



GIEWS Updates

VOLUME 2013

The **GIEWS Updates** are issued by FAO's **Global Information and Early Warning System (GIEWS)** from mid-2004. The updates focus on developing anomalous conditions aimed at providing early warnings, as well as latest and more elaborate information than other GIEWS regular reports on the food security situation of countries, at both national and sub-national levels.

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Southern Africa market review and 2013 crop prospects

■ **Maize prices in Zambia rose sharply at the end of 2012, while similarly rapid increases have been recorded in Malawi, Mozambique, South Africa and some markets of Zimbabwe**

■ **Overall, crop conditions for the 2012/13 agricultural season remain generally favourable, despite the late onset of seasonal rains in parts and an outbreak of armyworms that threatens production in some areas**

Rapid maize price increases in 2012

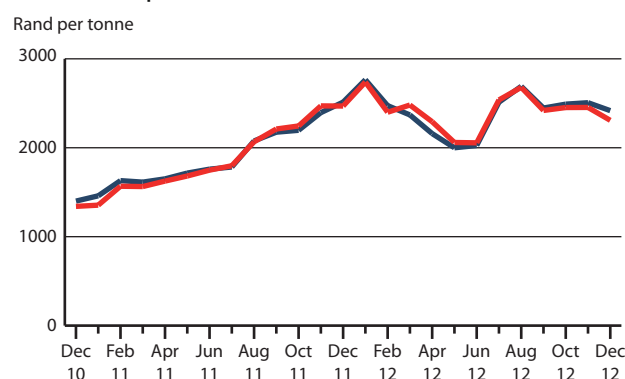
Prices of maize, the main staple in Southern Africa, rose rapidly in several areas during the second half of 2012, exceeding normal seasonable patterns and making access to food more difficult for large numbers of people. Several factors have combined to exert and sustain upward pressure on prices, including:

- tight local supplies, following weather related production shocks in 2012 and internal market disruptions
- rising international and regional maize prices
- increased transportation costs
- exchange rate variations

In **South Africa**, the subregion's main exporter, maize prices peaked in August 2012 to near record levels following trends in international markets. Prices decreased in September and December, although remaining at relatively high levels. The declines mainly reflected improved supplies and the favourable outlook for the 2013 maize harvest, from May onwards, on the back of an increase in the area planted. The strengthening of the Rand against the US dollar in late 2012 and weakening international quotations also weighed on maize prices. Despite the recent decrease in maize prices in South Africa,

their high levels are expected to continue to put pressure on domestic prices in the import dependent countries of Botswana, Lesotho, Namibia and Swaziland.

Wholesale prices of maize in South Africa



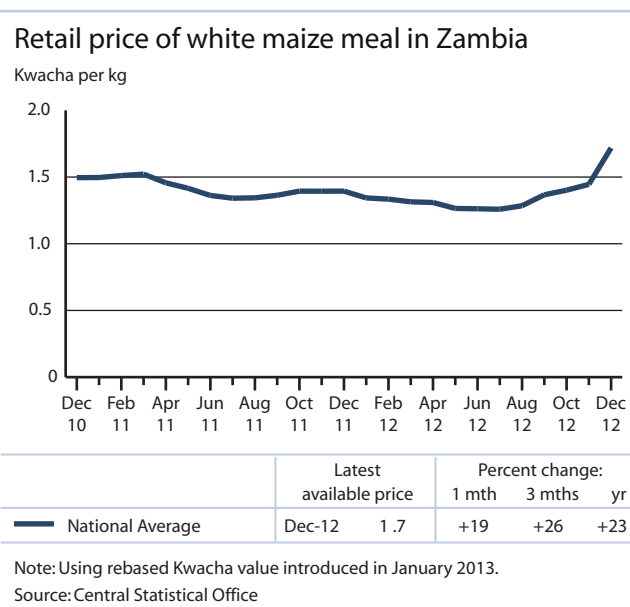
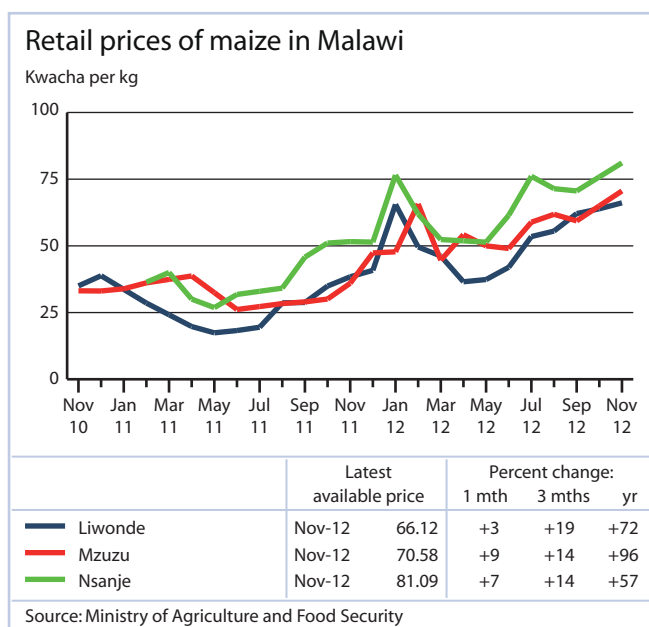
	Latest available price	Percent change:		
		1 mth	3 mths	yr
— Randfontein, Maize (yellow)	Dec-12 2 417.28	-4	-1	-4
— Randfontein, Maize (white)	Dec-12 2 308.28	-6	-5	-7

Source: SAFEX Agricultural Products Division

In **Malawi**, maize prices climbed steeply during the second half of 2012 and in November were generally double their levels a year earlier. The 50 percent devaluation of the national currency (kwacha) in May 2012 stoked inflationary pressure, causing a jump in food prices, including maize, particularly in deficit producing areas due to higher transportation costs. The poor 2012 harvest in the structurally deficit Southern Region tightened market supplies and fuelled price rises further. Changing trade dynamics after the kwacha devaluation also sustained the upward pressure on maize prices. In southern parts, which normally source limited quantities of maize from Mozambique, the cost of imports increased. Meanwhile, in northern markets, Malawi maize became more attractive for exportation with reports

indicating higher import demand from Tanzania and Kenya. Overall, the higher food prices have severely deteriorated the purchasing power of households and consequently the Malawi Vulnerability Assessment Committee (MVAC) revised upwards the number of persons in need of food assistance in October 2012 to approximately 2 million people, an increase of 21 percent from the previous figure in June. Ongoing humanitarian assistance, including the distribution of food aid, and the release of subsidized maize through the Government's Agriculture Development and Marketing Corporation (ADMARC) have tempered prices somewhat in recent weeks. The increase in the minimum farm gate price for maize in the forthcoming 2013/14 marketing season (May/April) to MWK 65 per kg, nearly double the level of

