



Crop Prospects and Food Situation

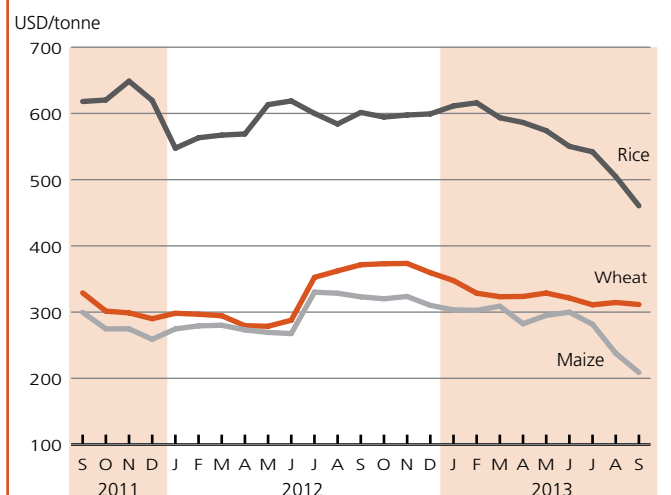
HIGHLIGHTS

- **The outlook for global cereal supply in the 2013/14 marketing season remains generally favourable despite downward adjustments to forecasts for world cereal production and closing stocks.**
- **Export prices of maize dropped further in September mainly reflecting the positive outlook for the 2013 global output.** Wheat prices remained relatively stable, while those of rice declined from most origins.
- **Aggregate cereal imports of LIFDCs during 2013/14 are estimated to increase by some 6 percent over the reduced imports of the year before.**
- **In Western Africa, prospects for the 2013 cereal crops are favourable in the Sahel but uncertain in coastal countries following irregular precipitation in several regions.** Despite an improved food supply situation this year in the Sahel, a large number of people are still affected by conflict and the lingering effects of 2011/12 food crisis, notably in northern **Mali**.
- **In Eastern Africa, the overall food security situation is improving as the harvest has started in several countries and food prices are generally stable or declining.** Although 35 percent fewer than last year, approximately 8.7 million people are still in need of humanitarian assistance.
- **In Central Africa, the food security situation continues to deteriorate in the Central African Republic (CAR) and in the Democratic Republic of the Congo (DRC) due to protracted civil insecurity.** Nearly 6.35 million people in DRC (18 percent up on last year) and 1.3 million people in CAR (more than double from February 2013) are in need of humanitarian assistance.
- **In North Africa, a good aggregate cereal harvest was gathered in 2013.** Estimates of wheat production in Algeria, Morocco and Egypt are the highest on record, while reduced plantings following poor rains caused a sharp reduction in Tunisia.
- **In Southern Africa, drought conditions in western parts resulted in a decline in cereal production and in higher prices in 2013, causing a rise in the number of food insecure, particularly in Namibia.**
- **In the Syrian Arab Republic, the persisting conflict continues to severely impact on food security conditions, with about 4 million people in need of humanitarian assistance.**
The conflict together with food price increases and the approaching winter lean season period is expected to further aggravate the poor food situation.
- **In Far East Asia, the aggregate 2013 cereal production is estimated at a record level, with virtually all countries expecting larger harvests.**
- **Cereal production in CIS countries has significantly recovered from last year's drought reduced levels, boosting export supplies and inventories.**
- **In Central America and the Caribbean, forecasts for the 2013 main season maize production points to a recovery from last year's low levels.** However, localized crop losses have been reported in Guatemala and Honduras, due to prolonged dry spells.
- **In South America, prospects for the 2013 wheat crop have deteriorated following severe frost damage, particularly in Paraguay and Brazil.** However, the subregion's wheat production is still forecast at a higher level than the poor harvest of 2012.

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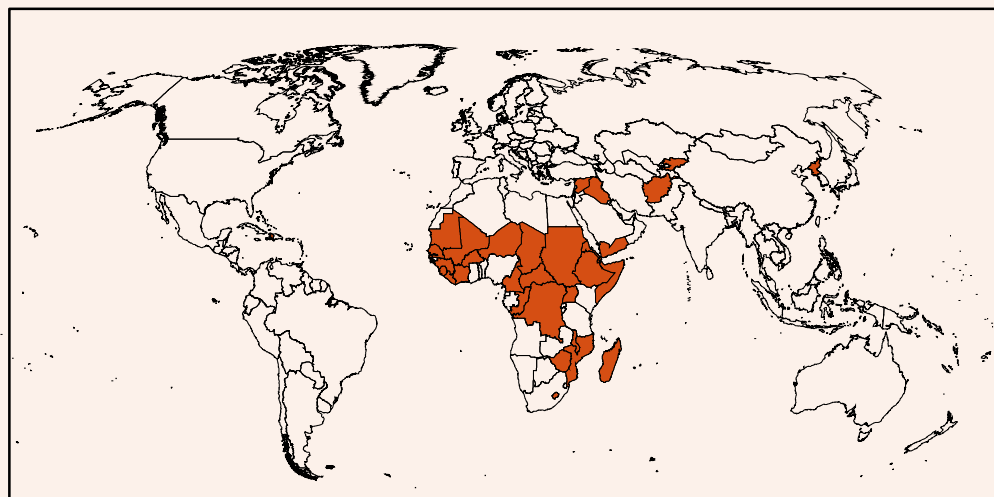
Selected international cereal prices



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

Countries requiring external assistance for food¹

World: 34 countries



country requiring
external assistance
for food

AFRICA (27 countries)

Exceptional shortfall in aggregate food production/ supplies

Zimbabwe

Maize production in 2013 declined by 17 percent from last year's below average level, causing deterioration in food security conditions, particularly in southern areas. The number of food insecure is projected to rise to 2.2 million people between January and March 2014, significantly above the 1.67 million in the first quarter of 2013.

Widespread lack of access

Burkina Faso

A massive influx of refugees from Mali has put additional pressure on local food markets. Although production recovered significantly in 2012, assistance is still needed in parts, due to the lingering effects of the previous year's drought-induced food crisis.

Chad

Lingering effects of the 2011 drought, influx of refugees (over 300 000 people from the Sudan's Darfur region and the Central African Republic) and the return of an estimated 79 000 Chadians from Libya, are putting additional pressure on the local food supply affecting food security.

Djibouti

About 70 000 people are food insecure, mainly in pastoral south-eastern and Obock zones following poor consecutive rainy seasons and reduced employment opportunities. Improvement is reported in pastoral north-western areas due to favourable rains and in Djibouti city due to humanitarian assistance.

Eritrea

Vulnerability to food insecurity due to economic constraints.

Gambia

Despite some improvement in last year's national cereal production assistance is still needed to overcome the lingering effects of 2011 drought and persistent high food prices.

Guinea

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

Liberia

Slow recovery from war-related damages, inadequate social services and infrastructure, and poor market access, and the presence of some 60 000 Ivorian refugees in the country (as of July 2013) result in the need for continued international support.

Malawi

In spite of an above average 2013 national maize harvest, an estimated 1.46 million persons in 2013/14 will not meet their annual food requirements. The main driver of food insecurity this year has been the rising price of maize.

Mali

Insecurity in northern Mali has disrupted commodity flows and resulted in large population displacement, worsening the already precarious food security situation created by the 2011 drought.

Mauritania

Lingering effects of the 2011 sharp drop in production resulted in depletion of household assets. The country is also affected by high international food prices due to its high import dependency. Moreover, more than 60 000 Malian refugees have been registered in the southeastern part of the country.

Niger

The country has been struck by successive severe food crises in recent years that resulted in depletion of household assets and high level of indebtedness. In addition, large numbers of refugees and returning national migrant workers from Mali and Libya placed an increased demand on food.

Sierra Leone

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

Severe localized food insecurity**Cameroon**

In North and Far North regions, recurrent climatic shocks in recent years have negatively impacted agricultural activities. This has led to severe food insecurity and malnutrition for about 615 000 people.

Central African Republic

Civil insecurity conditions, deteriorating since December 2012, caused widespread displacement, aggravating an already alarming food insecurity situation. The IDP caseload was estimated at 225 000 in August, while unrest in August/September has caused further displacement to about 24 000 people. The number of food insecure people in need of humanitarian assistance was estimated in July at about 1.29 million people, nearly double the estimated level in February 2013.

Congo

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

Côte d'Ivoire

Conflict-related damage to agriculture in recent years and the lack of support services mainly in the northern regions. The 2011 post-election crisis forced thousands of people to leave the country and seek refuge, mostly in eastern Liberia where over 61 000 Ivorian refugees were still living as of June 2013.

Democratic Republic of the Congo

Civil insecurity conditions, deteriorating since December 2012, have caused widespread displacement. The IDP caseload, estimated in August at 225 000 by UNHCR, increased sharply in September following clashes in the north-western Ohuam province, causing the displacement of additional 170 00 persons. The number people in need of humanitarian assistance was estimated in July at about 1.29 million people, nearly double the estimated level in February 2013.

Ethiopia

About 2.7 million people are estimated to be in need of humanitarian assistance, mainly located in Oromia (North Shewa and West Arsi zones), Somali, eastern Amhara, southern Tigray and north-eastern Afar regions, following below average "belg" and "sugum" rains.

Lesotho

Production recovery in 2013 has led to improved food security conditions. However, still an estimated 223 000 persons require assistance due to constrained food access; the number is down by about 70 percent compared to the previous year.

Madagascar

Lower rice production and higher prices in 2013 have contributed to a deterioration in food security conditions. South western areas are of particular concern, following the impact of the locust plague and Cyclone Haruna on 2013's harvest.

Mozambique

Overall satisfactory food security situation, benefiting from a favourable 2013 cereal harvest. However, high prices and the impact of flooding in Gaza province, earlier in 2013, have stressed food security conditions in affected areas.

Senegal

Production shortfalls and high food prices in 2012 led to a deterioration of the food security situation in several parts of the country. Although production recovered significantly last year, assistance is still needed in parts.

Somalia

About 870 000 people are estimated to be in need of emergency assistance, mainly IDPs and poor households in some pastoral central and north-western areas with below average livestock production.

South Sudan

The number of severely food insecure people, mainly affected by civil insecurity, trade restrictions and floods, is estimated at about 1.2 million. The situation is improving with the start of the green harvest in September.

Sudan

The number of people estimated to be in need of humanitarian assistance, mainly in conflict-affected areas, increased to about 4.3 million.

Uganda

About 392 500 people, mainly in Karamoja and Acholi regions, are estimated to be severely food insecure following two years of below average production.

ASIA (6 countries)

Exceptional shortfall in aggregate food production/supplies

Iraq

Severe civil insecurity.

Syrian Arab Republic

Due to worsening civil conflict, about 4 million people are estimated to be facing severe food insecurity. Although, some international food assistance is provided, the Syrian refugees are also putting strain on other countries in the region.



Widespread lack of access

Democratic People's Republic of Korea

According to the official estimates the cereal harvest of 2013 early crops, mainly winter wheat and barley, was much lower than the initial forecast. Despite improved cereal harvest of the 2012 main season chronic food insecurity exists. An estimated 2.8 million vulnerable people require food assistance until the next harvest in October. A new food security assessment by FAO/WFP is planned from 27 September to 11 October, 2013.

Yemen

The severely food-insecure population in need of emergency food assistance is estimated at over 10 million people (46 percent of the population) as a result of high levels of poverty, prolonged conflict and high prices of food and fuel.



Severe localized food insecurity

Afghanistan

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

Kyrgyzstan

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



LATIN AMERICA AND THE CARIBBEAN (1 country)

Severe localized food insecurity

Haiti

Despite a recovery in cereal production in 2013 and an increase of access to food by vulnerable populations, due to lower prices, lingering effects of the hurricanes in 2012 persists and food assistance is still required.



Countries with unfavourable prospects for current crops² (total: 1 country)

LATIN AMERICA AND THE CARIBBEAN (1 country)

Paraguay



Frosts during July and August caused severe damage to the 2013 wheat crop, to be harvested from October. Over half of the area planted has been affected and production is forecast at record lows.

Key - Changes since last report (July 2013)

No change ■ Improving ▲ Deteriorating ▼ New Entry +

Terminology

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

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

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

Global overview

Production and stocks forecasts lowered but the supply outlook remains favourable

The outlook for global cereal supply in the 2013/14 marketing season remains generally favourable despite downward adjustments to forecasts for world cereal production and closing stocks. At 2 489 million tonnes, FAO's current forecast for world cereal production in 2013 is marginally lower (3 million tonnes) than reported in September, mainly reflecting poorer prospects for the South America wheat crop, following adverse weather. Despite the adjustment, world cereal production would still surpass the 2012 level by nearly 8 percent.

Global coarse grains output rises strongly in 2013

This significant growth in cereal production is mainly the result of an anticipated 11 percent expansion in coarse grains to about 1 288 million tonnes. The bulk of the increase is expected in the United States, the world's largest producer, where the 2013 maize output is forecast at a record 348 million tonnes. However, also in Europe, production of coarse grains is forecast significantly up this year: output of barley is estimated up by nearly 10 percent while the maize output is forecast to recover sharply from last year's low. In Asia, coarse grains output in 2013 is forecast to increase by almost 3 percent, largely as a result of another strong increase in China's maize output.

In Africa, the aggregate coarse grains harvest in the Western Africa subregion is set to decrease somewhat from last year with delayed plantings in the Sahel region and irregular rains in the coastal countries likely to impinge on yields. In Eastern Africa, harvesting of the 2013 main season cereal crops is almost over in southern parts of the subregion while in northern parts crops are at varying stages of development. Overall, output of coarse grains is forecast to decline slightly from the previous year. In Southern Africa, the main coarse grain crops were already harvested earlier in the year, and production declined, notably due to drought conditions in western parts of the subregion. Elsewhere in the southern hemisphere, good to record harvests were gathered throughout Latin America and the Caribbean.

Latest forecasts put 2013 wheat crop at record high

FAO's latest forecast for global wheat production in 2013 stands at 705 million tonnes, about 7 percent up from last year's level and a record high. However, although the bulk of the crop in the Northern Hemisphere has already been gathered and estimates for these countries are quite firm, this figure may yet be revised pending the outcome of the harvests towards the end of the year in the key southern hemisphere producing countries.

Most of the increase in global wheat production, compared to last year, reflects the recovery of crops in the major producing CIS countries in Europe and Asia. Wheat output in the Russian Federation is estimated 37 percent up from 2012, in Ukraine, latest information points to an increase of about 34 percent, while in Kazakhstan, a 66 percent recovery from last year's low is expected. Elsewhere in Europe, aggregate wheat output of the EU countries also increased, rising 8 percent from the previous year to the

Table 1. Basic facts of world cereal situation

(million tonnes)

	2011/12	2012/13 estimate	2013/14 forecast	Change: 2013/14 over 2012/13 (%)
PRODUCTION¹				
World	2 356.9	2 311.7	2 489.1	7.7
Developing countries	1 355.8	1 401.9	1 438.6	2.6
Developed countries	1 001.0	909.8	1 050.5	15.5
TRADE²				
World	317.7	307.7	312.4	1.6
Developing countries	100.7	125.7	110.4	-12.2
Developed countries	217.0	182.0	202.1	11.0
UTILIZATION				
World	2 331.0	2 338.7	2 415.5	3.3
Developing countries	1 475.7	1 496.7	1 541.8	3.0
Developed countries	855.3	842.0	873.7	3.8
Per caput cereal food use (kg per year)	151.9	151.8	152.4	0.4
STOCKS³				
World	516.8	497.3	558.9	12.4
Developing countries	368.3	387.0	414.1	7.0
Developed countries	148.5	110.3	144.8	31.2
WORLD STOCK-TO-USE RATIO%	22.1	20.6	22.8	10.9

Note: Totals and percentage change computed from unrounded data.

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

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

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

highest level since the 2008 record. In the other Asian subregions, latest estimates indicate the 2013 wheat crop in the Far East turned out virtually unchanged from the previous year's level. In the Near East, wheat output increased somewhat under generally satisfactory conditions in most wheat producing areas, particularly in Turkey, the major producing country where the crop was estimated 9 percent up from 2012. North African wheat producers also had a good year in 2013, with the subregion's aggregate output estimated up by 17 percent. In North America, wheat output fell in the United States by some 7 percent, despite increased plantings, reflecting adverse conditions over the winter that led to above-average abandonment. Despite delayed planting, wheat production prospects remain positive in Canada, and output is still on-track to increase considerably from last year. At the current forecast it would be the largest crop since 1996.

In South America, conditions for the 2013 wheat crops to be harvested from October have deteriorated reflecting severe crop losses due to frost in Brazil and Paraguay and reduced prospects in Argentina because of dry conditions. Nevertheless, at the latest forecast level, the aggregate wheat output of the subregion is anticipated to recover from last year's sharply reduced crop, but would be below the five year average for the second consecutive year. The prospects for the 2013 winter cereal crops in Australia are generally favourable, despite variable growing conditions over the winter and output is officially forecast up 11 percent from the previous year.

Wheat planting for 2014

In parts of the northern hemisphere the winter wheat crops for harvest in 2014 are already being planted or are due to be sown in the next few weeks. In the United States, as of mid-September, about 12 percent of winter wheat planting was reported to be complete, about average for

that time of the season. After a significant drop in production in 2013, wheat area may rise for the 2014 harvest. In Europe, conditions for winter cereal planting in the EU are generally favourable. In the Russian Federation, early indications point to a similar area of winter cereals as last year. However, wet weather in the middle Volga region and in some regions of Central Russia is a concern for fieldwork and may limit plantings in affected areas if conditions don't improve soon. In Ukraine, planting conditions are satisfactory and the winter cereal area may increase compared to last year. In Asia, planting of the 2014 winter crops, mainly wheat, is underway in China, India and Pakistan.

