No. 4 ■ December 2013

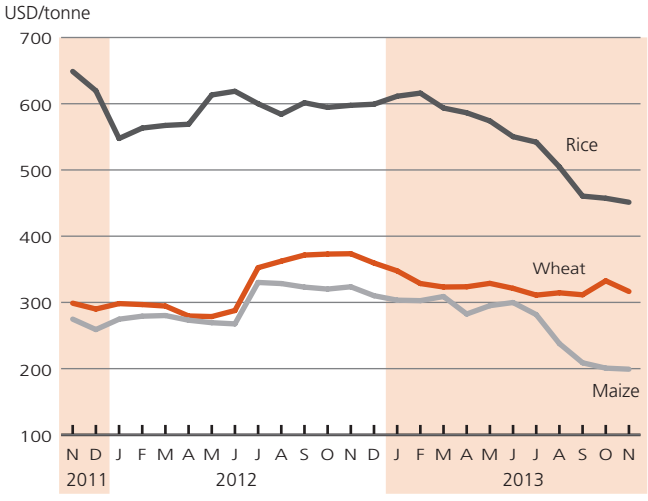
Crop Prospects and Food Situation

HIGHLIGHTS

- **Latest estimates confirm a large increase in 2013 world cereal output; early prospects for 2014 wheat crop are mostly favourable.**
- **The benchmark United States wheat export price declined in November on generally favourable 2014 crop prospects. Prices of maize and rice also eased somewhat and were at levels well below those of a year earlier.**
- **Cereal imports of LIFDCs for 2013/14 are estimated to increase by some 4 percent**, mainly reflecting reduced harvests in Africa and increased demand in Egypt.
- **In Western Africa, in several parts of the Sahel, especially in Chad, Mali, Mauritania, Niger and Senegal, crops and pastures have been affected this year by a late onset and early cessation of rains**, which could lead to a new surge in food insecurity and malnutrition in the 2013/14 marketing year.
- **In the Central African Republic, a serious food insecurity situation has developed following civil unrest, with 1.3 million people, approximately 30 percent of the rural population, in need of emergency food assistance.**
- **In North Africa, record 2013 wheat harvests were gathered in Egypt and Morocco while a sharp decline was observed in Tunisia.**
- **Eastern Africa, food security is improving gradually as newly harvested crops become available**; the number of people in need of humanitarian assistance has fallen by nearly one-third to about 9 million, compared to December 2012.
- **In Southern Africa, prices of cereals are near or at record levels in several countries, underpinned by tighter supplies in the 2013/14 marketing year**. Dry weather has delayed planting of the 2014 crop in parts.
- **In the Far East, the livelihood of over 14 million people in the Philippines has been adversely affected by Typhoon Haiyan**. Overall, the 2013 subregional aggregate cereal harvest is estimated at a record level.
- **In the Syrian Arab Republic and in Yemen continued civil conflicts result in severe food insecurity** with 6 and 4.5 million people, respectively, requiring emergency food assistance.
- **In CIS countries the area planted to winter grains in 2013 declined compared to 2012** following reductions in the Russian Federation and Ukraine due to excessive rains.
- **In Central America, the 2013 main season maize harvest was estimated at good levels and prices have declined sharply in several countries in recent months.**
- **In South America, the 2013 aggregate wheat crop, being harvested, is anticipated to recover from last year's reduced level** despite losses due to frost earlier in the season.

CONTENTS

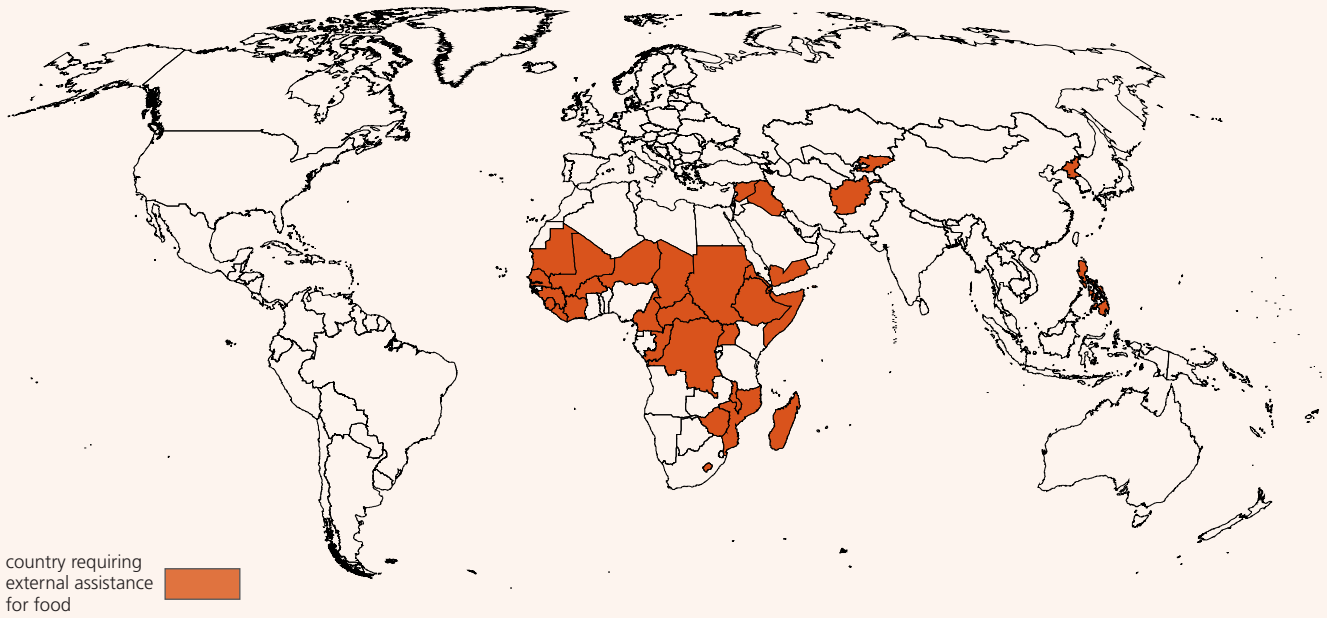
Selected international cereal prices



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

Countries requiring external assistance for food[1]

World: 33 countries



AFRICA (26 countries)

Exceptional shortfall in aggregate food production/supplies

Central African Republic ▼
Crop production in 2013 sharply declined from last year's level due to prevailing civil insecurity. The number of people in need of food assistance was estimated in September at about 1.3 million, about 30 percent of the rural population. IDPs increased sharply in September to 395 000 following clashes in the north-western Ohuam province.

Zimbabwe ▼
Tighter maize supply situation in 2013, following a reduced domestic harvest, caused a deterioration in food security conditions, particularly in southern and western parts. An estimated 2.2 million people between January and March 2014, significantly above the 1.67 million in the first quarter of 2013, are expected to be food insecure.

Widespread lack of access

Burkina Faso ▲
A massive influx of refugees from Mali has put additional pressure on local food markets. About 50 000 Malian refugees are estimated to be living in the country as of 31 October 2013.

Chad ■
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, have put additional pressure on the local food supply affecting food security.

Djibouti ■
About 70 000 people are still severely food insecure, mainly in pastoral south-eastern areas that received below average July-September rains and depend on humanitarian assistance.

Eritrea ■
Vulnerability to food insecurity due to economic constraints.

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, poor market access and presence of some 580 000 Ivorian refugees in the country (as of August 2013) result in the need for continued international support.

Malawi ▼
In spite of an above average 2013 maize harvest, an estimated 1.8 million persons in 2013/14 will not meet their annual food requirements. Continuing increases in the price of maize may led to further deterioration in food security conditions.

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. There were 283 000 IDPs in the country and 169 291 Malian refugees in neighbouring countries as of 31 October. Another below-average crop is expected in 2013.

Mauritania ■
More than 67 000 Malian refugees have been registered in the southeastern part of the country. Moreover, Mauritania is affected by relatively high international food prices due to its high import dependency.

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.

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, resulting in localized crop failures. This has led to severe food insecurity and malnutrition for about 615 000 people.

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 some 58 000 Ivorian refugees were still living as of August 2013.

Democratic Republic of the Congo ▼
The number of people in need of food assistance was estimated in July 2013 at about at about 6.35 million. Two-thirds of them are considered severely food insecure and are mostly concentrated in conflict-affected Northern Kivu and Katanga provinces. As of September 2013, the total number of IDPs was about 2.7 million. In addition, since early 2013, DRC has received about 43 000 refugees from CAR, and about 103 000 returnees who were expelled from Angola.

Ethiopia ▲
Although the overall food security conditions are improving as main "meher" season crop harvests become available, about 2.7 million people are still estimated to be in need of humanitarian assistance.

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 (18 percent below average) 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.

Mozambique ■
Overall satisfactory food security situation, benefiting from favourable 2013 harvests (main and secondary season). However, high prices continue to constrain food access.

Senegal ■
2013 cereal production is estimated to drop by 8 percent compared to the average. Already in 2012, production shortfalls and high food prices led to a deterioration of the food security situation in several parts of the country. Assistance is still needed in parts this year.

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. Newly harvested crops are replenishing local markets and improving supplies.

Sudan ▲
The number of people estimated to be in need of humanitarian assistance, mainly in conflict-affected areas, declined to 3.3 million coinciding with the crop harvesting season.

Uganda ▼
About 100 000 people in Karamoja region, are estimated to be severely food insecure following two years of below average production.

ASIA (7 countries)

Exceptional shortfall in aggregate food production/supplies

Iraq ■
Severe civil insecurity.

Syrian Arab Republic ▼
Due to worsening civil conflict, about 6 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 ■
Despite a small increase in the aggregate food production for a third year in a row in 2013/14, the food security situation remains unsatisfactory with 84 percent of households having borderline or poor food consumption. While the import requirement of 340 000 tonnes, for the 2013/14 marketing year, is the narrowest in many years, it needs to be covered through additional purchases by the Government and/or international support to avoid undernourishment. The food system in the DPRK remains highly vulnerable to shocks and serious shortages exist particularly in the production of protein-rich crops. The rates of stunting during the first 1 000 days of a child's life remain high and micronutrient deficiencies are of a particular concern.

Yemen ■
The severely food-insecure population in need of emergency food assistance is estimated at 4.5 million people, 18 percent of the population, as a result of high levels of prolonged conflict, poverty, and high food and fuel prices.

Severe localized food insecurity

Afghanistan ■
Some groups, particularly IDPs displaced by the conflict, returnees from Pakistan and natural disaster-affected households continue to face high level 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.

The Philippines ✚
Typhoon Haiyan hit the Philippines on 8 November, affecting nine Regions across the central parts of the country affecting, as of 18 November, a total of 13 million people, displacing over 4 million and causing a death toll of 4 460. Severe damages to housing and infrastructure, irrigation and storage facilities were reported. The country was also hit in October by Typhoon Nari which affected 740 000 people in 13 provinces across northern and central Luzon.
Given the food security concerns in the affected areas, FAO has appealed (as of 27 November) for over USD 30 million for agricultural rehabilitation and WFP has proposed emergency food assistance for 2.5 million people.

Countries with unfavourable prospects for current crops[2] (total: 4 countries)

AFRICA (3 countries)

Central African Republic ✚
The second season maize crop, which will be harvested in southern parts from December, will be negatively affected by civil insecurity conditions, which disrupted agricultural activities and caused input shortages.

Eritrea ✚
Late onset of the rainfall season together with a prolonged dry spell in July and early cessation of rains in September may have negatively impacted on crops.

Sudan ✚
Significant reduction in sorghum planted area due to delayed onset of rains in the surplus-producing eastern areas coupled with insecurity in Eastern Darfur, South Kordofan and Blue Nile states.

ASIA (1 country)

Syrian Arab Republic ✚
Civil insecurity, high costs of production and reduced input availability have caused reduced plantings of the 2013/14 winter cereal crops.

Key - Changes since last report (October 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

Latest estimates confirm large increase in 2013 world cereal output; early prospects for 2014 wheat crop mostly favourable

FAO's latest forecast for world **cereal production** in 2013 has been revised upward marginally, by 2 million tonnes, since the November figure to a new high of almost 2 500 million tonnes (including rice in milled terms), 8.4 percent up from last year's crop and some 6 percent above the previous record in 2011. The revision mostly reflects adjustments to the estimate of maize output in the United States, the Russian Federation and Ukraine, where figures became firmer towards the completion of the harvests. Based on the latest data, the overall increase in world cereal output this year comprises a 7.8 percent increase in wheat, a 12 percent increase in coarse grains and a slight 1 percent growth expected in rice. Early prospects for the winter wheat crops already planted in the northern hemisphere, to be harvested in 2014, are mostly favourable. Among the major producers, increased wheat areas are tentatively estimated in the EU, China, the United States and India, while reductions are reported in the Russian Federation and Ukraine. Although, many of the 2014 wheat crops around the globe will not be planted until next year, these early indications suggest that, overall wheat plantings for the next harvest could increase slightly compared to last year.