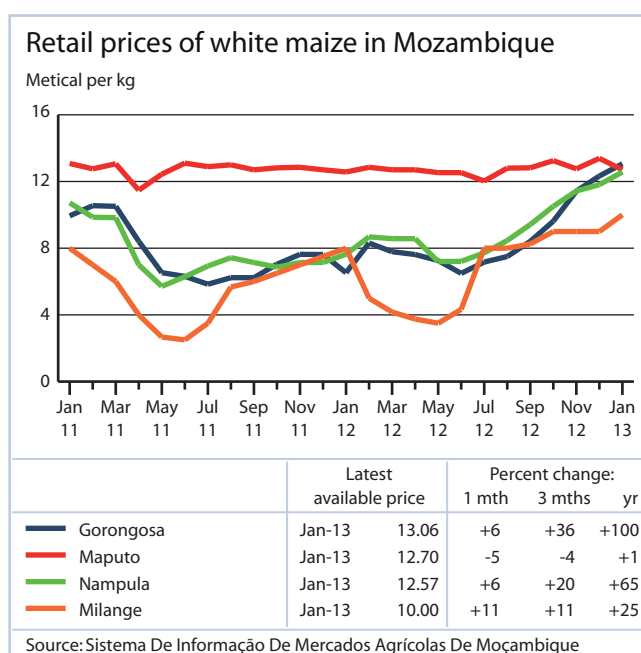
prices of meal. Wholesale prices of maize have since fallen; however, retail prices have been slow to fall as traders clear previously higher-priced stock.



In several markets of **Mozambique**, steep price rises compared to previous historical trends since mid-2012 pushed up prices to levels above the previous year, reflecting weather-induced production declines in 2012. Abnormal increases were recorded in some central markets of Mozambique, including Milange and Gorongosa, primarily on account of the depletion of market stocks and strong demand from deficit regions. Recent heavy rains in January and the consequent localized floods have disrupted access to some markets, with reports indicating reduced food supplies in the wholesale markets of Maputo, Gherkin, Beira and Nampula. If transport constraints continue, the lower

the previous year, is likely to continue to provide support to prices, whilst benefiting net-selling households.

In **Zambia**, despite large surplus public stocks following two bumper harvests in 2011 and 2012, national average roller maize meal prices rose steeply from September 2012, exceeding historical seasonable trends; between November and December prices jumped by 19 percent to ZMW43 per 25 kg. However, maize grain prices rose less markedly, by only 9 percent, partly as a result of subsidized maize sales by the Food Reserve Agency in December. Tighter supply conditions in some locations, notably in the Copperbelt Province, due in part to higher demand from neighbouring Democratic Republic of Congo as a result of the gradual depreciation of the Zambian kwacha, supported price rises. Increased production costs of milling have also underpinned maize meal prices. In response to the recent sharp increase, the Government issued a directive to maize millers in December to reduce



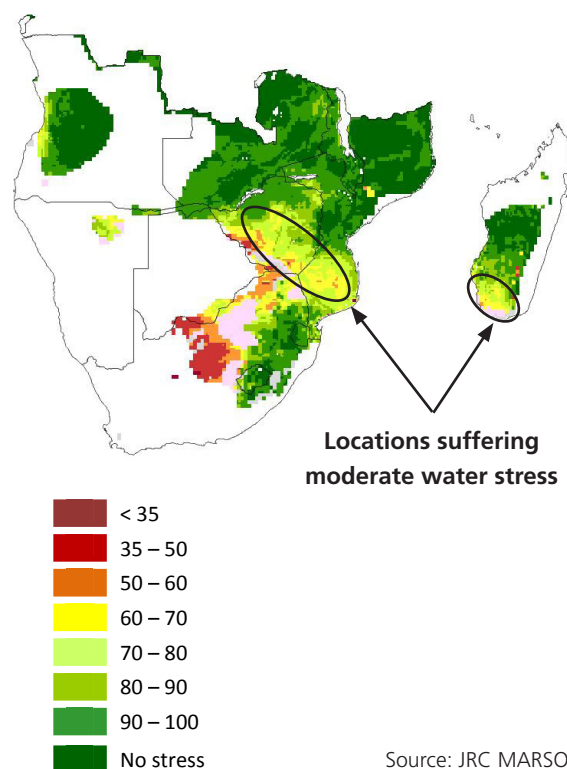
supplies may put upward pressure on prices, fueling further increases. In **Zimbabwe**, in south-western parts, seasonable increases of maize prices were observed, but with spikes above last year's levels as market supplies were depleted. However, in the capital Harare, prices have remained stable over the year.

Production outlook for 2013 harvest remains generally favourable, but crop losses anticipated in parts

Following a delayed start of seasonal rains for the 2012/13 cropping season (October-June), weather conditions generally improved over most areas of the subregion as the season progressed. Satellite imagery as of the second dekad of January 2013 indicates generally good maize crop conditions in the large producing areas. In the largest producing country South Africa, the area planted to maize is estimated to be higher than the good level of the previous year. At the regional level, prospects for the harvests from April/May are overall favourable so far.

However, in southern areas of Zimbabwe, Madagascar and Mozambique (which constitute relatively small cereal growing regions), a prolonged period of below-average rains during the first two months of the cropping season delayed planting activities and restricted early crop development. Subsequent abundant rains in December and early January alleviated early seasonal water deficits, although the shorter growing period could lower yields and limit production in these areas. In the Zambezi and Limpopo river basins, the heavy rains recorded during January resulted in localized flooding and crop losses, affecting parts of Botswana, Malawi, Mozambique, Namibia, South Africa and Zimbabwe. With water levels remaining at elevated levels, the potential for further floods remains, and the situation needs to be monitored closely in the coming weeks.

Maize water requirement satisfaction index as of 2nd dekad of January 2013



An outbreak of armyworms at the end of 2012 has affected parts of Botswana, Malawi, Namibia, Zambia and Zimbabwe, raising concerns about the negative impact on production. Control measures have been implemented to limit the spread throughout the subregion, while in Zambia, early maturing seed varieties were distributed to farmers to enable them to replant affected areas. Although the full extent of the damage is not yet known, any significant crop losses would deteriorate local food security conditions.

For Updates:

Crop Prospects and Food Situation report - next release March 2013

www.fao.org/giews/english/cpfs/index.htm

For more information:

GIEWS Food Price Data and Analysis Tool

www.fao.org/giews/pricetool

GIEWS Interpolated Estimated Dekadal Rainfall

www.fao.org/giews/english/ierf/index.htm



Central African Republic: civil conflict aggravates an already alarming food security situation

- **The recent escalation of civil conflict in the Central African Republic has considerably increased population displacements and disrupted agricultural and marketing activities. Large numbers of people are estimated to be in need of food assistance.**

Agricultural activities disrupted by civil insecurity

The sowing of the 2013 main cereal crop, due for harvest from July, is about to begin mostly in southern areas. According to satellite imagery, rainfall conditions are generally favourable. However, limited access to fields and agricultural inputs due to insecurity has raised serious concern over crop prospects. Moreover, the marketing of the annual cotton crop, a lifeline for the northern part of the country, has yet to start in parts, depriving farmers of an important income source.