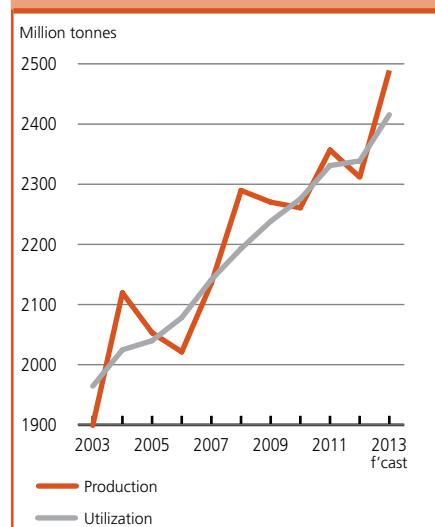
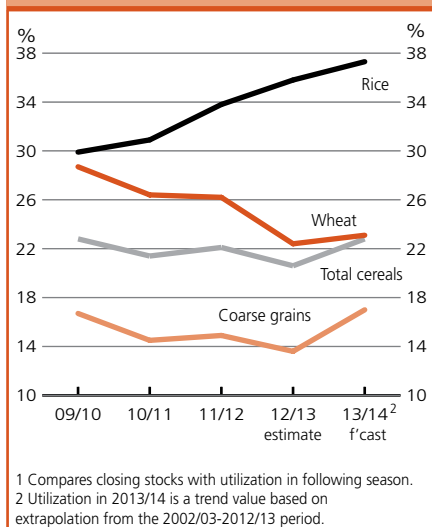
Global rice production forecast for 2013 revised downwards

Most producers in the Northern Hemisphere are now harvesting their main rice crops with some already engaged in sowing their secondary crops. Since August, the outlook for the 2013 rice season has been downgraded with a forecast reduction of 1 million tonnes in global production to 496.3 million tonnes, in milled equivalent. The revision was mainly the consequence of a 2.9 million tonnes downsizing in China, which mostly concerned the country's intermediate crop. Similarly, production prospects deteriorated in Pakistan, because of heavy monsoon rains and floods in Punjab, and in Panama. Part of the shortfall is expected to be compensated by a larger production forecast in India, where abundant monsoon precipitation this year resulted in increased plantings of the main crop, also improving expectations over the secondary irrigated crop. Prospects in Sri Lanka, the United States and Venezuela have also been upgraded.

At the current forecast, world milled rice production in 2013 would be only 1.1 percent larger than last season, or 5.4 million tonnes, a relatively modest expansion if compared with previous years. The overall production in Asia is

set to rise by 1.2 percent to 450.6 million tonnes compared to last year, with most countries in the region expecting gains. The largest increase is expected in India, which benefited from abundant monsoon rains. Despite recent reports of heavy rainfall and flash floods in various parts of the region, sizeable gains are also expected in Myanmar, the Philippines, Thailand, Sri Lanka and Bangladesh. While still poised to end higher than in 2012, output in Indonesia is likely to fall short of the government target, because of a lack of sufficient sunshine during the dry season and outbreaks of brown hopper pest. By contrast, production in China is forecast to decline for the first time since 2003, reflecting first the impact of drought in central provinces, and subsequently, of excessive rains in the northeast and passage of typhoons in the southern coastal provinces. On the other hand, virtually no growth is anticipated in Viet Nam this season due to poor price prospects.

In Africa, the rice sector may register a 1.2 percent production growth this year, sustained by substantial increases in Egypt, Mali, Nigeria, Senegal and United Republic of Tanzania. Overall, all the African subregions are anticipated to see an output rise, except southern Africa, where insufficient rains and locusts in Madagascar may curb output in the sub-region by 18 percent. In Latin America and the Caribbean, rice production is forecast to rebound by 2.5 percent in 2013, still remaining short of the 2011 excellent outturn. So far, most countries in Central America and the Caribbean are expected to garner good crops, with favourable weather boosting yields. The season outcomes are likely to be more diverse in South America. Despite poor returns having encouraged farmers to cut plantings in Argentina, Bolivia, Brazil, Chile and Uruguay, production is anticipated to fall only in Bolivia, Chile and Uruguay as higher yields have sustained some output growth in Argentina and

Figure 1. World cereal production and utilization

Figure 2. Ratio of world cereal stocks to utilization¹


Brazil. On the other hand, rice production is seen expanding significantly in Ecuador, Paraguay and Venezuela.

In the other regions, production in the United States is still predicted to drop by 6.9 percent, despite expectations of record yields, reflecting reduced cultivation due to poor price prospects and excessive rains constraining sowing in the southern states. In Europe, the EU is forecast to undergo an 8 percent cut in output, both because of smaller plantings and yields. By contrast, a small expansion in the area is expected to underpin a rise in production in the Russian Federation. In Australia, despite high summer temperatures, output jumped by 26 percent, boosted by an increase in the area and the achievement of record yields, which averaged 10 tonnes per hectare.

Table 2. World cereal production¹
(million tonnes)

	2011	2012 estimate	2013 forecast	Change: 2013 over 2012 (%)
Asia	1 075.3	1 090.3	1 113.5	2.1
Far East	964.9	994.9	1 006.3	1.1
Near East	69.9	68.4	72.6	6.1
CIS in Asia	40.6	27.1	34.7	28.1
Africa	159.0	167.9	169.1	0.7
North Africa	35.5	34.3	38.4	11.9
Western Africa	49.8	55.3	54.3	-1.9
Central Africa	4.7	4.6	4.8	3.4
Eastern Africa	38.5	43.4	42.7	-1.5
Southern Africa	30.5	30.2	28.8	-4.7
Central America and Caribbean	35.1	40.1	41.0	2.2
South America	149.1	154.6	172.8	11.8
North America	432.6	406.0	482.5	18.8
Europe	462.4	418.2	472.6	13.0
EU	288.5	277.1	305.3	10.2
CIS in Europe	157.2	125.4	153.8	22.6
Oceania	43.4	34.6	37.7	9.1
World	2 356.9	2 311.7	2 489.1	7.7
Developing countries	1 355.8	1 401.9	1 438.6	2.6
Developed countries	1 001.0	909.8	1 050.5	15.5
- wheat	702.4	659.5	704.6	6.9
- coarse grains	1 168.9	1 161.4	1 288.2	10.9
- rice (milled)	485.6	490.9	496.3	1.1

Note: Totals and percentage change computed from unrounded data.

¹ Includes rice in milled terms.

World cereal utilization in 2013/14 is now anticipated to reach some 2 415 million tonnes, up 3.3 percent from the 2012/13 estimated level. This forecast has been raised slightly since September, due to upward revisions to wheat and coarse grains, which more than offset a downward revision to rice. Total use of cereals for direct human consumption in 2013/14 is estimated at 1 094 million tonnes, up 1.3 percent from 2012/13. Wheat (479 million tonnes) and rice (409 million tonnes) account for the bulk of the cereal food consumption. World feed use is expected to reach 850 million tonnes, 5.3 percent above the 2012/13 estimated level. The volumes of cereals utilized for other uses (including post-harvest losses) are also set to grow strongly (by over 4 percent), with the industrial use alone expanding by 6 percent, to 320 million tonnes, according to a recent estimate from the International Grains Council. The main driver is the anticipated rise in the use of cereals for the production of starch (increasing by 7 percent from 2012/13 to 119 million tonnes) and of maize for the production of ethanol in the United States, which according to the

latest (September) forecast from the USDA could increase to 124.5 million tonnes, 5 percent higher than in 2012/13, but still below the 2010/11 record (127.5 million tonnes).

Based on the latest indications, most of the expansion in world cereal utilization in 2013/14 would concern coarse grains (up 5 percent) and rice (up 2 percent) while the increase is likely to prove more modest (1 percent) in the case of wheat. The projected increase in utilization of coarse grains would mainly reflect a higher feed use of maize in the United States now anticipated to surge by 14 percent to 130 million tonnes. Feed use of maize is also seen to increase sharply in China, by 10 percent, to 148 million tonnes, surpassing for the United States, traditionally the world's largest maize market, for the third consecutive season.

The FAO forecast for **world cereal stocks** by the close of seasons in 2014 has been lowered by almost 2 percent since September, to 559 million tonnes. This level would still imply a 12 percent (62 million tonnes) surge from last year's closing inventories and the highest stockpile since 2001/02. The adjustment since September reflects a cut in wheat (-6.8 million tonnes) and coarse grains (-5.7 million tonnes) ending stocks, consistent with the downward revisions to production estimates in several countries. By contrast, the forecast for rice inventories has been raised (by 2.2 million tonnes), as production prospects in India improved. Based on the current projections for world utilization and for a rebuilding of world stocks, the world cereal stocks-to-use ratio is estimated at 22.8 percent in 2013/14, up from 20.6 percent in 2012/13 and well above the historical low of 18.4 percent in 2007/08.

Among the major cereals, global inventories of coarse grains are forecast to increase the most; up 27 percent (45

million tonnes) from the previous season's low level, reaching 212.5 million tonnes. Most of the increase would reflect a build-up in the major exporting countries, especially in the United States where a recovery in maize production in 2013 could boost ending stocks from their historical low level of 16.8 million tonnes in 2013 to 44 million tonnes in 2014. Brazil, China and the EU are also expected to end their seasons with larger inventories. The accumulation of coarse grain stocks in major exporters¹ is expected to result in a significant improvement in their ratio of stocks-to-disappearance (defined as domestic consumption plus exports), which is expected to reach 13 percent, up sharply from the low of 7.6 percent in the previous season.

Global wheat inventories are forecast to reach 163.3 million tonnes, 5.2 percent (8 million tonnes) above their opening level. The bulk of this increase is expected in China (5 million tonnes), resulting from a higher production and lower feed use, and in the EU (2.6 million tonnes), following a sharp increase in production. By contrast, lower production is expected to result in a significant (-4.3 million tonnes) decline in stocks held in the United States, marking the fourth consecutive year of falling inventories. This combined with expectation of unchanged or reduced ending stocks in the other major exporters except the EU would bring the major exporters' stocks-to-disappearance ratio down to 12.6 percent from 13.5 percent in the previous season².

As in the past nine seasons, global rice production in 2013 is likely to surpass utilization in 2013/14, resulting in a further build-up of global carryover stocks in 2014. Overall, world rice inventories are expected to reach 183 million tonnes, some 8 million tonnes or 5 percent above their 2013 level. Much of the accumulation is anticipated to be

concentrated in China and India, the two largest holders of rice reserves, but also in Thailand, where the government has committed to maintain the rice pledging programme over the 2013/14 season, and Viet Nam. By contrast, the size of rice inventories is forecast to shrink in the United States, to accommodate the expected fall of production, and to change little in Pakistan. As a result, stocks held by the five major exporters are estimated to increase by 9 percent volume-wise, covering 29.6 percent of the group's disappearance, up from 27.8 percent in 2013.

International trade in cereals in 2013/14 is forecast to reach 312.4 million tonnes, 1.6 percent (4.8 million tonnes) higher than in 2012/13 and slightly above the forecast in September. Trade in 2013/14 is expected to benefit from larger export availabilities of coarse grains in particular.

World wheat trade in 2013/14 (July/June) is put at 141 million tonnes, 1.4 percent above 2012/13 and marginally above the previous forecast in September. The largest increase in imports is forecast for China (Mainland), where high domestic prices and strong demand could result in imports rising from 3 million tonnes in 2012/13 to 7.5 million tonnes in 2013/14. Several other countries are expected to import more wheat in 2013/14, especially Egypt, Kenya, Pakistan, Saudi Arabia and Tunisia. However, some may import less following a strong recovery in domestic production, such as Morocco and the Russian Federation. The projected increase in wheat import demand is expected to be met largely by higher exports from the CIS countries, while shipments from Australia and Argentina are likely to decrease and those from Canada, the EU and the United States to remain close to the 2012/13 levels.

World trade in coarse grains in 2013/14 (July/June) is set to increase by at least 2 percent, to an all-time high of 133.5 million tonnes. Trade in maize is put

¹ Major coarse grain exporters include Argentina, Australia, Brazil, Canada, EU, Russian Federation, Ukraine and the United States.

² Major wheat exporters include Argentina, Australia, Canada, EU, Kazakhstan, Russian Federation, Ukraine and the United States.

at a record level of 103.5 million tonnes, 2 percent higher than in 2012/13. Among other major coarse grains, trade in barley is forecast to remain steady at around 19 million tonnes while for sorghum it could reach 7.5 million tonnes, 800 000 tonnes higher than in 2012/13. The main drivers behind the anticipated expansion in world trade of coarse grains are larger imports by China, Egypt, Kenya, Japan, Indonesia and Mexico. On the export side, improved supplies are expected to boost shipments from the United States and Ukraine, more than compensating lower sales by Argentina and Brazil.

The early forecast for 2014 rice trade, at 37.9 million tonnes, shows little change from the 2013 current estimate. Overall, countries in Asia but also in Latin America and the Caribbean are expected to reduce their imports, while deliveries to Africa and Europe are predicted to rise. Among the exporters, Thailand may see its sales rebound, reflecting the government's new stance to allow prices to drop and converge to those of competitors. Shipments from India, on the other hand, may falter, as the newly approved Food Import Bill may reduce availabilities for export. Lower international prices may

also undermine sales from Cambodia, Pakistan and the United States.

INTERNATIONAL PRICE ROUND-UP

Maize and rice export prices continued to fall markedly in September, while those of wheat were stable

Export prices of **wheat** in September remained relatively unchanged compared to the previous month. The benchmark US wheat price (No.2 Hard Red Winter, f.o.b.) averaged USD 312 per tonne, which is 16 percent lower than in September 2012. Strong export demand, particularly from China, and weaker US dollar more than offset the downward pressure provided by favourable prospects for the 2013 world wheat output, forecast at record high. Export prices from the Black Sea region and Europe were also stable in September.

International **maize** prices dropped 12 percent further in September, with the benchmark US maize value (No.2, Yellow) averaging USD 209 per tonne, one-third lower than a year earlier. Prices have declined 30 percent in the past three months. The positive global supply

outlook for 2013, which mainly reflects the record maize production forecast in the United States, continued to weigh on prices.

International **rice** prices continued their downward trend in September, as reflected in the FAO All Rice Price index, which averaged 224 points, 14 points, or 5.9 percent, less than in August. The weakness featured all the rice categories, especially the Lower Quality Indica, which relinquished 17 points or 7.6 percent. Large supplies in stocks ahead of coming bumper harvests combined with generally weak exporter currencies were the major factors that weighed on the market. Price fell in most origins but especially in Thailand, reflecting both the devaluation of the Thai Baht and the release of rice from government stocks. At USD 461 per tonne, the benchmark Thai export price (Thai white rice 100% B) was priced 9 percent lower than in August, and 23 percent lower than in September last year.

Table 3. Cereal export prices*

(USD/tonne)

	2012			2013			Sept.
	Sept.	April	May	June	July	Aug.	
United States							
Wheat ¹	372	324	329	321	311	315	312
Maize ²	323	282	295	300	282	238	209
Sorghum ²	286	261	254	246	232	219	217
Argentina³							
Wheat	336	324	315	310	302	281	300
Maize	278	242	257	264	241	221	219
Thailand⁴							
Rice, white ⁵	602	586	574	550	542	505	461
Rice, broken ⁶	540	551	539	518	509	472	407

*Prices refer to the monthly average.

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

² No.2 Yellow, Gulf.

³ Up river, f.o.b.

⁴ Indicative traded prices.

⁵ 100% second grade, f.o.b. Bangkok.

⁶ A1 super, f.o.b. Bangkok.

Low-Income Food-Deficit Countries food situation overview³

Aggregate cereal production of LIFDCs in 2013 forecast to improve slightly over last year's record level

Harvesting of the 2013 main cereal crops was completed in several areas, namely in **Northern** and **Southern Africa**, **CIS Asia** and **Central America**, while the season is well advanced in **Western** and **Eastern Africa**, and much of **Asia**. FAO's latest forecast of the 2013 cereal production for the 62 LIFDCs, as a group, points to a crop of 546 million tonnes, a slight improvement over the record output of 2012, despite a marginal decline in the projected production (rice in milled terms) in India, which accounts for about 44 percent of the total LIFDC output. Most of the production increases are expected in the subregions of the Near East (+15 percent, despite a slight decrease in Afghanistan's production compared to last

year's bumper harvest), CIS in Asia (+4.7 percent) and Central Africa (+3.4 percent), mainly due to favourable weather conditions during the growing period. A bumper cereal production is anticipated in Egypt, the only LIFDC in **North Africa**, following favourable weather conditions, adequate supplies of improved seeds and government support, including higher procurement prices for wheat. In **Central America**, all countries have experienced a recovery in production from last year's weather-affected crop (dry-spells and hurricane-induced flooding) and the aggregate cereal outputs in 2013 are anticipated to remain generally above the previous five-year average. In **Eastern** and **Western Africa**, where the 2013 main season harvests are on-going or about to start, the aggregate outputs are projected to be slightly below the high levels of 2012, mainly due to insufficient

rains in some areas at the beginning of the cropping season. In **Southern Africa**, the aggregate output is forecast to decrease by 5 percent compared to the previous year's harvest, following dry conditions in southern and western regions, and erratic rains. Harvesting of the main season rice and maize crop is currently underway in the **Far East** and the latest projections point to an aggregate harvest of approximately 385.8 million tonnes (including milled rice), similar to last year's record level. The 2012 cereal production of LIFDCs, as a group, has been revised slightly upwards to 544.3 million tonnes from 543 million tonnes that was reported in the July issue of this publication.

