)

	2005 estimate	2006 forecast	Change: 2006 over 2005 (%)
Asia	885.4	898.0	1.4
Far East	775.4	787.5	1.6
Near East in Asia	72.0	73.1	1.6
CIS in Asia	28.5	28.6	0.3
Africa	128.8	125.2	-2.8
North Africa	30.3	35.1	16.0
Western Africa	42.9	41.0	-4.4
Central Africa	3.5	3.5	1.4
Eastern Africa	29.1	25.7	-11.9
Southern Africa	23.0	19.9	-13.5
Central America & Caribbean	34.8	37.3	7.1
South America	109.6	109.1	-0.4
North America	416.5	390.3	-6.3
Europe	422.5	423.4	0.2
EU 25	259.3	268.4	3.5
CIS in Europe	122.3	116.4	-4.8
Oceania	40.7	37.1	-8.8
World	2 038.4	2 020.5	-0.9
Developing countries	1 106.4	1 123.8	1.6
Developed countries	932.0	896.8	-3.8
- wheat	624.4	614.9	-1.5
- coarse grains	992.7	980.0	-1.3
- rice (milled)	421.3	425.6	1.0

¹Includes rice in milled terms.

Note: Totals computed from unrounded data.

the development stage in parts of Asia and Africa, Europe and North America, but are barely at the planting stage in major producing countries in Asia where the development of the season largely depends on the pattern of the monsoon. This represents a major element of uncertainty in the 2006 production outlook that will persist at least until August, when the timing and distribution of the monsoon rains will be clearer. Although still tentative, the FAO current forecast for global rice production in 2006 stands at about 426 million tonnes (milled terms). This would be a new record level, but at just 1 percent up from 2005, would represent a significant slow-down in the growth in production compared to that of the past three years, reflecting concerns over rising production costs and expectations of a return to normal growing conditions after the previous year's particularly favourable season. For those southern hemisphere countries where the 2006 season is fairly advanced, production is estimated to increase in Argentina, Australia, Indonesia and Madagascar. However, most of the expected growth in global production is

likely to originate in the major producing countries north of the Equator, especially Bangladesh and China.

Higher feed use to boost total cereal utilization in 2006/07

Based on current production forecasts for 2006 and total supply and price prospects for the 2006/07 marketing seasons, world cereal utilization is forecast at 2 062 million tonnes, up 1.6 percent from the estimated total utilization in 2005/06. At this level, world per caput food consumption of cereals is seen to remain nearly unchanged at around 152kg with a slight decline in the LIFDCs, to just below 157kg. In China, food consumption of wheat and rice continues to decline.

World wheat utilization is likely to increase marginally in 2006/07 to 627 million tonnes. The increase in total wheat utilization is less significant than in 2005/06 because of higher wheat prices and smaller supplies of feed wheat in world markets. In contrast, world coarse grain utilization in 2006/07 is forecast at 1 014 million tonnes, up 2.8 percent from 2005/06. The expansion is anticipated to

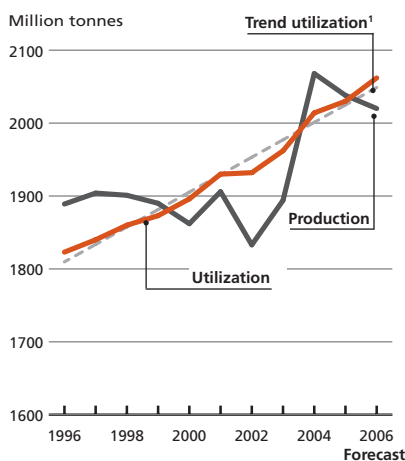
be stronger than in 2005/06 when a drop in animal feed usage slowed the overall growth in total utilization. Assuming a rebound in poultry consumption and lower feed wheat supplies, feed use of coarse grains is forecast to rebound in 2006/07, to 624 million tonnes. In addition, the growing demand for ethanol is likely to boost industrial use of coarse grains (mainly maize) again in 2006/07, especially in the United States and in China. Total use of rice, predominantly used as food, is also forecast to increase by 0.5 percent. The food consumption of rice is forecast at 371 million tonnes, up 0.8 percent from 2005/06.

Sharp drop in world cereal stocks in 2007

Taking into account the new season's production and consumption prospects, world cereal stocks by the close of seasons ending in 2007 are forecast at just 417 million tonnes, down 45 million tonnes, or 10 percent, from the start of the season. At this level, the ratio of world cereal stocks to expected utilization in the following season is forecast to drop to 20 percent, down from the estimated 22.5 percent in 2005/06. This anticipated drop in world inventories is driven by likely reductions in wheat and coarse grains stocks, while rice carryovers could increase slightly.

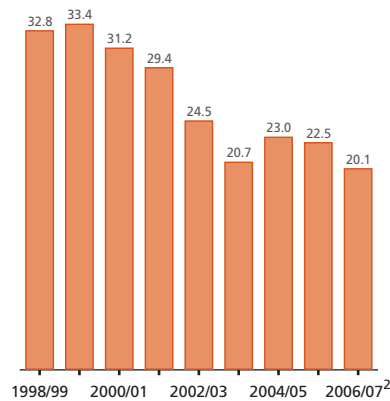
World wheat stocks are forecast to fall to 160 million tonnes, 10 million tonnes, or 6 percent, below the opening inventories. At this level, the global wheat stocks-to-use ratio is likely to be the lowest in three decades, at about 25 percent. Smaller inventories in major exporting countries as well as in the CIS account for most of the anticipated contraction in world wheat reserves. World coarse grain stocks by the end of national crop seasons in 2007 are also forecast to decline sharply, to 151 million tonnes. This represents a decline of some 38 million tonnes or over 20 percent. Most of the decrease is likely to occur in the United States where production is forecast to decline while domestic demand

Figure 1. World cereal production and utilization (rice in milled terms)



¹ The utilization trend is based on the 1996/97-2005/06 period.

Figure 2. World cereal stock-to-utilization ratio¹ (percentage)



¹ Compares closing stocks with utilization in the following season.

² Utilization in 2007/08 is a trend value based on extrapolation from the 1996/97-2005/06 period.

and exports are expected to increase. At this level, the world stocks-to-use ratio for coarse grains is likely to approach a record low of around 15 percent. On the contrary, preliminary forecasts for closing rice inventories by the end of the seasons in 2007 point to a continuation of the stock rebuilding process initiated in 2005, with inventories increasing to 106 million tonnes, up almost 4 percent. Most of this increase is expected in China and, to a lesser extent, in Thailand.

World cereal trade to change little in 2006/07

World cereal trade in 2006/07 is currently forecast to reach 243 million tonnes, close to the current estimate for 2005/06. Among the individual cereals, world trade in wheat is expected to increase marginally, to 110 million tonnes, whereas for coarse grains and rice, trade may decline slightly, to 105 million tonnes and 28.2 million tonnes respectively.

In spite of good production prospects envisaged by several wheat importing countries, especially in North Africa, several countries are likely to increase their wheat imports in the new season. One of the largest expansions is forecast for India where opening stocks are low. Several countries in sub-Saharan Africa are also likely to increase their wheat imports, namely Ethiopia, because of expected lower domestic production, and Nigeria, because of strong demand by the milling sector. Regarding exports, sales from major exporting countries are likely to increase following a general recovery in their supplies but a sharp decline in production is expected to curb exports from Bulgaria, the Russian Federation and Ukraine.

Based on the current production and utilization indications, world trade in coarse grains in 2006/07 (July/June) is seen to decrease slightly despite higher imports by several countries. Lower imports are anticipated especially in North Africa, Zambia and Zimbabwe, mostly as result of improved domestic crops. Smaller

imports are also forecast for Brazil because of larger domestic production. In contrast, strong demand and tighter feed wheat supplies are expected to drive up imports

by China, the Philippines and Canada. On the export side, sales from the United States, the world's largest exporter, are expected to increase, supported by

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

	2004/05	2005/06	2006/07	Change: 2006/07 over 2005/06 (%)
PRODUCTION¹	2 067.6	2 038.4	2 020.5	-0.9
wheat	632.1	624.4	614.9	-1.5
coarse grains	1 027.1	992.7	980.0	-1.3
rice (milled)	408.5	421.3	425.6	1.0
SUPPLY²	2 480.1	2 504.8	2 481.7	-1.0
wheat	792.3	797.9	785.3	-1.6
coarse grains	1 174.0	1 186.3	1 169.0	-1.5
rice	513.8	520.6	527.9	1.4
UTILIZATION	2 014.4	2 030.5	2 062.0	1.6
wheat	619.5	625.3	627.0	0.3
coarse grains	979.9	986.7	1 014.4	2.8
rice	415.1	418.5	420.6	0.5
Per caput cereal food use (<i>kg per year</i>)	151.9	152.6	152.2	-0.3
TRADE³	243.9	243.5	243.2	-0.1
wheat	110.3	109.7	110.0	0.3
coarse grains	104.1	105.3	105.0	-0.3
rice	29.4	28.5	28.2	-1.1
END OF SEASON STOCKS⁴	466.4	461.7	416.7	-9.8
wheat	173.5	170.4	160.0	-6.1
- main exporters ⁵	38.6	56.1	54.7	-2.5
coarse grains	193.6	189.0	150.6	-20.3
- main exporters ⁵	48.3	93.1	97.1	4.4
rice	99.3	102.3	106.1	3.7
- main exporters ⁵	68.6	66.6	67.2	0.8

Low-Income Food-Deficit Countries⁵

Cereal production¹	812.8	849.0	861.8	1.5
<i>excluding China and India</i>	265.6	288.0	290.9	1.0
Utilization	897.7	1 076.3	1 081.7	0.5
Food use	639.0	651.3	657.5	1.0
<i>excluding China and India</i>	259.4	268.9	271.8	1.1
Per caput cereal food use (<i>kg per year</i>)	156.6	157.3	156.6	-0.5
<i>excluding China and India</i>	154.5	157.1	155.7	-0.9
Feed	160.2	162.9	162.7	-0.1
<i>excluding China and India</i>	41.4	43.6	42.8	-1.9
End of season stocks⁴	227.7	226.7	229.3	1.2
<i>excluding China and India</i>	48.1	51.9	52.2	0.6

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

² Production plus opening stocks.

³ 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.

⁴ May not equal the difference between supply and utilization because of differences in individual country marketing years.

⁵ For definition see notes on back cover.

continuing large supplies in spite of strong demand from its own domestic feed and ethanol sectors. In contrast, exportable supplies are likely to be more limited in several other countries, most notably in Argentina, Canada, China, South Africa, the Russian Federation and Ukraine.

While world trade in rice in calendar year 2006 is expected to contract by about 3 percent, it would still be the second highest on record. For 2007, international trade is tentatively forecast to decline slightly. Lower shipments to Africa are mostly responsible for the expected contraction in world trade in 2006, with Nigeria accounting for most of that reduction, reflecting this year's ban on milled rice imports. In Asia, aggregate imports are seen to remain unchanged as declines in some countries would be offset by possible increases in purchases by others, most notably by China, the Islamic Republic of Iran, and Iraq. Some increases in imports are expected in Latin America and the Caribbean, such as in Brazil because of production shortfalls. Regarding exports, Australia, Argentina and China are seen

to increase their sales this year, while Viet Nam's shipments are forecast to remain close to the Government target of 5.2 million tonnes given the prevailing tight domestic situation.