Similarly, the harvesting of the secondary 2012 season cereal crop, last December, coincided with the intensification of civil conflict despite the above average rainfall received during the growing season (September-November). Large displacements during harvesting and damage to food stocks and distress sales of livestock were reported.

Trade disruptions cause food prices to escalate

The crisis has also affected significantly trade and marketing activities between different parts of the country, at times bringing transactions to a halt and leading to sharp food price increases. According to a recent multi agency rapid food security assessment, the price of the food basket in early February was up to 40 percent higher than 12 months earlier; in the capital Bangui, food prices have increased by 29 percent between December 2012 and January 2013.

Increased food insecurity due to loss of livelihoods, high food prices and displacement

Given the high share of household income spent on food items (about 70 percent), markets play a crucial role in accessing food. As a result, the food security situation, which was already alarming at 776 000 people as of May 2012, has further deteriorated. Drastic coping strategies, such as selling of productive assets and a reduction in the diversity

and quantity of food consumption compared to 2012 have been reported in many areas.

Overall food insecurity has been exacerbated by the widespread displacement, with the IDP caseload estimated at 173 000. The already precarious food situation is projected to deteriorate until the next harvest, in July 2013, especially in the north of Nana-Grebizi, in Ouham and Vakaga regions; during the lean season (from April/May in most parts) some 80 000 people might additionally become food insecure in the rebel occupied areas alone, unless trade flows resume and food aid distribution is extended.

In response, WFP is planning to scale up its operations in the country to assist an additional 120 000 people in need of food assistance. A close monitoring of the country's food situation and, conditions permitting, an in-depth assessment of the food security situation is warranted.

For Updates:

GIEWS Country Briefs

<http://www.fao.org/giews/countrybrief/index.jsp>

For more information:

GIEWS Interpolated Estimated Dekadal Rainfall

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Severe coffee leaf rust infection in Central American countries

Severe coffee leaf rust infection in central america adversely affecting production

In Central America, an outbreak of coffee leaf rust (roya) is adversely affecting coffee production of 2013. The current epidemic, considered the worst ever recorded, followed abnormal rains in late 2012, coupled with inadequate control measures due to the increased cost of fungicides. In most countries of the subregion, coffee is a key source of income for small farmers, as well as the main export commodity.

A detailed assessment of the crop losses at national level is not yet available. The extent of the damage varies from country to country and the final coffee outputs will depend on control measures implemented, as in most growing areas of the subregion the 2013 main harvests are scheduled from October. However, preliminary estimates of the incidence of the epidemic indicate extensive crop damage, with early forecast pointing to a significant reduction in this year's productions.

It is likely that also the production of the 2014 would

be negatively affected due to the severe defoliation in large growing areas and the need to replace the damaged plants.

Lower incomes to negatively impact food security of small farmers

Coffee is the main cash crop for small farmers of Central America and a significant source of temporal and permanent employment in rural areas, where high rates of poverty prevail, particularly in Guatemala, Honduras and Nicaragua. Overall, it is estimated that in average 25-30 percent of the subregion's rural population, or about 1.5 million people, is employed in the coffee sector. The anticipated sharp decline in this year's coffee harvests and derived lower labour demand and reduced salaries, will result in a loss of income for small farmers negatively affecting the food and nutritional situation of large groups of vulnerable population. Given the economic importance of coffee as an export commodity, the reduced 2013 coffee production in countries of the subregion is expected to have a negative impact at national levels.

- In **Guatemala**, about 70 percent of the total planted area to coffee crops has been affected by rust fungus and production in 2013 is expected to be 40 percent below its levels in 2012. The Government declared on 8 February the State of phytosanitary Emergency to provide support to small farmers.
- In **Honduras**, the roya fungus affected about 25 percent of the area planted and the 2013 output is forecast some 14 percent down from its initial forecast and 11 percent below the record production in 2012. The Government declared the State of phytosanitary Emergency on 24 January.
- In **Costa Rica**, the fungus affected about 20 percent of the area planted leading to an expected 10 percent decline in 2013 production compared to 2012. The Government declared the State of phytosanitary Emergency on 22 January.
- In **El Salvador**, about 40 percent of coffee plants were affected by rust and the 2013 production is expected 20 percent lower than forecast before the damages, although slightly above the reduced level of the past year.
- In **Nicaragua**, the fungus affected some 40 percent of the area planted to coffee and production in 2013 is anticipated some 10 percent lower than in 2012.

Joint efforts to face the emergency

Governments of the subregion are analyzing joint actions to control the epidemic of coffee leaf rust, as well as to assist producers to face the emergency and have asked the international community to support their efforts. An action plan with short and medium-term measures to face in an integral manner the emergency and mitigate its negative impact on producers has been jointly developed by different regional and international organizations, including FAO. The plan has four components to combat the epidemic and restore productive capacity:

- Integrated management, including technical assistance for control of rust, and establishment of a monitoring and early warning system;
- Genetic improvement program to breed resistant varieties;
- Assistance to the affected vulnerable population;
- Institutional capacity development, including policy measures.

GIEWS will continue to closely monitor the situation.

Related information:

Consejo Agropecuario Centroamericano (CAC) Action Plan

http://www.sica.int/busqueda/busqueda_basica.aspx?IdCat=9&IdMod=8&IdEnt=690

ICC Resolution number 451

<http://www.fao.org/giews/english/shortnews/ICC451.pdf>

OIRSA Workshop 9-10 January 2013

<http://www.oirsa.org/portal/taller-roya.aspx>

OIRSA Workshop 9-10 January 2013 - Aide Memoir

<http://www.oirsa.org/portal/documents/documentos-taller-roya/Ayuda-Memoria-Taller-de-Roya-9-10-enero-13.pdf>