Table 1. World cereal production[1]
(million tonnes)

	2011	2012 estimate	2013 forecast	Change: 2013 over 2012 (%)
Asia	**1 075.3**	**1 089.7**	**1 114.3**	**2.3**
Far East	964.8	994.3	1 006.0	1.2
Near East	69.9	68.4	73.7	7.7
CIS in Asia	40.6	27.1	34.6	27.9
Africa	**154.9**	**161.5**	**162.2**	**0.5**
North Africa	35.5	33.9	37.6	10.8
Western Africa	45.2	49.1	50.1	2.0
Central Africa	4.7	4.6	4.8	2.9
Eastern Africa	39.0	43.7	41.0	-6.2
Southern Africa	30.6	30.1	28.8	-4.3
Central America and Caribbean	**35.2**	**40.1**	**40.8**	**1.7**
South America	**149.1**	**154.2**	**171.4**	**11.2**
North America	**432.6**	**406.0**	**495.4**	**22.0**
Europe	**462.6**	**419.1**	**478.0**	**14.1**
EU	288.7	277.9	303.3	9.1
CIS in Europe	157.2	125.4	161.2	28.5
Oceania	**43.4**	**34.6**	**37.7**	**9.1**
World	**2 352.9**	**2 305.1**	**2 499.8**	**8.4**
Developing countries	1 351.7	1 394.3	1 430.5	2.6
Developed countries	1 001.2	910.8	1 069.3	17.4
- wheat	702.4	659.6	710.8	7.8
- coarse grains	1 164.5	1 156.3	1 294.8	12.0
- rice (milled)	486.1	489.1	494.2	1.0

Note: Totals and percentage change computed from unrounded data.
[1] Includes rice in milled terms.

Prospects mostly favourable for 2014 winter wheat crops

The bulk of the winter wheat crop in the northern hemisphere for harvest in 2014 is already in the ground and prospects are generally favourable. With wheat production generally remaining relatively more profitable to other crops in many regions, winter wheat plantings have increased in some major producers and these early indications point to an overall larger global wheat area for harvest in 2014. In the United States, early indications suggest that the winter wheat area could be slightly up from the previous year and the conditions of crops are overall much better. In the EU, despite some adverse weather in parts during the planting period, the aggregate winter wheat area is estimated to be up by about 4 percent. By contrast, in the European CIS countries, adverse autumn weather had a more significant disruptive impact and plantings are reported to be down in both the Russian Federation and Ukraine. In Asia, winter wheat plantings are expected to increase slightly in China and remain similar to last year's level in India and Pakistan. In North Africa, conditions are mostly favourable for the winter wheat planting currently underway. However, more rains are still needed across the subregion to ensure successful completion of the planting and for normal crop establishment and development.

FAO's latest estimate for global wheat production in 2013 has been revised up slightly since the previous figure in November to almost 711 million tonnes, 7.8 percent up from the previous year and a record high. Upward adjustments to estimates for Canada and the EU have more than offset some downward revisions for the major producers in the southern hemisphere, namely Argentina, Brazil and Australia, where harvests are underway.

Figure 1. World cereal production and utilization

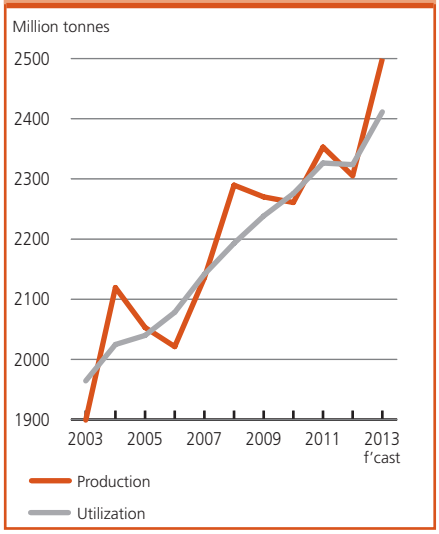
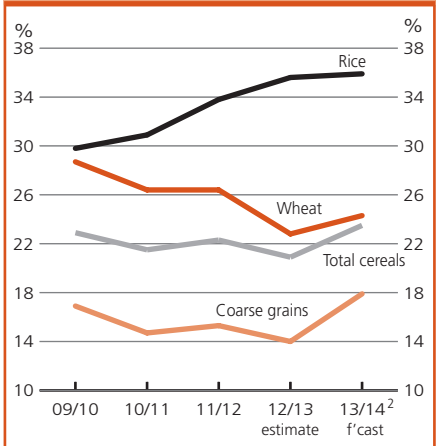


Figure 2. Ratio of world cereal stocks to utilization[1]



1 Compares closing stocks with utilization in following season.
2 Utilization in 2013/14 is a trend value based on extrapolation from the 2002/03-2012/13 period.

Latest information confirms strong growth in global coarse grains output in 2013

FAO's latest forecast for global coarse grains production in 2013 stands at a record high of about 1 295 million tonnes, 12 percent up from the previous year. By far the bulk of the increase is accounted for by the United States, the world's largest producer, where the 2013 maize output is estimated to have risen to a record 355 million tonnes, almost 30 percent up from the 2012 harvest. However, also in Europe, production of coarse grains is forecast significantly up this year, largely due to recovery in maize output among EU producers and in the Russian Federation. In Asia, latest estimates confirm a 3 percent rise in coarse grains output this year, 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 increase somewhat from last year's level. However, reduced outputs are estimated in several parts of the Sahel due to delayed rains and prolonged dry spells. In Eastern Africa, where harvesting of 2013 main season cereal is still ongoing in parts, the aggregate output of coarse grains is forecast to decline from the previous year after adverse weather in parts of the subregion throughout the season. 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. Planting of the 2014 crops is underway in the subregion and after some delays in October due to dryness, conditions improved in November with the arrival of good rains. Elsewhere in the southern hemisphere, good to record 2013 harvests were gathered throughout Latin America and the Caribbean.

Improved prospects in Indonesia lifts the global rice production forecast for 2013

At this time of the year, most of the largest world producers of rice have either completed or are about to complete the harvest of their 2013 main paddy crops, with several northern hemisphere countries already engaged in the planting of their secondary crops. Although the production outlooks are becoming firmer, setbacks, including the intense hurricane activity typical of the last quarter, may still markedly derail expectations. This was the case of the Philippines, which has been hit by a series of storms since October, including super Typhoon Haiyan in early November. Nonetheless, the forecast for 2013 global rice production has been raised slightly since last month, by some 100 000 tonnes, as improved prospects for Indonesia, the Democratic Republic of Korea, Nigeria and the United States outweighed a worsening of expectations in Myanmar, the Philippines and Mali. The upgrade in the forecast was particularly strong for Indonesia, which officially raised its season output by 1 million tonnes, to a record 44.6 million tonnes.

Under the current forecasts, world rice production, in milled rice equivalent, is poised to reach 494.2 million tonnes in 2013, about 1.0 percent, or 5.1 million tonnes more than in the preceding season and the second consecutive year of below average growth. The global production outlook closely mirrors prospects in **Asia**, where overall production is set to progress by 1.1 percent to 448.6 million tonnes. While most countries in the region are heading towards bumper harvests, the largest absolute increase in output is expected in Bangladesh, Cambodia, India, Indonesia, Myanmar and Thailand, where producers have generally benefited from attractive prices. The gains could have been larger had it not been for a number of weather problems, especially in India, where crops in the important northeastern states were affected by unseasonably dry conditions. Most striking, however, was the negative performance of the sector in China, where production looks set to fall by about 0.7 percent, or 1 million tonnes, for the first time since 2003. China's contraction is to result from a failed late rice crop, now expected to end 6 percent lower than last year, largely due to belated rains, while drought also wiped out expectations of an increase of the intermediate crop. In the region, Japan, Malaysia, the Philippines and Timor-Leste are also likely to witness a decline of output. In the case of the Philippines, typhoon/storm damage to crops, plus the difficulty for the affected areas to resume the normal agricultural activities over the second half of the season, have entailed a downward revision of the 2013 paddy

production forecast by 800 000 tonnes to 18.0 million tonnes, which compares with 18.1 million tonnes in 2012.

Production in **Africa** is now expected to reach 17.5 million tonnes, about 300 000 tonnes more than anticipated in October and virtually unchanged compared to last year. The upgraded forecast mainly reflects more buoyant expectations for Nigeria, where production is now predicted to rise to level of 2.8 million tonnes, 7 percent above the flood-affected 2012 outcome. More conducive growing conditions, and subsidized fertilizers and seeds under the Growth Enhancement Scheme (GES), are behind the expected improved performance. Moreover, having benefited from generally favourable weather and supportive policies, most countries in the region are gathering larger crops. In addition to Nigeria, the greatest gains, in absolute terms, are expected in Egypt, Guinea and Mali. However, much of these increases are anticipated to be offset by declines in a few other African countries that suffered from erratic rains and localized floods, such as Benin, Liberia, Senegal and, particularly, Madagascar. The island nation, which stands as the second largest producer in the region, is expected to see output fall by 21 percent, or over 600 000 tonnes, in 2013, constrained by irregular precipitation and locust outbreaks.

The 2013 season is virtually concluded in much of **Latin America and the Caribbean,** with countries south of the equator already engaged in planting their main 2014 crops. The 2013 season was generally positive in the Southern part of the continent, although not sufficiently for production to return fully to 2011 levels. Nonetheless, both Guyana and Paraguay managed to boost output over the season by 14 percent and 20 percent, respectively, assisted by favourable weather conditions and a strong demand for export. Increases were also recorded in Brazil, Colombia, Ecuador, Peru and Venezuela, while production fell in Bolivia, due to excessive rains and floods, and in Chile due to insufficient water availability for irrigation. Both Argentina and Uruguay harvested similar crops to last year's level. Meanwhile, several countries are already planting their 2014 season, with indications pointing to similar or to slightly better outcomes due to increases in area planted compared to 2013, with high production costs and more attractive prices of alternative crops mentioned as deterring growth factors. In Central America and the Caribbean, the 2013 season is expected to end positively in virtually all countries.

In **North America**, the United States raised its forecast of 2013 production slightly, largely on higher than previously expected yields. Output in the country is still predicted to recoil by 5 percent compared to last year, reflecting a contraction in area due to excessive rain at planting and a shift to more profitable crops. In **Oceania**, Australia harvested earlier this year its 2013 crop, which yielded 27 percent more than in 2012. Sowing of the 2014 crop is now underway, with early prospects pointing to some cut in area, as drought in New South Wales during the winter reduced the availability of water for irrigation. In **Europe**, the EU may face a 9 percent decline in production, reflecting reduced area and yields, especially in Italy, the EU's largest producer. Production in the Russian Federation is expected to increase by 3 percent this year.

Global cereal utilization, stocks and trade round-up

The FAO forecast for **global cereal utilization** in 2013/14 has been lowered to 2 413 million tonnes, slightly below the November forecast but still 4 percent higher than in 2012/13. The projected growth in world utilization of cereals in 2013/14 concerns mostly food and feed, which are

Table 2. Basic facts of world cereal situation

(million tonnes)

	2011/12	2012/13 estimate	2013/14 forecast	Change: 2013/14 over 2012/13 (%)
PRODUCTION [1]				
World	**2 352.9**	**2 305.1**	**2 499.8**	**8.4**
Developing countries	1 351.7	1 394.3	1 430.5	2.6
Developed countries	1 001.2	910.8	1 069.3	17.4
TRADE [2]				
World	**319.4**	**309.4**	**317.8**	**2.7**
Developing countries	101.6	125.6	107.5	-14.5
Developed countries	217.8	183.8	210.3	14.4
UTILIZATION				
World	**2 326.4**	**2 323.1**	**2 412.7**	**3.9**
Developing countries	1 470.3	1 488.2	1 538.6	3.4
Developed countries	856.1	834.9	874.1	4.7
Per caput cereal food use (kg per year)	151.3	151.2	151.8	0.4
STOCKS [3]				
World	**519.2**	**504.5**	**572.3**	**13.4**
Developing countries	370.2	387.5	411.5	6.2
Developed countries	148.9	117.0	160.8	37.4
WORLD STOCK-TO-USE RATIO%	22.3	20.9	23.5	12.3

Note: Totals and percentage change computed from unrounded data.

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

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

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

expected to increase by 1.7 percent and 6.3 percent, respectively, compared to the previous season. Larger supplies and lower prices are expected to boost feed use of cereals in 2013/14, especially of maize. Total feed use of maize in 2013/14 is projected to reach 545 million tonnes, 8.5 percent higher than in 2012/13, with most of this growth to occur in China (up 9.6 percent or 13 million tonnes from 2012/13), following another record crop, and in the United States (up 20 percent or 22 million tonnes), driven by this year's recovery in production to a record level. The forecast increase in the food use of cereals in 2013/14 is largely in line with world population growth.

World cereal stocks are predicted to increase to 572 million tonnes by the close of the 2014 crop seasons, 13.4 percent, or nearly 68 million tonnes, more than in the previous year. This forecast is almost 9 million tonnes higher than reported in November, reflecting upward revisions to ending stocks of wheat and coarse grains, while ending rice inventories were reduced slightly. The sharp expansion in world cereal stocks this season would result in the global cereal stocks-to-use ratio reaching 23.5 percent, well above the historical low of 18.4 percent registered in 2007/08. The ratio for coarse grains is expected to improve the most, from the historical low of 14 percent to a more comfortable level of nearly 18 percent. The recovery would be mainly sustained by a sharp rebound in maize inventories in the United States following this year's record harvest. Global wheat stocks are also heading toward a significant recovery, while rice inventories are expected to increase for the tenth consecutive year, leading to an all-time high stocks-to-use ratio of nearly 36 percent.