Prices to remain generally strong

International prices of most cereals have remained firm since the last report in April and further gains in prices seem likely considering the prospects for tighter supplies. The outlook for lower cereal stocks is also likely to provide support to prices in the new season.

In spite of some declines in recent weeks, the United States hard wheat export prices in June were up by about US\$56, or nearly 39 percent, from the same period last year. While harvesting pressure may result in some declines in international wheat prices in the coming months, the overall tighter supply outlook is likely to support prices in the new season. Similarly, for coarse grains, prices are expected to remain firm or even rise as a result of several factors; including high

energy prices and the continued strong demand for maize-based ethanol, a likely rebound in feed utilization, reduced global production and consequently smaller inventory prospects. Lower production in Argentina and South Africa and a decline in exports from China are also seen as supportive to coarse grain prices. In June, the United States maize export price (US No.2 Yellow) averaged US\$109 per tonne, up US\$11 from a year ago. Lower supplies have also pushed up Argentine prices, to US\$107, US\$16 more than in the previous year, while, in South Africa, tighter availabilities have led to more price gains in recent weeks. International rice prices have also been buoyant in recent months. The FAO rice price index rose to 108 in June, up 7 points from last year. Strong demand (specially for high quality rice) and a tightening of export availabilities in several major exporting countries that contributed to higher prices in recent months are likely to prevail at least until September/October when several northern hemisphere countries will start harvesting their main crops.

Low-Income Food-Deficit Countries' food situation overview

Small improvement in 2006 cereal production in LIFDC's

In the Low-Income Food-Deficit Countries (LIFDC's) the 2006 cereal seasons are at different stages, with crops already harvested in some regions but still to be planted in others. The overall outlook is favourable and FAO's provisional forecast of the LIFDC's aggregate cereal production in 2006 points to an increase of about 1.5 percent to 861.8 million tonnes. This represents a slowdown from the growth of over 4 percent in the previous year. Most of the expected increase comes from Asian countries, in particular

China where production is expanding following the Government's support policies and higher prices. When China and India are excluded, the expansion in aggregate production of the rest of LIFDC's is somewhat more modest at just 1 percent, compared to a significant growth of 8 percent in 2005. In Africa, harvest of the 2006 main season cereal crops has been completed in North and Southern Africa and outputs are estimated at record levels, fully recovering from the drought-affected crops of 2005. This improvement is likely to be offset by expected declines in Western and

Eastern Africa, where crops are harvested later in the year and yields are assumed to drop from last year's exceptional levels. In the CIS countries of Asia, another bumper cereal harvest is expected this year. In South America, a reduced cereal production is anticipated in Ecuador, the only LIFDC of the subregion, due to severe floods during the growing season. In Central America, planting of the 2006 main cereal crops has started under generally favourable growing conditions.

Cereal imports forecast to increase in 2006/07

Early forecasts of total cereal imports by the LIFDC's in 2006/07 indicate an increase of 2 to 3 percent from the previous season. This mainly reflects higher anticipated imports by India (Figures 3 and 4), where some 4 million tonnes of wheat

are expected to be imported to replenish stocks following a reduced harvest in 2005 and low levels of opening inventories. By contrast, cereal imports (including food aid) are likely to decline sharply in Southern Africa, where much improved harvests have been gathered and export surpluses are estimated in some countries. In North Africa, imports are forecast to decline sharply in Morocco, where this year's production is estimated to be double the drought-reduced level of 2005.

Slow progress in 2005/06 food aid allocations

In Eastern, Western and Central Africa countries still in marketing year 2005/06, food aid distributions/pledges as of June 2006 remain well below the estimated requirements. In Eastern Africa, some 41 percent of the food aid needs remain uncovered, against 50 percent at the time of the previous report in April. Despite recent improved rains, food assistance is still needed for large numbers of the population in drought-affected pastoral areas of the subregion, as well as for the victims of past and renewed civil conflicts. More donors' pledges are also required for vulnerable populations in Western Africa, where 35 percent of the food aid requirements are still uncovered, particularly in Coastal countries. In the Far East, in the Democratic People's Republic of Korea, most of the cereal imports in recent years have been in the form of food aid for chronically vulnerable people. However, against 2005/06 (November/October) estimated import requirements of 800 000 tonnes, distributions/pledges as of June 2006 amounted to only 392 000 tonnes.

With the 2005/06 marketing seasons just finished in several regions, including North Africa, Southern Africa, CIS in Asia, Near East, Central and South America and in most countries in Far East, the aggregate cereal imports of the 82 Low-Income Food-Deficit countries amount to 58.8 million tonnes, or 68 percent of the estimated requirements. This estimate

takes into account reports on exports from major exporters until April/May, and food aid pledges by donors as of June 2006.

Actual cereal imports in 2005/06 may prove to be higher once full information on deliveries becomes available.

Figure 3. India: from large exporter to large importer of wheat

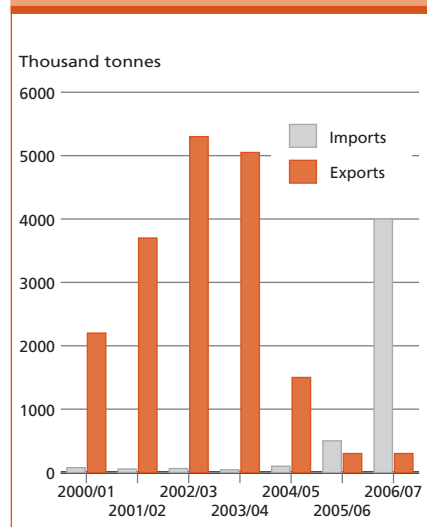


Figure 4. India: wheat stocks have declined sharply in past years

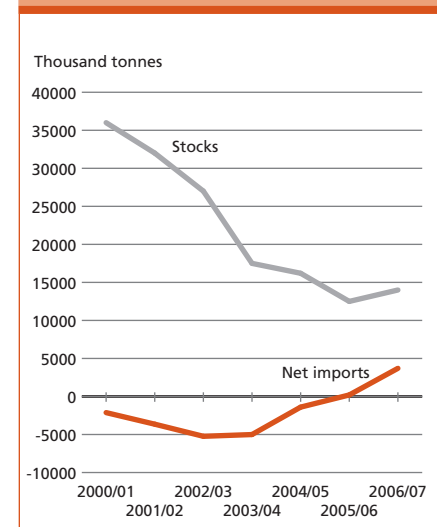


Table 3. Cereal import position of the Low-Income Food-Deficit Countries (000 tonnes)¹

	2004/05 Actual imports	2005/06			
		Requirements ²		Import position ³	
		Total imports:	of which food aid	Total imports:	of which food aid
Africa (44)	40 685	40 082	3 181	24 576	2 188
North Africa	16 788	17 119	5	13 825	5
Eastern Africa	6 724	6 253	1 804	3 172	1 063
Southern Africa	3 403	4 330	708	4 330	708
Western Africa	12 168	10 827	590	2 889	385
Central Africa	1 602	1 554	74	361	27
Asia (25)	50 122	41 536	1 633	30 962	928
CIS in Asia	3 100	2 627	190	2 234	61
Far East	35 654	28 239	1 327	21 322	790
Near East	11 368	10 670	116	7 405	77
Central America (3)	1 677	1 773	257	1 429	307
South America (1)	944	926	50	914	17
Oceania (6)	407	416	0	47	0
Europe (3)	1 572	1 685	20	887	1
Total (82)	95 407	86 417	5 141	58 815	3 442

¹ For more details see Table A1 in the Statistical appendix.

² For definition of **import requirements** see terminology on back cover.

³ Estimates based on information available as of June 2006.

Regional reviews

Africa

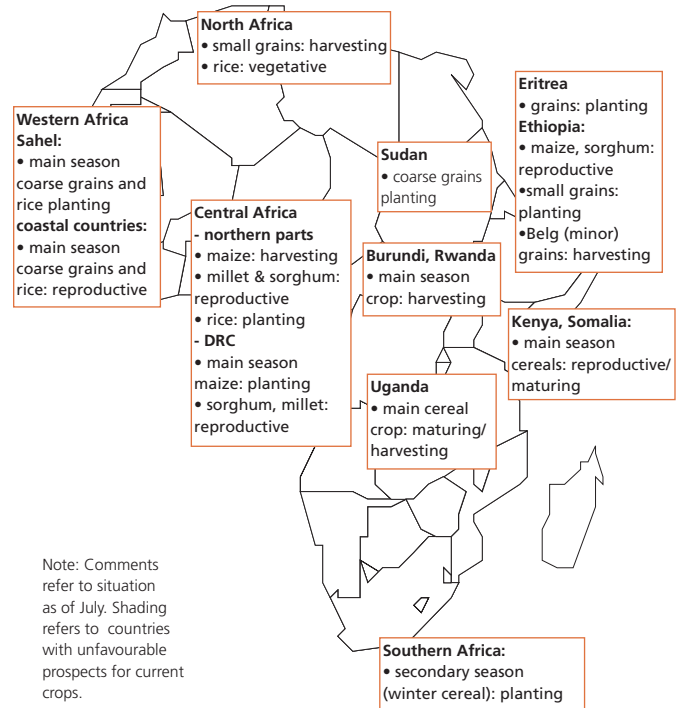
North Africa

Harvesting of the winter grains (mainly wheat and barley), which make up the bulk of the subregion's cereal crop, is underway. Prospects are very favourable for 2006 cereal production, except in Tunisia. Following above-average precipitation throughout the season across most of the subregion, FAO forecasts the aggregate output of wheat in North Africa at 18.5 million tonnes, 21 percent up from the previous year's drought-reduced level, while that of barley is put at 4.5 million tonnes, an increase of almost 56 percent, both results being well above the recent average. In **Egypt**, the largest producer in the subregion, the area sown to wheat, which is the most profitable winter crop, is officially estimated to have expanded again last autumn, and output is expected to rise further from the bumper level of almost 8.2 million tonnes already achieved in 2005. In **Morocco**, output of wheat, the main cereal, is officially estimated at a record of 6.1 million tonnes, nearly 50 percent above the average of the past 5 years and twice the level of the 2005 drought-affected crop. This is due to government policy to encourage investment in agriculture, in particular, increased subsidies to farmers to expand mechanization and use of high quality seeds, in addition to the exceptionally favourable weather conditions. In **Tunisia**, by contrast, below-normal and poor distribution of rainfall in March and April, seriously affected wheat and barley yields.

Western Africa

In the Sahel region, the start of the rainy season has been erratic with below-average rains recorded in several countries in June. In **Burkina Faso**, **Mali** and **Niger**, plantings have been delayed in several areas and emerging crops will suffer water stress if rains do not improve in July. By contrast, in the southern part of coastal countries of the Gulf of Guinea, rains have been regular and widespread since the beginning of the main season in April and prospects for the first maize crop, to be harvested from August, are good in most countries.