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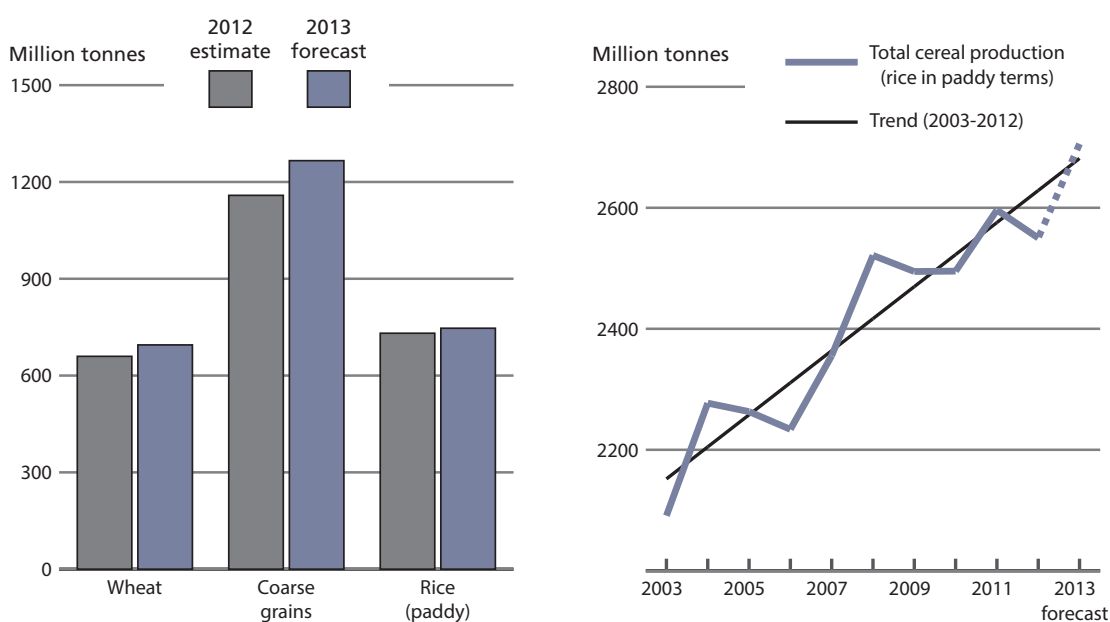
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Production prospects for 2013 cereal crops

World cereal production: 2012 estimates and forecasts for 2013



■ World cereal production is tentatively forecast to increase by about 6 percent in 2013 to about 2 708 million tonnes, recovering from the previous year's reduced level to just above the trend of the past ten years.

WHEAT

Global wheat output set to rise in 2013

FAO's latest forecast of global wheat production in 2013 stands at 695 million tonnes, 5.4 percent up from last year's harvest and just some 6 million tonnes short of the historical high recorded in 2011. Increased plantings for the 2013 crop, in response to strong prices are largely behind the expected growth, although a recovery of yields in some areas affected by drought last year also contributes to the current outlook.

In **North America**, latest indications for wheat production in the **United States** confirm a sharp decline in output is likely this year. Although the USDA *Prospective Plantings* report in March put the winter wheat plantings for 2013 marginally up from last year, the rate of abandonment

is expected to be above normal reflecting the impact of drought from planting time in parts, on top of the normal losses due to frost. As a result, the harvested area of winter wheat is forecast to drop by about 4 percent compared to 2012. Furthermore, drought conditions are reported to persist on about 54 percent of the winter wheat area as of 30 April, and subsequently, yields are expected to be below average in those areas. Although the *Prospective Plantings* report also saw a rise in spring wheat plantings, the slow pace of fieldwork as of late April raises some doubt as to whether farmers will fulfill their earlier intentions. Based on these latest indications, the country's total wheat production in 2013 is forecast at 56 million tonnes, some 9 percent down from 2012. In **Canada**, the main spring wheat crop planting is underway as of April and, based on an official survey, the

area is expected to increase sharply by some 12 percent, largely at the expense of the major oilseed crop Canola. Although planting has been delayed by unseasonably cold weather in late April, farmers still have time to catch up in May if conditions return to normal.

In **Europe**, the 2013 spring growing period has got off to a slow start in northern and central parts where temperatures have been below the long-term average, with consequent delays in winter crop development and spring planting. Although it is still too early to judge the impact on the yield potential of crops, this likely precludes anything better than average yields in the affected areas. In the **EU**, the aggregate wheat area is estimated some 2 percent higher than last year and assuming yields are about average, output is forecast 5 percent up at 138 million tonnes. In the **Russian Federation**, winter wheat plantings were down from the previous year due to dry weather but winter survival rates are estimated above normal after generally favourable winter conditions, especially in southern areas, which were particularly mild. The spring wheat area is expected to increase in response to high price prospects but apart from the milder southern areas, the arrival of spring weather has been later than normal, which could impact on the final area sown if conditions don't improve rapidly in May. At this stage, assuming normal conditions for the remainder of the season, aggregate wheat output in Russia is forecast to recovery sharply from last year's drought-reduced level to about 55 million tonnes. In **Ukraine**, the winter wheat conditions is also reported to be generally good, and

assuming normal conditions continue the harvested area and output will recover from last year's reduced level.

In **Asia**, harvesting of the 2013 wheat crops in the Far East subregion is already underway or due to start soon and prospects are mostly good in the main producing countries following generally favourable weather conditions. In **China**, favourable weather conditions at the start of the season, between November and January, over large parts of the country improved soil moisture, and together with seasonably cool weather aided early development of winter crops. Although the precipitation was below normal from mid-February over large parts of the North China Plain, particularly affecting Anhui, Hebei, Henan, northern Jiangsu and Shandong provinces, irrigation reserves are reported to be adequate. Consequently, the latest official forecast points to a winter wheat crop of 114.3 million tonnes, similar to last year's record level. The good outcome is also attributable to subsidized inputs including high-quality seeds, fertilizers and fuel. Regarding the small spring wheat crop, planting was complete by the end of April and the latest official forecast for 2013 points to an output of 6.7 million tonnes, some 15 percent above the 2012 level, reflecting a recovery from lower plantings in 2012. In **India**, a good 2013 winter (Rabi season) wheat crop is anticipated reflecting adequate irrigation reserves in most producing areas and, in addition, good rainfall in the latter part of the growing season in major producing states such as Uttar Pradesh, Punjab and Haryana in the north-west. The latest forecast (Third Advance Estimate) from the Ministry of Agriculture puts

winter wheat production at 93.6 million tonnes, just below the 2012 record harvest. In **Pakistan**, the latest official forecast for the 2013 wheat harvest points to a record high crop of 26.3 million tonnes, some 10 percent above 2012. With the harvested area estimated similar to the previous year's good level, the increase is mainly attributed to favourable yields due to good weather between December and March 2013 in the main wheat growing province of Punjab, coupled with adequate supplies of fertilizer and irrigation water.