Cereal imports of LIFDCs for 2013/14 estimated to increase

Total cereal imports of the LIFDCs for 2013/14 (marketing years) are estimated to rise to 78.6 million tonnes, 6 percent higher than the previous year's low level and slightly above the average level of the preceding five years. Among the subregions, North and Western Africa are expected to require larger import volumes, mainly due to increased requirements in the big importing countries such as Egypt and Nigeria. In Egypt, the anticipated increase in 2013/14 cereal imports is mostly in coarse grains and wheat, forecast to increase by 21 and 14 percent respectively, compared to the below average levels of 2012/13. Similarly, in Eastern and Southern Africa, expectations of a smaller domestic harvest in some countries are expected to boost their import requirements. In spite of a larger 2013 cereal harvest, imports are forecast to increase modestly in Central Africa (+2 percent) and the Near East (+4 percent), due to larger import requirements in Cameroon, Central African Republic, Afghanistan and Yemen. Only CIS in Asia

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

	2011/12	2012/13 estimate	2013/14 forecast	Change: 2013/14 over 2012/13 (%)
Cereal production¹	521.8	544.3	546.0	0.3
excluding India	287.1	303.4	305.3	0.6
Utilization	573.0	586.3	596.6	1.8
Food use	455.1	465.1	474.1	1.9
excluding India	267.0	273.5	278.6	1.9
Per caput cereal food use (kg per year)	0.2	0.2	0.2	0.8
excluding India	0.2	0.2	0.2	-0.1
Feed	51.6	53.1	54.5	2.7
excluding India	44.7	46.1	47.1	2.2
End of season stocks²	110.8	112.7	113.5	0.7
excluding India	66.0	63.4	61.5	-3.0

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

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

³ The Low-Income Food-Deficit Countries (LIFDCs) group includes net food deficit countries with annual per caput income below the level used by World Bank to determine eligibility for IDA assistance (i.e. USD 1915 in 2010). The 2013 FAO list of LIFDCs includes 62 countries as opposed to 66 on the 2012 list. For full details see: <http://www.fao.org/countryprofiles/lifdc.asp>.

subregion is expected to experience a 6 percent decline in import requirements, mainly on account of the favourable 2013 cereal harvest. Elsewhere, in Central America, Far East and Oceania cereal imports are anticipated to remain stable.

Table 5. Cereal production¹ of LIFDCs
(million tonnes)

	2011	2012 estimate	2013 forecast	Change: 2013 over 2012 (%)
Africa (39 countries)	128.4	138.4	136.4	-1.4
North Africa	20.0	21.1	21.3	1.1
Eastern Africa	38.5	43.4	42.7	-1.5
Southern Africa	15.4	13.9	13.3	-4.5
Western Africa	49.8	55.3	54.3	-1.9
Central Africa	4.7	4.6	4.8	3.4
Asia (17 countries)	391.2	404.1	407.5	0.8
CIS in Asia	9.4	9.6	10.1	4.7
Far East	372.6	384.4	385.8	0.4
- India	234.6	240.9	240.7	-0.1
Near East	9.3	10.0	11.6	15.5
Central America (3 countries)	2.2	1.8	2.0	11.9
Oceania (3 countries)	0.0	0.0	0.0	0.0
LIFDC (62 countries)	521.8	544.3	546.0	0.3

Note: Totals and percentage change computed from unrounded data.

¹ Includes rice in milled terms.

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

	2011/12 or 2012	2012/13 or 2013				2013/14 or 2014		
		Actual imports	Requirements ¹		Import position ²		Requirements ¹	
			Total imports:	of which food aid	Total imports:	of which food aid pledges	Total imports:	of which food aid
Africa (39 countries)	46 560	39 127	1 740	24 721	658	43 175	1 879	
North Africa	18 871	13 221	0	13 221	0	15 371	0	
Eastern Africa	7 961	7 349	1 128	3 645	340	8 224	1 299	
Southern Africa	2 495	2 293	207	2 293	207	2 604	205	
Western Africa	15 358	14 255	233	4 869	78	14 937	240	
Central Africa	1 874	2 008	171	693	32	2 039	135	
Asia (17 countries)	37 270	32 941	688	29 624	548	33 073	608	
CIS in Asia	4 740	3 620	4	3 620	4	3 393	1	
Far East	21 970	19 359	518	18 171	428	19 273	441	
Near East	10 560	9 962	166	7 833	116	10 407	166	
Central America (3 countries)	1 696	1 869	100	1 869	100	1 892	141	
Oceania (3 countries)	442	442	0	112	0	447	0	
Total (62 countries)	85 968	74 379	2 528	56 326	1 306	78 587	2 627	

Note: Totals computed from unrounded data.

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

² Estimates based on information available as of early September 2013.

Regional reviews

Africa

North Africa

Good 2013 cereal harvest overall

Harvesting of the 2013 wheat and barley crops was completed in July in the subregion, while in **Egypt**, the harvest of maize and sorghum is ongoing and that of paddy is about to start.

Provisional estimates of wheat production in **Algeria** (at 3.6 million tonnes), **Morocco** (at 7 million tonnes) and **Egypt** (at 9.4 million tonnes) are the highest on record following favourable weather conditions, adequate availability of improved seeds and continued government support. The supportive policies included higher government procurement prices in Egypt, subsidies for farm machinery and irrigation equipment in Morocco, and interest-free loans and support for farm inputs in Algeria. By contrast, wheat production in Tunisia, at 1 million tonnes, decreased by about 43 percent compared to last year's crop of 1.8 million tonnes and 25 percent compared to the five-year average, due to reduced plantings following poor rains at the start of the cropping season. The coarse grains harvest of the subregion is provisionally estimated at 12.5 million tonnes, near the five-year average and about 7 percent higher than last year.

The aggregate subregional cereal output (including paddy rice) is, therefore, provisionally estimated at 40.5 million tonnes, an increase of about 12 percent on last year's output as well as on the five-year average. Wheat production in the subregion, which accounts for just over half of the aggregate cereal output, increased by 17 percent on last year to 21.2 million tonnes.

Cereal imports remain high

Even in good harvest years, North African countries rely heavily on cereal imports from the international market to cover their consumption needs, with **Egypt** being the world's largest wheat importer. On average, in the last five years, 45 percent of the total



domestic cereal requirements (including food and feed) in Egypt and **Morocco** were met through imports. The share of imports is even higher in **Tunisia** (an average of 65 percent), Algeria (68 percent) and **Libya** (90 percent).

Despite the bumper harvests in 2013, the subregion's aggregate cereal import requirements for the 2013/14 marketing year (July/June) is estimated at 35.8 million tonnes, similar to the average of the previous five-years. Wheat accounts for almost 60 percent of the cereal imports. In Egypt, cereal import requirements in 2013/14 are estimated at about 15 million tonnes, some 16 percent higher than in 2012/13. Algeria's and Libya's cereal imports are forecast to be similar to the levels of last year, while a decrease of 23 percent, to 5 million tonnes, is forecast in Morocco. On the other hand, reflecting a poor harvest, Tunisia's cereal import requirements are provisionally forecast to reach about 4 million tonnes, over 46 percent higher compared to 2012, and 39 percent up on the previous five-year average.

Table 7. North Africa cereal production (million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2011	2012 estim.	2013 f'cast	2011	2012 estm.	2013 f'cast	2011	2012 estim.	2013 f'cast	2011	2012 estm.	2013 f'cast	Change: 2013/2012 (%)
North Africa	18.9	18.0	21.2	12.6	11.7	12.5	5.7	6.6	6.8	37.2	36.4	40.5	11.5
Algeria	2.8	3.4	3.6	1.5	1.6	1.8	0.0	0.0	0.0	4.2	5.0	5.5	9.1
Egypt	8.4	8.8	9.4	7.8	7.8	7.3	5.7	6.5	6.8	21.8	23.1	23.4	1.3
Morocco	6.0	3.9	7.0	2.6	1.4	2.9	0.1	0.1	0.1	8.6	5.3	10.0	87.1
Tunisia	1.6	1.8	1.0	0.7	0.8	0.4	0.0	0.0	0.0	2.3	2.6	1.4	-47.4

Notes: Totals and percentage change computed from rounded data.

Food price inflation slowly increasing

In **Algeria**, in June 2013, the consumer price index (CPI) increased by about 6 percent and 1 percent compared to the previous month and previous year respectively. The year-on-year price increase for bread and cereals was nearly 4 percent in June 2013 while red meat prices recorded increases of almost 17 percent. In **Egypt**, the annual food and beverage inflation rate in July 2013 reached about 14 percent compared to 13 percent in June 2013. The increase was attributed to the depreciating exchange rate, bottlenecks in fuel distribution as well as increasing prices of red meat, poultry, fish, seafood, fruit and vegetables, which coincided with the month of Ramadan. In **Morocco**, the food inflation rose about 3 percent in the 12 months to the end of June 2013, against 3.4 percent in May 2013. In **Tunisia**, CPI reached just over 6 percent in July 2013 on a yearly basis, while the food price inflation reached 7 percent, driven by over 10 percent increases in meat, vegetable oil and fruit prices.

In many countries of the subregion, budgetary constraints have forced governments to examine the costs of subsidies and food waste, especially related to underpriced staples. In **Libya**, for example, the government is considering launching a food and fuel subsidy reform and replacing it with a direct monthly cash transfer to Libyans. It is estimated that around one-third of subsidized food and fuel are smuggled into neighbouring countries.

Western Africa

Overall crop prospects are favourable in the Sahel but uncertain in coastal countries

In the **Sahel**, irregular and insufficient rains at the beginning of the cropping season in May/June delayed plantings of coarse grains in several parts of the subregion. However, significant increase in precipitation and soil water reserves from July over the main producing areas has improved crop prospects. Satellite imagery analysis for early September indicates that good rains continued to fall over most of the Sahel. Hence, the outlook for

the harvest to start from October is generally favourable despite the need for continued rains in the following weeks to allow crops to reach full maturity.

In the **coastal countries** of the Gulf of Guinea, harvesting of the first maize crop has started in the south, while harvesting of cereals will begin in October in the north which only has one rainy season. Precipitation has remained irregular in several regions, notably in the southern parts of Ghana, Togo, Benin and Nigeria, affecting maize yields in parts. Although rainfall has been more favourable in the northern parts of these countries, overall crop prospects remain uncertain.

Cereal prices mostly stable and started to decline in coastal countries

Prices in recent months of locally-produced sorghum, millet and maize have remained relatively stable and significantly lower than last year's crisis-affected levels. Adequate supplies from the last harvests contributed to the stability of prices. In coastal countries along the Gulf of Guinea, in spite of uncertain prospects for 2013 cereal crops, the beginning of the harvesting season has pushed prices down in some markets.

In the Sahel, millet prices in Ouagadougou (**Burkina Faso**) and Bamako (**Mali**) in August were, respectively, 25 percent and 35 percent below their levels in August 2012. In Mali, lower and relatively stable millet and sorghum prices were also recorded in the northern cities of Gao and Tombouctou, reflecting the improved security situation. In **Niger**, where cereal prices have been much higher than in neighbouring Sahel countries due to the impact of reduced supplies in Nigeria, millet and sorghum prices declined significantly in August driven by increased imports from neighbouring Benin and Nigeria where harvesting of the 2013 maize crops has started. In Niamey, the capital of Niger, sorghum and millet prices declined by 13 percent and 11 percent, respectively, in August.

In **Nigeria**, maize prices, following an increasing trend in the preceding months, declined moderately in July in the main northern Kano market. The slight drop in prices is driven by increased supplies from the new 2013 harvest in the southern part of the country. In spite of recent declines, however, maize prices in Kano in July were still 22 percent above their year-earlier levels. The higher prices in Nigeria where due to reduced 2012 cereal production and trade disruptions, causing a sustained upward trend through July and putting pressure on

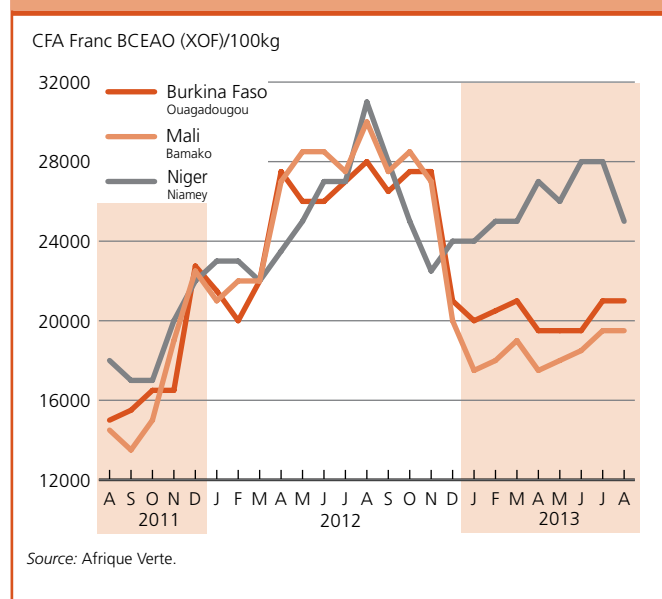
Table 8. Western Africa cereal production
(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals ¹			
	2011	2012 estim.	2013 f'cast	2011	2012 estim.	2013 f'cast	2011	2012 estim.	2013 f'cast	Change: 2013/2012 (%)
Western Africa	42.0	47.1	45.7	12.2	12.7	13.4	54.3	60.0	59.2	-1.3
Burkina Faso	3.4	4.6	4.0	0.2	0.3	0.3	3.7	4.9	4.4	-10.6
Chad	1.5	3.0	2.8	0.2	0.2	0.2	1.7	3.2	3.0	-5.0
Ghana	2.2	2.4	2.3	0.5	0.5	0.5	2.6	2.9	2.8	-4.0
Mali	4.0	4.7	4.4	1.7	1.9	2.2	5.8	6.7	6.6	-1.1
Niger	3.5	5.3	5.1	0.1	0.1	0.1	3.6	5.3	5.2	-3.4
Nigeria	22.1	21.2	21.5	4.6	4.2	4.4	26.7	25.5	26.0	1.8

Note: Totals and percentage change computed from unrounded data.

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

Figure 3. Millet prices in selected Western African markets



markets of neighbouring Niger and Benin. Similarly, in Benin, maize prices in July were still up to one-quarter higher than a year earlier. By contrast, in Accra (Ghana), after a 5 percent decline in July, maize price were 32 percent below last year's level.

Food security in the region affected by civil insecurity in Mali and northern parts of Nigeria

In spite of last year's good harvests and adequate food supplies, the food security situation remains difficult in parts, due to insecurity and the lingering effects of the food crisis of 2011/12.

Recent conflict in Mali has resulted in large population displacement in the subregion. Currently about 150 000 Malian refugees are still living in neighbouring countries, including 60 000 in **Mauritania**, 40 000 in **Niger** and 50 000 in **Burkina Faso**. The number has come down from 174 000 in June reflecting an improved security situation in the north. In addition, over 300 000 people are estimated to have been internally displaced as of June. Similarly, in Nigeria, the ongoing civil insecurity in the northern part of the country has led to a significant population displacement as well as disruptions in commodity movement and cross-border trade.

Moreover, the severe food crisis that struck the Sahel in 2011/12 (similar to 2004/05 and 2009/10) has had an adverse long-term impact on household assets and savings, on levels of

indebtedness, and on the health and nutritional status of the population. Despite the good crop gathered in 2012, several segments of the population still need food and non-food assistance to restore their livelihoods. Implementations of income generation and asset rebuilding activities for food insecure and vulnerable people need to continue in most countries.

Central Africa

Good rains benefit crops

In **Cameroon** and in the **Central African Republic (CAR)**, harvesting of the 2013 main maize crop in southern parts is well underway, while in the northern unimodal areas, harvesting of millet and sorghum crops has just started. So far, above average precipitation was received in most provinces of both countries. However, while a good crop is expected in Cameroon, production in parts of CAR is likely to be negatively affected due to civil insecurity, which disrupted agricultural activities and caused input shortages.

In the **Democratic Republic of the Congo (DRC)**, the main season's maize crop is currently reaching maturity in northern provinces and will be harvested from October. According to remote sensing analysis, rainfall levels have been near average throughout the cropping period, and a satisfactory harvest is expected. In central regions, harvesting of the main maize crop will begin from November. Below average rainfall was received in parts, mainly in Bandundu, Kasai Occidental and Kasai Oriental provinces. The performance of rainfall in the coming weeks will be critical for crop development and outcome.

In **Congo** and **Gabon**, where harvesting of the second season maize crop was completed in July and the planting of the main 2013 crop is currently underway. So far, well distributed rainfall has been received. However, in both of these countries, the bulk of the national cereal requirement is imported.

The FAO provisional forecast for the subregion indicates a 3.5 percent increase in cereal production in 2013 compared to 2012.

Table 9. Central Africa cereal production
(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals ¹			
	2011	2012 estim.	2013 f'cast	2011	2012 estim.	2013 f'cast	2011	2012 estim.	2013 f'cast	Change: 2013/2012 (%)
Central Africa	4.4	4.3	4.4	0.5	0.5	0.5	4.9	4.8	5.0	3.5
Cameroon	2.8	2.8	2.9	0.2	0.1	0.2	3.0	3.0	3.1	5.3
Central Africa Rep.	0.2	0.2	0.2	0.0	0.0	0.0	0.2	0.2	0.2	0.4
Dem.Rep.of the Congo	1.3	1.2	1.3	0.3	0.3	0.3	1.6	1.6	1.6	0.6

Note: Totals and percentage change computed from unrounded data.