The FAO forecast for world cereal trade in 2013/14 has been raised by 3.4 million tonnes since November, to 317.8 million tonnes, now 2.7 percent, or 8.4 million tonnes, higher than the volume of trade in 2012/13. This month's upward revision mainly reflects higher anticipated maize exports from Ukraine, boosted by this year's record domestic production and strong world demand. World trade in coarse grains is forecast at 137.5 million tonnes, 2.5 million tonnes more than was previously reported and 5.3 million tonnes higher than in 2012/13. World wheat trade in 2013/14 is put at 142 million tonnes, up 2.3 million tonnes from 2012/13 and unchanged from November but the forecast for trade in rice in 2014 has been raised by 900 000 tonnes to 38.3 million tonnes, now 800 000 tonnes higher than in the previous year and almost matching the all-time high achieved in 2012.

INTERNATIONAL PRICE ROUND-UP

Wheat export prices followed mixed trends in November while those of maize and rice fell to lower levels

Export prices of **wheat** from the United States declined by 5 percent in November, partly reversing gains of the previous month. The benchmark US wheat price (No.2 Hard Red Winter, f.o.b.) averaged USD 317 per tonne, which is 15 percent lower than in November 2012. Slower export demand and generally favourable prospects for the recently planted 2014 winter crop, pushed prices down. Low quotations of maize also contributed to the downward pressure. By contrast, wheat export prices from the Black Sea region increased by 5 percent in November, supported by tight supplies of high-quality wheat and a reduction in the 2014 winter plantings caused by unfavourable weather.

International **maize** prices eased further in November, with the benchmark US maize value (No.2, Yellow) averaging USD 199 per tonne, 39 percent below their high levels a year earlier. The recently harvested record output in the United States continued to weigh on prices. However, strong export demand provided some support, limiting the decline.

International **rice** prices were generally under pressure in November. Prices in Thailand continued to slide, reflecting large Government releases of rice from public stocks and the arrival of new harvest on the market. These led the benchmark Thai White Rice, 100%B to shed 1 percent to USD 451 per tonne, marking the ninth consecutive monthly drop. The market weakness also affected rice from other origins, with the exception of Viet Nam, where quotations strengthened, with the allocation to the country of a major sales contract with the Philippines.

Table 3. Cereal export prices*

(USD/tonne)

	2012	2013					
	Nov.	June	July	Aug.	Sept.	Oct.	Nov.
United States							
Wheat[1]	374	321	311	315	312	333	317
Maize[2]	324	300	282	238	209	201	199
Sorghum[2]	289	246	232	219	217	204	196
Argentina[3]							
Wheat	345	310	302	281	300	344	353
Maize	294	264	241	221	219	207	207
Thailand[4]							
Rice, white[5]	598	550	542	505	461	457	451
Rice, broken[6]	545	518	509	472	407	405	376

*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 overview[1]

Aggregate 2013 cereal output of LIFDCs estimated at a comparable level to 2012's record harvest

Since the release of the October issue of this publication, FAO revised downwards the aggregate 2013 cereal production of the 62 LIFDCs by 1.4 percent to 538.5 million tonnes. At this level, the aggregate output remains virtually unchanged from the record production of 2012, which in itself was about 4 percent higher than the year before. The lower December estimate was mostly driven by a downward adjustment in Africa, particularly Western Africa following a late start and early cessation of seasonal rains; however, the subregion is still expected to achieve a 2 percent year-on-year gain, mainly on account of a recovery in Nigeria over the flood-affected output of 2012. Elsewhere in the region, despite attaining above average harvests, adverse weather conditions resulted in annual decreases in 2013 cereal production in Southern (harvested by July) and Eastern Africa (currently being harvested). The only LIFDC in North Africa, Egypt, is estimated to have produced a bumper cereal crop, on account of favourable weather and supportive policies. In Far East Asia, unfavourable weather in several countries dampened a potential larger crop in 2013, particularly in India (the largest producing LIDFC) and the Philippines; aggregate production is estimated at 385.4 million tonnes, similar to last year's record harvest. On account of favourable weather conditions, cereal production is estimated to increase by 15 percent in the Near East and by 4 percent in CIS in Asia. In Central America, all countries have experienced a recovery from last year's weather-affected harvest and the aggregate cereal output is estimated to be above the previous five-year average. While in Oceania, cereal production remains at the same level of 2012 output.

[1] **The Low-Income Food-Deficit Countries (LIFDCs)** group includes net food deficit countries with annual per caput income below the level used by World Bank to determine eligibility for IDA assistance (i.e. USD 1 915 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.

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 production[1]	**517.6**	**538.6**	**538.5**	**0.0**
excluding India	283.0	297.7	299.0	0.4
Utilization	**568.4**	**579.6**	**594.0**	**2.5**
Food use	451.1	460.9	472.6	2.5
excluding India	262.6	269.1	274.6	2.1
Per caput cereal food use *(kg per year)*	0.2	0.2	0.2	0.4
excluding India	0.2	0.2	0.2	0.1
Feed	51.4	53.4	53.8	0.8
excluding India	44.5	46.4	46.5	0.2
End of season stocks[2]	**111.9**	**114.8**	**110.9**	**-3.4**
excluding India	67.4	65.8	62.2	-5.4

[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.

Table 5. Cereal production[1] of LIFDCs *(million tonnes)*

	2011	2012 estimate	2013 forecast	Change: 2013 over 2012 (%)
Africa *(39 countries)*	**124.2**	**131.9**	**129.5**	**-1.8**
North Africa	20.0	20.7	20.9	1.0
Eastern Africa	39.0	43.7	41.0	-6.2
Southern Africa	15.4	13.7	12.8	-7.0
Western Africa	45.2	49.1	50.1	2.0
Central Africa	4.7	4.6	4.8	2.9
Asia *(17 countries)*	**391.2**	**404.9**	**407.0**	**0.5**
CIS in Asia	9.4	9.6	10.0	3.7
Far East	372.6	385.2	385.4	0.0
- India	234.6	240.9	239.6	-0.5
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)*	**517.6**	**538.6**	**538.5**	**0.0**

Note: Totals and percentage change computed from unrounded data.

[1] Includes rice in milled terms.

Cereal imports of LIFDCs estimated to increase in 2013/14

Total cereal imports for LIFDCs in 2013/14 are estimated to rise to 78 million tonnes, about 4 percent higher than the previous year's low level and comparable to the preceding five-year average. Judging from the import position as of early November, approximately 85 percent of the aggregate import requirement was satisfied. Among the subregions, CIS in Asia and the Far East are estimated to require fewer imports this year, reflecting overall production gains; however, import needs for the Philippines were revised upwards following forecast losses of the 2013 rice crop. The largest annual increases were recorded in Eastern Africa, due to expectation of smaller domestic harvests, and in the large importing country of Egypt, as a result of increased wheat and maize needs. The contraction in Southern Africa's 2013 cereal output caused a rise in national deficits and the subregion is expected to import 8.5 percent more compared to the previous year.

Figure 3 shows that there are 32 countries (20 in Africa, 6 each in Asia and elsewhere) with high cereal import dependency, measured by the import share in the past five years averaging 30 percent or higher in the total domestic utilization. Among these, Liberia, Eritrea, the Gambia and Zimbabwe recorded the largest increases in the share of imports to domestic utilization, reflecting reduced 2013 cereal harvests. Elsewhere, Central America, Central Africa and Oceania, moderate import growth is anticipated this year.

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

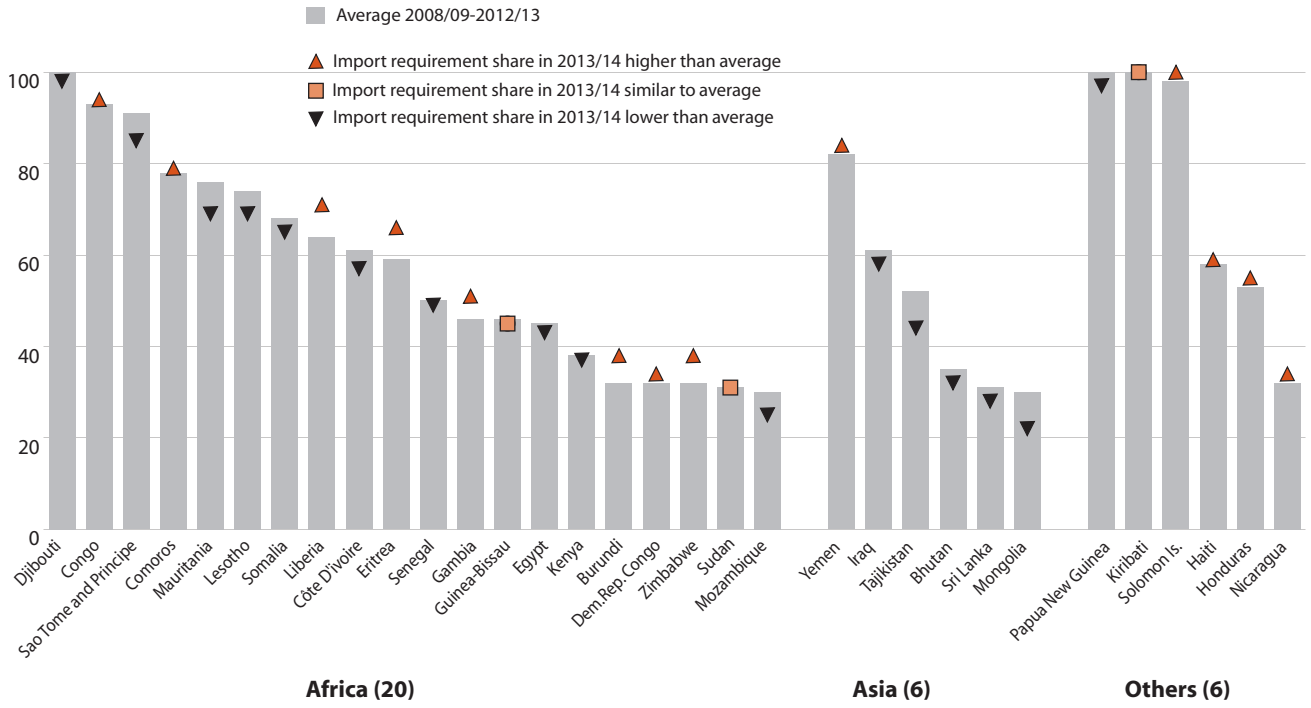
	2011/12 or 2012	2012/13 or 2013				2013/14 or 2014	
		Requirements[1]		Import position[2]		Requirements[1]	
	Actual imports	Total imports:	*of which food aid*	Total imports:	*of which food aid pledges*	Total imports:	*of which food aid*
Africa *(39 countries)*	**46 878**	**40 102**	**1 748**	**30 518**	**1 000**	**42 884**	**1 752**
North Africa	18 871	13 971	0	13 971	0	15 371	0
Eastern Africa	8 314	7 513	1 090	5 122	591	8 375	1 179
Southern Africa	2 469	2 245	231	2 245	231	2 436	175
Western Africa	15 290	14 364	256	8 073	130	14 661	263
Central Africa	1 934	2 009	171	1 107	48	2 041	135
Asia *(17 countries)*	**37 320**	**32 812**	**574**	**30 895**	**458**	**32 802**	**607**
CIS in Asia	4 740	3 620	4	3 620	4	3 393	1
Far East	22 020	19 230	405	18 495	288	19 002	440
Near East	10 560	9 962	166	8 779	166	10 407	166
Central America *(3 countries)*	**1 696**	**1 869**	**100**	**1 869**	**100**	**1 929**	**141**
Oceania *(3 countries)*	**442**	**442**	**0**	**162**	**0**	**447**	**0**
Total *(62 countries)*	**86 336**	**75 225**	**2 423**	**63 444**	**1 558**	**78 063**	**2 499**

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 November 2013.

Figure 3. Share of imports in total domestic utilization of cereals (where average share is 30 percent or more)



Regional reviews

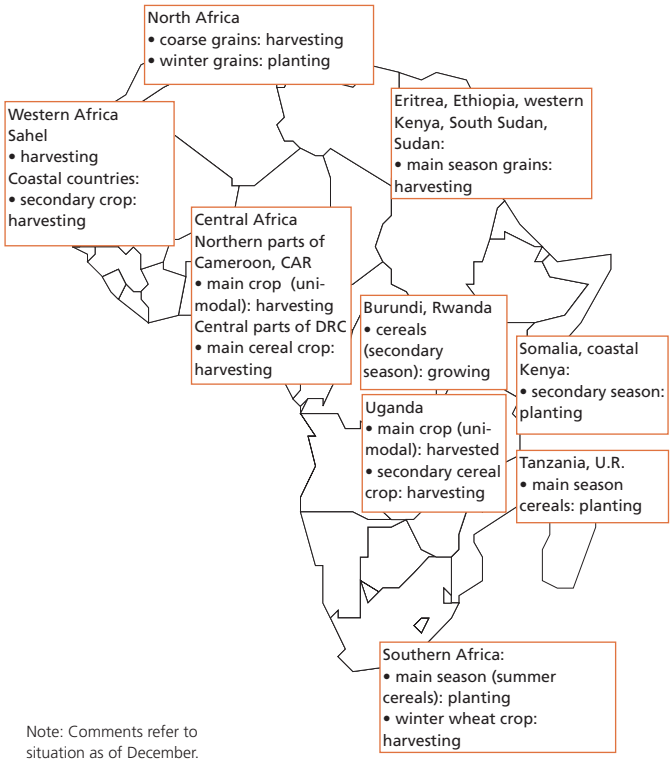
Africa

North Africa

Mixed outturn of the 2013 cereal harvest in the subregion

Planting of the 2013/14 winter wheat and coarse grains is underway throughout the subregion under favourable weather. However, exceptions include parts of eastern Morocco and some central and western areas of Algeria due to the below average rainfall during September and October affecting planting operations adversely. Rainfall in the coming months will be crucial for crop development and performance.