In spite of an overall satisfactory food supply situation in the region, following a sharp recovery of cereal production in 2005 from the previous year's drought and locust-affected harvest, serious localized food insecurity is reported to persist in several countries. In **Guinea-Bissau** a failure of the 2005 rice crop in the southern regions of Quinara and Tombali, combined with market disruption in the cashew sector, the source of cash income for rural households, led to severe food difficulties. In **Niger**, both



food and cash reserves have become exhausted for the majority of families, food consumption has been sharply cut back, and sale of livestock and other few remaining assets has resumed. Unless 2006-2007 is a second very good year in a row, there may be a deep and generalized food crisis. In **Mauritania**, the hunger period reportedly came early this year for thousands of households due to localized insufficient cereal production in 2005 and a lack of income. In **Guinea**, the price of rice - the staple food for Guineans - has more than doubled over the past two years following a large depreciation of the Guinea Franc. Petrol prices also rose steeply in recent months, fuelling inflation and seriously eroding the purchasing power of, and access to food by, urban and rural populations. In **Chad**, insecurity in recent weeks has severely constrained humanitarian access to the Sudanese refugees who are living in the eastern part of the country. In these countries, vulnerable groups need to be continuously monitored and assisted during the lean season.

Central Africa

In **Cameroon** and the **Central African Republic**, where rains have been abundant and widespread since the beginning of the cropping season in April, harvesting of the first 2006 maize crop is about to start. In the latter country, however, agricultural recovery and food security continue to be hampered by persistent insecurity and inadequate availability of agricultural inputs, notably in northern parts. In the **Democratic Republic of the Congo**, June weather conditions were unfavourable for development of the recently planted sorghum and millet, and for the main maize crop planting in the north and centre of the country. Moreover,

security problems continue to cause food insecurity, especially in the eastern and north-eastern provinces.

Eastern Africa

In eastern Africa, harvesting of the 2006 main season cereal crops is about to start in southern parts, while in northern parts crops are in the early stages of development or still being planted. In pastoral areas, despite generally improved rainfall from February to May, precipitation has been irregular dimming earlier optimism of a strong recovery from the impact of the recent severe drought in the subregion. In addition, escalation of long-running conflicts in parts of the subregion continues to exacerbate the difficult food situation. In **Eritrea**, planting of the 2006 cereal and pulse crops has just started. Recent rains have helped land preparation and water replenishment in some areas of the country, but more rains are required in main growing zones. In pastoral areas, the spring (short) rains from March to May were generally beneficial for regeneration of pastures, but precipitation has been inadequate in localized areas. In **Ethiopia**, good rains from March have improved prospects for the 2006 secondary "belg" grain crops, being harvested, in several parts of the country. The belg crop accounts for some 10 percent of annual grain output at the national level, but in some areas it provides most of the annual grain production. The good rains have also helped land preparation for the main "meher" season crops and improved pasture conditions in parts of the lowland areas of the south

and south-east and in the pastoral Afar region, which suffered severe drought in 2005 and earlier in 2006. However, inadequate rainfall in the drought-affected south-eastern parts of the country is a cause for concern. In **Kenya**, the 2006 long-rains have been adequate in the main growing areas of the Rift Valley and overall prospects for the cereal harvest are favourable. Official forecasts point to a good 2006 maize crop. The overall food supply situation has improved considerably following good short-rains harvests and improved pasture in most pastoral districts. However, localized areas in the eastern and northern parts have yet to recover with only scant rainfall received so far. The food security situation in pastoral areas continues to be serious, as herds need to be rebuilt following several months of pasture and water shortages. In **Somalia**, prospects for the 2006 main "gu" cereal crops, for harvest from August, are poor due to insufficient rains. This would lead to the third consecutive year of below-average production. Despite some heavy rains at the beginning of the season, large areas in Gedo, Bakol and Hiran and parts of Bay, Lower Shabelle, Lower and Middle Juba, Galgadud, Togdeer, Sool, Sanaag, and Bari received below-normal rains. In **Sudan**, estimates of the recently harvested 2006 wheat crop indicate an output of 414 000 tonnes, about 14 percent above the five-year average. The 2005 total cereal production, estimated at about 5.5 million tonnes, was also above the average of the last five years. In **Tanzania, U.R.**, harvesting of the 2006/07 main season maize crop is well underway in uni-modal central and

Table 4. Africa cereal production (million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total Cereals		
	2004	2005 estim.	2006 f'cast	2004	2005 estim.	2006 f'cast	2004	2005 estim.	2006 f'cast	2004	2005 estim.	2006 f'cast
Africa	22.3	21.0	23.6	81.9	94.2	87.6	19.4	20.8	21.5	123.6	136.0	132.7
North Africa	17.2	15.3	18.5	12.9	10.7	12.3	6.4	6.2	6.2	36.5	32.2	37.0
Egypt	7.2	8.2	8.3	7.8	7.7	7.8	6.4	6.1	6.2	21.3	22.0	22.3
Morocco	5.5	3.0	6.1	3.0	1.3	2.7	-	-	-	8.6	4.3	8.8
Western Africa	0.1	0.1	0.1	28.0	37.1	34.9	8.1	9.2	9.8	36.1	46.4	44.7
Nigeria	0.1	0.1	0.1	13.7	19.6	17.9	3.5	4.2	4.8	17.3	23.9	22.8
Central Africa	-	-	-	2.9	3.2	3.2	0.4	0.4	0.4	3.3	3.6	3.6
Eastern Africa	3.2	3.3	2.8	20.4	24.9	22.0	1.2	1.4	1.3	24.8	29.6	26.1
Ethiopia	2.2	2.4	1.9	7.9	9.3	8.4	-	-	-	10.0	11.7	10.3
Sudan	0.4	0.4	0.4	3.1	5.0	4.3	-	-	-	3.5	5.5	4.8
Southern Africa	1.9	2.2	2.2	17.7	18.4	15.2	3.3	3.6	3.8	22.9	24.2	21.2
Madagascar	-	-	-	0.4	0.4	0.3	3.0	3.4	3.5	3.4	3.8	3.8
South Africa	1.7	1.9	1.9	10.3	12.3	6.7	-	-	-	12.0	14.2	8.6
Zimbabwe	0.1	0.1	0.1	1.1	0.7	1.3	-	-	-	1.2	0.8	1.5

Note: Totals computed from unrounded data.

western regions, while in the grain-basket southern highlands, harvesting is expected to start in August. Seasonal rains were delayed by up to 40 days across much of Tanzania, limiting the crop growth cycle and negatively affecting yield prospects. Earlier, the 2005/06 short "vuli" season crops in the bi-modal rainfall northern areas failed due to severe drought conditions. Normally, the vuli crop accounts for about 30 percent of annual production of the bimodal areas. In pastoral areas recent rains have generally improved pasture conditions, but in northern and central parts precipitation has been insufficient. In **Uganda**, prospects for the 2006 main season cereal crops have generally improved due to well distributed rainfall. In the Great Lakes, in **Burundi** and **Rwanda**, the 2006A season harvest earlier in the year was reduced but prospects for the main season (2006B) cereal and other food crops are favourable, improving the food outlook for the second part of the year.

Southern Africa

In Southern Africa, harvest of 2006 main season coarse grain crops is complete. Growing conditions were generally favourable throughout the season and production recovered from last year's drought-reduced levels in most countries. However, in **South Africa**, by far the largest producer of the subregion, which did not suffer from the drought last year, output fell sharply as a result of reduced plantings. Thus, despite good crops elsewhere,

Table 5. Southern Africa maize production
(000 tonnes)

	2001-05 av.	2005 estim.	2006 prelim. est.	2006 over 2005 (%)	2006 over av. (%)
Southern Africa	15 501	17 047	13 827	81	89
Southern Africa excl. South Africa	5 705	5 331	7 512	141	132
Increase from 2005					
Botswana	7	3	12	400	171
Malawi	1 623	1 253	2 350	188	145
Mozambique	1 289	1 382	1 534	111	119
Namibia	33	41	52	127	156
Swaziland	72	60	67	112	93
Zambia	928	866	1424	164	153
Zimbabwe	844	550	1100	200	130
No significant change from 2005					
Lesotho	93	92	95	103	102
Decrease from 2005					
Angola	542	734	579	79	107
Madagascar	274	350	300	86	109
South Africa	9 796	11 716	6 315	54	64

the subregion's aggregate 2006 coarse grain output is estimated by FAO at 15.2 million tonnes, about 17 percent down from 2005 (Table 4). Excluding South Africa, the total maize harvest this year for the subregion is estimated at 7.5 million tonnes, 41 percent above the previous year (Table 5 and Figure 5). Apart from the generally favourable rains during the growing season, subsidized fertilizer distributions in some countries (for example in Malawi and Zambia) were also an important contributing factor to this outcome. Based on the results of the coarse grain harvest and the early outlook for the winter crops to be harvested later this year (mostly wheat in South Africa), total cereal output in the subregion in 2006 is now forecast at 21.2 million tonnes, 12 percent down from 2005.

In **South Africa**, the total area planted area under maize and sorghum for the 2005/06 agricultural season declined sharply by

Figure 5. Southern Africa cereal production

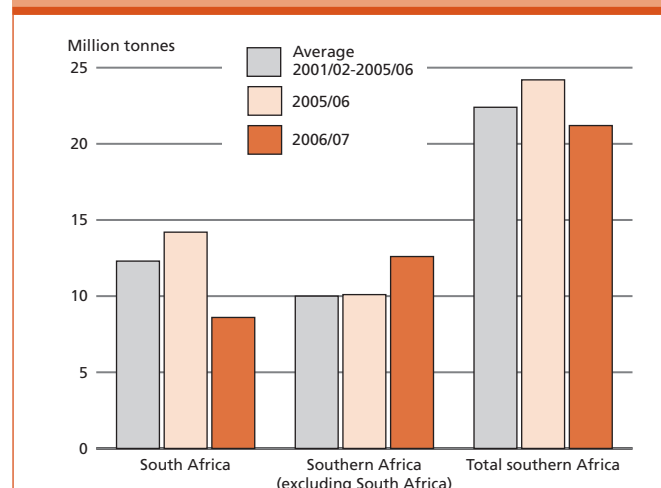
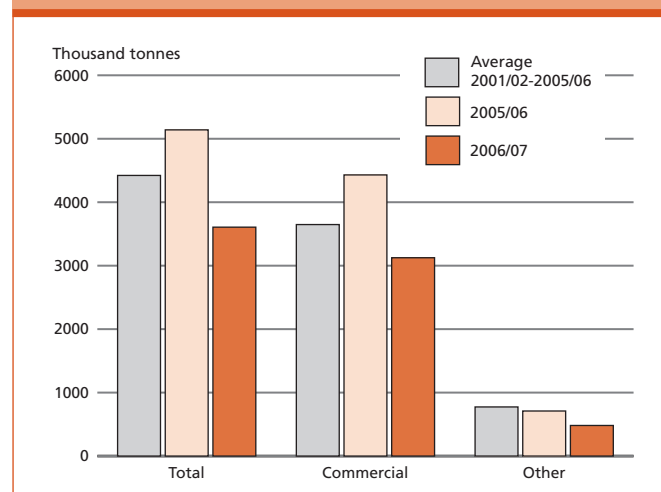


Figure 6. Southern Africa (excluding South Africa) cereal imports: average, 2005/06 estimate and forecast requirements for 2006/07



about 40 and 60 percent respectively, largely reflecting low and unprofitable prices at planting time and high levels of closing stocks at the end of 2005/06 marketing year (May/April) (nearly 4 million tonnes). Consequently, the 2006 maize production is officially estimated at 6.3 million tonnes, down 5.4 million tonnes from 2005. Cereal output decreased also in **Angola**, due to erratic rains and long dry spells that particularly affected the central and southwestern provinces. Maize production is estimated at about 579 000 tonnes, some 21 percent below last year's bumper harvest. In **Lesotho**, the total cereal harvest remained at the reduced level of last year due to some frost damage and uneven distribution of precipitation. Elsewhere in the subregion, bumper harvests were gathered. In **Zimbabwe**, despite a significant recovery from last year, maize production remains well below requirements.