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

High food prices recorded in CAR and parts of DRC

In **DRC**, prices of cereals have been volatile and have remained at high levels in conflict affected eastern and southern areas, since late 2012, but remain lower than the record levels reached in February/March 2013. Prices of maize in Bunia, in the eastern Ituri province, and Lubumbashi, in the southern Katanga province, declined in recent months as newly harvested crops increased supplies; however, in August, they were still 84 and 20 percent higher, respectively, than in Kisangani, Bandudu, Kikwit and Mbandaka markets, located in the non-conflict areas of the country.

In **CAR**, the average inflation rate, which rose from 1.3 percent in 2011 to 5 percent in 2012, driven by increasing food prices, is forecast to rise further in 2013 to 8 percent, due to the severe and widespread market disruptions caused by civil insecurity.

In **Gabon**, prices of imported wheat, the main staple, declined by about 30 percent in April 2013 compared to May 2013, and remained stable in June and July at well below their levels of 12 months earlier. The price decrease is mainly due to the Government's decision to expand the number of food commodities subject to price control from 66 in August 2012 to 166 in May 2013, including wheat flour. The sharp drop of 30 percent from April to May is likely due to this price cap announced in March.

The average inflation rate increased from 1.3 percent 2011 to 3 percent in 2012, driven by high commodity and import prices. Average rates of inflation are forecast to remain stable in 2013 in Cameroon, Congo Equatorial Guinea and Gabon.

The food security situation worsens in CAR and DRC

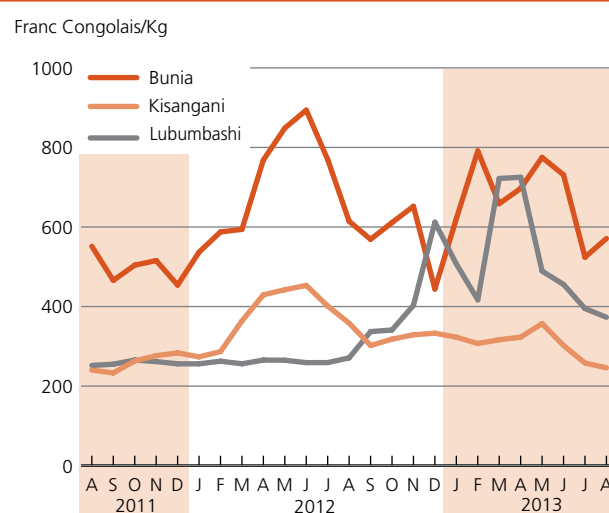
Continued civil insecurity in **CAR** and in **DRC**, has resulted in massive population displacements and hampered populations' access to food. In addition, disruptions in humanitarian interventions have compounded the impact on vulnerable groups.

In **CAR**, according to an Integrated Food Security Phase Classification (IPC) analysis conducted in July 2013, the number of people in need of food assistance was estimated at 1.29 million (about 40 percent of the total population), nearly double the level of February 2013. Similarly, the IDP caseload, estimated in late September at 395 000 by UNHCR, is nearly twice the level of the August figure. This sharp increase is mainly due to heavy fighting in the north-western Ouham province. In addition, torrential rains in Bangui in early September resulted in the flooding of several districts, which affected about 33 000 people, of which 1 785 were displaced. To tackle the steady aggravation of the food insecurity situation, the Consolidated Appeal Process (CAP), a joint effort by the government, the United Nations and the humanitarian community, launched in early December 2012,

was scaled up in June 2013 to meet the needs of those affected by the escalation of civil conflict. The international community currently plans to assist 1.6 million beneficiaries.

In **DRC**, according to the latest available IPC analysis, the number of people in acute food insecurity and livelihood crisis (IPC phases 3 and 4) was estimated at about 6.35 million as of June 2013, about 18 percent more than one year before. Two-thirds of them (about 4.2 million persons) are considered severely food insecure and are mostly concentrated in Northern Kivu province in the east and in Katanga province in the south, where the escalation of civil conflict in recent months severely damaged local livelihood systems and caused massive displacement. As of late June, the total number of IDPs was estimated at about 2.6 million, with North and South Kivu and Katanga provinces accounting for almost 80 percent of the total. Subsequently, clashes in eastern provinces in August and September have caused further displacement of up to 80 000 people, while in early September torrential rains in Oriental province resulted in floods that displaced about 6 000 people. In addition, since early 2013, DRC has received more than 40 000 refugees from the CAR, and more than 100 000 Congolese who were expelled from Angola. The international community currently plans to assist 3.9 million beneficiaries.

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



Source: FAO and DRC Ministry of Agriculture.

Eastern Africa

Favourable production prospects for main season cereal harvests in the region

In Eastern Africa, harvesting of the 2013 main season cereal crops is almost complete in southern parts of the subregion, while in northern parts crops are at varying stages of development.

Harvesting was recently concluded in **Somalia**, (the main gu season crops), in south-eastern and coastal areas in **Kenya** (the long-rains crops), in the **United Republic of Tanzania** (both masika season crops in bimodal rainfall areas and msimu season crops in unimodal rainfall areas) and in the bimodal areas of **Uganda**. In these countries, cereal production is forecast at about average levels. However, significantly below average levels are reported in parts of Somalia (in some agro-pastoral areas in north-western and south-central, especially in Hiran and Lower Shabelle regions), Kenya (in south-eastern counties of Makueni and Taita Taveta) and Uganda (in some central and northern parts), where rains were erratic and ceased earlier than usual.

On the other hand, main season's cereal crops are at varying stages of development in **Eritrea, Ethiopia**, western **Kenya, the Sudan, South Sudan**, and the Karamoja region in **Uganda** and harvesting is expected to start from October. Overall, production is forecast at average to above average levels in these areas, following favourable rains from June to September. The weather outlook for the remainder of the cropping season is also positive in major producing areas. However, delayed harvests and well below average levels of production are likely in eastern Sudan, some areas of northern Ethiopia and in southern Eritrea where the onset of seasonal rains was late by about one month, significantly reducing the planted area. Abundant precipitation since early August has partially eased moisture deficits in these areas, but has caused localized flooding across the Sudan, in north-central Ethiopia and along the Uganda/Kenya border, displacing people and damaging local infrastructure. There is also a concern that maturing crops may suffer damage due to excessive soil moisture and water-logging in the coming months as the forecast calls for

above average rainfall during the October- December period. In pastoral and agro-pastoral areas of Karamoja region in Uganda, especially in the highlands of Kaabong, Moroto and Kotido districts, production prospects are generally unfavourable, mainly where the maize and sorghum crops were severely affected at germination/flowering stage by a long dry spell in May-June.

In Eastern Africa, the overall 2013 cereal production, including an expected average production for the secondary season crops to be harvested at the beginning of next year, is tentatively forecast at 43.5 million tonnes, nearly 13 percent above the average of the previous five-years.

Cereal prices ease in most markets

After steadily rising since the beginning of 2013, prices of coarse grains, in local currency, have declined or stabilized in July/August in most markets of Somalia, Kenya, Uganda, Tanzania and Rwanda, as newly harvested crops became available and/or traders decided to release stocks just before the new harvest. By contrast, prices continued to increase in Ethiopia, the Sudan and in some markets of South Sudan, reflecting the deepening of the lean season. As reported in Figure 5, cereal prices in USD often show a different pattern due to appreciation or devaluation of local currencies.

In **Somalia**, prices of locally grown maize and sorghum declined in August in Mogadishu and other markets as the newly harvested main gu season crops increased supplies. Coarse grain prices in August were up to 50 percent below their levels of 12 months earlier and about 75 percent below the peaks in June 2011, when famine was declared. In Kenya, prices of maize stabilized in August due to the beginning of the 2013 long rains harvest in bimodal rainfall areas and a significant flow of cross-border imports from neighbouring Tanzania. In Tanzania, prices of maize were generally stable in August in most markets, while they decreased sharply in Arusha, an urban market located in the bimodal rainfall area, where the harvest of the masika crops has just been completed. In Uganda, prices of maize levelled off in August in Kampala and Lira wholesale markets as the bulk of the main season harvest improved local availability. Maize prices

(in local currency) are currently at about the same levels of 12 months earlier, despite the sustained export demand from neighbouring countries, mainly Kenya, South Sudan and eastern DRC. In Rwanda, prices of beans, maize and rice reached near record levels in June, due the early depletion of stocks from

Table 10. Eastern Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Total cereals ¹			
	2011	2012 estim.	2013 f'cast	2011	2012 estim.	2013 f'cast	2011	2012 estim.	2013 f'cast	Change: 2013/2012 (%)
Eastern Africa	4.0	4.5	4.6	33.1	37.7	36.7	39.2	44.0	43.5	-1.3
Ethiopia	3.1	3.5	3.6	16.7	17.4	17.5	20.0	21.1	21.2	0.8
Kenya	0.3	0.4	0.3	3.7	3.9	3.6	4.1	4.5	4.1	-9.5
Sudan ²	0.3	0.3	0.5	2.5	5.4	4.5	2.9	5.7	5.0	-12.6
Tanzania U.R.	0.1	0.1	0.1	5.5	6.2	6.5	7.0	7.4	8.1	8.8
Uganda	0.0	0.0	0.0	3.3	3.3	3.2	3.5	3.6	3.4	-3.5

Note: Totals and percentage change computed from unrounded data.

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

² Including South Sudan.

the below average 2013 A season harvest gathered last February. Following these strong gains, prices declined by between 20 and 33 percent from June to August, as the season B and C crops increased supplies. Currently, prices of beans, maize and rice are between 14 and 35 percent lower than 12 months earlier.

In **Ethiopia**, prices of the main cereals continued in recent months to follow the upward seasonal trend that started at the beginning of the year, with prices of maize increasing by between 6 and 20 percent from June to August. In Addis Ababa, prices of maize and red sorghum were 24 and 35 percent higher, respectively, than 12 months earlier, while prices of wheat, white sorghum and teff were at around the same levels. Following a similar trend, prices of locally produced sorghum and millet in the Sudan continued to increase from June to August by between 5 and 15 percent, reflecting the deepening of the lean season. Although around or below the high levels of 12 months earlier, current prices of coarse grains remain very high in most markets mainly as a result of increased production costs, such as labour and fertilizers and soaring inflation rates. Prices of wheat, consumed mainly in urban areas and mostly imported, continued also to increase, reaching record levels in August in the capital Khartoum. The surge in wheat prices started in mid-2012 mainly reflecting international prices but also due to high inflation, limited foreign currency reserves and the devaluation of the Sudanese pound. In **South Sudan**, prices of sorghum followed mixed trends in July, continuing to increase seasonally in Juba and Bor, while they declined in Aweil and Kapoeta as traders released some stocks in anticipation of the start of the green harvest in September/October. Prices in July were around

or below their levels of 12 months earlier, due to the adequate supplies from the good harvest in 2012.

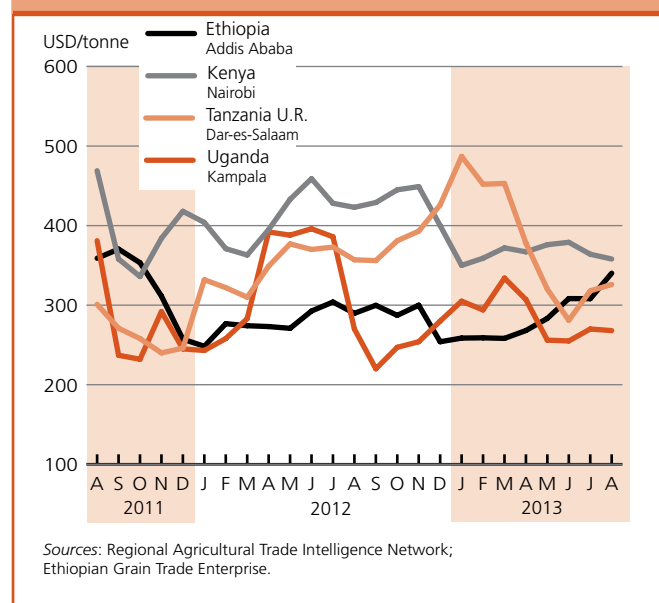
Newly harvested crops improve food security

The number of people in need of humanitarian assistance in the sub-region is currently estimated at about 8.7 million (including 3.9 million in the Sudan, 2.7 million in Ethiopia, 1.2 million in South Sudan, 870 000 in Somalia and 70 000 in Djibouti), down by about 35 percent compared to October 2012 estimates of 13.4 million people.

Since July, food security conditions have improved in many parts of Somalia, Uganda, Tanzania, Burundi and Rwanda following harvests of new crops. Further improvements are expected from October as the main season harvests start in the rest of the countries. The favourable outlook of the October-December rains is also expected to improve grazing conditions in pastoral areas. In Somalia, the number of people in IPC Crisis and Emergency is now at its lowest level since the 2011 famine declaration following consecutive favourable rainy seasons which improved food availability, lowered prices and increased livestock herd size. The sustained humanitarian response, in addition, contributed to the improved conditions.

Despite the overall positive trend, high levels of food insecurity persist in conflict-affected areas of North and South Darfur, South Kordofan and Blue Nile States in the Sudan and in parts of Jonglei, Lakes and Warrap States in South Sudan. Food security conditions have also deteriorated significantly in most pastoral and agro-pastoral areas of Karamoja region in Uganda as the lean season has been two to three months longer than usual, starting last January with the early exhaustion of food stocks. In Ethiopia, severe food insecurity conditions remain in north-eastern Amhara and Tigray regions, in central lowlands of Oromia region and in north-eastern Afar region due to three consecutive poor belg seasons, as well as in some agro-pastoral areas of southern Somali region following unfavourable weather conditions.

Figure 5. Maize prices in selected Eastern African markets



Southern Africa

Contraction in 2013 aggregate maize harvest results in tighter cereal supplies

The main 2013 cereal harvest was completed in July, while the winter wheat harvest, mainly in **South Africa** and **Zambia**, will begin in October. Total cereal production in the subregion declined somewhat, notably due to drought conditions in western parts. In addition, farmers' decision to increase cash crop production, notably tobacco, especially in Malawi and Zimbabwe, further contributed to reducing the cereal harvest of 2013. Overall the subregion's cereal harvest is put at 30.2 million tonnes, approximately 1.4 million tonnes below the five-year average; of which, the maize harvest is estimated at 22.4 million tonnes, 3 percent below the five-year average.

Lesotho, albeit from a low level, posted strong production gains in 2013 over the drought-affected harvest of last year, doubling production, while **Mozambique** also recorded an increase. By contrast, **Namibia** recorded a sharp 42 percent decrease in cereal production relative to 2012 due to drought. Although Namibia is a net importer, the significant decline has seriously stressed food security conditions in northern areas. **Angola** also suffered poor rains in southern parts; however, generally beneficial rainfall in the large central producing provinces is expected to help a recovery compared to last season's poor output. Dry conditions in **Zimbabwe**, notably in southern and western regions, caused a drop in the maize harvest by 18 percent, compared to 2012's output. The large maize producing countries of **Zambia** and **Malawi**, which together contribute an average of about 25 percent to the aggregate sub-regional output, recorded above-average harvests. However, Zambia harvested a lower crop than last year. In **South Africa**, following the recent upward revision for the commercial yellow maize crop, the maize harvest is put at 12 million tonnes, 6 percent and 5 percent below the previous season's production and five year average respectively. **Botswana** and **Swaziland**, which import the bulk of their maize requirements from South Africa, harvested average maize crops. In **Madagascar**, the main rice crop harvest is estimated to have declined by about 21 percent, compared to the previous year's output. Erratic rains and a locust plague (mainly impacting south-western regions), in addition to generally stagnant investment in crop production, contributed to the overall decline.

The 2013 millet and sorghum production in the subregion is estimated to have increased by about one third to 1.14 million tonnes compared to 853 000 tonnes in 2012, owing largely to production rebounds in South Africa and Mozambique. By contrast, the winter wheat crop is projected to be below last year due to reductions in plantings in South Africa that are expected to more than off-set production gains in Zambia, the subregion's second largest producer. In Zimbabwe and Malawi

tobacco production grew by 17 and 64 percent respectively, largely benefitting from an expansion in plantings. The expected increase in income for tobacco farmers is likely to improve their purchasing power and food access.

Import requirements expected to rise slightly in 2013/14

Despite the lower harvest, the subregion has sufficient supplies to cover the aggregate import requirements for the 2013/14 marketing year (generally May/April), estimated at about 1.34 million tonnes of maize. Namibia and Zimbabwe are both projected to import larger quantities of maize to compensate for the contraction in domestic production. However, the lower surplus in Zambia, the second largest exporter in the subregion, will limit import opportunities for Zimbabwe, which restricts the importations of GM maize produced in South Africa. However, Zimbabwe had already agreed to import 150 000 tonnes from Zambia at the beginning of this marketing year. The subregion's aggregate import requirement for wheat in 2013/14 is estimated to grow to 3.5 million tonnes, marginally higher than the previous year's level, as demand for the commodity out-paces the generally stagnant production.