FAO estimates the aggregate output of the 2012/13 cereal crops, harvested between July and October 2013, at 39.5 million tonnes, about 10 percent up on last year and the five-year average. Wheat production in the subregion, which accounts for just over half of the aggregate cereal output, is estimated at 20.8 million tonnes, a 15 and 19 percent higher the last year and the five-year average, respectively. Wheat production estimates in **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 including higher Government procurement prices in Egypt, and subsidies for farm machinery and irrigation equipment in Morocco. By contrast, wheat production decreased in **Algeria** and **Tunisia**. In Algeria the wheat output (3.2 million tonnes) was 6 percent lower due to insufficient precipitation in some eastern parts, but was still higher by 15 percent than the five-year average). The decline was sharper in Tunisia, where wheat production, at 1 million tonnes, decreased by about 43 percent compared to last year's crop and 25 percent compared to the five-year average, due to reduced plantings following poor rains at the start of the cropping season.



Note: Comments refer to situation as of December.

Food inflation decreasing in recent months

Food inflation rates declined in the subregion mostly due to falling prices of meat, vegetable and fruit, mainly reflecting a lower demand after the month of Ramadan. In **Algeria**, the annual food inflation rate rose to a peak of 5.9 percent in June 2013 but declined subsequently between July and September to 1.2 percent. Similarly, in **Morocco**, the annual food inflation declined between June and September from 3.2 percent to 1.8 percent. In **Egypt**, the annual food and beverage inflation was stable at about 13 percent in August and September 2013, after having declined from the 14 percent in July. In **Tunisia**, annual food inflation was stable in recent months, at around 8 percent from July to October. Inflation rates of bread and cereals are at low levels across the subregion, partly due to the generous food subsidies system in place. In Algeria alone, more than TND 200

Table 7. North 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 (%)
North Africa	**18.9**	**18.0**	**20.8**	**12.6**	**11.7**	**12.5**	**5.7**	**6.0**	**6.2**	**37.2**	**35.8**	**39.5**	**10.4**
Algeria	2.8	3.4	3.2	1.5	1.6	1.9	0.0	0.0	0.0	4.2	5.0	5.1	1.1
Egypt	8.4	8.8	9.4	7.8	7.8	7.3	5.7	5.9	6.1	21.8	22.5	22.8	1.2
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

Note: Totals and percentage change computed from unrounded data.

billion (USD 2.56 billion) have been spent for subsidies on wheat, milk, sugar and cooking oil in 2012. However, in many countries of the subregion, budgetary constraints have forced governments to examine their cost (including large import bills and administrative costs) and the related food waste.

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 good 2013 cereal outputs, the subregion's aggregate cereal import requirement for the 2013/14 marketing year (July/June) is estimated at 35.9 million tonnes, similar to the average of the previous five-years. Wheat imports account for almost 60 percent of the total. In Egypt, cereal import requirements in 2013/14 are estimated at 15.4 million tonnes, some 10 percent higher than in 2012/13. Algeria's and Libya's cereal imports are forecast to be similar to the levels of last year, at 9.2 and 2.5 million tonnes, respectively, while in Morocco a decrease of 22 percent, to 4.8 million tonnes, is forecast thanks to the record wheat harvest. 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 than in 2012, and 39 percent up on the previous five-year average.

Western Africa

A reduced 2013 crop expected in the Sahel

The 2013 coarse grains harvest is nearly completed in the **Sahel**, while in the **coastal countries** along the Gulf of Guinea, harvesting of the second season cereal crops has just started. The joint inter-agency Crop Assessment Missions to the nine Sahelian countries (Burkina Faso, Cabo Verde, Chad, the Gambia, Guinea-Bissau, Mali, Mauritania, Niger and Senegal) and eight coastal countries (Benin, Côte d'Ivoire, Ghana, Guinea, Liberia, Nigeria, Sierra Leone and Togo) have recently been concluded. The Missions reviewed the evolution of the 2013 cropping season and preliminary cereal production estimates prepared by the national agricultural statistics services. FAO participated in most of these missions.

Following last year's record crop, a reduced harvest is anticipated in the Sahel in 2013. Delayed rains and prolonged dry spells affected 2013 crop production in several parts of the Sahel belt. Compared to 2012, cereal output is expected to decline significantly in most Sahelian countries, notably in **Senegal** by 11 percent, **Chad** by 24 percent, and **Niger** and **Mali** by 18 percent. In addition to the decline in cereal production, pasture conditions were affected in these countries. Areas of lower biomass production include northern Senegal, northern Chad, the regions of Brakna, Gorgol and Guidimakha in Mauritania, as well as Tillabéri, Diffa, Agadez and Tahoua regions in Niger. The exception is **Burkina Faso**, further south in the Sahel belt, which is expected to gather a new record crop in 2013.

Overall harvest prospects are better in coastal countries along the Gulf of Guinea, notably in **Nigeria**, the largest producer of the subregion, where cereal production is forecast to increase by 20 percent compared to last year's flood-affected output. An above-average cereal crop is also anticipated in **Guinea, Ghana** and **Côte d'Ivoire**. The decline in production in the affected Sahel countries will be somewhat offset by the expected above-average crop production in the coastal countries. The aggregate cereal harvest in West Africa is expected to be about 8 percent above the average of the previous five years.

Coarse grain prices are on the decline, reflecting increased supplies from ongoing harvests

In coastal countries, along the Gulf of Guinea, increased supplies from the 2013 first season harvests have put downward pressure on prices in several markets. Similarly, in the Sahel, in spite of the mixed crop prospects, prices of locally-produced sorghum, millet and maize remained relatively unchanged or declined in recent months and were considerably lower than the crisis-affected levels of last year. Overall, favourable prospects for the 2013 crop in major producing countries and adequate carryover stocks from the 2012 harvest, contributed to these downward movements.

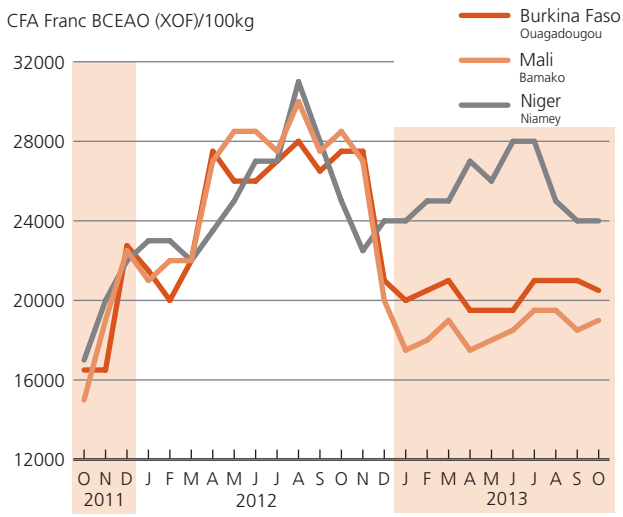
Reflecting increased supplies

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	**37.4**	**40.8**	**41.5**	**12.2**	**12.8**	**13.4**	**49.7**	**53.8**	**55.0**	**2.2**
Burkina Faso	3.4	4.6	4.8	0.2	0.3	0.3	3.7	4.9	5.1	4.5
Chad	1.5	3.0	2.2	0.2	0.2	0.2	1.7	3.2	2.4	-23.5
Ghana	2.2	2.4	2.3	0.5	0.5	0.5	2.6	2.9	2.8	-3.7
Mali	4.0	4.7	3.4	1.7	1.9	2.0	5.8	6.7	5.5	-18.3
Niger	3.5	5.3	4.3	0.1	0.1	0.1	3.6	5.3	4.4	-17.9
Nigeria	17.4	14.9	18.4	4.6	4.4	4.7	22.1	19.3	23.2	20.0

Note: Totals and percentage change computed from unrounded data.
[1] Total cereals includes wheat, coarse grains and rice (paddy).

Figure 4. Millet prices in selected Western African markets



Source: Afrique Verte.

from ongoing harvests in the subregion, millet prices in **Burkina Faso, Mali** and **Niger** remained generally stable in October, but declined significantly in several markets. Stable millet prices were also reported in the northern city of Tombouctou, where the improved security situation has resulted in enhanced trade flows. Overall, coarse grain prices were well below their levels in October 2012. In Niger, where cereal prices have been much higher than in neighbouring Sahel countries due to the impact of last year's floods in Nigeria, millet prices declined by 14 percent between July and October due to increased imports from neighbouring Benin and Nigeria.

In **Nigeria**, maize prices dropped by 35 percent from June to September in the main northern Kano market. The drop in prices was driven by increased supplies from the new 2013 harvest in the southern part of the country. In spite of the recent steep declines, maize prices in Kano in September were still 6 percent above their levels year earlier. The higher prices in Nigeria were due to a reduced 2012 cereal production and trade disruptions, causing a sustained upward trend since June and putting upward pressure on markets in neighbouring Niger and Benin. Substantial declines in maize prices were also recorded recently in other coastal countries including **Benin, Ghana** and **Togo.** The steepest price movement was observed in Benin, where maize prices dropped by up to 36 percent between July and September.

Prices of rice, another important staple, particularly in urban areas, remained stable in both Sahel and coastal countries, reflecting adequate supplies from last year's good production and imports, coupled with favourable prospects for the new harvest.

Food and agricultural assistance continues to be needed in the region

Most Sahel countries have been affected by a series of severe food crises in recent years, that caused a drop in incomes, substantial loss of livestock and other assets, increased levels of household indebtedness, and deterioration of the nutritional status of pastoralists, agro-pastoralists and other farming groups. Thus, the rural population of these countries is still vulnerable to food production shocks because of the exhaustion of their coping strategies. The areas affected by irregular rains this year may experience increase in the level of food insecurity and malnutrition in the 2013/2014 marketing year if appropriate safety net interventions are not adopted. Several segments of the population will continue to need food and non-food assistance to restore their livelihoods, notably in Niger, Mali, Chad, Senegal and Mauritania. Interventions, such as targeted distribution, sale at subsidized prices, food-for-work, cash-for-work or cash transfers will be required during the next lean season.

Moreover, 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 October. 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.

Central Africa

Outlook for current crops is poor in Central African Republic while favourable in the other countries

In **Cameroon** and in the **Central African Republic (CAR),** harvesting of the 2013 main maize crop was completed in October in bimodal southern areas, while in northern unimodal areas harvesting of millet and sorghum crops was completed in November. The second season maize crop will be harvested in southern parts from December.

In Cameroon, despite a dry spell in August in southern parts, average to above average rains were recorded in September and October, and good harvests are expected. By contrasts, in CAR, despite the abundant rains received so far across the country, cereal production is expected to be negatively affected by the prevailing civil insecurity, which disrupted agricultural activities and caused input shortages. In addition, the heavy fighting which erupted in the Ouham province in September 2013 caused further damage to agriculture in a cereal surplus producing area which is considered to be the country's granary. According to a

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**	**3.0**
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	-9.0
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).

multi-agency Emergency Food Security assessment conducted in September, two-thirds of the farmers included in the nation-wide sample have indicated that their crop production in 2013 was lower than in last year.

In **the Democratic Republic of the Congo (DRC)**, harvesting of the main 2013 maize crop has recently been completed in northern areas and is currently underway in the centre, while crops in southern regions are still in vegetative stage which will be harvested early next year. According to satellite based estimates, rainfall levels have been average throughout the cropping period in the north, and a satisfactory harvest is expected, while below average rainfall was received in central parts, with likely negative effects on yields. In the south, the rainfall pattern so far has been more favourable, benefitting the recently planted crops.

In **Congo** and **Gabon**, where the harvesting of the main season maize crop has just started and will be completed in January 2014, near average to average rainfall has been received. However, in both countries, the bulk of the national cereal requirement is met through imports.

The subregional production forecast for cereals in 2013 is put at 5 million tonnes, with a 3 percent increase over the 2012 output.

High food prices recorded in CAR and parts of DRC

In **DRC**, cereal prices conflict affected eastern and southern areas have remained generally high and volatile since late 2012. In September and October 2013, prices of maize increased seasonably in several markets, but remained lower than their record levels reached in February/March 2013. However, in Bunia (Ituri province) and Lubumbashi (Katanga province) maize prices in October 2013 were, respectively, more than double and 60 percent higher than in Kisangani, Bandundu, Boma and Mbandaka markets, located in the non-conflict areas of the country.

In the capital Bangui, **CAR**, prices of maize were very volatile in recent months, and in November 2013, at XAF 281/kg, were 70 percent higher than in January 2013. By contrast, prices of cassava, an important staple, in November were 27 percent lower than in January 2013. In Ouham province, an important sorghum and millet producing area, prices of millet began increasing from May 2013 and by October they were about 70 percent higher than in March 2013.