Reflecting this year's good crops in most countries, the aggregate cereal import requirement of the subregion for the 2006/07 marketing year (April/March in most cases) is estimated to go down by about 1 million tonnes from the previous year to about 6.4 million tonnes (Figure 6). If South Africa is excluded, the reduction in the total cereal import requirements of the subregion is more marked, declining from 5.1 million tonnes to 3.6 million tonnes. Food assistance needs in 2006/07 are also projected to decrease to under 500 000 tonnes, well below the five average level of nearly 800 000 tonnes.

In the countries where production recovered, maize and other cereal prices have declined sharply since the beginning of the new harvest in April to normal post-harvest lows, resulting in an improvement in food security for the majority of food-deficit households. In **Zimbabwe**, however, the sky-rocketing prices, with inflation officially estimated at an unprecedented level of 1 194 percent in May 2006, continue to severely hamper access to food for large numbers of vulnerable people.

In **South Africa**, contrary to the usual post-harvest trend, the SAFEX export price of white maize has been firming up in recent months. By July 2006, prices, that have increased steadily since planting time last November/December 2005, reached Rand 1 340 per tonne, an increase of 62 percent from the corresponding level a year ago (Table 6). This reflects tighter supplies in the country following this year's sharply reduced maize production. However, the comfortable level of carryover stocks and the improved harvests in the other countries of the subregion are likely to limit

further increases in prices. In dollar terms, the increase in SAFEX white maize prices has been eased by the recent depreciation of the Rand against the US dollar.

Overall, prospects for the regional food supply for the current marketing year look favourable. In **South Africa**, the subregion's major exporter, despite a 54 percent reduction in this year's maize harvest, an exportable surplus is still available. Supplies of white maize (for human consumption) are estimated at 6.1 million tonnes which, compared with a domestic utilization of 4.3 million tonnes, leaves a surplus of 1.8 million tonnes. Assuming the level of the strategic reserves at about 600 000 tonnes, the potential exportable surplus of white maize from South Africa is likely to be about 1.2 million tonnes, just enough to cover the needs of the other maize deficit countries in the subregion. In addition, some sizeable exportable quantities are estimated from **Zambia** (180 000 to 280 000 tonnes), **Mozambique** (150 000 to 250 000 tonnes) and **Malawi** (100 000 to 200 000 tonnes) after accounting for a build-up of stocks in each of these three countries.

AFRICA: Countries in crisis requiring external assistance and main reasons (26)

Exceptional shortfall in aggregate food production/supplies

Burundi	Civil strife, IDPs, returnees and recent dry spells
Eritrea	Drought, IDPs, returnees, high food prices
Lesotho	Multiple year droughts, HIV/AIDS impact
Somalia	Drought, civil strife
Swaziland	Multiple year droughts, HIV/AIDS impact
Zimbabwe	Deepening Economic Crisis

Widespread lack of access

Liberia	Post-conflict recovery period, IDPs
Mauritania	After effects of 2004 drought and locusts
Niger	After effects of 2004, avian influenza
Sierra Leone	Post-conflict recovery period, refugees

Severe localized food insecurity

Angola	Resettlement of returnees, adverse weather in parts
Burkina Faso	After effects of 2004 drought and locusts, avian influenza
Chad	Refugees, insecurity
Central Afr. Rep.	Recent civil strife, insecurity
Congo, Dem. Rep.	Civil strife, IDPs and refugees
Congo Rep. of	IDPs, refugees
Côte d'Ivoire	Civil strife, IDPs, avian influenza
Ethiopia	IDPs, low incomes, drought in south-eastern parts
Guinea	IDPs, refugees, high food prices
Guinea-Bissau	Floods in parts
Kenya	Drought in parts
Madagascar	Drought in parts
Mali	After effects of 2004 drought and locusts
Sudan	Civil strife, returnees, drought in parts
Tanzania, U.R.	Drought in parts
Uganda	Civil strife, IDPs

Note: For explanation of terminology see back cover.

Table 6. Safex white maize export prices

	July 2005	Dec. 2005	July 2006	Change: July 2006 over July 2005	Change: July 2006 over Dec. 2005
Rand/tonne	829	1 070	1 340	62%	25%
US\$/tonne	127	168	180	42%	7%

Asia

Far East

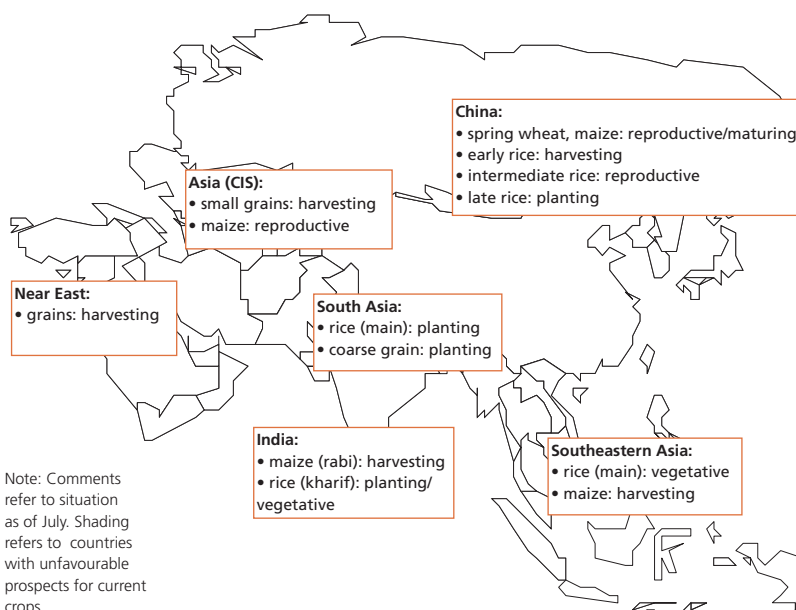
Harvesting of the 2006 main winter wheat and first rice crops is complete and land preparation and planting of the main rice and coarse grains crops have started with the timely arrival of monsoon rains. In countries around the Equatorial belt, the main rice season is well advanced. In **China (mainland)**, the 2006 winter wheat output is estimated at 95 million tonnes, some 2.8 million tonnes above last year's good crop and the highest in the past 5 years, mainly reflecting favourable weather conditions in the major producing regions. Sowing of 2006 coarse grain crops, mainly maize, is complete in the major producing regions and soil moisture availability was reported to be generally satisfactory for germination, apart from some localized areas. With the continuing recovery in production of the past three years, China's cereal imports in 2006/07 are expected to remain at the relatively low level of the previous year.

In **India**, harvesting of the 2006 wheat crop is almost complete and an above-average output of 71.5 million tonnes is estimated. This is, however, lower than earlier forecast. The Government has revised downward the estimate of the 2005 wheat output from 72 million tonnes to 68.6 million tonnes. Thus, despite the good crop just harvested, in order to replenish stocks, wheat imports in 2006/07 are expected to reach 4 million tonnes, resulting in the country changing its trade position from a large net exporter of wheat to a large net importer. The Government has recently allowed duty free imports of wheat by private traders and flour millers until the next harvest in April 2007. Sowing of the main Kharif coarse grains and rice, oilseeds

and groundnuts crops, for harvest from September, has begun. The early outlook is satisfactory but the Kharif season will still depend greatly on the rains of the southwest monsoon in the next months. Harvesting of the 2006 wheat crop is complete in the main wheat-growing provinces of **Pakistan**, with the output officially estimated at a record level of 21.7 million tonnes, reflecting increased availability of irrigation water and increased application of fertilizers and herbicides. The country is expected to import some 400 000 tonnes of wheat in 2006/07, compared to 758 000 tonnes in the previous year. In the **Philippines**, paddy production in the first half of 2006 is officially estimated at a record 6.52 million tonnes, some 8 percent above output during the same period in 2005 and 2004, reflecting favourable weather and expanded (irrigated) areas. The aggregate 2006 paddy output in **Thailand**, the world's largest rice exporter, is tentatively forecast to reach a record 30 million tonnes, 285 000 tonnes above the previous record achieved last year, reflecting attractive intervention prices and good weather so far. Output of maize in 2006 is forecast to reach an about-average 4.25 million tonnes, which would be enough to meet domestic demand in 2006/07. Harvesting of the winter/spring rice crop is underway in **Viet Nam**. A sharp increase in paddy output is expected in 2006, reflecting increased plantings and higher yields. Viet Nam, the world's second largest rice exporter after Thailand, exported around 5.2 million tonnes of rice in 2005 and a similar amount is expected in 2006. In **Mongolia**, the 2006 wheat crop is being planted. Harvesting will take place in September and output is provisionally forecast at 127 000 tonnes, which, although about average, would cover only about 33 percent of the normal domestic wheat utilization. Thus, the wheat import requirement for 2006/07 is estimated at about 256 000

tonnes. In **Timor-Leste**, the aggregate output of cereals in 2006 is expected to recover from the drought-affected level of last year and is tentatively forecast at 155 000 tonnes. The cereal (mainly rice) import requirement for 2006/07 is estimated at some 60 000 tonnes.