Maize prices rise, underpinned by reduced production in some areas

Maize prices across the subregion began to rise in July/August, after a generally stable period in the preceding months since the start of the main harvest in May. However, in South Africa, maize prices have continued to remain stable, as downward pressure from decreasing international prices was off-set by strong export demand for yellow maize, particularly from Japan, from May onwards, and South Korea more recently. Prices of yellow and white maize showed slightly diverging trends in August, unlike previous months, increasing the price differential between the two. In August, white maize was about 7 percent (Rand 160) per tonne higher, reflecting the recent downward revision for

Table 11. Southern Africa cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2011	2012 estim.	2013 f'cast	2011	2012 estim.	2013 f'cast	2011	2012 estim.	2013 f'cast	2011	2012 estim.	2013 f'cast	Change: 2013/2012 (%)
Southern Africa	2.3	2.2	2.1	25.0	24.6	24.0	4.8	5.1	4.1	32.1	31.9	30.2	-5.4
- excl. South Africa	0.3	0.3	0.4	13.5	11.4	11.4	4.8	5.1	4.1	18.6	16.8	15.9	-4.9
Madagascar	0.0	0.0	0.0	0.4	0.4	0.4	4.3	4.6	3.6	4.7	5.0	4.0	-19.6
Malawi	0.0	0.0	0.0	4.0	3.7	3.8	0.1	0.1	0.1	4.1	3.8	3.9	1.1
Mozambique	0.0	0.0	0.0	2.6	2.0	2.4	0.3	0.3	0.4	2.9	2.4	2.8	16.4
South Africa	2.0	1.9	1.7	11.5	13.2	12.5	0.0	0.0	0.0	13.5	15.1	14.2	-6.0
Zambia	0.2	0.3	0.3	3.1	2.9	2.6	0.0	0.0	0.0	3.4	3.2	2.9	-9.0
Zimbabwe	0.0	0.0	0.0	1.6	1.1	1.0	0.0	0.0	0.0	1.7	1.2	1.0	-13.4

Note: Totals and percentage change computed from unrounded data.

the 2013 output to about 20 percent below the previous year's level, while yellow maize production was revised upwards. The current price levels are expected to help stabilize prices in the import-dependent countries of Lesotho, Swaziland, Botswana and Namibia.

In Zambia, Mozambique and Malawi, prices of maize grain are rising seasonally, but at a generally faster rate than in previous years, and are well above their levels of a year earlier. In Malawi, higher transportation and production costs, following the devaluation of the currency (kwacha) in 2012, and production decreases relative to the previous year in some central and northern districts, have sustained high prices across the country. The national average price, at MWK 114 per kg in August, was more than twice the level of a year earlier. Similarly, prices in Zambia are approximately 50 percent above their year earlier levels, resulting from the reduced 2013 harvest and the removal of Food Reserve Agency's (FRA) price subsidy to millers. The abandonment of fuel subsidies have further contributed to pushing up prices. In Mozambique, maize prices rose markedly in August in several markets, after strong seasonal declines earlier in the year on the back of a recovery of the 2013 maize production to an about-average level. However, in southern parts, prices declined from their high levels benefiting from improved supplies from the productive central region, as well as favourable production from the second cropping season. Maize prices in Harare, Zimbabwe, have been generally constant during 2013, with higher prices in southern and western districts reflecting tight local supplies following the poor harvests earlier in 2013.

The reduced national harvest of 2013 in Madagascar has put

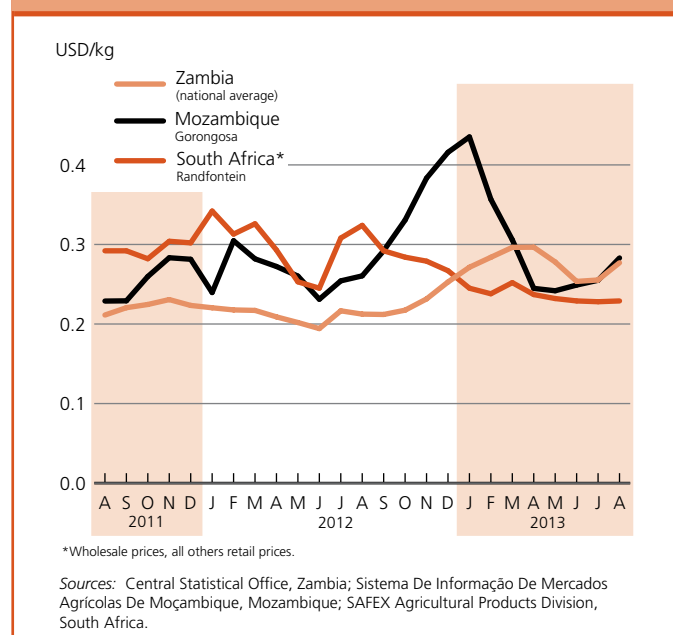
upward pressure on local rice prices, which increased year-on-year by 16 percent higher in August 2013. Unlike previous years, local rice prices did not experience a strong seasonal decline following the start of the first harvests in February and consequently prices are expected to continue to remain above the levels of 2012. Prices of imported rice have remained relatively constant during 2013, on account of generally stable exchange rate and export prices from main suppliers of the country. They were, however, still 5 percent above their levels of a year earlier.

Overall deterioration in food security mainly due to production shortfalls in some countries

Contractions in cereal production and rising cereal prices have combined to stress food security conditions in most parts of the subregion. In total, approximately 6.5 million persons are estimated to be food insecure in 2013/14 (excluding Madagascar and South Africa). Namibia has experienced the sharpest deterioration, with an estimated 778 504 persons assessed to be food insecure. Of these approximately 330 000 are in need of emergency assistance. The current figure is a significant increase from the 75 000 assessed in the previous year, with some northern regions experiencing a second consecutive year of drought conditions that forced many households to implement a number of coping strategies. In response, the government has initiated several short and long-term interventions, including emergency food aid distributions. Although the country has the capacity to import sufficient quantities of cereals, households' access to market supplies is expected to be constrained due to reduced livestock prices and limited local harvest. Similarly in southern Angola, a consecutive season of below average rains has severely reduced crop production and food security conditions are anticipated to deteriorate as a result.

Elsewhere in the subregion, food security conditions deteriorated in areas where crop production shortfalls are estimated, particularly in parts of the Limpopo river basin of Mozambique, southern and western areas of Zimbabwe, and parts of central and northern Malawi. Although still a critical situation in Malawi, the number of food insecure decreased by 26 percent relative to last year. In Zimbabwe, the number of food insecure people is projected to rise to 2.2 million (25 percent of the rural population) during the peak lean period (January-March 2014), up from 1.67 million persons in the first quarter of 2013. Similarly, Lesotho recorded a 69 percent reduction in the number of people at risk of food insecurity to 223 000 persons, largely on account of the production rebound. Furthermore, increasing maize prices in these countries are also continuing to constrain food access. In Madagascar, the food security situation deteriorated as a result of erratic weather conditions and a locust plague affecting 2013 cereal. Areas in southern parts of Madagascar have the highest rates of food insecurity.

Figure 6. White maize prices in selected Southern African markets



Asia

Far East Aggregate cereal production in 2013 seen expanding slightly to a new record level

Harvesting of the 2013 main season rice and maize crops, which make up the bulk of the subregion's cereal crops, is underway in most countries. FAO forecasts the 2013 aggregate cereal output for the Far East subregion (including rice in paddy equivalent) at 1 230 million tonnes, slightly above the previous record harvest of 2012. Overall in the subregion, an early arrival and relatively good progression of the southwest monsoon rains have boosted cereal production prospects, particularly in **Myanmar, Nepal, the Philippines, Republic of Korea and Sri Lanka**, and leading to a recovery from last year's reduced harvests in **Pakistan and Thailand**. In the remaining countries of the subregion, except **Timor-Leste**, similar harvests to the year before are expected. Production of paddy rice, the major staple crop in the subregion, is tentatively forecast to reach 671 million tonnes, up 1 percent from the previous year's record. The major improvement, in absolute terms (paddy equivalent), in the subregion's projected growth is expected from India. Despite the anticipated production gains, mainly on account of larger plantings, dry-weather in the important rice producing states (including in Haryana, Bihar and Tamil Nadu), depressed yields, preventing a potentially larger crop for main Kharif season. The First Advance Estimate from India's Ministry of Agriculture forecasts the 2013 Kharif rice



production to remain close to last year's bumper level, at 92.3 million tonnes. In China, a prolonged dry spell and above-average temperatures in some central and eastern areas affected the main season paddy crop. Latest estimates for the 2013 national paddy crop is put at 204 million tonnes, about 1 percent below last year's output. On the other hand, a poor harvest is estimated in Timor-Leste, following a sharp reduction in the area planted to rice from last year's record level. Similarly, heavy seasonal rains in D.P.R. Korea, which resulted in flooding in parts of the country, particularly affecting the provinces of North and South Pyongyang, is expected to depress production, slightly offsetting

Table 12. Far East cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2011	2012 estim.	2013 f'cast	2011	2012 estim.	2013 f'cast	2011	2012 estim.	2013 f'cast	2011	2012 estim.	2013 f'cast	Change: 2013/2012 (%)
Far East	233.7	243.9	243.7	293.8	308.7	315.2	655.2	662.9	670.7	1 182.7	1 215.5	1 229.6	1.2
Bangladesh	1.0	1.3	1.3	1.7	2.1	2.1	50.8	50.8	51.3	53.6	54.1	54.7	1.0
Cambodia	0.0	0.0	0.0	0.7	1.0	1.0	8.8	9.3	9.3	9.5	10.2	10.3	0.3
China	117.4	120.8	122.2	201.4	214.1	221.5	202.7	205.8	203.7	521.5	540.8	547.3	1.2
India	86.9	94.9	92.5	42.5	41.6	40.2	157.9	156.6	162.0	287.3	293.1	294.7	0.5
Indonesia	0.0	0.0	0.0	17.6	19.0	18.8	65.8	69.1	69.3	83.4	88.0	88.1	0.1
Japan	0.7	0.9	0.8	0.2	0.2	0.2	10.5	10.7	10.6	11.4	11.7	11.6	-0.6
Korea Rep.of	0.0	0.0	0.0	0.2	0.2	0.2	5.6	5.4	5.7	5.9	5.6	5.9	5.4
Myanmar	0.2	0.2	0.2	1.5	1.7	2.0	29.0	31.5	32.5	30.7	33.4	34.7	3.9
Nepal	1.8	1.8	1.9	2.5	2.3	2.4	5.1	4.5	4.6	9.3	8.7	8.9	2.3
Pakistan	25.2	23.5	24.3	4.8	5.2	5.2	9.2	8.3	8.7	39.3	37.0	38.2	3.4
Philippines	0.0	0.0	0.0	7.0	7.4	7.4	17.0	18.0	18.9	24.0	25.4	26.3	3.3
Thailand	0.0	0.0	0.0	5.2	5.1	5.2	38.1	36.9	37.5	43.3	42.0	42.6	1.5
Viet Nam	0.0	0.0	0.0	4.8	4.8	4.9	42.4	43.7	43.8	47.2	48.5	48.7	0.5

Note: Totals and percentage change computed from unrounded data.

a small increase in plantings. Production is foreseen to remain fairly stable in Bangladesh, Cambodia, Indonesia, Japan, Laos, and Viet Nam.

The harvest of the 2013 winter wheat crop, gathered earlier in the year, has been revised downwards from the last issue of this publication, primarily due to lower crop estimates for India and Pakistan, as a result of adverse weather that depressed plantings and yields. Planting of the 2014 winter crops, mainly wheat, is underway in China and will start in October in India and Pakistan. For the subregion as a whole, the relatively high prices are expected to boost the area planted to wheat.

Cereal exports to decrease, while imports to increase in 2013/14 mainly reflecting wheat trade

Despite the estimated overall increase in cereal production in 2013 in most countries of the subregion, the aggregate cereal imports in the 2013/14 marketing years are expected to increase by some 10 percent compared to 2012/13 and remain 16 percent above the preceding five-years average. The increase is mainly attributed to the higher estimate of maize consignments to China, approximately one third higher than the previous year, following growing demand for feed use. Similarly, total wheat imports of the subregion are expected to increase by 5.2 million tonnes, about 15 percent above last year's level, following higher demand for the crop in Indonesia, China, the Philippines, Thailand and Viet Nam. Reflecting a downward revision for the wheat crop in Pakistan, the government plans to import considerably higher quantities of wheat in current marketing year. By contrast, the aggregate rice imports of the subregion are expected to decline mainly reflecting lower import demand in Indonesia and Viet Nam due to the improved domestic production.

On the export side, an anticipated contraction in exportable surplus mainly from India, is forecast to decrease the aggregate cereal exports by 2 percent compared to the previous year. Since

the last issue of this publication, the wheat export estimate has been lowered to some 7 million tonnes, a decrease of 14 percent compared to the previous year. The downward adjustment mainly reflects lower wheat exports from India, given the estimated decrease in 2013 harvest. With regards to rice, exports for 2013 are anticipated to rise slightly compared to 2012 level. Lower estimated rice exports by India compared to last year, are expected to be more than compensated by an increase in exports from Thailand and Viet Nam, estimated at 8 and 7.7 million tonnes respectively, an improvement of 14 and 3 percent relative to the 2012 performance.

Prices of rice and wheat followed mixed patterns

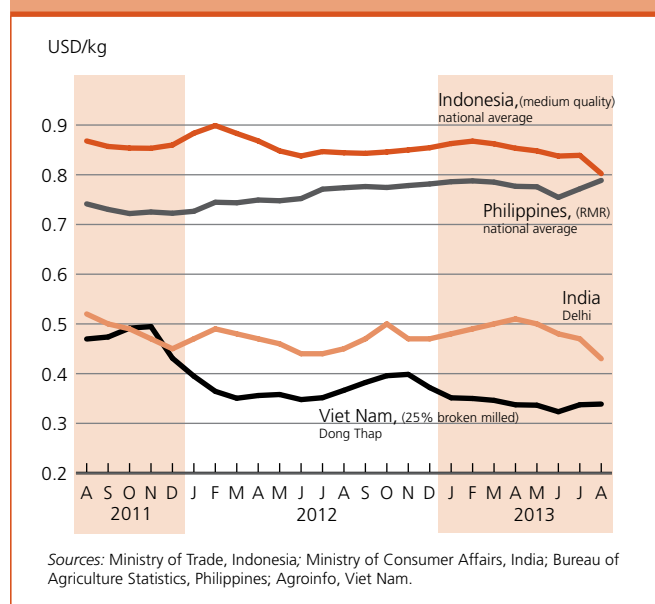
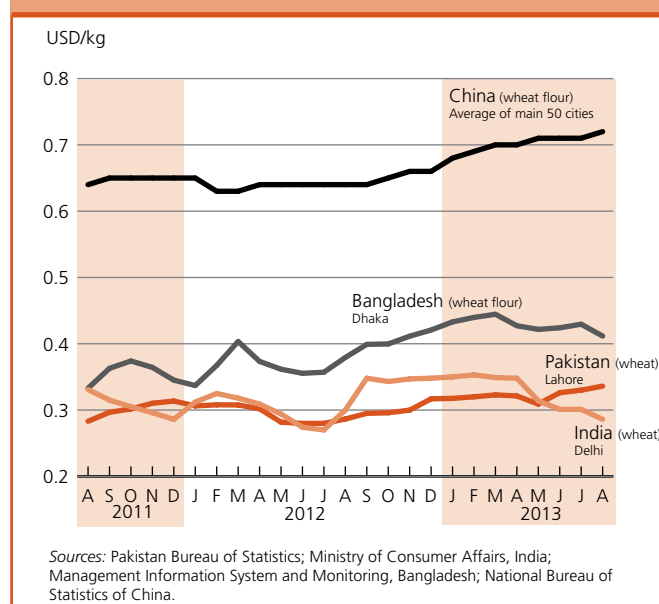
Overall, retail rice prices in local currencies remained relatively stable in most countries of the subregion, but declined slightly in the main exporters India and Thailand, following the release of government stocks. By contrast, prices increased slightly since June 2013 in Viet Nam, after a steady decline over several months. Prices were underpinned by the increase of the minimum export price in mid-July and disruption to harvesting, due to heavy rains in the Mekong Delta. In the Philippines, national average prices of regular and well milled rice varieties rose in August for the second consecutive month with the progress of the lean season, from July to September. In Myanmar, domestic prices for Emata rice in local currency have been increasing since December 2012 reaching near-record levels in August 2013, supported by strong export demand, particularly from China and the European Union.

Nominal prices of wheat and wheat flour followed mixed trends. In China and Pakistan, wheat prices in US dollar terms have been increasing in recent months, reaching record levels in most markets. In August, prices of wheat and wheat flour in Karachi (Pakistan), reached record average levels (PKR 36.4, about USD 0.34, and PKR 45.5, about USD 0.42 per kg, respectively). By contrast, prices of wheat and wheat flour decreased in India (USD terms), reflecting ample domestic availability from the 2013 near-record crop, harvested earlier in the year, and the general weakening of Indian Rupee against USD. Similarly, in Bangladesh, linked to the Indian export prices, wheat flour prices have been decreasing in recent months. In Sri Lanka, imported wheat flour quotations remained unchanged but higher than their year-earlier levels.

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

	Avg 5-yrs (2008/09 to 2012/13)	2012/13	2013/14	2013/14 over 2012/13 (%)	2013/14 over 5-yr avg (%)
Cereals - Exports	35 567	43 939	43 059	-2.0	21.1
Cereals - Imports	85 530	90 326	99 353	10.0	16.2
Cereals - Production	931 971	994 854	1 006 269	1.1	8.0
Rice-milled - Exports	26 989	29 708	30 108	1.3	11.6
Rice-milled - Imports	9 520	10 086	9 810	-2.7	3.0
Rice-milled - Production	424 985	442 254	447 345	1.2	5.3
Wheat - Exports	3 443	8 195	7 050	-14.0	104.8
Wheat - Imports	33 040	34 422	39 600	15.0	19.9
Wheat - Production	227 987	243 910	243 713	-0.1	6.9

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

Figure 7. Rice retail prices in selected Far East countries**Figure 8. Wheat and wheat flour retail prices in selected Far East countries**

Near East

Generally favourable outturn of winter crop harvests

Harvesting of 2013 winter wheat and barley crops is complete throughout the subregion. Bumper harvests were reported in **Turkey**, the **Islamic Republic of Iran**, **Iraq** and **Afghanistan**.