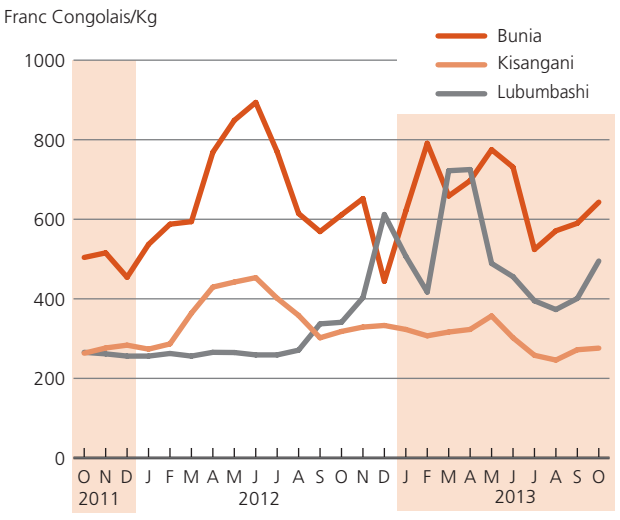
In **Gabon**, prices of imported wheat, the main staple, decreased in recent months, declining by 16 percent from August to October 2013. October prices were 22 percent below their levels of 12 months earlier and 37 percent lower than the peak reached in April 2013, mainly due to the Government's decision, taken in May 2013, to expand the number of food commodities subject to price control from 66 to 166, including wheat flour.

In **Cameroon, Congo** and **Equatorial Guinea**, the average annual rate of inflation remained stable at low levels in 2013.

Serious food security situation in CAR and parts of DRC

Continued civil insecurity in **CAR** and in parts of **DRC** has resulted in massive population displacements and access to food has become very difficult for the affected population. In addition, disruptions in humanitarian interventions have compounded the impact on vulnerable groups.

Figure 5. Democratic Republic of the Congo, maize retail prices



Source: FAO and DRC Ministry of Agriculture.

In **CAR**, where the number of people in need of food assistance nearly doubled from February to July 2013, the food security situation stabilized in recent months as the new harvest, albeit reduced, improved food availability. A multi-agency Emergency Food Security assessment carried out in September 2013 estimated the number of people in need of food assistance at about 1.3 million (approximately 30 percent of the rural population). The areas most affected by food insecurity are Ouham and Nana Gribizi regions in the north, Lobaye in the south, Vakaga in the northeast and Haut Mboumou in the southeast. The food situation of the estimated 395 000 IDPs in September, is also precarious. The stabilization of the food security situation is likely to be short-lived due to the reduced harvests that may result in an early start of the lean season, which normally begins in May. To tackle the food security problems, the Consolidated Appeal Process (CAP) that was launched in early December 2012, was scaled up in June 2013 to meet the needs of those affected by the escalation of the civil conflict. The number of people requiring assistance is put at 1.6 million.

In **DRC**, according to the latest available IPC analysis, conducted in June 2013, the number of people in acute food insecurity and livelihood crisis (IPC phases 3 and 4) was estimated at about 6.35 million, about 18 percent more than one year earlier. 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 escalating civil conflict, which started in 2012, severely damaged local livelihood systems and caused massive displacement. As of late September 2013, the total number of IDPs was estimated at about 2.7 million, with North and South Kivu and Katanga provinces accounting for about 80 percent of the total. In addition, DRC has received about 43 000 refugees from the CAR since early 2013, and about 103 000 Congolese who were expelled from Angola. Assistance is planned to be provided to about 3.9 million vulnerable people.

Eastern Africa

Mixed prospects for the 2013 main season harvest

Harvesting of the 2013 main season cereal crops is well underway in **Ethiopia, the Sudan, South Sudan,** western **Kenya, Eritrea**, the Karamoja region in **Uganda** and will continue well into early next year. FAO's preliminary estimates of the subregion's aggregate cereal output, including the forecast for the secondary season harvest to be gathered next year, is set at 41.9 million tonnes, about 6 percent less than in 2012 but 7.5 percent above the average of the previous five years.

At the country level, the outlook of current production is mixed. In Ethiopia, prospects for the 2013 main ***meher*** season production are generally good in western surplus-producing areas, although below average outputs are forecast in parts of the regions of Tigray, Amhara and Oromia that received erratic ***kiremt*** rains (June to September). In these areas, the poor performance of the 2013 secondary ***belg*** season (March-July) prevented a timely preparation of land for the long-cycle crops, often inducing farmers to plant short-cycle crops such as wheat, barley and teff. In addition, the onset of rains has been late by three to four weeks in some northwestern sorghum producing areas and most farmers had to plant short-cycle early-maturing varieties of sorghum, which have lower yields.

In bimodal rainfall areas of South Sudan, especially in the greenbelt of Greater Equatoria, production of coarse grains is forecast at above average levels, while lower yields are expected in lowlands of Warrap, Unity, Upper Nile and Northern Bahr el Ghazal states following seasonal floods in September/early October. Very low production is expected in the disputed area of Abyei, as farmers, for the second consecutive year, were unable to plant due to insecurity.

In the Sudan, prospects for sorghum production are unfavourable in main producing areas. Rains were about 3-4 dekads late in eastern states of Kassala, El Gedaref, El Gezira and Sennar, which together account for about 60 percent of annual sorghum production, leading to a significant reduction in planted area. Conflicts and high levels of insecurity also hampered agricultural activities in Eastern Darfur, South Kordofan and Blue Nile states. In Kenya, significantly lower yields are expected in some surplus-producing areas of the Rift Valley, such as Nyanza and Western provinces, where a prolonged dry spell from mid-May to early-July, together with delayed distribution of inputs,

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**	**4.7**	**33.1**	**37.7**	**34.7**	**40.0**	**44.6**	**41.9**	**-6.1**
Ethiopia	3.1	3.5	3.6	16.7	17.4	17.3	20.0	21.1	21.0	-0.4
Kenya	0.3	0.4	0.4	3.7	3.9	3.5	4.1	4.5	4.0	-11.0
Sudan [2]	0.3	0.3	0.5	2.5	5.4	4.0	2.9	5.7	4.4	-21.9
Tanzania U.R.	0.1	0.1	0.1	5.5	6.2	5.7	7.8	8.1	7.7	-4.6
Uganda	0.0	0.0	0.0	3.3	3.3	2.9	3.5	3.5	3.1	-11.3

Note: Totals and percentage change computed from unrounded data.

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

[2] Including South Sudan.

severely affected the maize crop at critical development stages. In agro-pastoral areas of northwestern Somalia, harvesting of ***gu/karan*** crops is expected to start in December, delayed by about 4-6 weeks, and production prospects are near average following good June to September rains.

In **Eritrea**, harvesting is complete and, based on satellite images, cereal production is forecast at below average levels. The onset of seasonal rains was delayed, beginning in mid-June, and were followed by a prolonged dry spell in July which may have lowered planted area. Rains resumed in August in some areas, but their cessation in early September may have also negatively impacted on crops that were at crucial grain filling stage.

In the Karamoja region in Uganda, well below average production is forecast in northern districts of Napak, Moroto and Kaabong where a prolonged dry spell in May/June has severely affected crop establishment and reduced yields by up to 50 percent in some areas.

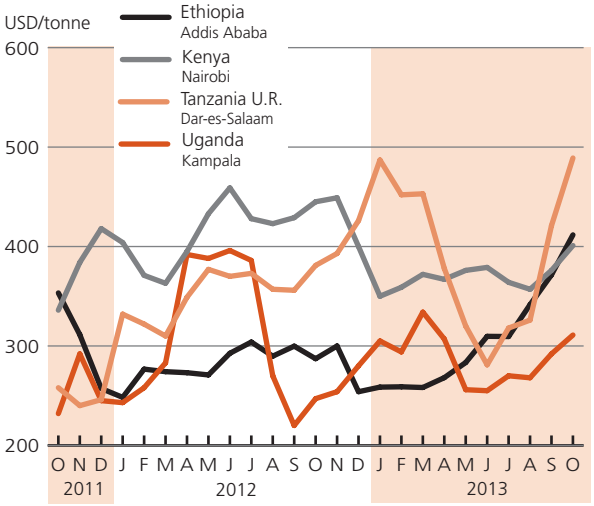
In the subregion, planting of the 2013 second season crops (to be harvested from early next year) has been delayed in most areas of southcentral Somalia (***deyr*** season), southern coastal lowlands of Kenya (***short rains***) and bimodal United Republic of Tanzania (***vuli*** season) as the onset of the short-rainy season (October-December) was been generally late. The rainy season in the pastoral areas of central and eastern Kenya has not yet started, preventing the regeneration of grazing resources with negative effects on livestock body conditions and milk production. Conversely, rains started on time in Burundi and Rwanda where planting of the 2014 A season crops was finalized by end-October, but some re-planting is still ongoing following damage to germinating crops due to floods and dry spells. Meteorological forecast for the remainder of the short rainy season is generally favourable in most cropping areas, except in some coastal areas of Kenya and eastern bimodal areas of the United Republic of Tanzania, which are expected to receive average to below average amounts of rain.

Cereal prices remain high in most markets

In the subregion, prices of coarse grains increased in September/October in areas where harvests have recently started, but the bulk of crops have not yet been commercialized, and where the lean season is already underway. Upward pressure on prices was exerted by localized production shortfalls earlier in the year, uncertain prospects for some of the current harvests and prevailing high fuel prices. As a result, prices of cereals and other important staples are well above their levels of last year in several countries and at record or near record levels in Ethiopia, the Sudan, Uganda, United Republic of Tanzania and Rwanda.

In Kenya, maize prices increased from August to October by about 12 to 16 percent, partly due to the below average 2013 long rains season production, harvested in August/September in bimodal southern and coastal areas, outside the grain basket. Concerns over the performance of the long rains harvest, currently underway, in major growing areas and increasing fuel costs are also additional factors. Similarly, in Uganda, prices of maize increased from August to October by 16 to 21 percent as stocks from the reduced 2013 first season harvest in June/July were depleted early and available supplies from the ongoing secondary season harvest had not yet arrived. Sustained export demand from neighbouring countries, mainly Kenya, South Sudan and the Democratic Republic of Congo provided additional support to price increases. A similar trend was observed in Rwanda, where prices of beans, an important staple crop, increased sharply in recent months (+41 percent from July to October) reaching record levels, due to the early depletion of stocks from the below average 2013 B season production, gathered in June/July.

Figure 6. Maize prices in selected Eastern African markets



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

In Ethiopia, wholesale prices of cereals continued to strengthen in recent months in most markets, reaching near record levels in October, partly due to the reduced output from the secondary ***belg*** season harvest, concluded in August. In Addis Ababa's wholesale market, all major cereals were traded in October at record prices, with increases of about 60 percent during the last six months for red sorghum and maize, and about 30 percent for wheat and white sorghum. In the Sudan, prices of locally produced sorghum, the main staple, increased in October reaching record levels in most markets. The upward seasonal trends were compounded by the poor prospects for the ongoing harvest and by increases in fuel prices following the removal of fuel subsidies in September. Prices of wheat, consumed mainly in urban areas and mostly imported, also continued to increase, reaching record levels in October in the capital Khartoum. By

contrast, in South Sudan, prices of sorghum were stable in September in most markets as the green crops from the 2013 harvest started to increase local supplies. In the United Republic of Tanzania and Somalia, prices of locally produced cereals have recently increased with the progress of the lean season. In the United Republic of Tanzania, wholesale maize prices, increased between June and October 2013 by 74 percent in Dar Es Salaam, the main urban centre, and by 15 percent in Mbeya, located in a major producing area. In October, maize was traded at a record level of USD 490 per tonne in Dar es Salaam market, about 30 percent more than one year earlier, partly due to strong local demand. In Somalia, prices of locally produced maize and sorghum increased in October in several key markets of the South. Sorghum price increases (up to 51 percent in Mogadishu) were sharper than those of maize (up to 25 percent in Baidoa) due to localized sorghum production shortfalls. Reduced humanitarian assistance and episodes of violence disrupted market functioning adding an upward pressure on prices.

Food security improves as household food stocks are being replenished by new harvests

The lean season is over in most producing areas of Ethiopia, the Sudan, South Sudan and Kenya with the beginning of the green harvest in October. Food security conditions are gradually improving as new harvests progress and crops become available for consumption. Although the bulk of production has not yet reached all the main markets, new crops have begun to replenish household stocks, reducing their market dependence.

Conflict and civil insecurity remains the main reason of severe food insecurity in parts of southern Somalia, in South Kordofan and Blue Nile states in the Sudan, around the disputed Abyei area between the Sudan and South Sudan and in Pibor County in South Sudan. In Somalia, a tropical cyclone hit northwestern Puntland region at the beginning of November and torrential rains caused flash floods in Bari and Nugal regions that led to losses of human lives and livestock, and damage to housing and fishery infrastructures, with severe disruption of local livelihood systems.

Pockets of high food insecurity are also reported in Ethiopia, particularly in areas that received below average rains, such as northeastern Amhara, eastern and southern Tigray, lowlands of East Hararghe zone in Oromia, northeastern Afar and parts of the southern Somali region. The lean season in the Karamoja region in Uganda is expected to start in January, about two months earlier than usual, as food stocks are expected to be depleted quickly due to the estimated below-average harvest.