Despite an overall satisfactory food supply situation in the subregion, food shortages and emergencies persist, at national or subnational levels. In **Pakistan**, drought has devastated the Baluchistan and Sindh provinces, causing serious food shortages. Water levels in major reservoirs in Sindh are low after winter rain was reportedly 40 percent less than normal and the snowfall was up to 25 percent less than normal. The Government is planning to distribute subsidized wheat to the affected people. Furthermore, some 11 000 people in 30 villages around Muzaffarabad city in



Pakistan-controlled Kashmir have been prepared for evacuation because of a landslide threat but the operation was delayed by early monsoon rains. This is a part of the area affected by the massive October 2005 earthquake, which claimed over 75 000 lives and made over 3.5 million people homeless. WFP is preparing a food distribution plan for over 21 000 beneficiaries. In **China**, several provinces in western and northern parts have experienced a prolonged drought. The most affected provinces include Yunnan, Gansu, Ningxia, Inner Mongolia, Hebei and Helongjiang. The drought has had an adverse impact on the food security situation of vulnerable groups, particularly in mountain areas. In the **Philippines**, about 450 people have reportedly been evacuated from around Mount Bulusan after dangerous volcanic activity in Sorsogon province on 18 June. The farming towns of Casiguran and Juban were affected. Experts are warning of a threat of a major eruption, which could threaten about 50 000 people in six towns in the province. Also affecting the Philippines is a long-standing internal conflict since the late 1970s, which has created a precarious food situation and very dire living conditions in the affected areas in Mindanao. Clashes in the southern region of Mindanao in the first week of July displaced 16 000 people. Uncertainty about long-term prospects has deterred foreign investment, stunted rural development and disrupted agricultural marketing and food production. In **Mongolia**, unfavourable winter conditions and summer drought in the past few years have substantially depleted the coping mechanisms of pastoral households, resulting in increased food insecurity. In **Timor-Leste**, the food security situation of many urban residents remains significantly affected by recent

ASIA: Countries in crisis requiring external assistance and main reasons (9)

Widespread lack of access

Afghanistan	Civil strife, IDPs and returnees, avian influenza
Iraq	Conflict and insecurity, IDPs
Korea, DPR	Economic constraints
Mongolia	Adverse weather conditions
Nepal	Civil strife and drought
Timor-Leste	Adverse weather conditions, civil strife

Severe localized food insecurity

Indonesia	After effects of the Tsunami and earthquake
Pakistan	After effects of the Kashmir earthquake
Sri Lanka	After effects of the Tsunami, insecurity

Note: For explanation of terminology see back cover.

civil unrest; more than 145 000 people, some 15 percent of the country's total population, are reported to be displaced and in need of food and other humanitarian assistance. In **Nepal**, the armed conflict and the unstable political situation in the country also continue to disrupt the food security and livelihood of thousands of families. WFP is distributing emergency food to more than 225 000 people in the central and western parts of the country, affected by severe drought during the 2005/06 winter. Tsunami recovery and rehabilitation efforts continue in **Sri Lanka**, where the WFP will extend its operations through 2007 for some 347 000 people affected by the disaster, with a focus on long-term recovery rather than free food distributions.

Table 7. Asia cereal production (million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total Cereals		
	2004	2005 estim.	2006 f'cast	2004	2005 estim.	2006 f'cast	2004	2005 estim.	2006 f'cast	2004	2005 estim.	2006 f'cast
Asia	255.0	263.2	270.0	232.4	241.7	242.6	551.7	569.7	577.2	1039.1	1074.6	1089.7
Far East	186.7	190.1	195.9	207.5	216.3	217.2	535.8	553.1	561.2	930.0	959.6	974.3
Bangladesh	1.3	1.1	0.9	0.1	0.1	0.1	37.7	41.5	42.5	39.1	42.6	43.4
China	92.0	97.0	100.0	140.4	146.1	147.2	180.5	182.1	187.6	412.9	425.2	434.8
India	72.2	68.6	71.5	33.6	34.6	33.6	128.0	134.8	135.0	233.7	238.0	240.1
Indonesia	-	-	-	11.2	12.4	12.4	54.1	54.1	54.3	65.3	66.5	66.6
Pakistan	19.5	21.6	21.7	3.3	3.8	3.8	7.5	8.3	7.8	30.3	33.7	33.3
Thailand	-	-	-	4.4	4.4	4.5	28.5	29.9	30.2	33.0	34.3	34.7
Viet Nam	-	-	-	3.4	3.8	3.8	36.2	35.8	36.5	39.6	39.5	40.3
Near East	46.2	48.2	49.4	20.0	20.9	20.7	4.3	4.6	4.7	70.5	73.7	74.9
Iran (Islamic Republic of)	14.0	14.5	14.5	4.4	4.4	4.6	3.1	3.3	3.4	21.5	22.2	22.5
Turkey	21.0	20.2	21.0	12.6	12.8	12.6	0.5	0.5	0.6	34.1	33.6	34.2
CIS in Asia	21.1	23.8	23.7	4.6	4.3	4.5	0.7	0.6	0.7	26.4	28.7	28.8
Kazakhstan	9.9	11.5	11.5	2.4	2.2	2.3	0.3	0.3	0.3	12.6	14.0	14.1

Note: Totals computed from unrounded data.

Food supply and demand in the Democratic People's Republic of Korea

In October 2005, after four years of steady recovery in agricultural production, the Government of the Democratic People's Republic of Korea (DPRK) requested the United Nations to end all humanitarian aid, declaring that it would accept only medium and long-term development assistance. In May 2006, The World Food Programme (WFP) and the Government reached a new food aid agreement according to which WFP operations would be extended until mid-2008, although at a significantly reduced scale. Under this new programme, 150 000 tonnes of food aid are to be provided by WFP to feed 1.9 million North Koreans, compared to volumes varying from 600 000 to 1.5 million tonnes in the past 10 years for a target population of 6.5 million people. Implementation details are still being negotiated by the two parties.

2005/06 marketing year (November/October)

Since 1995, FAO and WFP have conducted Crop and Food Supply Assessment Missions (CFSAM) to the DPRK, to estimate annual cereal production and import requirements, including food aid. No CFSAM has been requested by the Government as of 2005, but based on satellite imagery interpretation, rainfall monitoring during the main growing season, fertilizer and seed supply, and availability of agricultural labour at critical periods, FAO/GIEWS analysis estimated a relatively favourable harvest last year. Total 2005 cereal production was put at some 3.9 million tonnes, including rice (milled terms), maize, wheat, and other cereals, but excluding potatoes. At this level, cereal production was up 8 percent from the previous year, assessed by the 2004 FAO/WFP CFSAM at 3.6 million tonnes, and the largest since 1995.

With the relatively high 2005 production level, the cereal deficit for the 2005/06 marketing year (November/October) was estimated at 900 000 tonnes. Against this deficit, the

country had received 292 000 tonnes of food aid by the beginning of July 2006 (including some 190 000 tonnes from China and 100 000 tonnes from South Korea). With commercial imports estimated at 100 000 tonnes, this leaves a cereal deficit of approximately 500 000 tonnes for 2005/2006. DPR Korea has reportedly requested 500 000 tonnes of food aid from South Korea, but Seoul suspended further shipments of rice to North Korea following Pyongyang's recent missile tests.

Even if the entire cereal deficit were covered, cereal per capita consumption in North Korea would remain low, at some 160 kg per caput, and below the nutritional requirements based on international standards. If the country does not somehow secure an additional 600 000 tonnes in the remainder of the marketing year, per caput cereal consumption is expected to fall by some 20 kg in 2005/06.

2006/07 marketing year (November/October)

Harvesting of the 2006 winter crops (mainly wheat, barley, and accounting for less than 10 percent of total annual production), was complete in June with an estimated output similar to last year's above average level. Planting of main crops, including rice, maize, wheat, barley and early potatoes, is complete and due for harvest from October. SPOT-Vegetation indices indicate a good start of season in June. Assuming normal weather conditions over the next two months, aggregate cereal production is tentatively forecast at 3.95 million tonnes. At current consumption levels, this would imply a cereal deficit for 2006/07 of 830 000 tonnes. Under the very optimistic scenario of a 5 percent increase on the 2005 bumper crop, 2006 cereal production could reach some 4.1 million tonnes, with a gap reduced to 720 000 tonnes.

Tsunami recovery and rehabilitation also continue in **Indonesia**. The country suffered from another earthquake with a magnitude of 6.3 on the Richter scale on May 27 2006, making over 1 million people homeless. Some 100 000 farming households in the Yogyakarta and central Jaya districts have reportedly lost their assets and source of income. In the **Democratic People's Republic of Korea**, despite expectation of another relatively good cereal production in 2006, reflecting the Government's agricultural production support policy, the country is facing a large cereal deficit, and chronic food insecurity is likely to remain widespread. The Government stopped all humanitarian aid by the United Nations on 31 December 2005 and decided to only

accept assistance addressing medium-and long-term needs. Under a Protracted Relief and Recovery Operation (PRRO), approved in February 2006, WFP is to provide 150 000 tonnes of various commodities to 1.9 million children over two years.

Near East

The outlook for winter cereal crops, being harvested, is generally favourable throughout the subregion. In **Iraq**, the overall food security situation continues to be adversely affected by conflict and security problems. According to humanitarian agencies, there are more than 1 million internally displaced people in the country. In **Afghanistan**, water stress due to reduced precipitation this

year, particularly in the areas south and west of the Hindukush mountains, has compromised some cereal crops, in particular rainfed wheat, which accounts for nearly 20 percent of the wheat production. Affected vulnerable households will require food aid over the coming year.

Asian CIS

Cereal harvesting has begun in the region and the aggregate output is forecast at about 28.8 million tonnes, slightly up on the already bumper harvest collected in 2005. The increase is mainly attributed to above-average precipitation, especially snowfall

during the winter, which provided ample water for the extensive irrigation systems in the subregion. Of the total output, wheat is forecast to account for some 23.7 million tonnes, while coarse grains would account for 4.5 million tonnes. **Kazakhstan** is the main producer in the subregion and its aggregate cereal exports during the 2006/07 (July/June) marketing year are forecast at about 4.5 million tonnes, some 400 000 tonnes up on the 2005/06. **Uzbekistan** has also exported some half-a-million tonnes of cereals annually over the past few years and is expected to do likewise in 2006/07 (July/June). Only a few years back, the country was a net cereal importer.

Latin America and the Caribbean

Central America and the Caribbean

Harvesting of the 2006 main irrigated wheat crop is well advanced in **Mexico**, virtually the sole producer in the subregion, under favourable dry weather conditions. Production is expected to be above the good level of the previous year, as a consequence of adequate availability of irrigation water in the north-west's main producing states. Planting of the 2006 first season coarse grain and bean crops has been completed in all Central American and Caribbean countries. Precipitation has been abundant since the beginning of the season. Rains have been particularly heavy in Cuba, the Dominican Republic, Guatemala, Honduras and Nicaragua, with some damage to rural housing and infrastructure, but no significant losses are reported so far to newly planted crops. The 2006 aggregate cereal area is expected to reach 13.2 million hectares, almost 1 million hectares above the previous year's level, mostly reflecting higher planting intentions for first season maize and sorghum crops in Mexico,

which are favoured by the abundant widespread rains from the southern plateau to the Yucatan peninsula. Despite the forecast increase in maize production, imports from Mexico in 2006/07 (July/June) are expected to remain at last year's high level due to increasing demand from the domestic feed industry. Assuming average yields, 2006 aggregate cereal production (wheat and coarse grains) is tentatively forecast at some 38.2 million tonnes, 2.5 million tonnes more than last year's output and above the five-year average.

In **Cuba**, harvest of 2006 sugar cane crop is virtually completed and raw sugar output is tentatively estimated at 1.2 million tonnes, further down from last year's previous record low of 1.3 million tonnes. The crisis in the sugar sector started in 2003 with the progressive reduction of area and milling capacity as a consequence of unattractive international prices. However, better prospects for prices, coupled with plans to produce ethanol for domestic use and export, have led the Government to recently revitalize the sugar industry. Following an increase in planted area, sugar cane production in 2007 is expected to increase by about 15 percent.