In the **Asian CIS** subregion, **Kazakhstan** is the major wheat producer and the bulk of the crop is spring sown in April to May. Plantings are forecast at about 13

Global wheat production ¹ (million tonnes)

	Average 2010-12	2011	2012 estimate	2013 forecast	Change: 2013 over 2012 (%)
European Union	135.0	137.6	131.3	138.0	5.1
China (Mainland)	117.7	117.4	120.6	121.0	0.3
India	87.5	86.9	94.9	93.6	-1.4
United States of America	58.8	54.4	61.8	56.0	-9.4
Russian Federation	45.1	56.2	37.7	55.0	45.9
Australia	26.5	29.9	22.1	24.0	8.6
Canada	25.3	25.3	27.2	28.4	4.4
Pakistan	24.2	25.2	24.0	26.3	9.6
Turkey	20.5	21.8	20.1	21.0	4.5
Ukraine	18.3	22.3	15.8	19.8	25.3
Kazakhstan	14.3	22.7	10.3	14.3	38.8
Iran Islamic Rep. of	14.1	13.5	13.8	13.8	0.0
Argentina	13.1	14.5	9.0	11.0	22.2
Egypt	8.1	8.4	8.8	9.4	6.8
Uzbekistan	6.6	6.3	6.7	6.7	0.0
Other countries	57.0	59.1	55.5	56.7	2.2
World	672.2	701.5	659.6	695.0	5.4

¹ Countries ranked according to average production 2010-12.

million hectares, slightly down from 2012, but a return to normal yields after last year's reduced levels is expected to lift production back up to some 14 million tonnes.

In **North Africa**, weather conditions remain favourable for the 2013 winter wheat and coarse grains, for harvest from April/May. In Egypt, the 2013 wheat crop is officially forecast to reach a record 9.4 million tonnes. In **Algeria** and **Tunisia**, outputs are forecast similar to last year's satisfactory levels, while in **Morocco**, wheat production is set to recover to 5.9 million tonnes, after a reduction in the previous year due to adverse weather.

In the Southern Hemisphere, winter wheat sowing is underway in **Australia**. Early indications point to an increase in plantings by about 4 percent in response to attractive prices, which assuming average yields, could lift output to 24 million tonnes. However, if good rainfall doesn't arrive soon in the eastern grain belt, where soil moisture conditions are unfavourably dry, farmers may revise down their planting intentions in the coming weeks. In **Argentina**, early indications for the 2013 wheat crop, to be planted from June suggest an increase of area from last year's sharply reduced level to about 3.5 million hectares. Assuming normal weather conditions and a recovery in yields from last year, production is tentatively forecast point to increase to 11 million tonnes. In **Brazil**, planting of the 2013 crop will begin in May. An early official production forecast points to an increase of about 12 percent from last year's poor level to 4.9 million tonnes, which is still below average. Planted area is expected to increase only marginally while yields are seen to recover by almost 11 percent from the low levels of 2012.

Coarse grains

Global output of coarse grains could recover strongly in 2013

FAO's first forecast for world production of **coarse grains** in 2013 stands at 1 266 million tonnes, 9.3 percent up from last year's crop and a new record level, well above the previous high of 1 167 million tonnes in 2011. The bulk of the increase is expected in maize, which could amount to about 960 million tonnes. In the southern hemisphere the

Global coarse grains production ¹ (million tonnes)

	Average 2010-12	2011	2012 estimate	2013 forecast	Change: 2013 over 2012 (%)
United States of America	313.6	324.0	286.3	366.6	28.0
China (Mainland)	201.6	201.3	217.0	227.5	4.8
European Union	144.5	149.0	141.2	152.9	8.3
Brazil	63.8	59.0	74.1	77.7	4.9
India	42.4	42.4	41.4	38.5	-7.0
Argentina	31.3	32.8	31.1	34.3	10.3
Mexico	28.6	24.7	30.0	30.3	1.0
Russian Federation	28.3	34.2	30.8	34.0	10.4
Ukraine	28.1	33.4	29.9	31.6	5.7
Canada	23.4	23.0	24.4	24.5	0.4
Nigeria	22.4	22.1	22.6	22.6	0.0
Indonesia	18.3	17.6	19.0	17.9	-5.8
Ethiopia	16.7	16.7	17.4	17.4	0.0
South Africa	12.9	11.5	13.3	12.7	-4.5
Turkey	12.4	12.5	12.4	12.8	3.2
Other countries	165.7	162.9	167.9	164.6	-2.0
World	1,153.8	1,167.1	1,158.5	1,266.0	9.3

¹ Countries ranked according to average production 2010-12.

main 2013maize harvests are already underway or already complete in some countries. In **South America**, harvesting of the 2013 maize first season is underway in **Brazil**, while planting of the second season was completed in March. Official forecasts point to an aggregate production in 2013 of 74.9 million tonnes, 5 percent higher from last year's record level. This mainly reflects an 8 percent increase in the area harvested relative to last year. The increase in area is being driven by higher market prices. In **Argentina**, harvesting of the 2013 maize crop is underway. Production is officially forecast to increase by 21 percent from the previous year to 25.7 million tonnes. Higher yields in the key growing areas have more than offset a reduction in the area planted due to excessive rains at sowing time. In **Southern Africa**, where the main maize harvest is already underway in parts or will start during May, aggregate output is forecast to decrease for the third year in succession, albeit slightly, and at about 22.4 million tonnes, would remain close to the average of the past five years. In **South Africa**, the subregion's main producer and exporter, prospects have deteriorated since forecasts earlier in the season mainly because of dry conditions in western areas of the country's maize triangle, predominantly a white maize growing region. Growing conditions remain more favourable in the yellow maize growing eastern areas. Based on latest indications, the country's aggregate maize output is expected at 12.2 million tonnes, about 5 percent below the recently revised 2012 harvest following larger than previously estimated maize deliveries. In **Zambia** and **Malawi**, the outlook is mixed, with Malawi expecting a good

harvest of about 3.6 million tonnes. However, below normal rains in southern parts of Zambia during February and March, as well as delayed distribution of fertilizer, is likely to restrict yields; the 2013 maize crop is tentatively estimated between 2 and 2.3 million tonnes. Overall, the subregion's aggregate 2013 cereal harvest is expected to register a third consecutive annual decrease, but remain close to the short-term average.

In the Northern Hemisphere, the bulk of the coarse grain crops have now been sown throughout Europe, but much of maize crop in **United States**, the world's largest producer, has yet to be planted. Planting progress is behind normal but if weather conditions in the next few weeks are clement, survey data indicates that producers intend to plant the largest area since 1936. If these intentions are realized, and yields return to normal after last year's drought-reduced levels, the country's maize output could increase to about 340 million tonnes. In the **EU**, maize plantings are forecast to increase slightly this year, and assuming yields recover after reduced levels last year, output could increase by some 18 percent or 10 million tonnes to about 65 million tonnes. Barley is also an important coarse grain in the EU, and output of this crop is forecast to increase slightly to some 55 million tonnes, although remaining below the short-term average.

In **China**, the world's second largest coarse grains (mostly maize) producer, production is expected to increase by nearly 5 percent in 2013 from last year's crop to a new record high of 227.5 million tonnes, off which maize is expected to

account for some 218 million tonnes. The expected increase is largely attributed to an expansion of almost 3 percent in the area planted. In **India**, the 2013 Rabi season maize output is officially estimated at 5.46 million tonnes, some 3.6 percent above the 2012 harvest of the same season. In **Indonesia**, the overall prospects for the 2013 main (rainy) season maize crop, currently being harvested, are generally good and the 2013 maize production is preliminarily forecast at 19 million tonnes, similar to the 2012 record crop.