In Turkey, official early estimates indicate a wheat harvest of 21.95 million tonnes in 2013, some 9 percent higher than last year due to generally favourable weather conditions and increased use of certified seeds following the new protein-based procurement policy of the Turkish Grain Board. Similarly, a favourable growing season in the Islamic Republic of Iran resulted in a wheat production estimated at 14 million tonnes, an small increase of 1 percent compared to 2012, but still below the bumper harvests of 15 million tonnes in 2007 and 2010. Similarly in Iraq, favourable conditions were reported in both rain-fed and irrigated areas, although heavy rainfall in early May (beginning of the harvest) has negatively affected the expected wheat yield in

the southern part of the country. Despite the losses, however, the official preliminary estimates put wheat production at 3.3 million tonnes, about 57 percent above last year's outturn and the five-year average. In Afghanistan, reports indicate an above average wheat harvest of 4.9 million tonnes, slightly lower than last year's exceptional harvest of over 5 million tonnes.

By contrast, in the Syrian Arab Republic, despite favourable seasonal rainfall, the 2013 wheat production is estimated at 2.4 million tonnes, significantly lower than the average for the ten years prior to 2010/11 that exceeded 4 million tonnes (a 40 percent decline) and 37 percent below the poor 2011/12 crop. A smaller area was planted to cereals due to high costs of production, reduced input availability, including labour, and prevailing violence related to damage to farm equipment and abandonment of cultivation. Power cuts, damage to power stations, canals, and pumps; and high diesel costs also contributed to a decline in irrigated area. Pre- and post-harvest grain losses were also estimated to be higher than the average, on account of

Table 14. Near East cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2011	2012 estim.	2013 f'cast	2011	2012 estim.	2013 f'cast	2011	2012 estim.	2013 f'cast	2011	2012 estim.	2013 f'cast	Change: 2013/2012 (%)
Near East	46.8	45.1	47.7	20.5	20.6	22.1	4.1	4.2	4.4	71.4	70.0	74.2	6.0
Afghanistan	3.3	5.0	4.9	0.6	0.7	0.7	0.7	0.7	0.7	4.6	6.4	6.3	-1.8
Iran (Islamic Rep. of)	13.5	13.8	14.0	4.3	4.7	4.5	2.3	2.4	2.5	20.1	20.9	21.0	0.7
Iraq	2.8	2.1	3.3	1.2	0.8	1.2	0.2	0.2	0.2	4.2	3.1	4.7	52.9
Syrian Arab Republic	3.9	2.8	2.4	0.8	1.0	1.1	0.0	0.0	0.0	4.7	3.8	3.5	-8.4
Turkey	21.8	20.1	22.0	12.5	12.4	13.6	0.9	0.9	0.9	35.2	33.4	36.4	9.1

Note: Totals and percentage change computed from unrounded data.

damage to harvesting equipment and storage structures.

Aggregate cereal output in the subregion is therefore provisionally estimated at 74.2 million tonnes (rice in paddy equivalent), an increase of 6 percent on last year, and 10 percent higher than the five-year average. Consequently, the total subregional wheat imports are expected to be about 5 percent less than last year at almost 23 million tonnes.

High food prices and civil unrest, in parts, affecting food security

In the **Syrian Arab Republic**, the persisting conflict continues to worsen the state of food security, particularly for vulnerable groups. Following the unrest, the economy contracted by 3.4 percent in 2011 and 19 percent in 2012. For 2013 a further contraction of over 13 percent is expected. The economy continues to be under pressure from international sanctions which include an embargo on oil exports as well as restrictions on international trade, investment and financial transactions. The FAO/WFP Crop and Food Security Assessment Mission (CFSAM) conducted between May and June 2013 estimated that approximately 4 million people are facing food insecurity. Most vulnerable groups include the internally displaced, small scale farmers, herders, casual labourers, petty traders, the urban poor, children, pregnant and lactating mothers, the elderly, the disabled and the chronically sick. Although WFP continues to provide food assistance to vulnerable Syrian populations in Jordan, Lebanon, Iraq, and Turkey, resources in host communities remain under strain. The WFP assistance in neighbouring countries was scaled-up to reach more than 1.2 million beneficiaries by December 2013, up from 795 000 in June 2013. The current situation is likely to worsen further as the country enters the winter lean season and food prices continue to increase.

An increasingly complex humanitarian crisis has also been under way in Yemen with conflict in the north and secessionist movements in the south. Persistent civil insecurity throughout the country resulted in the reduction of basic social services, shrinking household resilience, and widespread displacement, with the IDP caseload estimated at about 300 000 as of late April 2013. According to a Comprehensive Food Security Survey by WFP, released in June 2012, over 5 million people (22 percent of the population) are severely food insecure and in need of emergency food assistance, and an additional 5 million people are “moderately” food insecure and at risk of deterioration in the face of continuing shocks. Child malnutrition rates are among the highest in the world with 47 percent of Yemen’s children (under five years) being chronically malnourished and 13 percent suffering from acute malnutrition. To tackle the food insecurity situation, an Emergency Operation (EMOP) worth USD 250 million has been approved by WFP and FAO on 14 January 2013 to provide

emergency food and nutrition support to 5 million food-insecure and conflict affected people through food assistance and cash transfers in 2013.

In **Afghanistan**, the overall food security situation has generally been stable owing to the above average harvest. However, food security concerns remain in some areas, particularly in the west-central highlands where below average rain-fed harvest is expected. Vulnerable households will have sold most of the marketable livestock by September. External humanitarian assistance will be needed. The WFP extended its protracted relief and recovery operation to December 2013 to tackle food security challenges. Emergency food assistance is expected to reach over 900 000 beneficiaries in 2013.

CIS in Asia⁴

The 2013 cereal production recovered; larger export surplus available in 2013/14

The 2013 cereal harvests are close to completion and the aggregate output is estimated around 35 million tonnes, a recovery of 28 percent from last year’s drought-reduced level (about 27 million tonnes) and about 10 percent above the five-year average. Wheat production is estimated to be over 28 million tonnes, approximately 80 percent of the aggregated cereal production.

The bumper 2013 cereal harvest is mainly the result of the wheat production recovery in **Kazakhstan**, the largest cereal producer and main wheat exporter in the subregion. The higher wheat production reflects improved yields as the planted area decreased for the third consecutive year to below average levels.

A significant increase in cereal production has also been reported in **Kyrgyzstan**. However, despite an increase of 27 percent compared to last year’s level, wheat production remained 10 percent below the five-year average due to a continuous decline in the planted area since 2008. In all other CIS Asian countries (**Tajikistan, Turkmenistan, Uzbekistan, Armenia, Azerbaijan and Georgia**) normal weather conditions during the cropping season have contributed to a slight increase in this year’s cereal productions.

Planting of the winter wheat crops to be harvested in 2014 is underway or about to start in the Asian CIS countries. Soil moisture conditions are reported to be generally satisfactory after sufficient precipitation. The planted area under winter crops is expected to remain similar to the previous year. However, in Kazakhstan, the main cereal producer in the subregion, the wheat crop is not planted until spring.

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

Cereal exports to increase in 2013/14

The cereal exports in the subregion for the 2013/14 marketing year (July/June) are forecast to rise from the previous year's level mainly due to Kazakhstan's increased wheat export availabilities, estimated at about 8 million tonnes, after accounting for the replenishment of wheat stocks.

Prices of wheat and wheat products generally stable or declining slightly but still high

In most countries of the subregion, domestic prices of wheat and wheat products remained stable or eased somewhat in July and August. However, prices remained high, particularly in Tajikistan, reflecting strong prices in Kazakhstan, the main supplier of the subregion.

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

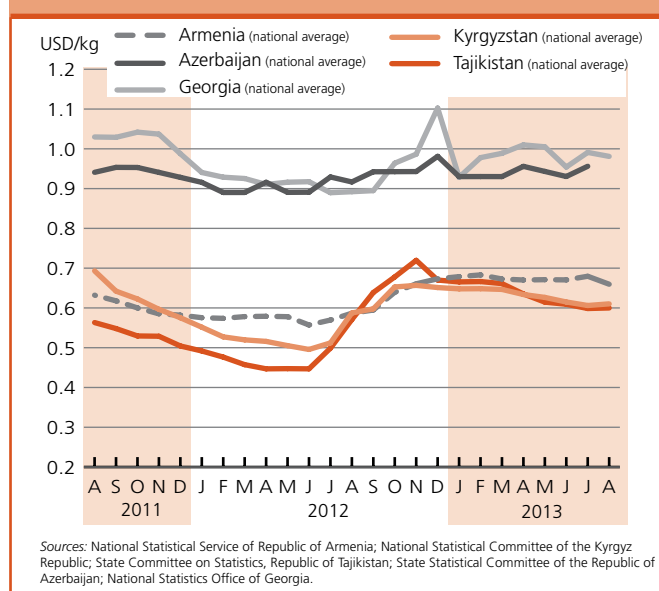


Table 15. CIS in Asia cereal production

(million tonnes)

	Wheat			Coarse grains			Total cereals ¹			Change: 2013/2012 (%)
	2011	2012 estim.	2013 f'cast	2011	2012 estim.	2013 f'cast	2011	2012 estim.	2013 f'cast	
CIS in Asia	33.9	21.4	28.4	6.2	5.1	5.7	40.8	27.3	34.9	27.8
Armenia	0.2	0.2	0.2	0.2	0.2	0.2	0.4	0.4	0.4	-1.6
Azerbaijan	1.6	2.0	2.1	0.8	0.8	0.8	2.4	2.8	2.9	2.5
Georgia	0.1	0.1	0.1	0.4	0.4	0.4	0.5	0.5	0.5	0.0
Kazakhstan	22.7	9.8	16.3	3.5	2.2	2.8	26.5	12.5	19.5	56.7
Kyrgyzstan	0.9	0.6	0.8	0.7	0.7	0.8	1.6	1.4	1.6	15.8
Tajikistan	0.7	0.8	0.8	0.2	0.2	0.2	1.0	1.1	1.1	1.8
Turkmenistan	1.3	1.2	1.2	0.1	0.1	0.1	1.5	1.4	1.4	1.4
Uzbekistan	6.3	6.7	6.9	0.4	0.4	0.4	6.9	7.3	7.6	2.9

Note: Totals and percentage change computed from unrounded data.

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

Latin America and the Caribbean

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

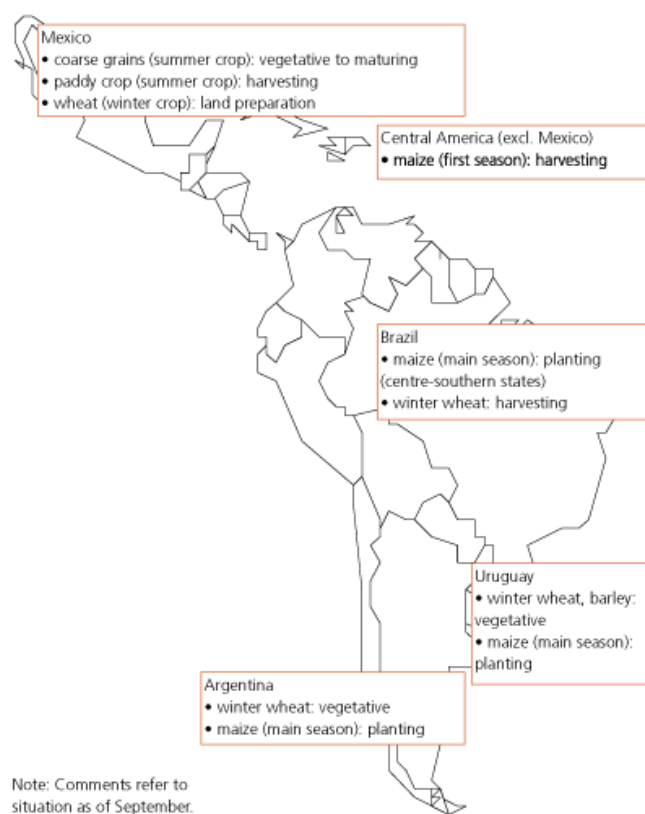
Harvesting of the main 2013 season cereal crops is underway or has just been completed. The aggregate cereal production is forecast at 42 million tonnes or approximately 2 percent higher than in 2012. In **Mexico**, the subregion's main cereal producer, cereal output is expected to be at a record level of 34.3 million tonnes (paddy equivalent), slightly above last year's good level, and mainly reflecting a recovery in yields of the maize crop, which is forecast at 22.4 million tonnes. Production of wheat, harvested earlier in the year, is preliminarily estimated at 3.8 million tonnes, 15 percent higher than in 2012, mainly reflecting a recovery in the planted area.

Elsewhere in the subregion, especially in **Nicaragua** and **Haiti**, the 2013 maize harvest is expected to significantly recover from last year's reduced levels. In **El Salvador**, production is forecast to remain around the record level of 2012 as the government continues to facilitate access to improved seeds and fertilizer.

Cereal imports are expected to increase 6 percent from last year to about 26 million tonnes in 2013. The increase in imports is driven by the strong demand for maize from the feed industry particularly in **Mexico**, **El Salvador** and **Panama**.

Cereal prices decreasing in most countries

In **Guatemala** and **El Salvador**, maize prices declined slightly in August with the beginning of the first 2013 harvests, prospects for which are favourable at the national level. The selling-off of old stocks by traders also put downward pressure on prices which are below their levels of a year earlier. In **Haiti**, maize prices continued to decline significantly in August reflecting the arrival into the markets of the good 2013 main season crop. Prices of rice, the country's main staple and mostly imported, significantly



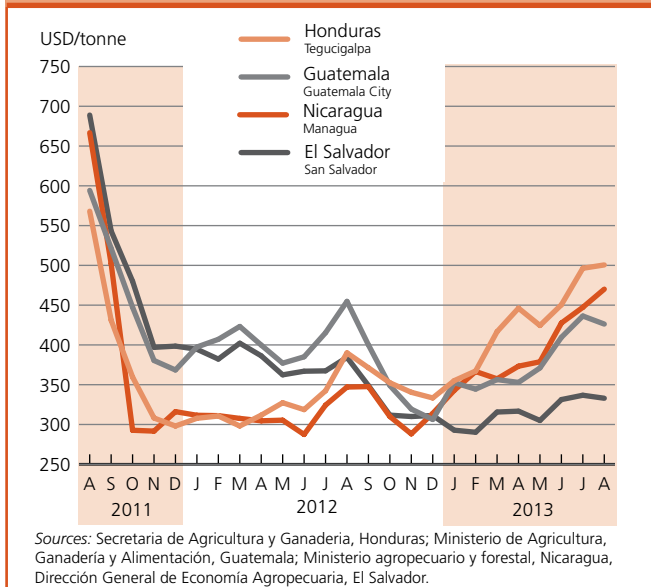
declined in August in the capital Port-au-Prince on account of abundant supplies in the market, including direct imports by the government of the cheaper Vietnamese rice aimed at stabilizing prices of the staple food. In **Mexico**, prices of the staple maize remained stable and low due to adequate supplies from last year's good production and the good 2013 secondary season harvest. By contrast, in **Honduras** and **Nicaragua**, where the harvest starts only in late August/September, maize prices strengthened further in August, and were unseasonably high reflecting last year's reduced crop and localized crop losses due to dry weather in July and first half of August.

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

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2011	2012 estim.	2013 f'cast	2011	2012 estim.	2013 f'cast	2011	2012 estim.	2013 f'cast	2011	2012 estim.	2013 f'cast	Change: 2013/2012 (%)
Central America & Caribbean	3.6	3.3	3.8	29.6	35.0	35.3	2.8	2.8	2.9	36.1	41.1	42.0	2.3
El Salvador	0.0	0.0	0.0	0.9	1.1	1.1	0.0	0.0	0.0	0.9	1.1	1.1	2.1
Guatemala	0.0	0.0	0.0	1.7	1.7	1.7	0.0	0.0	0.0	1.8	1.8	1.8	0.6
Honduras	0.0	0.0	0.0	0.6	0.6	0.6	0.0	0.1	0.1	0.7	0.7	0.7	7.4
Mexico	3.6	3.3	3.8	24.7	30.2	30.3	0.2	0.2	0.2	28.5	33.7	34.3	1.7
Nicaragua	0.0	0.0	0.0	0.7	0.5	0.6	0.4	0.4	0.4	1.1	1.0	1.0	6.9
South America	25.5	16.8	18.7	106.0	121.4	137.4	26.4	24.5	25.1	157.8	162.7	181.1	11.3
Argentina	14.5	8.2	9.5	32.8	31.2	37.5	1.7	1.6	1.6	49.1	40.9	48.6	18.7
Brazil	5.7	4.4	5.1	59.0	74.1	83.7	13.6	11.6	11.9	78.3	90.1	100.6	11.7

Note: Totals and percentage change computed from unrounded data.

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



South America

Cereal production to reach a record in 2013 despite severe wheat crop losses

Despite the effects of adverse weather on the subregion's wheat crop, the 2013 aggregate cereal production is estimated at a new record level of 181 million tonnes, 11 percent above last year's record. This is mainly due to a rise in maize production to 124 million tonnes, 17 percent up from 2012. In **Brazil**, the aggregate maize production is estimated to have risen by 13 percent to a new high of almost 81 million tonnes. The first and second cropping seasons of 2013 were characterized by an increase in both the area planted and yields due to higher prices and favourable weather. Similarly, the 2013 maize outputs reached new record levels in **Argentina**, **Uruguay** and **Paraguay**, as a result of higher plantings and yields.