Currently, the number of people in need of humanitarian assistance in the subregion is estimated at 9.1 million (including 3.3 million in the Sudan, 2.7 million in Ethiopia, 1.2 million in South Sudan, 870 000 in Somalia, 850 000 in Kenya, 100 000 in Karamoja region of Uganda and 70 000 in Djibouti), down by about 27 percent compared to estimates in December 2012 of 12.4 million people.

Southern Africa

Generally average rainfall forecast for the 2013/14 cropping season

Planting of the 2014 cereal crops in the subregion is underway, while harvesting of the 2013 winter wheat crop is expected to be finalised before the end of the year. Precipitation levels in October, which marks the start of the rainy season, were generally below average, except in southeastern areas, with consequent moisture deficits delaying land preparation. However, enhanced rains were received in November facilitating planting activities. Rainfall forecasts for the next three months (December to February) point to average to above average levels across most of the subregion. While heavier rains are expected in southern **Angola** and **Namibia** (areas which experienced drought conditions during the preceding season), western **Botswana**, much of central **South Africa** and **Lesotho**, during this period.

Although it is too early in the season to estimate the area planted to cereals for most countries, South Africa's preliminary planting intentions survey points to a 3 percent year-on-year contraction in the maize area. Still, the forecast area for maize of about 2.7 million hectares would exceed the average area of the previous five years. As well as supporting the production of the main staple crop maize, government programmes are also expanding their assistance to other food crops, including legumes, in efforts to diversify the agriculture output. In addition, early indications point to an expectation of a larger 2014 tobacco crop in Malawi and Zimbabwe, which would mark a second year of growth, as farmers react positively to favourable prices this year helping to improve small-holder farmers' household food security.

Tighter cereal supplies following reduced aggregate 2013 harvest

The subregion's aggregate 2013 cereal production, including the winter wheat crop, is estimated at 30.1 million tonnes, about 5 percent less than last year, notably due to drought conditions in western parts and reduced outputs in the large producing countries of **South Africa, Zambia** and **Madagascar**. Production of maize, the main food staple averaging nearly 80 percent of the total cereal output, is estimated at 22.5 million tonnes, 2.4 percent below the five-year average. **Namibia** recorded the largest year-on-year decrease, estimated at 51 percent, on account of drought conditions during the cropping season. Similarly, **Zimbabwe** recorded a large 17 percent decrease in its 2013 maize production to its lowest level since 2008. **Lesotho** and **Mozambique** registered production gains in 2013, aided by

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**	**2.2**	**25.0**	**24.4**	**23.8**	**4.8**	**5.1**	**4.2**	**32.1**	**31.7**	**30.1**	**-5.0**
- excl. South Africa	**0.3**	**0.3**	**0.4**	**13.5**	**11.2**	**10.9**	**4.8**	**5.1**	**4.2**	**18.6**	**16.6**	**15.4**	**-7.0**
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	-19.3
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	1.4
Mozambique	0.0	0.0	0.0	2.6	1.8	1.8	0.3	0.3	0.4	2.9	2.2	2.2	1.9
South Africa	2.0	1.9	1.8	11.5	13.3	12.9	0.0	0.0	0.0	13.5	15.1	14.7	-2.8
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	-9.3
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.

generally favourable weather conditions, while **Malawi's** output remained virtually unchanged. In **Madagascar**, the main rice crop is estimated to have declined by about 21 and 18 percent below the previous year and the five-year average. Erratic rains and a locust plague (mainly impacting south-western regions) contributed to the overall decline.

The 2013 millet and sorghum production in the subregion is estimated to have increased by about 10 percent to 884 000 tonnes, owing largely to a production rebound in South Africa. 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 since 2008.

Import requirements expand in 2013/14

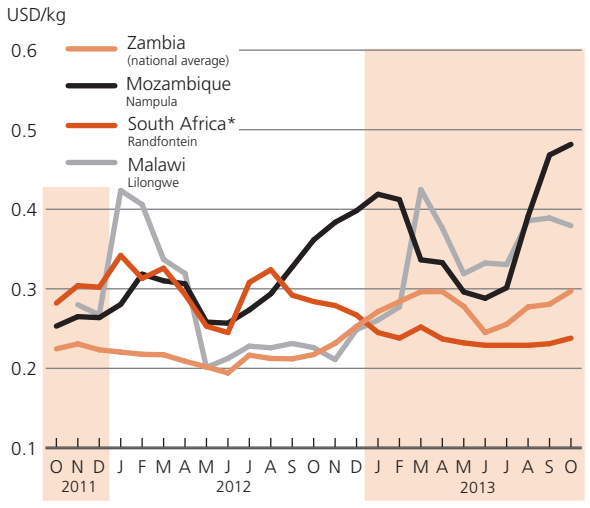
The total maize import requirement for the 2013/14 marketing year (generally May/April) is estimated at about 1.38 million tonnes, 12 percent higher than the previous year, principally reflecting lower domestic harvests. The reduced output in Zambia and consequent trade restrictions have rendered a shortage of sources in the subregion, particular for Zimbabwe, who imported nearly 380 000 tonnes from Zambia in 2012/13. As a result, Zimbabwe, which has a larger national deficit this year, may seek supplies from outside of the subregion, while they have already agreed to import 150 000 tonnes from Zambia and imported approximately 110 000 tonnes from South Africa since April 2013. Namibia's monthly import rate from South Africa, its main supplier of grain, is nearly six times faster this year, with nearly 80 percent of its import requirement already satisfied, following a significantly reduced domestic harvest.

The subregion's aggregate import requirement for wheat in 2013/14 is estimated at 3.3 million tonnes, marginally higher than the previous year's level, as demand for the commodity outpaces the generally static production. Madagascar is expected to import larger quantities of rice to cover the domestic shortfall in 2013/14.

Maize prices well above 2012 levels, except in South Africa

Maize prices rose steeply from July/August, though slowed in October, and remain well above their levels of a year earlier. The exception to this trend is South Africa, where October prices were below 2012's levels attributed to good national supplies following an average 2013 harvest, and decreasing international quotations. However, prices increased gradually in the preceding months, particularly for white maize, driven by expectations of reduced plantings for the 2014 crop and dry conditions at the start of the 2013/14 cropping season in western parts of the maize triangle. The current levels are expected to help stabilize prices in the import-dependent countries of Lesotho, Swaziland, Botswana and Namibia.

Figure 7. White maize prices in selected Southern African markets



*Wholesale prices, all others retail prices.

Sources: Central Statistical Office, Zambia; Sistema De Informação De Mercados Agrícolas De Moçambique, Mozambique; SAFEX Agricultural Products Division, South Africa; Ministry of Agriculture and Food Security, Malawi

In Mozambique, Zambia and Zimbabwe, prices continued to rise in most markets, but in Malawi increases were more muted in October, as harvesting of the irrigated winter crop augmented market supplies. Reduced maize outputs in Zambia and Zimbabwe, particularly in grain deficit regions in the south, put upward pressure on prices contributing to the higher year-on-year levels. In Mozambique, prices rose markedly in recent months, notably in the northern province of Nampula, where they were up to 50 percent higher than their year earlier levels.

The reduced 2013 rice harvest in Madagascar put upward pressure on prices of local rice varieties, and in October they were 11 percent up on their year earlier levels. Despite recent gains, prices of imported rice have remained more stable during 2013, reflecting declining international prices, as well as a stable exchange rate.

Food security has deteriorated in areas where 2013 harvests decreased

In areas where reduced 2013 cereal harvests were recorded and the peak lean season approaches (January-March), food security conditions have deteriorate, while rising prices of staple foods will further affect food access. In Zimbabwe, an estimated 2.2 million persons (25 percent of the rural population and significantly above the 1.67 million in the first quarter of 2013) are projected to be food insecure between January and March 2014, with the highest prevalence in southern and western provinces, reflecting both low household stocks and higher maize prices. Similarly, Namibia experienced an acute deterioration in food security conditions, particular in the north where drought conditions caused a sharp drop in agricultural production. In total, an estimated 778 504 persons were affected by the drought and of these 463 581 are in need of food assistance, significantly above the 75 000 assessed in the previous year, according to a recently updated government food security assessment. Similarly in southern Angola, a consecutive season of below average rains severely reduced crop production, stressing food security conditions. However, the arrival of seasonal rains in southern Angola and northern Namibia are expected to lead to a recovery in pastures and livestock conditions, while government assistance to the affected households is helping to stabilise the food security situation. In Madagascar, food security deteriorated as a result of an 18 percent decrease in rice production compared to the short-term average, while higher rice prices further aggravated conditions. Based on findings from the 2013 Crop and Food Security Assessment Mission, an estimated 4 million people in rural areas are food insecure. In Malawi, the number of persons in need of humanitarian assistance has recently been revised upwards to approximately 1.8 million, from 1.5 million. The provision of food aid and cash transfers is currently ongoing in the affected areas.

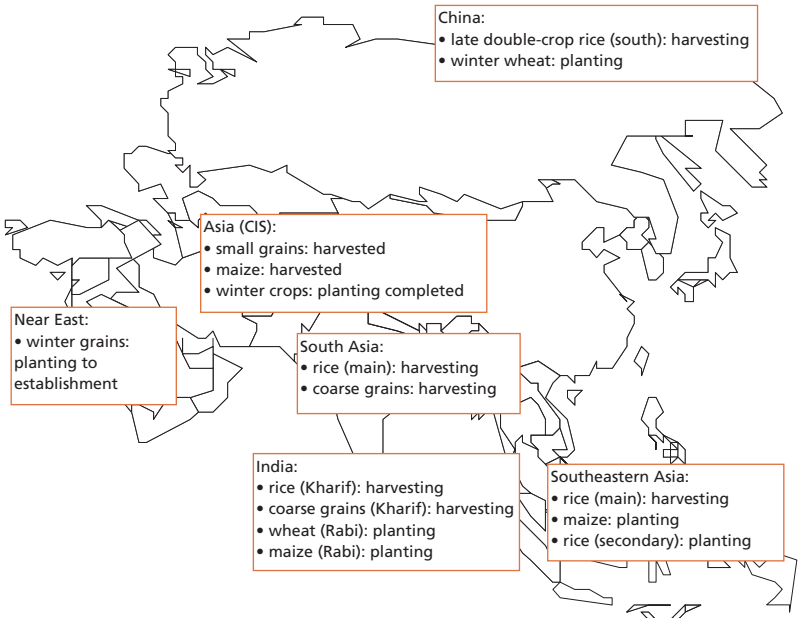
Elsewhere in the subregion, conditions are generally stable. Good secondary season harvests in the Limpopo river basin of Mozambique have helped to partly mitigate the impact of lower outputs from the main season's harvest. In Lesotho, an improved situation relative to last year prevails, as a result of a production rebound that led to a 69 percent decrease in the number of people at risk of food insecurity to 223 000 persons.

Asia

Far East

Record 2013 aggregate cereal harvest, despite adverse weather conditions in some countries

Harvesting of the 2013 main wet season rice and coarse grains crop is nearing completion. Despite adverse weather conditions in several countries of the subregion, the 2013 aggregate cereal output (including rice in paddy equivalent) is estimated at a record level of about 1 228.3 million tonnes, slightly above last year's record harvest. With wheat production almost unchanged, most of the growth is expected on account of a strong increase in production of coarse grains (+7 million) and rice (+7.6 million). Overall, the monsoon rains this year were mostly beneficial.



Note: Comments refer to situation as of December.

However, localized flooding and severe weather affected several countries across southeastern Asia, preventing a potentially larger crop. Favourable weather boosted cereal production prospects, particularly in **Cambodia, D.P.R. Korea, Myanmar, Nepal** and **Sri Lanka**, and lead to a recovery from last year's reduced harvests in **Pakistan** and **Thailand.** The remaining countries of the subregion, except **Malaysia, the Philippines** and **Timor-Leste**, are expecting a total cereal output more or less similar to the year before.

Production of paddy rice, the major staple crop, is forecast at a record level of 667.5 million tonnes, up 1.2 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** (+2.4 million), followed by **Indonesia** (+1.8 million) and Thailand (+1.4 million). In India, despite an estimated 3 percent increase in plantings, dry weather and localized floods prevented a potentially larger crop for main *Kharif* season, which is officially estimated to remain close to last year's level of 92.3 million tonnes. In Thailand, the 2013 main season rice harvest is officially forecast at 28.4 million tonnes, up 7 percent on 2012, following adequate water supplies during growing period and the Government support to the sector,

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**	**310.0**	**317.1**	**655.1**	**659.9**	**667.5**	**1 182.6**	**1 213.8**	**1 228.3**	**1.2**
Bangladesh	1.0	1.3	1.3	1.7	2.1	2.1	50.8	50.8	51.5	53.6	54.1	54.9	1.4
Cambodia	0.0	0.0	0.0	0.7	1.0	1.0	8.8	9.3	9.5	9.5	10.2	10.5	2.2
China	117.4	120.8	122.2	201.4	214.7	222.5	202.7	205.8	204.4	521.5	541.4	549.1	1.4
India	86.9	94.9	92.5	42.5	41.6	41.1	157.9	156.6	159.0	287.3	293.1	292.6	-0.2
Indonesia	0.0	0.0	0.0	17.6	19.4	18.5	65.8	69.1	70.9	83.4	88.4	89.4	1.1
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	5.7
Myanmar	0.2	0.2	0.2	1.5	1.7	2.0	29.0	28.1	29.0	30.7	30.0	31.2	4.1
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	5.6	5.6	9.2	8.3	8.7	39.3	37.3	38.6	3.4
Philippines	0.0	0.0	0.0	7.0	7.4	7.4	17.0	18.1	18.0	24.0	25.5	25.4	-0.7
Thailand	0.0	0.0	0.0	5.2	5.1	5.2	38.1	36.6	38.0	43.3	41.7	43.2	3.5
Viet Nam	0.0	0.0	0.0	4.8	4.8	4.9	42.4	43.7	44.1	47.2	48.5	49.0	1.0

Note: Totals and percentage change computed from unrounded data.

including higher Government support prices. Assuming normal weather during the second season, from January to July 2014, the aggregate paddy production in Thailand is tentatively forecast at 38 million tonnes, 4 percent higher than the above-average crop in 2012. The outlook for rice is also positive for Myanmar, Nepal and Pakistan, all of which are expected to partially recover from last year's poor output. Further gains are anticipated in **Bangladesh**, Cambodia, D.P.R. Korea and Sri Lanka, due to higher yields following favourable weather conditions. In **China**, a prolonged dry spell in some central and eastern parts affected the main season paddy crop. Latest estimates for the 2013 national paddy crop is put at 204.4 million tonnes, about 1 percent below last year's record output. Following a sharp reduction in the area planted to rice from last year's record level, a poor harvest is anticipated in Timor-Leste.