Rice

Early indications see global rice production rising in 2013¹

Still tentatively, and assuming a return to a more normal weather pattern in Asia, FAO foresees **rice** production in the forthcoming 2013 season to rise to 497.7 million tonnes, 10 million tonnes, more than in 2012, with particularly large increases expected in India and Indonesia.

¹For more details on rice see the latest issue of the FAO Rice Market Monitor - April 2013 Volume XVI - Issue No. 2 at:

<http://www.fao.org/economic/est/publications/rice-publications/rice-market-monitor-rmm/en/>

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Central African Republic: The food security situation deteriorates further with disruptions in agricultural and marketing activities following civil conflict

■ **The civil conflict, which began in December 2012 in the north eastern provinces of the Central African Republic, escalated further in late March 2013, when violence spread to the capital Bangui and to the whole country. This has resulted in widespread disruption in agricultural and marketing activities, and the already large number of displaced and food insecure people increased further.**

Protracted civil conflict negatively impacts on agricultural activities

The main 2013 maize harvest is almost complete in the southern bimodal rainfall area, while in the unimodal northern area millet and sorghum crops will be harvested in October. The cassava crop, the principal staple, grown across the country with the exception of the northeast, was sown in May/June and will be harvested in December/January.

Although above-average rainfall was received across the country during the cropping season, crop production is likely to be reduced and harvests are expected to be delayed in parts due to deteriorating civil insecurity, which disrupted agricultural activities and caused input shortages. Several assessments in April and May 2013 found that large numbers of households lacked seeds for planting due to looting and/or used for household consumption. According to a joint FAO/WFP Rapid Food Security Evaluation conducted in May, production prospects were particularly poor in the North (Ouham-Pende, Ouham, North Nana-Grebizi, Bamingui-Bangoran, Vakaga, Haute Kotto).

Increasing food prices due to low supplies and market disruptions

Market supplies are tight across the country and food prices are at high levels following the severe and widespread market disruptions due to increased civil insecurity. The average inflation rate, which surged from 1.3 percent in 2011 to 5 percent in 2012, is forecast to rise further to 8

percent in 2013. In April, in the main markets of the capital Bangui, groundnuts and maize supplies were very low and in response, maize prices increased by 60 percent compared to the pre-conflict levels. Meat and fish were not even available in the markets. Manioc (a root crop) was the only crop in sufficient supply and its prices were around their pre-conflict levels.

The number of people in need of food assistance almost doubled since February 2013

According to an Integrated Phase Classification (IPC) analysis conducted in July 2013, about 978 000 individuals are currently experiencing Crisis (IPC Phase 3) food insecurity levels, while about 309 000 individuals are in Emergency (IPC Phase 4). Accordingly, the total number of people in need of food assistance adds up to a total of about 1.29 million people (about 40 percent of the total population) nearly double the estimated level in February 2013. The areas most affected by food insecurity are Ouaka region in the center, Kabo and Batangafo sub-prefectures in the northwest, and Salo, Nola, Boda sub-prefectures in the south east. Child malnutrition rates have also continued to rise - for example, in Solo, Nola and Boda, the GAM (global acute malnutrition) rate increased from less than 10 percent in July 2012 to

For updates:

GIEWS Country Briefs

<http://www.fao.org/giews/countrybrief/index.jsp>

Further reading:

Resultats de l'analyse de la situation de l'insecurite alimentaire aigue actuelle (Report from the IPC analysis July 2013)

<http://www.disasterriskreduction.net/east-central-africa/fsnwg/documents/detail/en/c/2873>

between 13 and 33 percent in July 2013, while the number of malnourished children admitted to the therapeutic feeding center in Nola more than tripled from January to May 2013. The IDP caseload, which was estimated at 206 000 by UNHCR in late March, increased to 225 000 by late August.

To tackle the aggravation of food insecurity situation, the Consolidated Appeal Process (CAP), a joint effort by the government, the United Nations and the humanitarian community, which was launched in early December 2012, has been revised in June 2013 and scaled up to meet the needs of those affected by the escalation of civil conflict. The international community currently plans to assist 1.6 million beneficiaries for a total cost of USD 195. The appeal has so far received 34 percent of its required funding.

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The Philippines: Strong Typhoon Haiyan Severely Affected the Agriculture Sector in Central Regions

Typhoon Haiyan of category 5 struck the Philippines on 8 November, affecting nine Regions across central parts of the country and causing widespread devastation, massive loss of life and severe damage to the agriculture and fisheries sector. According to UN/OCHA, as of 18 November 2013, the death toll had reached 4 460, while 13 million people were affected of which over 4 million are displaced. High winds, heavy rains and localized floods destroyed houses and infrastructure, including irrigation facilities, and resulted in losses of the main staple rice paddy, sugarcane and coconut crops, as well as livestock, poultry and fisheries. Losses of stored paddy rice and seeds are also reported. The impact of Haiyan has severely compromised livelihoods of the affected households.

Overall damage to agriculture high

Although a comprehensive evaluation of the typhoon damage is not yet available, official partial estimates from the Government of The Philippines indicate that some 153 495 hectares of rice paddy, maize and other high value crops such as coconut, banana, cassava, mango, vegetables have been adversely affected (Table 1). As of 18 November, official estimates indicate total crop losses of Philippines Peso (PHP) 4.72 billion (or USD 110 million at the current exchange rate) and overall damage to the agriculture sector close to PHP 10 billion (USD 225 million). However, these estimates are only preliminary as assessments are still ongoing to establish the full extent of the damage.