The 2013 wheat crop in the main producing countries are to be harvested from October. The aggregate wheat output in the subregion is anticipated to recover from last year's sharply reduced crop. But at 18.7 million tonnes it still remains below the five-year average for the second consecutive year. In Paraguay, production is expected to contract by some 32 percent from 2012 as intense frosts in July and August resulted in severe crop losses. In Brazil, the main producing wheat area of Parana, accounting for half of the country's production, also experienced severe crop losses due to frost. The official forecast of the 2013 wheat crop has been lowered to 5.1 million tonnes, still 16 percent higher than last year's poor crop. In Argentina, wheat production is forecast to be 16 percent higher than last year as a result of an

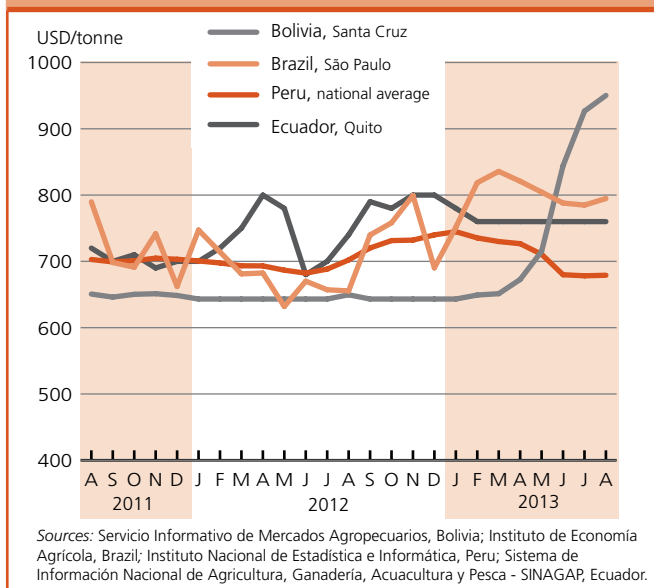
increase in plantings and improved yields. However, this forecast may not materialize due dry weather in recent months.

Total cereal exports are expected to remain relatively unchanged from last year and remain significantly higher than their five-year average at 60 million tonnes for the subregion. Exports of maize are expected to reach new highs for the subregion, reflecting the bumper crops in the three main exporters of **Argentina**, **Brazil** and **Paraguay**. By contrast, wheat exports are going to be significantly reduced because of the drop in local supplies particularly in Paraguay and also the trade restrictions still in place in Argentina.

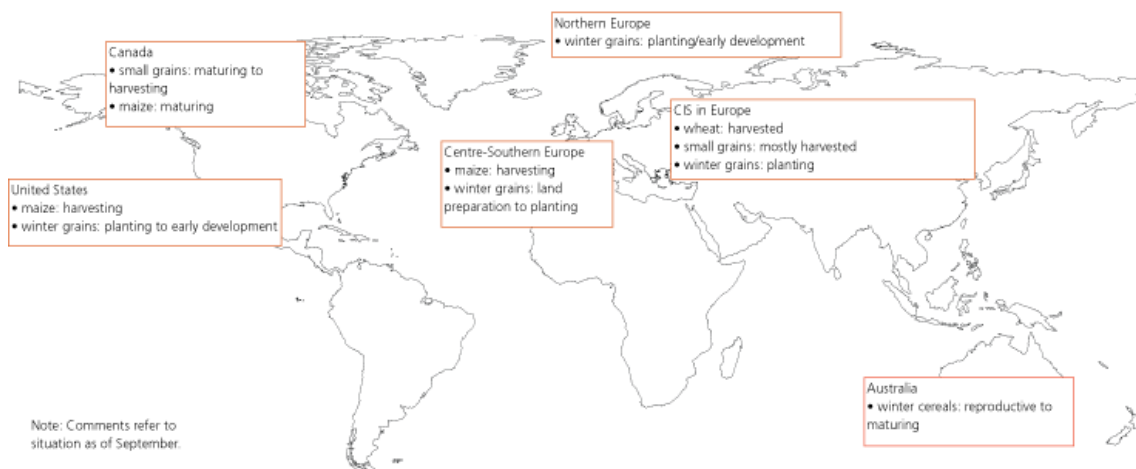
Wheat prices increased sharply in most countries of the subregion

Prices of wheat have surged in recent months in several exporting and importing countries of the subregion, and in August were around record levels. Prices were underpinned by reduced export availabilities and deteriorating prospects for this year's crop. In **Argentina**, domestic wheat flour prices, in local currency, remained stable in August but at levels 88 percent above those in August 2012. A sharply reduced 2012 wheat harvest has supported prices since the second quarter of the year. Concerns about the impact of dry weather in August and early September on the 2013 crop, provided further lift. In **Bolivia**, wheat flour prices increased slightly in August after surging in June and July and were 84 percent up on a year earlier. As most of the wheat consumption in the country is covered by imports, the high prices are the result of lower exportable surplus in the main supplier Argentina. To mitigate the increase in prices, the Government of Bolivia has suspended import tariffs on wheat and wheat flour from non-Mercosur countries until the end of 2013. In Paraguay, frost damage to the 2013 wheat crop resulted in a price surge for wheat products in late August, with those of bread, the main staple, rising by 20 percent. Prices of wheat and wheat flour have been on the rise since the beginning of the year underpinned by strong export demand in the subregion. In **Brazil**, wheat flour prices reached new record levels in August and, in local currency, were 40 percent higher than a year earlier. This is the result of a poor 2012 wheat harvest, reduced supplies from traditional exporter Argentina, and depreciation of the national currency in the past months. Frost damage to the 2013 crop resulted in further price increases in early September. Following the disruption of Argentina wheat exports, Brazil have switched to importing wheat from the United States, becoming the second most important US wheat buyer this year. To facilitate imports of non-Mercosur wheat the government increased the duty free import quota to 2.7 million tonnes, up to the end of November. By contrast, in **Ecuador** and **Peru**, wheat flour prices remained stable in August and around their levels of a year earlier, both in local currency and USD.

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



North America, Europe and Oceania



North America

United States 2013 cereal crop will be smallest in six years

The bulk of the **United States'** 2013 wheat harvesting was completed by mid-September and the total output is officially estimated at 57.5 million tonnes, 7 percent down from last year, despite a 4 percent increase in plantings. The reduction is due to above-average abandonment, which resulted in a 7 percent decrease in the area harvested. Regarding coarse grains, the USDA September report puts the 2013 maize output at some

352 million tonnes, 28 percent up from last year, and the largest crop on record. This outcome is expected to result from a combination of the highest average yield since 2009, together with a record area forecast to be harvested.

In **Canada**, prospects for the 2013 wheat harvest have deteriorated with late summer heat and moisture stress, especially in Saskatchewan, which accelerated ripening and likely reduced yields. Official estimates in mid-September put the total wheat output in 2013 at 29.2 million tonnes, down from earlier forecasts, although still some 7 percent up from last year's crop.

Overall, the area planted to wheat for the 2013 crop increased by about 10 percent in response to good price prospects. The maize crop, mostly grown in Eastern Canada, is forecast similar to last year's level at about 13 million tonnes.

Europe European Union Warm dry conditions favour harvesting and latest information confirms significant increase in 2013 cereal output

Drier and warmer conditions than usual in the EU this summer, particularly in western and central areas, were favourable for crop maturation and harvesting. With the bulk of the wheat crop already gathered as of mid-September, the forecast for aggregate output in 2013 has been raised since previously reported to some 142 million tonnes, 8 percent up from last year's output and the largest crop since 2008. Yields in some of the larger producing countries, namely Germany, Poland, Hungary and Romania, turned out larger than what was earlier expected. With an improved outlook for maize crops among the main producing countries, the forecast for aggregate coarse grains production in 2013 has also been raised since the previous report to 162.5 million tonnes, 14 percent up from last year's crop.

CIS in Europe Recovery in the 2013 cereal production

Harvesting of the 2013 crop (except maize) is about to be finished in all of the European CIS countries (**Belarus, Republic of Moldova, the Russian Federation and Ukraine**). With the exception of Belarus, cereal outputs have increased significantly from last year's drought-affected harvests, reflecting favourable weather conditions. In aggregate, the subregion's cereal output is estimated at 154 million tonnes, 23 percent higher than last

year's output and 8 percent higher than the five-year average level.

In the **Russian Federation**, the 2013 cereal output is put at over 87 million tonnes, an increase of almost 26 percent from the 2012 level and close to the five-year average. Wheat is estimated at 51.5 million tonnes, 37 percent higher although still below the average. By contrast, coarse grains significantly improved, with the maize harvest reaching a record level of 9 million tonnes. In Ukraine, good crop conditions for the winter and spring crops have resulted in the second highest cereal production since 2002. The aggregate production is put at some 55.7 million tonnes well above the drought-reduced harvest of last year and 17 percent above the five-year average level. Wheat production is estimated at 21 million tonnes. This provides a potential exportable surplus of around 17 million tonnes of maize. In total, Ukraine's cereal export potential is put at some 28.75 million tonnes, which is significantly above last year's level.

In 2013, the **Republic of Moldova** recorded the most productive cereal harvest in last ten years, estimated at about 3 million tonnes, which is well above the five-year average as well as last year's reduced output.

Winter crops planting in the region are underway with satisfactory weather conditions. It is expected that the planted area under winter crops will be close to the previous year, with a slight increase of about 2.4 percent expected in Ukraine. In the Russian Federation the rainy weather in the middle Volga Region and in some regions of the Central Russia may complicate the planting campaign of winter crops. Previously the country had planned to plant 13 million hectares of winter wheat and 3 million hectares of winter rye, winter barley and other crops on the remaining area. So, in total it is forecast to plant around 16.4 million hectares under winter cereals which is close to last year's planted area.

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

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2011	2012 estim.	2013 f'cast	2011	2012 estim.	2013 f'cast	2011	2012 estim.	2013 f'cast	2011	2012 estim.	2013 f'cast	Change: 2013/2012 (%)
North America	79.7	89.0	86.7	347.0	310.7	389.9	8.4	9.0	8.4	435.1	408.7	485.0	18.7
Canada	25.3	27.2	29.2	23.0	24.4	25.4	0.0	0.0	0.0	48.2	51.6	54.6	5.9
United States	54.4	61.8	57.5	324.0	286.3	364.4	8.4	9.0	8.4	386.9	357.1	430.4	20.5
Europe	223.6	192.7	222.9	236.0	222.8	247.1	4.4	4.4	4.2	464.1	419.9	474.2	12.9
Belarus	2.1	2.1	1.9	5.7	6.7	6.3	0.0	0.0	0.0	7.7	8.8	8.2	-7.1
EU	137.6	132.2	143.1	149.0	143.0	160.4	3.2	3.1	2.9	289.8	278.3	306.4	10.1
Russian Federation	56.2	37.7	51.5	34.2	30.8	34.8	1.1	1.1	1.1	91.5	69.6	87.4	25.5
Serbia	2.1	1.9	2.4	7.0	6.7	6.8	0.0	0.0	0.0	9.0	8.6	9.1	5.4
Ukraine	22.3	15.8	21.2	33.4	29.9	34.3	0.2	0.2	0.2	55.9	45.9	55.7	21.3
Oceania	30.2	22.4	24.8	12.7	11.5	12.1	0.7	0.9	1.2	43.6	34.9	38.1	9.2
Australia	29.9	22.1	24.5	12.1	11.0	11.6	0.7	0.9	1.2	42.7	34.0	37.2	9.5

Note: Totals and percentage change computed from unrounded data.

Higher export availabilities in 2013/14 (July/June)

The total cereal export potential of the Russian Federation in the marketing year 2013/14 (July/June) is estimated at about 20 million tonnes, including 14.5 million tonnes of wheat, 2.6 million tonnes of barley and 2.7 million tonnes of maize. If these levels were to materialize, wheat exports from the Russian Federation would account for 10 percent of the global wheat exports. Total cereal exports from the Russian Federation in 2012/13 were estimated at 15 million tonnes.

Wheat and wheat flour prices declining in most countries

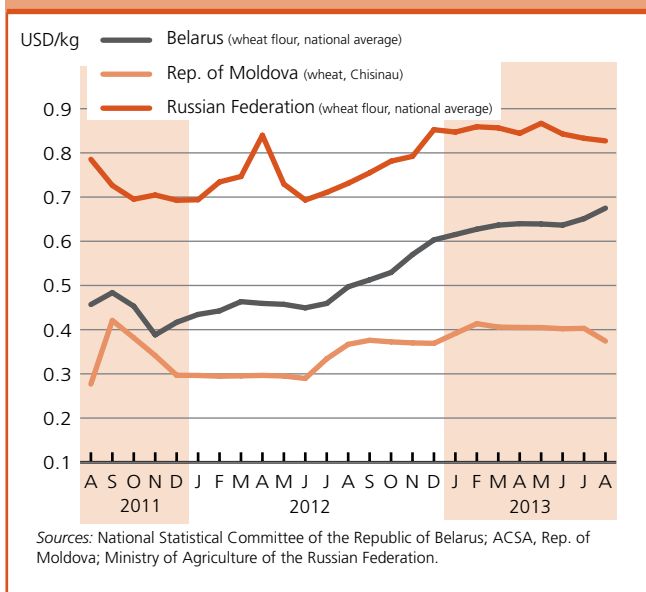
Wholesale prices of wheat and wheat flour in the Russian Federation and Ukraine declined markedly in July and August as a result of the bumper 2013 wheat harvests, recently completed. Export prices of wheat in these countries also fell sharply in July, but remained relatively unchanged in August due to strong export demand.

Oceania Dry winter in parts limits crop yield potential but 2013 cereal output forecast up overall

The prospects for the 2013 winter cereal crops in **Australia** are generally favourable, despite variable growing conditions over the winter, which have caused latest forecasts to be reduced from earlier expectations. Production is projected to increase in Victoria, South Australia and Western Australia but fall in Queensland and New South Wales where winter conditions were adversely dry. The latest official estimate in mid-September put the country's

total wheat output in 2013 at 24.8 million tonnes, 11 percent up from last year, reflecting an increase in plantings as well as higher yield expectations. Barley production is also forecast to rise significantly, by 13 percent, to approximately 8 million tonnes. The early outlook for the minor summer grain crop for harvest in 2014, mainly sorghum and maize to be planted in the coming weeks, points to an increase in area. However, with soil moisture conditions in key growing regions of New South Wales and southern Queensland reported to relatively dry, timely rain will be needed before the main planting period for this increase to be realized.

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



Statistical appendix

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Table A1. Global cereal supply and demand indicators

	Average 2006/07 - 2010/11	2009/10	2010/11	2011/12	2012/13	2013/14
1. Ratio of world stocks to utilization (%)						
Wheat	24.5	28.7	26.4	26.2	22.4	23.1
Coarse grains	15.5	16.7	14.5	14.9	13.6	17.0
Rice	28.0	29.9	30.9	33.8	35.8	37.3
Total cereals	20.7	22.8	21.4	22.1	20.6	22.8
2. Ratio of major grain exporters' supplies to normal market requirements (%)						
	120.9	124.4	115.8	118.2	108.0	117.7
3. Ratio of major exporters' stocks to their total disappearance (%)						
Wheat	17.5	21.7	20.8	18.3	13.5	12.6
Coarse grains	12.9	15.4	10.4	10.4	7.6	13.0
Rice	20.3	21.6	20.9	25.4	27.8	29.6
Total cereals	16.9	19.6	17.4	18.1	16.3	18.4
	Annual trend growth rate 2003-2012	2009	2010	Change from previous year		2013
4. Changes in world cereal production (%)						
	2.2	-0.9	-0.4	4.3	-1.9	7.7
5. Changes in cereal production in the LIFDCs (%)						
	2.9	-0.3	7.5	1.6	4.3	0.3
6. Changes in cereal production in the LIFDCs less India (%)						
	3.3	4.6	7.0	-2.1	5.7	0.6
	Average 2006-2010	2009	2010	Change from previous year (%)		2013*
7. Selected cereal price indices:						
Wheat	171.5	-34.6	9.6	31.5	-5.5	-1.1
Maize	162.5	-25.5	12.0	57.6	2.2	-4.0
Rice	215.0	-14.0	-9.4	9.7	-4.6	0.0

Notes:

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

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

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

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

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

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

*January-September average.