Table 8. Latin America and Caribbean cereal production (million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total Cereals		
	2004	2005 estim.	2006 f'cast	2004	2005 estim.	2006 f'cast	2004	2005 estim.	2006 f'cast	2004	2005 estim.	2006 f'cast
Latin America & Caribbean	27.7	23.6	24.5	108.3	103.3	105.5	25.7	26.6	25.0	161.7	153.4	154.9
Central America & Caribbean	2.4	3.0	3.1	33.5	30.2	32.5	2.4	2.5	2.6	38.3	35.7	38.2
Mexico	2.4	3.0	3.1	29.7	26.2	28.5	0.3	0.3	0.3	32.4	29.6	31.9
South America	25.3	20.6	21.4	74.8	73.1	73.0	23.3	24.1	22.4	123.4	117.7	116.7
Argentina	16.0	12.5	14.3	18.7	24.5	17.2	1.1	1.0	1.2	35.7	37.9	32.7
Brazil	5.8	4.7	4.1	44.9	37.5	44.7	12.8	13.2	11.6	63.5	55.4	60.5
Colombia	-	-	-	1.6	1.7	1.6	2.7	2.6	2.6	4.4	4.3	4.3

Note: Totals computed from unrounded data.

Food assistance from the international community continues to be delivered in **El Salvador**, **Nicaragua** and **Honduras** to most food insecure communities and in **Guatemala** to households that have been affected by hurricanes during the second half of 2005. Food aid is also distributed to vulnerable population in North, West and North-East departments of **Haiti**, as well as in the capital city, where the food situation continues to be tight despite an improved security situation since the presidential election of last February.

South America

Harvesting of the 2006 main season coarse grain and rice crops is well advanced or just completed in the main southern growing areas. Preliminary estimates put the subregion's aggregate output at about 73 million tonnes, virtually unchanged from last year's average level. While production in Brazil recovered sharply, this was mostly offset by reduced crops elsewhere. In **Brazil**, the area planted to the main season maize crop increased by about 10 percent in response to unattractive prices for soybeans and a technical need for rotation, and yields recovered from last year's drought-reduced levels. The latest official forecast for the 2006 aggregate maize production (first and second seasons) now points to a crop of about 42.4 million tonnes, 7.2 tonnes more than in 2005 and above average. The recently harvested paddy crop, accounting for some 80 percent of the subregion's aggregate output, is tentatively estimated at 11.6 million tonnes, some 1.6 million tonnes less than the 2005 record output although still average. This reflects a sharp decrease in plantings



LATIN AMERICA AND THE CARIBBEAN: Countries in crisis requiring external assistance and main reasons (3)

Widespread lack of access

Haiti Insecurity, constraints to agriculture

Severe localized food insecurity

Colombia Civil strife, IDPs

Cuba Lower planted area and yields

Note: For explanation of terminology see back cover.

in response to low domestic prices following the bumper harvest of the previous year. In **Argentina**, harvesting of maize crop is almost completed and preliminary official estimates point to a production of 14 million tonnes, well below the record of 20.5 million tonnes obtained in 2005. Plantings were reduced by 10 percent in response to low prices, higher production costs and higher export taxes, while yields were reduced by prolonged mid-season dry weather. In **Uruguay**, the 2006 maize production is expected to decrease substantially from last year's level of 251 000 tonnes to 190 000 tonnes, as a consequence of dry weather in late 2005 that affected early crops at flowering stage, particularly in northern departments. By contrast, in **Chile** a good maize crop has been recently harvested.

In the Andean countries, harvesting of the bulk of 2006 maize crop was completed during the months of May and June. In **Colombia** and **Peru**, the outcome of the harvest was good, while a below average crop was gathered in **Ecuador** due to excessive rains at the beginning of the year in key producing coastal provinces of Guayas, Los Ríos and Manabí. The intense rainy season caused damage to infrastructure and localized losses of food and cash crops in Ecuador, as well as in some areas of Bolivia, Colombia and Peru. In May, severe localized flooding also occurred in **Suriname**, affecting subsistence farming systems of about 175 villages in the interior areas that are based on paddy and cassava crops and causing losses of poultry and small livestock. Overall, however, prospects for the 2006 cereal crops remain favourable in these countries.

Planting of the 2006 winter wheat crop, to be harvested by the end of the year, has been recently completed in central and southern states of **Brazil**, while it is still underway in **Argentina**, **Chile** and **Uruguay**. The subregion's aggregate planted area is forecast at 8.6 million hectares, slightly above the level of the previous year, but still below the five-year average of 9.3 million hectares. However, insufficient precipitation in some main growing areas of Argentina and Uruguay may prevent farmers' planting intentions from materializing, especially for long-term varieties; more rains are needed.

Expecting another very active Atlantic hurricane season

The 2005 Atlantic hurricane season was the most active in history, with a record 27 tropical and subtropical named storms, of which 15 became hurricanes. This had a far-reaching impact, with almost 2 300 human casualties and a record total estimated damage of about US\$100 billion. Six major hurricanes – Dennis, Emily, Katrina, Rita, Stan and Wilma – were responsible for most of the destruction. The most affected areas were the Mexican states of Quintana Roo, Yucatan and Tamaulipas, the US states of Mississippi, Louisiana, Texas and Florida, Cuba, Haiti, the Dominican Republic, The Bahamas and some departments of Guatemala, El Salvador and Nicaragua.

In addition to destruction of housing and infrastructure, the 2005 storms caused serious damage to the oil and agriculture sectors. The temporary reduction of the oil extracting and refinery capacity in the US and the Gulf of Mexico had economic repercussions at worldwide level due to speculative spikes in the price of crude oil and consequent increase in the energy bill. Regarding agriculture, in many affected areas, landslides caused loss of arable land and entire villages were swept away. Localized, extremely heavy rains often damaged food and

cash crops (such as maize, plantains, sesame, coffee and vegetables), and adversely affected the fishery and livestock sectors with a negative impact on food availability. Damage to plantation crops (such as coffee, sugar cane and banana) reduced wage labour opportunities for rural families, with serious short and medium-term consequences on their livelihoods and income. However, on the positive side, in several areas, the 2005 intense hurricane season resulted in improved growing conditions for crops and allowed replenishment of the irrigation reservoirs.

The 2006 Atlantic hurricane season started on 1 June. Based on the analysis of some meteorological indicators - such as warmer than normal sea surface temperatures, lower wind shear and reduced sea level pressure – early forecasts indicate that this year's season will be again very active. Although not likely to reach the record level of 2005, there is a high (80 percent) possibility that hurricane activity will be above the long-term average. During the current season, the number of tropical storms is expected to range between 13 and 16, with 8 to 10 hurricanes of which about half may reach an intensity (in terms of wind speed) above Category 3 in the Saffir-Simpson scale.

North America, Europe and Oceania

North America

The harvest of the 2006 wheat crop is underway in the southern parts of the **United States** as of early June and progress was reported to be more rapid than normal because of the prevailing hot and dry conditions. Despite latest information (updated after the completion of the spring wheat planting) indicating an increase in the aggregate wheat area (winter plus spring), an exceptionally high abandonment of winter wheat, because of drought, is expected to lead to a reduction in the harvested area this year compared to 2005. Lower winter wheat yields are also expected to impact on this year's aggregate wheat crop, which is currently forecast at just 49.4 million tonnes, sharply down from last year and well below the average of the past five years (55.4 million tonnes). With regard to coarse grains, planting of the main crops was virtually complete by late June. The area in maize is estimated to be about 3 percent down on the previous year but the crop is reported to be developing satisfactorily. Based on the early area indications, and assuming

normal weather conditions prevail for the remainder of the season, the aggregate 2006 coarse grains output in the United States is forecast at about 284 million tonnes, which would be 5 percent down from the previous year, but close to the average of the past five years. Of the total, maize would account for 268 million tonnes. The area sown to rice in 2006 is estimated to have declined by about 12 percent from last year. The bulk of the crop had emerged by late June and its condition was mostly rated from good to excellent. In **Canada** latest estimates indicate a 6 percent increase in the overall wheat area this year, reflecting generally adequate moisture conditions and an improved price outlook during the planting period. However, assuming yields return closer to average following two years of above-average levels, which the seasonal conditions would currently point to, aggregate wheat output may decrease slightly from last year's level to about 26.3 million tonnes, which would still be well above the five-year average. For coarse grains, latest indications point to little change in the overall area but a switch to more oats and less barley compared to the previous year. The aggregate coarse grain output is forecast at 24.2 million tonnes, about 8 percent down from last year, but about average.

Europe

Total cereal production in the **EU** in 2006 is forecast at 269.2 million tonnes, 9 million tonnes up from last year and slightly above the average of the past five years. The increase is mainly accounted for by larger wheat and barley crops in France, Germany and Spain. In France, despite dry conditions at the beginning of the season, yields are expected to be higher than last year and, combined with an increased area, production is forecast to rise by about 5 percent. In Germany, the wheat area has not changed significantly this year but despite an abnormally cold spring, which delayed crop development, higher yields are expected and production is forecast to rise by about 5 percent from 2005. In Spain, dry conditions towards the end of the growing season caused some deterioration in wheat yield prospects, but output is, nevertheless, expected to recover sharply from last year's drought-reduced level. Among the other major wheat producers, output is expected to change little in the United Kingdom, where it is forecast to remain close to average, but could drop again this year in Poland to about 8.3 million tonnes because of harsh winter conditions and a significant delay encountered with the spring wheat sowing campaign. Regarding coarse grains, the total EU output is forecast at 138.2 million tonnes, 4.5 million tonnes up from 2005. For barley, as for wheat, most of the increase is expected in France, Germany and Spain, partly due to increased areas and partly due to improved yields expected. The latter is most relevant in Spain where a significant recovery in yields of all cereals is expected after severe drought-reduced levels last year. Maize production is not expected to change much in

EUROPE: Countries in crisis requiring external assistance and main reasons (1)

Severe localized food insecurity

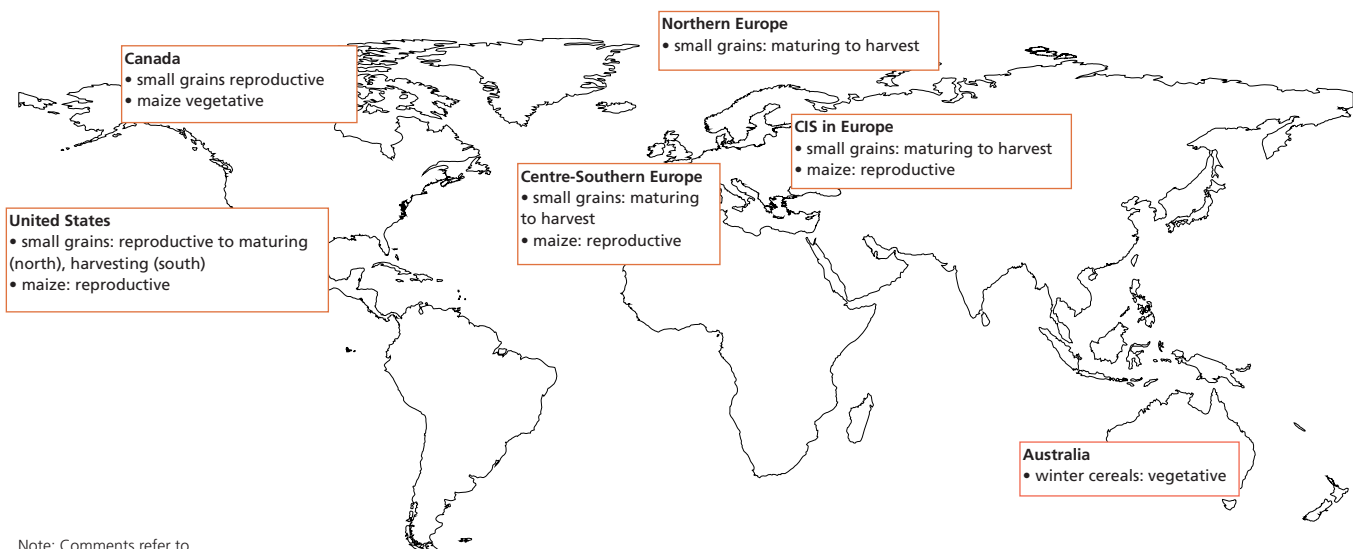
Russian Federation Civil strife
(Chechnya)

Note: For explanation of terminology see back cover.