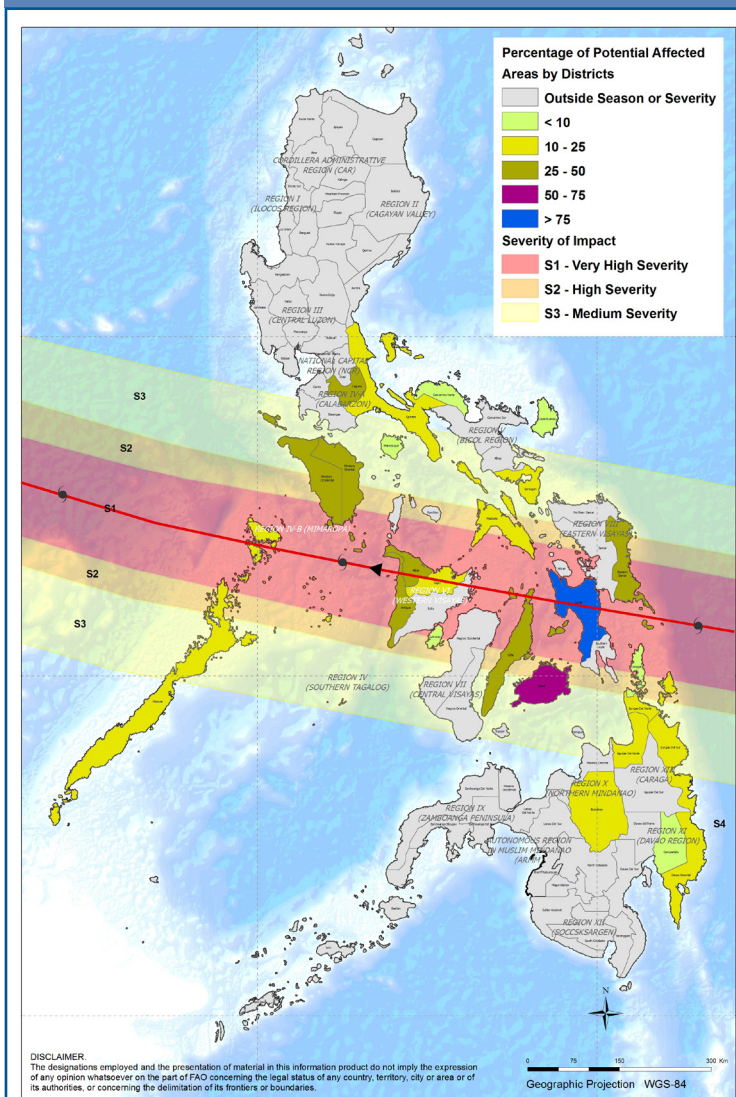
Earlier expectations for increased rice production in 2013 stifled by the typhoons

At the time of Typhoon *Haiyan*, harvesting of the 2013 main season paddy crop, representing 55 percent of the annual production, was well advanced, while planting of the mostly irrigated 2013/14 secondary season crop had started. *Haiyan* followed earlier Typhoon *Nari* which hit northern parts of the country on 12 October.

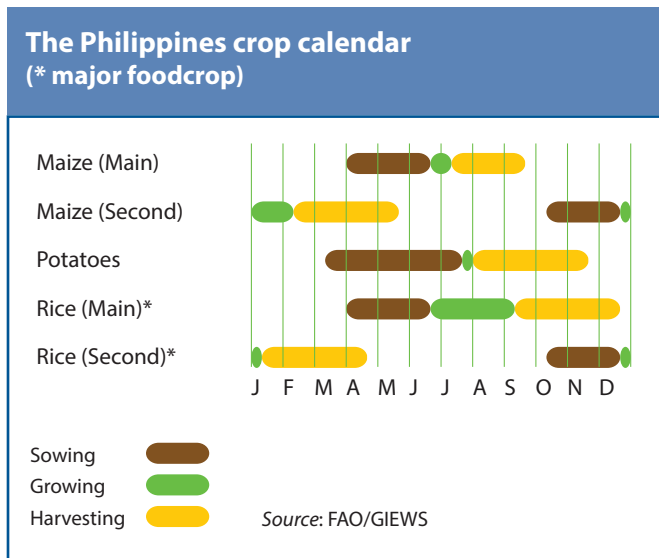
¹The extent (hectares) and percentages of the potential affected crop areas by district was calculated by intersecting the degrees of severity of the tropical cyclone in different areas with the administrative layers and annual harvested area for year 2012.

Sources: Agromaps, FAOSTAT, CountrySTAT Philippines, GAEZ, GIEWS, GLC-SHARE, FAO NRL Geospatial Unit datasets, Data@FAO.ORG, EC-JRC, ESA GlobCover, UNITAR, UNOSAT, WFP, National Disaster Risk Reduction and Management Council, Republic of Philippines, Philippines rice crop calendar, Philippines Rice Research Institute (PhilRice-DA), International Rice Research Institute (IRRI) sponsored by the DA-National Rice Program via the Rice Self Sufficiency Program (RSSP) and the Global Rice Science Partnership (GRISP), the CGIAR Research Program on Rice.

The Philippines: Potential paddy crop area affected by Typhoon Haiyan¹



Copyright, FAO, 2013. Map Created by FAO Land and Water Division, Geospatial Unit



Pending a more detailed assessment, FAO has lowered its 2013 paddy production forecast for the Philippines to take into account losses to the main season crop due to both Typhoon *Nari* in northern parts and recent Typhoon *Haiyan*, as well as anticipated reductions in planted area for the secondary season to be harvested from January next year. The 2013 aggregate paddy production (main 2013 season and 2013/14 secondary season) is now expected at 18 million tonnes, down from expectations of a bumper crop of 18.9 million tonnes at the beginning of the season, which reflected larger plantings and anticipated higher yields in response to Government production incentives and favourable weather in the first part of the season. At the revised level, the 2013 paddy output would be slightly lower than that of 2012. However, the final outcome will greatly depend on timely rehabilitation activities and provision of seeds and fertilizers to the affected farmers for planting/replanting before the end of the sowing period by late December to early January.

Table 1: Official partial estimates of damage caused by Typhoon Haiyan to agriculture

	Land area (hectares)	Amount of losses/damage (million PHP) ¹
Total Agriculture		9 762
Total Crops	153 495	4 721
Rice	77 476	2 327
Maize	20 951	285
High Value Crops	45 068	2 109
Livestock		2 317
Irrigation		498
Fisheries		1 055
Ag infrastructure		1 632

¹ Current UN exchange rate PHP 43.1 to USD 1
 Source: The Philippines National Disaster Risk Reduction and Management Council (NDRRMC) Update No. 25, 18 November 2013

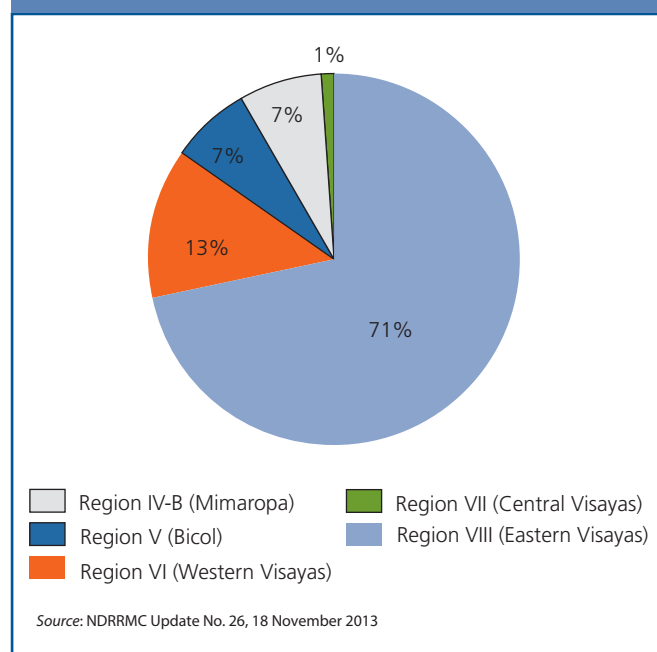
Significant paddy losses at sub-national level

The impact of the recent Typhoon *Haiyan* on national production masks the extent of crop losses at the sub-national level given that the bulk of the reduction in the paddy output comes from the affected central Regions of the country, which account for 35 percent of the total paddy area and 32 percent of annual production (see Table 2). According to the National Disaster Risk Reduction and Management Council (NDRRMC), main season paddy and maize losses have occurred in Regions VIII (Eastern Visayas), VI (Western Visayas), IV-B (Mimaropa), V (Bicol), and VII (Central Visayas) (see Figure 1). Furthermore, over 80 percent of the damaged paddy area and 70 percent of the value of paddy and maize losses are concentrated in the region of Eastern Visayas.