Earlier expectations for increased rice production in 2013 in the Philippines were stifled by a succession of typhoons, including Typhoon ***Nari*** on 12 October which struck northern parts and Super Typhoon Haiyan on 8 November which severely impacted central areas. Pending a more detailed assessment, FAO has lowered its 2013 paddy production forecast for the Philippines to take into account losses to the main season crop due to both typhoons, as well as anticipated reduction in the area planted to the secondary season, to be harvested from January next year. The 2013 aggregate paddy production (main 2013 season and 2013/14 secondary season) is tentatively put at 18 million tonnes, down from a previously expected bumper crop of 18.9 million tonnes at the beginning of the season. At the projected level, the 2013 paddy output will be slightly lower than that of 2012. Production is forecast to remain fairly stable in **Japan,** the **Lao People's Democratic Republic** and **Viet Nam.**

The harvest of the 2013 winter wheat (including winter and spring wheat), already harvested by mid-year, is estimated at 243.7 million tonnes, similar to last year's record production. Despite the earlier anticipated production gains, adverse weather depressed yields and plantings in India, preventing a potentially larger crop. The drop in production there was compensated by increase in China.

Planting of the mainly irrigated 2013/14 winter crops (primarily wheat, barley and the secondary rice crop) is currently underway and will continue until mid-December. In India, early official forecasts for the 2014 wheat crop is set at 92.5 million tonnes, similar to last year's above-average level. In Pakistan, above-average monsoon rains, helped replenish water reserves for irrigation and improved soil moisture conditions, benefiting planting activities and early crop development. In China, the total area planted to wheat is expected to increase marginally from last year's level to 22.8 million hectares.

Cereal exports to decrease slightly although remain much higher than average, while imports are projected to reach an all-time high

Despite the estimated increase in cereal production in 2013 in most countries of the subregion, aggregate cereal imports in the 2013/14 marketing years are expected to increase considerably to 100.7 million tonnes, by some 13 percent compared to 2012/13 and 18 percent above the preceding five-year average.

Total maize imports, the largest component, are estimated at 43.3 million tonnes, an increase of 6.2 million tonnes over last year's above average level. The increase is mainly attributed to the continued strong domestic demand for maize in China, which is forecast to reach an all-time high of 6 million tonnes in 2013/14 (October/September), up 3.3 million tonnes from the previous year. Similarly, total wheat imports are estimated to increase by 5.1 million tonnes, about 15 percent above last year's level, driven by increased import demand in Indonesia, the Philippines, Thailand and Viet Nam. In China, a strong demand for high quality wheat is seen to boost wheat purchases to 7.5 million tonnes during the 2013/14 marketing year (July/June), up 4.5 million tonnes from last year's level and the highest since the mid-1990s. Likewise, rice imports are expected to increase in 2014 by 6.4 percent over 2013 reflecting higher demand from Bangladesh, China, Indonesia, Nepal and the Philippines.

Aggregate cereal exports in 2013/14 are estimated to decrease by 2.4 percent from the previous year following an anticipated contraction in exportable surplus mainly from India (by 17 percent) and Pakistan (by 6 percent). Since the last issue of this publication, the wheat export estimate has been lowered to

Table 13. Far East cereal production and anticipated trade in 2013/14 [1]
(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	35 559	44 021	42 969	-2.4	20.8
Cereals - Imports	85 253	88 899	100 660	13.2	18.1
Cereals - Production	931 841	994 257	1 006 029	1.2	8.0
Rice-millled - Exports	26 963	29 698	30 658	3.2	13.7
Rice-millled - Imports	9 390	9 496	10 105	6.4	7.6
Rice-millled - Production	424 586	440 310	445 302	1.1	4.9
Wheat - Exports	3 373	7 847	6 050	-22.9	79.4
Wheat - Imports	33 127	34 857	40 000	14.8	20.7
Wheat - Production	227 987	243 910	243 656	-0.1	6.9

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

some 6 million tonnes, a decrease of 23 percent compared to the previous year mainly reflecting lower wheat exports from India, given the estimated year-on-year decrease of the 2013 harvest. With regards to rice, the subregion's largest exported cereal, exports in 2013 are anticipated to rise by 3.2 percent compared to 2012. 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 8.5 and 7.2 million tonnes, respectively.

Prices of rice remained generally stable or eased somewhat, while those of wheat followed a mixed trend

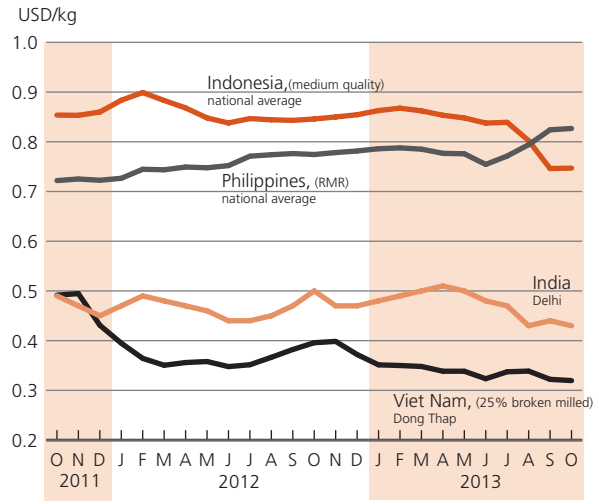
Overall, retail prices in local currencies remained relatively stable or eased in most countries of the subregion, with the start of the 2013 main season harvest. However, concerns over flood-related crop losses in some exporting countries, namely Viet Nam and Cambodia, pushed up prices. Overall, domestic prices remained above their levels of a year earlier in importing countries including Bangladesh, Indonesia and the Philippines.

Nominal prices of wheat and wheat flour followed mixed trends. In China, the average price of wheat flour, in US dollar terms, has been increasing in recent months and in October reached a record level of USD 0.73/kg, some 12 percent above their level a year earlier. Similarly, in India despite ample state reserves, prices of wheat in local currency remained stable or increased in most markets in October, supported by the Government's decision to increase the 2014/15 marketing year's (April/March) Minimum Support Price (MSP) of wheat to INR 1400 per quintal, 4 percent higher than in 2013/14. On the other hand, prices of wheat and wheat flour generally firmed up in recent months in major wheat consuming countries, including, Pakistan and Sri Lanka, mainly reflecting adequate supplies and lower international prices and decreased in Bangladesh as a result of continued public distribution through Open Market Sale (OMS). In Pakistan, normally an exporting country, but has imported wheat this year, prices of wheat grain and flour (in local currencies), although at near-record levels, flattened in October as result of sustained supplies from regional markets, particularly from Kazakhstan.

Overall food security adequate but concerns remain due to the impact of floods and typhoons in some countries

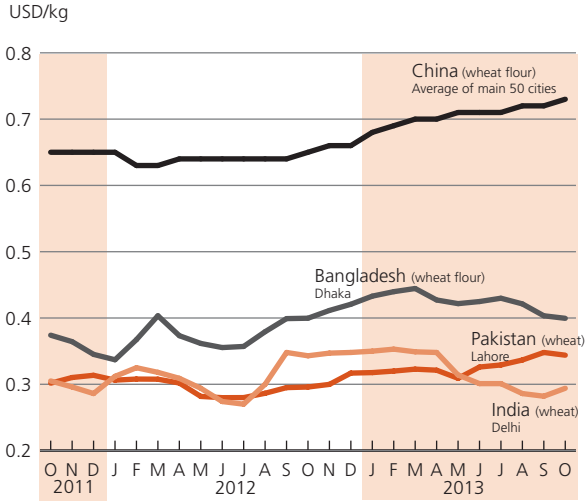
Overall, food security conditions are favourable in most countries, mainly due to good harvests, increased income from employment opportunities and regular supply of food to the local markets. However, intense rains coupled with typhoons/storms, caused localized flooding and devastation in several countries in southeast Asia, including Cambodia, the Lao People's Democratic Republic, the Philippines, Thailand and Viet Nam. According to the UN/OCHA estimates, as of 2 December, a total of 14.9 million people have been affected and over 4.1 million displaced due to the Typhoon Haiyan in the Philippines. High winds, heavy rains and localized floods caused significant losses of household food stock, as well as livestock and poultry, and worsened food security of the vulnerable people. In Thailand some 2.1 million people have been affected by the adverse weather.

Figure 8. Rice retail prices in selected Far East countries



Sources: Ministry of Trade, Indonesia; Ministry of Consumer Affairs, India; Bureau of Agriculture Statistics, Philippines; Agroinfo, Viet Nam.

Figure 9. Wheat and wheat flour retail prices in selected Far East countries



Sources: Pakistan Bureau of Statistics; Ministry of Consumer Affairs, India; Management Information System and Monitoring, Bangladesh; National Bureau of Statistics of China.

Near East

Planting of the 2014 winter season crops is underway

Land preparation and planting of the 2013/14 winter cereal crops is underway in the subregion. Beneficial rains in late September/early October in **Turkey** and along the Mediterranean coast, boosted soil moisture and assisted the establishment of winter wheat and barley crops. In **Iraq** and the **Islamic Republic of Iran,** moderate rainfall in early November favoured planting activities.

The subregion's aggregate cereal output in 2013 is estimated at a record high of 75.3 million tonnes, about 11 percent higher than the average of the previous five years. Bumper harvests were gathered in Turkey, the Islamic Republic of Iran, Iraq and **Afghanistan**. By contrast, in the **Syrian Arab Republic,** despite favourable seasonal rains, the 2013 cereal production is estimated at 3.5 million tonnes, about 12 percent lower than the previous five-year average. Large number of farmers abandoned their fields due to civil conflict, while farm equipment, irrigation systems and infrastructures were severely damaged. In addition, high costs of production and reduced input availability have caused reduced plantings.

Severe food insecurity in parts due to civil conflicts and high food prices

In the Syrian Arab Republic, the civil conflict intensified between July and September 2013, especially in Homs, Idlib, Aleppo and the north-eastern part of the country, and the number of IDPs has increased to 6.5 million from 4.25 million in July. As the economy contracted by 18-20 percent in 2012 and 2013, high levels of unemployment, reduced income generating opportunities, high inflation (up to 60 percent in 2013), depreciation of local currency and disruptions in the supply chain have reduced household capacity to access food. Currently, an estimated 6 million people are food insecure (50 percent more than the 4 million estimated in June), and with the approaching lean season during the winter and the continued high food prices the number of people in need of emergency food assistance is expected to increase further in 2014. In addition, as of early November 2013, more than 2.2 million Syrian refugees were reported to have fled to neighbouring countries, especially to **Lebanon, Jordan** and **Turkey,** putting severe strains on resources of hosting communities. The uncontrolled movement of people and unvaccinated animals across borders is increasing the risk of disease outbreaks and infections across the region.

In **Yemen**, an increasingly complex humanitarian crisis is underway with conflict in the north and secessionist movements in the south. Currently, an estimated 4.5 million people (about 18 percent of the population) are severely food insecure while, in addition, over 6 million people are moderately food insecure. Since 2011, food security conditions have significantly deteriorated in Abyan and Shabwah Governorates due to continued conflict, extreme poverty, high and volatile food prices, and loss of access to livelihoods for returnees. In addition, child malnutrition levels are alarming: about half of Yemen's children are chronically malnourished and the global acute malnutrition (GAM) rate was 13 percent in 2012, which is classified as "serious", by the World Health Organization (WHO). Following recent changes in Saudi Arabia's labour law, a large number of Yemeni migrant workers have started to return. Overall, between 300 000 and 500 000 undocumented migrant workers are expected to be deported in coming months, with likely negative impact on food security of poor households that were relying mainly on remittances.

In **Afghanistan,** the 2013 aggregate wheat crop, accounting for almost 80 percent of national cereal production, is estimated at 4.9 million tonnes, slightly below the last year's bumper harvest and 20 percent above average of the past five years. As a result of the two consecutive years of bumper harvests, the overall food security situation is improving. However, concerns remain in some central western areas, particularly in Ghor province, where poor weather considerably reduced this year's crop harvest. Vulnerable groups, particularly IDPs displaced by the conflict, returnees from Pakistan and natural disaster-affected households continue to face high level food insecurity.