2006. A slightly larger crop in Italy is likely to be mostly offset by smaller harvests in Hungary and Germany.

In the **Balkan Peninsula**, latest information continues to point to reduced cereal harvests in the two largest producing countries, Romania and Bulgaria. Winter grain planting last autumn was hampered and subsequently reduced because of the delayed 2005 harvest and inclement autumn weather conditions, while yields are expected to have been compromised by harsh winter conditions in parts, particularly in the former country. Among the other Balkan countries this year's cereal output prospects look to be similar to last year's about-average crop.

In the **European CIS** (The Russian Federation, The Ukraine, Belarus and Moldova), cereal harvesting is about to begin with a significant decline in wheat production in prospect, following an abnormally cold winter. The aggregate cereal harvest in the subregion this year is estimated at 116.7 million tonnes, some 5.8 million tonnes down from 2005. Wheat is the main crop affected by the harsh winter and aggregate output is forecast at 57 million tonnes, some 11.5 million tonnes from 2005. Losses in wheat are entirely accounted for in the two main producing countries, the Russian Federation



Note: Comments refer to situation as of July.

and Ukraine. Winter coarse grains are more resistant to harsh weather and the aggregate coarse grain harvest in the region is forecast at almost 59 million tonnes, nearly 5.6 million tonnes up on the harvest in 2005. The aggregate cereal exports from the region during the 2005/06 marketing year are estimated at about 25.5 million tonnes. Aggregate cereal exports from the region during the 2006/07 marketing year are forecast to decline to about 17.6 million tonnes, including 8.8 million tonnes of wheat and 8.8 million tonnes of coarse grains.

Oceania

Australia is expecting a drier than average winter cropping season in 2006 and winter grain production is tentatively forecast to decline by 11 percent from last year's above-average crop. The planting season started late or was hampered in most states because of dry conditions. As a result, the area planted is estimated to have declined in all states with the exception of South Australia, and yields are also forecast to fall compared to the previous year, although may remain above or close to the five-year average. The June Crop Report released by The Australian Bureau of Agriculture and Resource Economics (ABARE) forecasts the 2006 wheat output at 22.8 million tonnes, about 9 percent down from 2005. Output of barley is also seen down, by about 14 percent at 8.5 million tonnes. The small summer grain harvest is virtually completed. Output of sorghum is estimated at about 2 million tonnes compared to almost 2.2 million tonnes in the previous year. After a promising start to the season, hot and dry conditions in early 2006 in the main producing areas

of New South Wales and southern Queensland significantly reduced yield potential. By contrast, rice production, all of which is in New South Wales, is estimated to have more than tripled to over 1 million tonnes, reflecting higher irrigation water allocations and generally better growing conditions.

Table 9. North America, Europe and Oceania cereal production (million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total Cereals		
	2004	2005 estim.	2006 f'cast	2004	2005 estim.	2006 f'cast	2004	2005 estim.	2006 f'cast	2004	2005 estim.	2006 f'cast
North America	84.6	84.1	75.7	346.6	325.4	308.1	10.5	10.1	9.3	441.7	419.6	393.1
Canada	25.9	26.8	26.3	26.7	26.3	24.2	-	-	-	52.6	53.0	50.5
United States	58.7	57.3	49.4	319.9	299.1	284.0	10.5	10.1	9.3	389.1	366.5	342.6
Europe	219.5	207.1	198.1	245.2	213.1	223.0	3.4	3.4	3.3	468.1	423.6	424.4
EU	137.5	123.8	128.4	152.1	133.7	138.2	2.8	2.7	2.6	292.4	260.1	269.2
Romania	7.8	7.3	5.6	16.8	11.5	11.9	-	-	-	24.5	18.9	17.5
Serbia and Montenegro	2.8	1.8	1.7	7.2	6.4	6.5	-	-	-	9.9	8.2	8.2
CIS in Europe	64.8	68.5	57.0	60.3	53.4	59.0	0.6	0.7	0.7	125.6	122.5	116.7
Russian Federation	45.4	47.7	42.7	30.3	28.3	31.4	0.5	0.6	0.6	76.2	76.5	74.6
Ukraine	17.5	18.7	12.5	23.1	18.6	21.3	0.1	0.1	0.1	40.7	37.4	33.8
Oceania	22.9	25.4	23.1	12.7	15.1	13.3	0.6	0.3	1.1	36.1	40.8	37.5
Australia	22.6	25.1	22.8	12.1	14.5	12.7	0.5	0.3	1.1	35.3	40.0	36.6

Note: Totals computed from unrounded data.

Special features

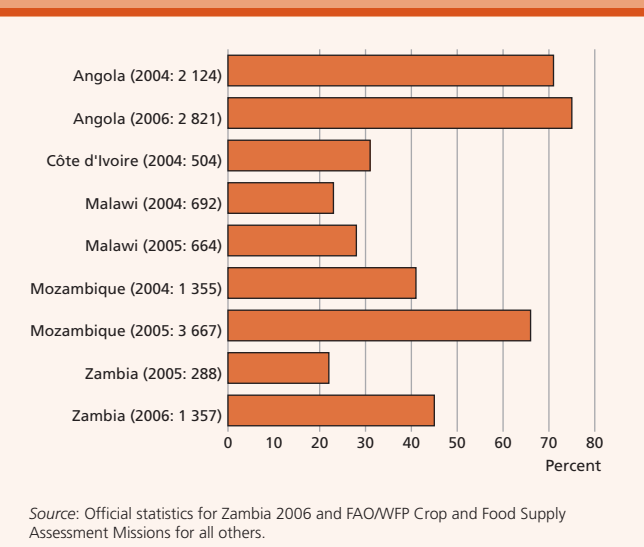
The place of cassava in food production and national food balance sheets

Root and tuber crops in general and cassava in particular, play an important role in household food security in Sub-Saharan Africa and in several countries of Asia and Latin America and the Caribbean. Yet, compared to cereals, their importance is not duly recognized and, as a consequence, there is little reliable information and statistics on the extent of their cultivation, yield, production, marketing, storage, and utilization. Fresh cassava is not easily marketed because it is bulky and perishable, making transport difficult and costly. Where cassava is consumed and traded, markets seem to be well developed. For example, prices of cassava and cassava flour, among other food commodities, are regularly monitored in Burundi (Table 10). Prices of fresh commodity are typically much more volatile than those of the flour. These have important implications for food security locally. Unexploited trade and market potential exists in many countries in Africa, where this commodity can be grown more efficiently than maize.

Available information on cassava production in most countries in Africa is sketchy and inaccurate. However, based on official approximate estimates of area cultivated, statistics show that in several countries, cassava production accounts for a significant portion of total food supplies (Figure 7).

These statistics are, however, not widely accepted and require systematic review for improved accuracy. Estimation of cassava yield and production in mixed smallholder cropping systems is notoriously difficult. Cultivars of different maturity lengths may be grown mixed together; planting may be carried out over several months, resulting in different maturity periods; the crop may be planted on mounds and intercropped with a wide range of other crops (at least during the first year), making the actual cropped area difficult to estimate. Harvesting may be done piecemeal according to household requirements, with

Figure 7. Share of cassava in total food production (in cereal equivalent) in selected countries (year and production, in 000 tonnes, shown in y axis labels)



mature roots of unknown size and condition left in the ground for many months. FAO/GIEWS, with a project funded by the EC under the EC/FAO Programme, is currently working on a practical methodology to estimate the potential contribution of the main tuber crop (cassava) to the national food balance sheet, normally expressed in terms of cereal equivalent. Field work has been completed in Mozambique and the preliminary report and guidelines will be available shortly. (E-mail: giews1@fao.org)

Table 10: Average monthly prices (Fbu) of cassava and cassava flour compared to the cost of the food basket in Bujumbura market, Burundi

	July 1996	May 2005	May 2006	Change: May 2006/ May 2005
Fresh cassava (kg)	100	500	1 100	120%
Cassava flour (kg)	150	613	700	14%
Food Basket	5 228	19 709	25 825	31%

Source: Price survey, Bujumbura market, Burundi, June 2006

Table A1. Estimated cereal import requirements of Low-Income Food-Deficit Countries (000 tonnes)