In addition, losses to the stored crop at household level and in warehouses are likely to be high.

Damage to the 2013 main season maize crop has been limited as the harvest was virtually completed by mid-September.

Figure 1: Share of paddy and maize damage cost by region



Rice imports forecast to increase in 2014

The Philippines is a rice importer and in the last five years quantities have ranged from 2.4 million tonnes in 2008 (July/June) to 1 million tonnes in 2013 (Figure 2). Given the tentative reduced forecast for the 2013 rice production, imports in 2014 are expected to rise by 20 percent to 1.2 million tonnes. Wheat is not produced domestically, hence

the country imports all of its consumption requirements, forecast at 3.35 million tonnes in 2014. In aggregate, the country's total cereal import requirement for the current marketing year is anticipated at 4.7 million tonnes, some 11 percent above last year's level. The overall increase in cereal imports is also supported by expanding population.

Fisheries sector also severely affected by Haiyan

Fisheries output represents 20 percent of the total agricultural production of the Philippines. The Visayas Regions (VI, VII and VIII) together account for one-quarter of the national output. Before the disaster, there were about 1 500 commercial fishing vessels in the Visayas and 150 000 small 'municipal' vessels or "bancas" of which one-third were motorized. Reportedly some of the worst hit islands, nearly all boats have been destroyed. These boats are key for the population as they depend on them for transporting supplies, food and water. This destruction, along with fishing gear, fish ponds and related equipment leave many with no means of livelihood.

Figure 2: The Philippines cereal imports

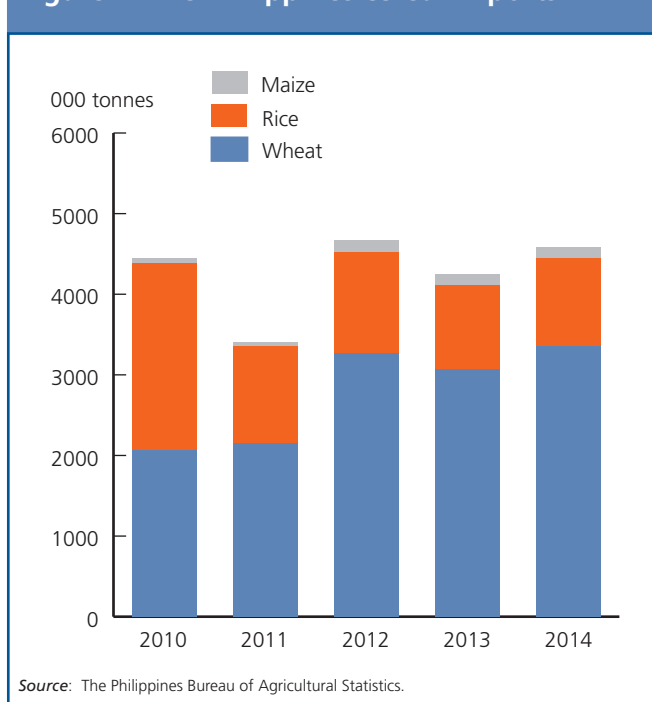


Table 2: The Philippines paddy rice and maize area harvested and production, 2012/13

	Area Harvested (000 ha)			Production (000 tonnes)		
	2012	2013	2012/13	2012	2013	2012/13
	Semester 2 Main season	Semester 1 Secondary season	Annual total	Semester 2 Main season	Semester 1 Secondary season	Annual total
Paddy rice						
Philippines Total	2 654.0	2 043.7	4 697.8	10 140.5	7 997.4	18 137.9
Total of 5 Affected Regions	975.6	679.6	1 655.2	3 432.8	2 331.8	5 764.6
% of affected Regions in National total	37	33	35	34	29	32
IV-B Mimaropa	166.1	111.6	277.7	610.9	404.5	1 015.3
V Bicol region	167.4	172.6	340.0	583.8	625.3	1 209.1
VI Western visayas	450.6	193.7	644.3	1 575.0	614.0	2 189.0
VII Central visayas	55.3	50.7	106.0	183.0	156.3	339.3
VIII Eastern visayas	136.2	151.0	287.2	480.2	531.7	1 011.9
Total of other regions	1 423.2	1 086.7	2 509.9	5 749.7	4 642.5	10 392.2
Maize						
Philippines Total	1 482.3	1 075.1	2 557.4	3 938.1	3 323.3	7 261.4
Total of 5 Affected Regions	328.3	193.3	521.6	502.4	422.0	924.3
% of affected Regions in National total	22	18	20	13	13	13
IV-B Mimaropa	11.4	16.4	27.8	29.9	72.7	102.6
V Bicol region	54.2	55.7	109.9	107.6	139.4	246.9
VI Western visayas	70.9	49.1	120.1	179.9	136.9	316.8
VII Central visayas	158.2	42.8	201.1	138.5	28.8	167.3
VIII Eastern visayas	33.5	29.3	62.8	46.5	44.2	90.7
Total of other regions	777.1	676.8	1 453.8	2 366.8	2 472.7	4 839.5

Source: The Philippines Bureau of Agricultural Statistics; List of Regions affected - The Philippines National Disaster Risk Reduction and Management Council (NDRRMC)

FAO to provide assistance for agriculture rehabilitation

FAO will assist the affected households in the rehabilitation of agricultural, fisheries and livestock activities. In particular, it seeks to urgently provide rice seed and fertilizers to farmers so they can plant and/or replant paddy before the secondary sowing season ends by late-December/early January. FAO also aims to provide affected families with vegetable seeds – helping to bridge the time gap before harvesting their main crops – as well as post-harvest facilities and related equipment.

Overall, FAO has called for USD 24 million for immediate interventions in fisheries and agriculture targeting 250 000 households as part of the UN-coordinated humanitarian Flash Appeal.

For Updates:

FAO in Emergencies

<http://www.fao.org/emergencies/crisis/philippines-typhoon-Haiyan/en/>

UN Office for the Coordination of Humanitarian Affairs

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