Table A2. World cereal stocks¹
(million tonnes)

	2009	2010	2011	2012	2013 estimate	2014 forecast
TOTAL CEREALS	490.9	519.7	498.0	516.8	497.3	558.9
Wheat	160.0	188.6	184.1	180.2	155.3	163.3
held by:						
- main exporters ²	49.7	55.4	51.6	44.0	35.1	33.9
- others	110.3	133.2	132.5	136.2	120.2	129.4
Coarse grains	199.6	193.5	168.6	175.3	167.3	212.5
held by:						
- main exporters ²	85.8	87.0	61.5	57.6	42.6	79.1
- others	113.8	106.5	107.1	117.7	124.7	133.4
Rice (milled basis)	131.2	137.5	145.4	161.3	174.7	183.1
held by:						
- main exporters ²	36.1	33.4	33.6	41.9	46.5	50.7
- others	95.1	104.1	111.8	119.4	128.2	132.4
Developed countries	177.5	190.7	151.9	148.5	110.3	144.8
Australia	6.6	7.4	9.5	7.3	4.3	4.6
Canada	13.0	13.6	11.2	9.4	7.5	8.9
European Union	47.9	45.1	31.9	32.2	24.7	33.8
Japan	4.6	4.8	4.8	5.0	4.8	5.0
Russian Federation	18.1	21.1	17.8	14.8	7.2	8.1
South Africa	2.5	3.1	4.0	2.5	3.1	2.4
Ukraine	8.0	6.7	5.1	10.7	5.8	5.3
United States	65.9	75.9	57.3	49.3	40.1	63.5
Developing countries	313.3	329.0	346.2	368.3	387.0	414.1
Asia	258.8	273.9	284.0	304.2	330.6	349.7
China	154.9	163.7	167.1	172.2	188.4	201.4
India	37.9	33.7	37.0	44.8	49.3	52.0
Indonesia	6.4	8.3	10.4	12.4	13.3	13.2
Iran (Islamic Republic of)	3.2	6.0	4.7	3.6	8.1	9.5
Korea, Republic of	2.8	3.8	4.3	4.2	4.6	4.2
Pakistan	3.8	4.2	2.9	3.5	2.5	2.8
Philippines	4.1	4.3	3.3	2.6	2.3	2.5
Syrian Arab Republic	3.9	4.7	3.7	3.3	2.8	2.1
Turkey	4.1	4.2	4.2	5.2	4.2	4.7
Africa	25.3	29.9	34.7	37.0	34.0	33.1
Algeria	2.7	3.6	3.9	4.3	4.7	4.8
Egypt	5.6	6.6	5.9	8.1	6.1	6.0
Ethiopia	0.8	1.5	2.0	1.8	2.0	2.0
Morocco	1.4	3.1	4.0	4.6	3.2	3.7
Nigeria	1.3	1.2	1.4	1.3	0.8	0.8
Tunisia	1.5	1.5	1.0	1.1	1.3	1.5
Central America	6.2	4.4	6.0	4.5	5.1	5.9
Mexico	4.2	2.4	3.7	2.0	2.6	3.2
South America	22.7	20.4	21.1	22.2	16.9	25.0
Argentina	3.7	2.2	5.4	5.4	2.7	3.8
Brazil	12.5	11.6	8.1	8.1	5.8	11.7

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

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

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

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

	Wheat			Maize		Sorghum
	US No.2 Hard Red Winter Ord. Prot. ¹	US Soft Red Winter No.2 ²	Argentina Trigo Pan ³	US No.2 Yellow ²	Argentina ³	US No.2 Yellow ²
Annual (July/June)						
2003/04	161	149	154	115	109	118
2004/05	154	138	123	97	90	99
2005/06	175	138	138	104	101	108
2006/07	212	176	188	150	145	155
2007/08	361	311	318	200	192	206
2008/09	270	201	234	188	180	170
2009/10	209	185	224	160	168	165
2010/11	316	289	311	254	260	248
2011/12	300	256	264	281	269	264
2012/13	348	310	336	311	278	281
Monthly						
2011 - September	329	270	300	300	294	285
2011 - October	301	255	260	275	276	265
2011 - November	299	256	239	275	271	275
2011 - December	290	246	224	259	242	261
2012 - January	298	258	249	275	258	271
2012 - February	297	262	263	279	267	268
2012 - March	294	259	260	280	270	266
2012 - April	279	255	252	273	256	242
2012 - May	279	252	251	269	246	219
2012 - June	288	250	263	268	238	234
2012 - July	352	318	314	330	285	293
2012 - August	362	332	335	328	294	296
2012 - September	372	341	336	323	278	286
2012 - October	373	339	332	320	274	290
2012 - November	373	346	345	324	294	289
2012 - December	359	325	360	310	288	288
2013 - January	348	311	362	303	294	287
2013 - February	329	297	358	303	283	288
2013 - March	323	286	346	309	276	297
2013 - April	324	279	324	282	242	261
2013 - May	329	277	315	295	257	254
2013 - June	321	270	310	300	264	246
2013 - July	311	257	302	282	241	232
2013 - August	315	251	281	238	221	219
2013 - September	312	258	300	209	219	217

Sources: International Grains Council and USDA.

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

² Delivered United States Gulf.

³ Up River f.o.b.

Table A4a. Cereal import requirements of Low-Income Food-Deficit Countries¹, 2012/13 or 2013 estimates
(thousand tonnes)

	Marketing year	2011/12 or 2012 Actual imports			2012/13 or 2013 Import position ²			
		Commercial purchases	Food aid	Total commercial and aid	Total import requirements (excl. re-exports)	Total commercial and aid	Food aid allocated, committed or shipped	Commercial purchases
AFRICA		44 430.0	2 129.6	46 559.6	39 126.8	24 720.8	657.6	24 063.2
North Africa		18 871.0	0.0	18 871.0	13 221.0	13 221.0	0.0	13 221.0
Egypt	July/June	18 871.0	0.0	18 871.0	13 221.0	13 221.0	0.0	13 221.0
Eastern Africa		6 740.3	1 220.8	7 961.1	7 349.2	3 644.6	339.8	3 304.8
Burundi	Jan./Dec.	106.0	16.4	122.4	74.4	19.7	12.4	7.3
Comoros	Jan./Dec.	59.1	0.0	59.1	59.5	11.5	0.0	11.5
Djibouti	Jan./Dec.	83.9	3.6	87.5	99.1	59.5	6.8	52.7
Eritrea	Jan./Dec.	376.0	7.0	383.0	406.0	27.3	0.0	27.3
Ethiopia	Jan./Dec.	435.1	489.6	924.7	1 022.8	145.3	111.0	34.3
Kenya	Oct./Sept.	1 943.6	195.1	2 138.7	1 568.1	874.0	70.2	803.8
Rwanda	Jan./Dec.	75.9	1.7	77.6	62.9	31.4	2.6	28.8
Somalia	Aug./July	353.0	183.0	536.0	540.0	73.0	49.2	23.8
Sudan	Nov./Oct.	2 200.1	296.6	2 496.7	2 124.7	1 312.1	78.4	1 233.7
Uganda	Jan./Dec.	386.5	7.0	393.5	459.6	158.8	5.8	153.0
United Rep. of Tanzania	June/May	721.1	20.8	741.9	932.1	932.1	3.5	928.6
Southern Africa		2 257.3	237.6	2 494.9	2 293.3	2 293.3	207.2	2 086.1
Lesotho	April/March	237.0	5.0	242.0	266.0	266.0	5.0	261.0
Madagascar	April/March	305.3	28.8	334.1	345.9	345.9	26.6	319.3
Malawi	April/March	135.1	29.0	164.1	105.0	105.0	18.0	87.0
Mozambique	April/March	950.9	118.8	1 069.7	931.4	931.4	97.2	834.2
Zambia	May/April	46.0	1.0	47.0	25.0	25.0	1.0	24.0
Zimbabwe	April/March	583.0	55.0	638.0	620.0	620.0	59.4	560.6
Western Africa		14 842.5	515.9	15 358.4	14 255.2	4 869.2	78.2	4 791.0
Coastal Countries		11 246.1	120.0	11 366.1	10 707.5	3 562.1	5.3	3 556.8
Benin	Jan./Dec.	385.4	11.6	397.0	447.0	497.1	0.0	497.1
Côte d'Ivoire	Jan./Dec.	1 833.9	14.6	1 848.5	1 775.0	491.9	2.8	489.1
Ghana	Jan./Dec.	989.0	31.0	1 020.0	945.0	177.7	1.1	176.6
Guinea	Jan./Dec.	515.2	21.8	537.0	477.0	35.5	0.2	35.3
Liberia	Jan./Dec.	350.6	27.7	378.3	384.0	55.5	0.0	55.5
Nigeria	Jan./Dec.	6 787.0	0.0	6 787.0	6 320.0	2 207.1	0.0	2 207.1
Sierra Leone	Jan./Dec.	120.0	12.8	132.8	114.0	54.0	1.3	52.7
Togo	Jan./Dec.	265.0	0.5	265.5	245.5	43.4	0.0	43.4
Sahelian Countries		3 596.4	395.9	3 992.3	3 547.7	1 307.0	72.8	1 234.2
Burkina Faso	Nov./Oct.	354.4	30.1	384.5	391.5	67.3	6.1	61.2
Chad	Nov./Oct.	108.9	75.0	183.9	177.8	60.5	24.3	36.2
Gambia	Nov./Oct.	169.5	25.5	195.0	195.5	37.8	1.7	36.1
Guinea-Bissau	Nov./Oct.	147.5	6.8	154.3	154.3	3.0	1.9	1.1
Mali	Nov./Oct.	337.7	38.8	376.5	221.2	150.2	11.6	138.6
Mauritania	Nov./Oct.	401.5	39.6	441.1	470.5	253.2	5.5	247.7
Niger	Nov./Oct.	353.4	127.3	480.7	461.9	37.0	20.9	16.1
Senegal	Nov./Oct.	1 723.5	52.8	1 776.3	1 475.0	698.1	0.9	697.2
Central Africa		1 718.9	155.3	1 874.2	2 008.1	692.7	32.4	660.3
Cameroon	Jan./Dec.	877.0	3.5	880.5	880.1	332.9	1.8	331.1
Cent.Afr.Rep.	Jan./Dec.	46.4	11.9	58.3	50.0	16.4	4.6	11.8
Congo	Jan./Dec.	284.8	5.2	290.0	311.0	133.5	1.8	131.7
Dem.Rep.of the Congo	Jan./Dec.	493.7	134.7	628.4	750.0	205.3	24.2	181.1
Sao Tome and Principe	Jan./Dec.	17.0	0.0	17.0	17.0	4.6	0.0	4.6

Table A4b. Cereal import requirements of Low-Income Food-Deficit Countries¹, 2012/13 or 2013 estimates
(thousand tonnes)

	2011/12 or 2012			2012/13 or 2013				
	Marketing year	Actual imports		Import position ²				
		Commercial purchases	Food aid	Total commercial and aid	Total import requirements (excl. re-exports)	Total commercial and aid	Food aid allocated, committed or shipped	Commercial purchases
ASIA		36 303.4	966.8	37 270.2	32 941.3	29 624.3	547.6	29 076.7
Cis in Asia		4 738.3	2.0	4 740.3	3 620.2	3 620.4	3.7	3 616.7
Kyrgyzstan	July/June	646.3	2.0	648.3	512.2	512.4	3.7	508.7
Tajikistan	July/June	1 168.0	0.0	1 168.0	1 088.0	1 088.0	0.0	1 088.0
Uzbekistan	July/June	2 924.0	0.0	2 924.0	2 020.0	2 020.0	0.0	2 020.0
Far East		21 282.7	686.8	21 969.5	19 359.1	18 171.3	427.8	17 743.5
Bangladesh	July/June	1 711.0	204.6	1 915.6	1 971.3	1 971.3	133.0	1 838.3
Bhutan	July/June	63.8	0.0	63.8	73.8	73.8	0.0	73.8
Cambodia	Jan./Dec.	37.1	4.3	41.4	36.4	10.7	0.7	10.0
D.P.R. of Korea	Nov./Oct.	303.2	408.1	711.3	507.9	328.0	273.0	55.0
India	April/March	104.0	0.1	104.1	110.2	110.2	0.5	109.7
Indonesia	April/March	12 590.1	3.1	12 593.2	10 622.7	10 622.7	1.0	10 621.7
Lao, P.D.R.	Jan./Dec.	41.1	4.2	45.3	44.9	3.1	1.4	1.7
Mongolia	Oct./Sept.	118.1	0.0	118.1	115.8	20.8	0.0	20.8
Nepal	July/June	477.3	24.5	501.8	531.8	531.8	1.7	530.1
Philippines	July/June	4 697.7	7.9	4 705.6	4 205.3	4 205.3	15.5	4 189.8
Sri Lanka	Jan./Dec.	1 139.3	30.0	1 169.3	1 139.0	293.7	1.1	292.6
Near East		10 282.4	278.0	10 560.4	9 962.0	7 832.6	116.1	7 716.5
Afghanistan	July/June	2 037.5	212.9	2 250.4	1 252.0	1 252.0	101.0	1 151.0
Iraq	July/June	4 794.9	15.1	4 810.0	5 210.0	5 210.0	15.1	5 194.9
Yemen	Jan./Dec.	3 450.0	50.0	3 500.0	3 500.0	1 370.6	0.0	1 370.6
CENTRAL AMERICA		1 615.0	81.0	1 696.0	1 869.3	1 869.3	100.4	1 768.9
Haiti	July/June	524.4	62.1	586.5	680.1	680.1	82.4	597.7
Honduras	July/June	706.0	15.9	721.9	775.0	775.0	16.7	758.3
Nicaragua	July/June	384.6	3.0	387.6	414.2	414.2	1.3	412.9
OCEANIA		441.9	0.0	441.9	441.9	111.9	0.0	111.9
Kiribati	Jan./Dec.	8.7	0.0	8.7	8.7	0.6	0.0	0.6
Papua New Guinea	Jan./Dec.	390.2	0.0	390.2	390.2	104.8	0.0	104.8
Solomon Islands	Jan./Dec.	43.0	0.0	43.0	43.0	6.5	0.0	6.5
TOTAL		82 790.3	3 177.4	85 967.7	74 379.3	56 326.3	1 305.6	55 020.7

Source: FAO

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

² Estimates based on information as of early September 2013.

Table A5. Cereal import requirements of Low-Income Food-Deficit Countries¹, 2013/14 estimates
(thousand tonnes)

	Marketing year	2012/13 Actual imports			2013/14 Import position ²			
		Commercial purchases	Food aid	Total commercial and aid	Total import requirements (excl. re-exports)	Total commercial and aid	Food aid allocated, committed or shipped	Commercial purchases
AFRICA		16 259.5	259.9	16 519.4	19 353.0	338.9	2.0	336.9
Northern Africa		13 221.0	0.0	13 221.0	15 371.0	0.0	0.0	0.0
Egypt	July/June	13 221.0	0.0	13 221.0	15 371.0	0.0	0.0	0.0
Eastern Africa		952.4	52.7	1 005.1	1 378.0	0.0	0.0	0.0
Somalia	Aug./July	23.8	49.2	73.0	570.0	0.0	0.0	0.0
United Rep. of Tanzania	June/May	928.6	3.5	932.1	808.0	0.0	0.0	0.0
Southern Africa		2 086.1	207.2	2 293.3	2 604.0	338.9	2.0	336.9
Lesotho	April/March	261.0	5.0	266.0	228.0	51.1	0.0	51.1
Madagascar	April/March	319.3	26.6	345.9	448.0	6.3	1.5	4.8
Malawi	April/March	87.0	18.0	105.0	103.0	44.2	0.0	44.2
Mozambique	April/March	834.2	97.2	931.4	1 035.0	142.0	0.5	141.5
Zambia	May/April	24.0	1.0	25.0	25.0	0.0	0.0	0.0
Zimbabwe	April/March	560.6	59.4	620.0	765.0	95.3	0.0	95.3
ASIA		27 326.0	271.5	27 597.5	27 380.0	2 407.2	0.0	2 407.2
CIS in Asia		3 616.7	3.7	3 620.4	3 392.2	268.3	0.0	268.3
Kyrgyzstan	July/June	508.7	3.7	512.4	514.2	44.5	0.0	44.5
Tajikistan	July/June	1 088.0	0.0	1 088.0	1 012.0	46.8	0.0	46.8
Uzbekistan	July/June	2 020.0	0.0	2 020.0	1 866.0	177.0	0.0	177.0
Far East		17 363.4	151.7	17 515.1	17 350.8	2 138.9	0.0	2 138.9
Bangladesh	July/June	1 838.3	133.0	1 971.3	1 340.0	0.0	0.0	0.0
Bhutan	July/June	73.8	0.0	73.8	69.0	0.0	0.0	0.0
India	April/March	109.7	0.5	110.2	103.9	55.5	0.0	55.5
Indonesia	April/March	10 621.7	1.0	10 622.7	10 604.1	2 083.4	0.0	2 083.4
Nepal	July/June	530.1	1.7	531.8	621.8	0.0	0.0	0.0
Philippines	July/June	4 189.8	15.5	4 205.3	4 612.0	0.0	0.0	0.0
Near East		6 345.9	116.1	6 462.0	6 637.0	0.0	0.0	0.0
Afghanistan	July/June	1 151.0	101.0	1 252.0	1 397.0	0.0	0.0	0.0
Iraq	July/June	5 194.9	15.1	5 210.0	5 240.0	0.0	0.0	0.0
CENTRAL AMERICA		1 768.9	100.4	1 869.3	1 892.4	0.0	0.0	0.0
Haiti	July/June	597.7	82.4	680.1	724.1	0.0	0.0	0.0
Honduras	July/June	758.3	16.7	775.0	760.0	0.0	0.0	0.0
Nicaragua	July/June	412.9	1.3	414.2	408.3	0.0	0.0	0.0
TOTAL		45 354.4	631.8	45 986.2	48 625.4	2 746.1	2.0	2 744.1

Source: FAO

¹ Includes food deficit countries with per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. USD 1 905 in 2009), which is in accordance with the guidelines and criteria agreed to by the CFA. should be given priority in the allocation of food aid.

² Estimates based on information as of early September 2013.

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Enquiries may be directed to:

Global Information and Early Warning System on Food and Agriculture (GIEWS)
Trade and Markets Division (EST)
Food and Agriculture Organization of the United Nations
Viale delle Terme di Caracalla
00153 Rome - Italy

Direct Facsimile: 0039-06-5705-4495

E-mail: GIEWS1@fao.org

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