	Marketing year	2004/05 or 2005			2005/06 or 2006			
		Actual imports			Total import requirements (excl. re-exports) ¹	Import position ²		
		Commercial purchases	Food aid	Total commercial and aid		Total commercial and aid	Food aid allocated, committed or shipped	Commercial purchases
AFRICA		37 443.8	3 241.4	40 685.2	40 081.5	24 576.1	2 187.9	22 388.2
North Africa		16 779.8	8.2	16 788.0	17 119.0	13 824.8	5.3	13 819.5
Egypt	July/June	12 733.8	8.2	12 742.0	12 101.0	10 219.9	5.3	10 214.6
Morocco	July/June	4 046.0	0.0	4 046.0	5 018.0	3 604.9	0.0	3 604.9
Eastern Africa		4 603.8	2 120.2	6 724.0	6 252.7	3 172.0	1 062.6	2 109.4
Burundi	Jan./Dec.	42.1	53.9	96.0	116.0	41.3	41.3	0.0
Comoros	Jan./Dec.	38.0	0.0	38.0	40.0	16.4	0.0	16.4
Djibouti	Jan./Dec.	56.2	19.0	75.2	72.0	19.0	0.9	18.1
Eritrea	Jan./Dec.	159.8	244.5	404.3	383.0	77.4	70.0	7.4
Ethiopia	Jan./Dec.	26.4	786.1	812.5	461.0	287.7	287.7	0.0
Kenya	Oct./Sept.	1 517.2	124.4	1 641.6	1 631.0	733.1	164.2	568.9
Rwanda	Jan./Dec.	167.0	21.7	188.7	145.0	26.1	20.3	5.8
Somalia	Aug./July	388.0	52.6	440.6	510.0	163.7	115.5	48.2
Sudan	Nov./Oct.	1 447.4	650.0	2 097.4	1 830.0	917.1	221.9	695.2
Tanzania, U.R.	June/May	683.8	34.3	718.1	803.7	803.7	54.5	749.2
Uganda	Jan./Dec.	77.9	133.7	211.6	261.0	86.5	86.3	0.2
Southern Africa		2 965.4	437.2	3 402.6	4 329.5	4 329.5	708.1	3 621.4
Angola	April/March	767.9	56.4	824.3	646.0	646.0	44.4	601.6
Lesotho	April/March	183.1	5.7	188.8	207.9	207.9	14.9	193.0
Madagascar	April/March	237.7	29.9	267.6	315.0	315.0	28.7	286.3
Malawi	April/March	204.6	87.7	292.3	511.7	511.7	223.0	288.7
Mozambique	April/March	696.4	40.3	736.7	919.5	919.5	93.5	826.0
Swaziland	May/April	133.5	5.3	138.8	121.8	121.8	15.3	106.5
Zambia	May/April	61.7	62.9	124.6	240.2	240.2	68.3	171.9
Zimbabwe	April/March	680.5	149.0	829.5	1 367.4	1 367.4	220.0	1 147.4
Western Africa		11 605.4	562.9	12 168.3	10 826.7	2 888.7	385.4	2 503.3
Coastal Countries		8 857.6	256.9	9 114.5	8 109.3	1 986.9	139.3	1 847.6
Benin	Jan./Dec.	124.4	13.1	137.5	118.0	91.8	1.4	90.4
Côte d'Ivoire	Jan./Dec.	1 228.0	27.0	1 255.0	1 206.1	246.3	11.8	234.5
Ghana	Jan./Dec.	823.0	55.7	878.7	751.0	195.0	59.5	135.5
Guinea	Jan./Dec.	349.5	30.1	379.6	325.0	23.6	9.8	13.8
Liberia	Jan./Dec.	187.7	87.3	275.0	240.0	124.4	31.4	93.0
Nigeria	Jan./Dec.	5 763.7	10.5	5 774.2	5 070.0	1 198.9	0.0	1 198.9
Sierra Leone	Jan./Dec.	254.8	33.2	288.0	294.0	53.4	25.2	28.2
Togo	Jan./Dec.	126.5	0.0	126.5	105.2	53.5	0.2	53.3
Sahelian Countries		2 747.8	306.0	3 053.8	2 717.4	901.8	246.1	655.7
Burkina faso	Nov./Oct.	365.5	30.1	395.6	261.9	54.6	38.8	15.8
Cape Verde	Nov./Oct.	53.2	31.5	84.7	105.0	41.9	27.0	14.9
Chad	Nov./Oct.	73.7	63.1	136.8	130.4	57.1	40.2	16.9
Gambia	Nov./Oct.	126.3	9.0	135.3	146.8	25.4	6.5	18.9
Guinea Bissau	Nov./Oct.	74.2	9.3	83.5	81.9	8.3	2.4	5.9
Mali	Nov./Oct.	242.3	19.9	262.2	269.2	57.9	13.4	44.5
Mauritania	Nov./Oct.	431.0	49.7	480.7	381.6	188.3	60.0	128.3
Niger	Nov./Oct.	375.3	79.3	454.6	317.9	59.7	45.7	14.0
Senegal	Nov./Oct.	1 006.3	14.1	1 020.4	1 022.7	408.6	12.1	396.5
Central Africa		1 489.4	112.9	1 602.3	1 553.6	361.1	26.5	334.6
Cameroon	Jan./Dec.	717.3	13.0	730.3	677.0	148.9	1.7	147.2
Cent.Afr.Rep.	Jan./Dec.	42.8	3.6	46.4	48.1	9.1	4.5	4.6
Congo, Dem.Rep.	Jan./Dec.	411.3	86.8	498.1	500.0	140.9	20.0	120.9
Congo, Rep.	Jan./Dec.	285.0	5.0	290.0	295.0	54.2	0.0	54.2
Eq. Guinea	Jan./Dec.	23.5	0.0	23.5	19.5	6.5	0.0	6.5
Sao Tome & Principe	Jan./Dec.	9.5	4.5	14.0	14.0	1.5	0.3	1.2

Table A1. (continued)

	Marketing year	2004/05 or 2005			2005/06 or 2006			
		Actual imports			Total import requirements (excl. re-exports) ¹	Import position ²		
		Commercial purchases	Food aid	Total commercial and aid		Total commercial and aid	Food aid allocated, committed or shipped	Commercial purchases
ASIA/NEAR EAST		47 722.7	2 399.7	50 122.4	41 535.8	30 961.7	928.1	30 033.6
CIS in Asia		2 806.0	294.0	3 100.0	2 627.0	2 234.0	61.1	2 172.9
Armenia	July/June	154.0	9.0	163.0	140.0	24.8	3.1	21.7
Azerbaijan	July/June	1 113.0	34.0	1 147.0	988.0	947.9	5.9	942.0
Georgia	July/June	903.0	67.0	970.0	827.0	808.3	12.9	795.4
Kyrgyz Republic	July/June	71.0	131.0	202.0	122.0	98.9	0.9	98.0
Tajikistan	July/June	303.0	53.0	356.0	247.0	231.3	38.3	193.0
Turkmenistan	July/June	4.0	0.0	4.0	14.0	0.9	0.0	0.9
Uzbekistan	July/June	258.0	0.0	258.0	289.0	121.9	0.0	121.9
Far East		33 767.8	1 886.3	35 654.1	28 238.8	21 322.4	790.1	20 532.3
Bangladesh	July/June	3 198.8	338.2	3 537.0	3 050.0	2 254.6	194.2	2 060.4
Bhutan	July/June	64.7	1.3	66.0	71.0	0.2	0.2	0.0
Cambodia	Jan./Dec.	134.8	15.2	150.0	40.9	13.9	2.9	11.0
China	July/June	15 907.1	66.9	15 974.0	10 532.0	7 629.1	0.0	7 629.1
India	April/March	209.3	45.4	254.7	650.0	650.0	28.2	621.8
Indonesia	April/March	6 590.5	53.2	6 643.7	5 745.1	5 745.1	48.3	5 696.8
Korea, D.P.R.	Nov./Oct.	92.9	1 144.0	1 236.9	900.0	434.9	392.0	42.9
Lao, P.D.R.	Jan./Dec.	12.3	15.8	28.1	37.6	0.6	0.6	0.0
Mongolia	Oct./Sept.	208.6	39.4	248.0	323.0	156.5	29.7	126.8
Nepal	July/June	128.2	11.8	140.0	120.2	10.1	9.7	0.4
Pakistan	May/April	1 428.1	7.7	1 435.8	780.0	780.0	0.0	780.0
Philippines	July/June	4 550.0	48.2	4 598.2	4 744.0	3 192.4	70.1	3 122.3
Sri Lanka	Jan./Dec.	1 174.5	99.2	1 273.7	1 180.0	455.0	14.2	440.8
Timor-Leste	July/June	68.0	0.0	68.0	65.0	0.0	0.0	0.0
Near East		11 148.9	219.4	11 368.3	10 670.0	7 405.3	76.9	7 328.4
Afghanistan	July/June	1 602.2	184.8	1 787.0	450.0	166.5	40.9	125.6
Iraq	July/June	4 299.9	9.3	4 309.2	5 430.0	4 426.3	28.8	4 397.5
Syria	July/June	2 754.7	10.5	2 765.2	2 315.0	1 968.6	7.0	1 961.6
Yemen	Jan./Dec.	2 492.1	14.8	2 506.9	2 475.0	843.9	0.2	843.7
CENTRAL AMERICA		1 496.8	179.9	1 676.7	1 773.0	1 428.9	307.3	1 121.6
Haiti	July/June	548.1	117.4	665.5	657.0	513.3	131.5	381.8
Honduras	July/June	658.0	19.7	677.7	760.0	585.5	113.8	471.7
Nicaragua	July/June	290.7	42.8	333.5	356.0	330.1	62.0	268.1
SOUTH AMERICA		896.6	47.0	943.6	926.0	914.2	17.0	897.2
Ecuador	July/June	896.6	47.0	943.6	926.0	914.2	17.0	897.2
OCEANIA		407.0	0.0	407.0	415.7	46.8	0.0	46.8
Kiribati	Jan./Dec.	8.7	0.0	8.7	8.7	0.0	0.0	0.0
Papua New Guinea	Jan./Dec.	349.3	0.0	349.3	358.0	46.8	0.0	46.8
Solomon Isl.	Jan./Dec.	29.5	0.0	29.5	29.5	0.0	0.0	0.0
Tonga	Jan./Dec.	6.4	0.0	6.4	6.4	0.0	0.0	0.0
Tuvalu	Jan./Dec.	1.1	0.0	1.1	1.1	0.0	0.0	0.0
Vanuatu	Jan./Dec.	12.0	0.0	12.0	12.0	0.0	0.0	0.0
EUROPE		1 564.0	8.4	1 572.4	1 685.0	887.4	1.2	886.2
Albania	July/June	468.1	8.4	476.5	440.0	286.9	1.2	285.7
Belarus	July/June	566.0	0.0	566.0	675.0	373.4	0.0	373.4
Bosnia-Herzegovina	July/June	529.9	0.0	529.9	570.0	227.1	0.0	227.1
TOTAL		89 530.9	5 876.4	95 407.3	86 417.0	58 815.1	3 441.5	55 373.6

¹ For definition of **import requirements** see terminology.² Estimates based on information available as of June 2006.

Terminology

- **The Low-Income Food-Deficit (LIFDC) group of countries** includes food deficit countries with per caput annual income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. US\$1 465 in 2003), which is in accordance with the guidelines and criteria agreed to by the CFA should be given priority in the allocation of food aid.
- The **import requirement** is the difference between **utilization** (food, feed, other uses, exports plus closing stocks) and **domestic availability** (production plus opening stocks). Utilization is based on historical values, adjusted upon assessment of the country's current economic situation.
- **The main wheat and coarse grain exporters** are Argentina, Australia, Canada, the EU and the United States. The main **rice** exporters are China (including Taiwan Province), Pakistan, Thailand, the United States and Viet Nam.
- **Countries facing unfavourable prospects for current crops** are countries where prospects point to a shortfall in production of current crops as a result of the area planted and/or adverse weather conditions, plant pests, diseases and other calamities, which indicate a need for close monitoring of the crop for the remainder of the growing season.
- **Countries in Crisis Requiring External Assistance** 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.

NOTE: This report is prepared on the responsibility of the FAO Secretariat with information from official and unofficial sources. Since conditions can change rapidly and information may not always represent the current crop or food supply situation as of present date, further enquiries should be made before any action is taken. None of the reports should be regarded in any way as statements of governmental views.

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