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**	**47.9**	**20.5**	**20.6**	**23.0**	**4.1**	**4.2**	**4.4**	**71.4**	**70.0**	**75.3**	**7.6**
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	22.1	12.5	12.4	14.5	0.9	0.9	0.9	35.2	33.4	37.5	12.4

Note: Totals and percentage change computed from unrounded data.

CIS in Asia[2]

The 2014 winter crops planted under normal weather conditions

In the Asian CIS countries, planting of the winter cereal crops to be harvested in 2014 is almost complete under normal weather conditions. Early estimates indicate that the total area planted is close to the previous year. However, the outcome of the 2014 subregional cereal crop will largely depend on the outcome in Kazakhstan, accounting for some 56 percent of the subregion's total cereal output, where the bulk of the crop will be sown in the spring.

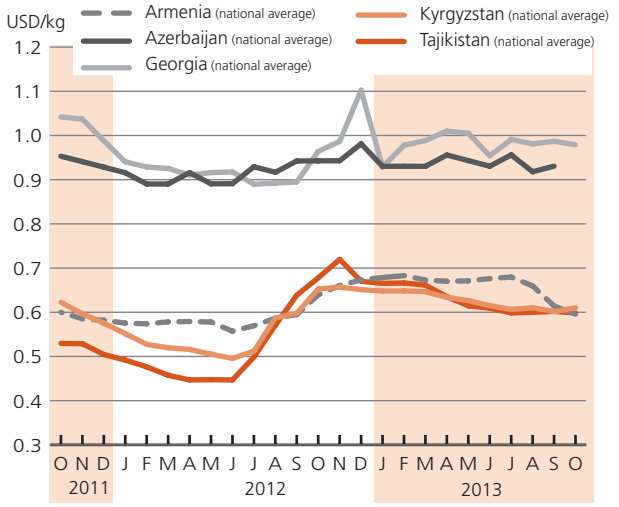
Improved export availabilities in 2013/14 following the recovery in the 2013 production

The 2013 cereal harvests have been successfully completed in all countries of the subregion and the aggregate output is estimated at about 34.9 million tonnes, 28 percent higher than last year's drought-reduced level and about 10 percent above the five-year average. Wheat production is estimated at over 28 million tonnes, representing approximately 80 percent of the aggregate cereal production.

The bumper 2013 cereal harvest mainly reflects an increased production in **Kazakhstan**, the main wheat exporter in the subregion, due to improved yields as the planted area decreased for the third consecutive year to below average levels. The recovery in export availabilities has improved in 2013/14 following production rebounds in 2013.

A significant increase of 14 percent in cereal production has also been reported in **Kyrgyzstan**, though wheat production still remained 10 percent below the five-year average. In all other CIS Asian countries, namely **Tajikistan, Turkmenistan, Uzbekistan, Armenia, Azerbaijan** and **Georgia,** this year's cereal harvests increased slightly from the 2012 level.

Figure 10. Retail wheat flour prices in selected CIS in Asia countries



Sources: National Statistical Service of Republic of Armenia; National Statistical Committee of the Kyrgyz Republic; State Committee on Statistics, Republic of Tajikistan; State Statistical Committee of the Republic of Azerbaijan; National Statistics Office of Georgia.

Prices of wheat flour in importing countries still close to their record highs

In the wheat importing countries of the subregion, including **Kyrgyzstan** and **Tajikistan**, prices of wheat flour were stable in October though still remained close to their peaks of a year earlier reflecting higher fuel and transport costs, as well as stronger wheat quotations in Kazakhstan. In **Azerbaijan**, prices of wheat flour in September stayed near their levels of the previous month and of a year earlier. Adequate supplies from the 2013 wheat harvest and high imports contributed to stabilising prices. In **Georgia**, an increase in the price of dairy products and vegetables pushed up the monthly food inflation rate by 2 percent in October.

Table 15. CIS in Asia 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 (%)
CIS in Asia	**33.9**	**21.4**	**28.4**	**6.2**	**5.1**	**5.7**	**40.8**	**27.3**	**34.9**	**27.6**
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	0.7	2.4	2.8	2.8	1.6
Georgia	0.1	0.1	0.1	0.4	0.4	0.4	0.5	0.5	0.5	-0.2
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	1.5	14.3
Tajikistan	0.7	0.8	0.8	0.2	0.2	0.2	1.0	1.1	1.1	-0.1
Turkmenistan	1.3	1.2	1.3	0.1	0.1	0.1	1.5	1.4	1.5	7.1
Uzbekistan	6.3	6.7	6.9	0.4	0.4	0.4	6.9	7.3	7.5	2.2

Note: Totals and percentage change computed from unrounded data.

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

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

Latin America and the Caribbean

Central America and the Caribbean

Cereal production to increase slightly in 2013

The aggregate cereal production of the subregion is forecast by FAO at almost 42 million tonnes or approximately 2 percent higher than in 2012. The main season output was estimated above average and prospects for the second season, currently underway, are favourable. In **Mexico**, the subregion's main producer, the cereal output is expected at a record level of 34 million tonnes (including paddy), slightly up from last year's above-average production, 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, was estimated at 3.4 million tonnes, 5 percent higher than in 2012, following a return to normal planting levels.

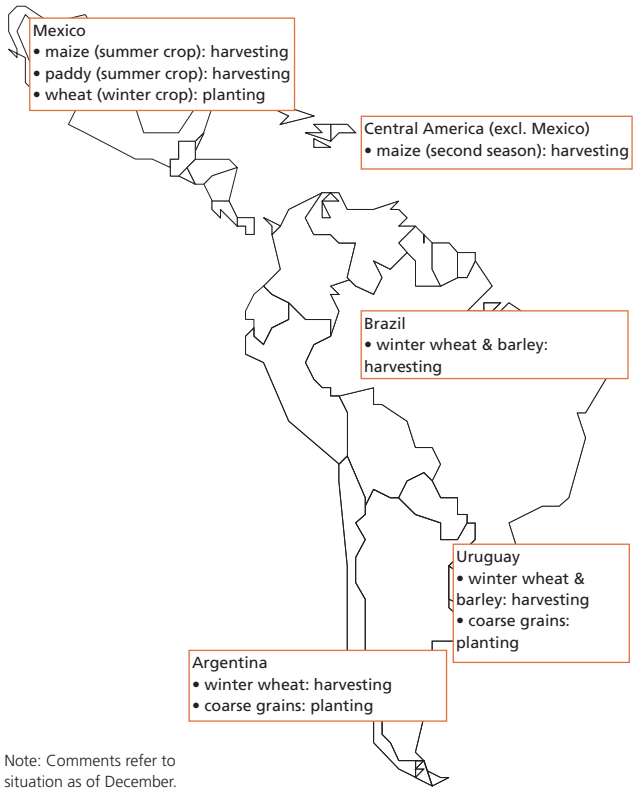
Elsewhere in the subregion, in Haiti, Honduras and Nicaragua, the 2013 main season maize harvests recovered significantly from last year's reduced levels leading to an expected above average aggregate 2013 cereal productions. In El Salvador, production is forecast to remain around the record level of 2012 as the Government continues to facilitate access to improved seeds and fertilizer.

Cereal imports to rise in 2013/14

Despite the anticipated higher cereal production this year, cereal imports are estimated to rise by almost 14 percent in 2013/14 marketing year (July/June) to about 26 million tonnes in 2013/14. 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 decreased in October

In countries across Central America, maize prices significantly declined in October as the 2013 main season crop, harvested by September, reached the market. Prices declined sharply in



Note: Comments refer to situation as of December.

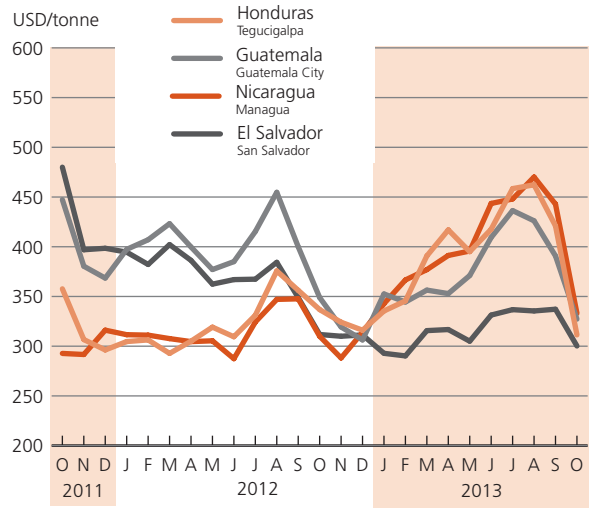
Guatemala, Honduras, El Salvador and **Nicaragua**, where record or higher productions relative to last year were reported. In Mexico, prices of white maize remained fairly stable in October reflecting favourable prospects for the 2013 main season crop, still being gathered, and good supplies from the secondary season, harvested earlier in the year. Prices of maize tortilla, a traditional part of the local diet, remained also unchanged in October. In **Haiti**, maize meal prices remained stable at low levels in most markets, while they declined in the capital Port-au-Prince and were lower than those of a year earlier. Prices of rice, the country's main staple and mostly imported, were also generally stable and low in October, reflecting adequate volumes of imports and trends in international markets.

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**	**3.4**	**29.6**	**35.0**	**35.4**	**2.9**	**2.7**	**2.9**	**36.1**	**41.0**	**41.7**	**1.8**
El Salvador	0.0	0.0	0.0	0.9	1.1	1.0	0.0	0.0	0.0	0.9	1.1	1.1	-2.5
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	5.3
Mexico	3.6	3.3	3.4	24.7	30.2	30.5	0.2	0.2	0.2	28.5	33.6	34.1	1.3
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**	**17.9**	**106.0**	**120.8**	**136.7**	**26.4**	**24.7**	**25.1**	**157.8**	**162.4**	**179.7**	**10.7**
Argentina	14.5	8.2	8.8	32.8	31.2	37.6	1.7	1.6	1.6	49.1	41.0	48.0	17.2
Brazil	5.7	4.4	4.9	59.0	74.1	83.3	13.6	11.6	11.7	78.3	90.1	100.0	11.0

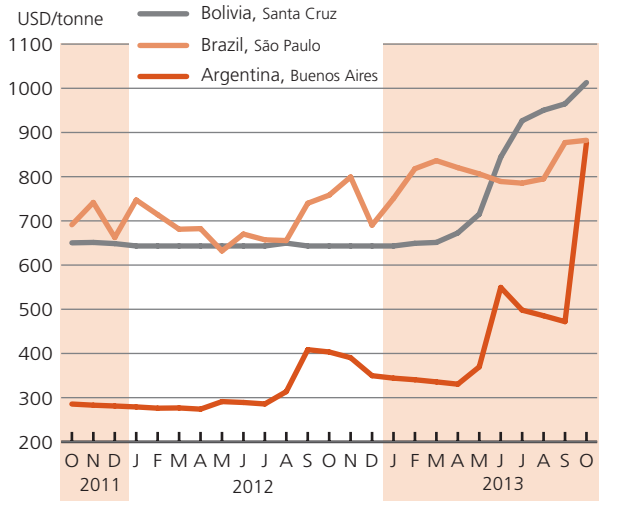
Note: Totals and percentage change computed from unrounded data.

Figure 11. Wholesale white maize prices in selected countries in Central America



Sources: Secretaria de Agricultura y Ganaderia, Honduras; Ministerio de Agricultura, Ganadería y Alimentación, Guatemala; Ministerio agropecuario y forestal, Nicaragua, Dirección General de Economía Agropecuaria, El Salvador.

Figure 12. Wholesale wheat flour prices in selected countries in South America



Sources: Servicio Informativo de Mercados Agropecuarios, Bolivia; Instituto de Economía Agrícola, Brazil; Bolsa de Cereales, Argentina.

South America

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

Despite the effects of adverse weather on the wheat crop, the subregion's 2013 aggregate cereal production is estimated to reach a record high of almost 180 million tonnes, 11 percent above last year's level. The increase reflects bumper 2013 maize crops, harvested in the first half of the year, in **Argentina, Brazil, Paraguay** and **Uruguay**. As a result of higher plantings and yields, the 2013 maize harvest reached almost 123 million tonnes, 18 percent up from 2012.

Harvesting of the 2013 wheat crop is underway. Preliminary estimates point to a recovery in the subregion's output from last year's sharply reduced level. However, at less than 18 million tonnes, production 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. Brazil also experienced severe crop losses due to frost, especially in the main wheat producing area of Parana, which accounts for about half of the country's production. However, official forecast points to an increase in the 2013 wheat production of almost 12 percent from last year's poor crop to 4.9 million tonnes, which is still below the five-year average. In Argentina, wheat production is forecast 7 percent higher than in the previous year as a result of an expansion in plantings and improved yields. However, this forecast may not materialize due dry weather in recent months.

Wheat flour prices at high levels in several countries and surged in October in Argentina

Wholesale wheat and wheat flour prices in October remained at around their high levels of the previous months in several countries of the subregion, and surged in **Argentina** as a result of localized shortages of wheat, due to last year's sharply reduced production and uncertain prospects for the 2013 crop. Wholesale prices of wheat flour in the capital Buenos Aires spiked in October due to last year's sharply reduced production, reaching new highs. However, prices of the grain have sharply declined since late October with the beginning of the 2013 wheat harvest and are expected to put downward pressure on flour prices in the coming weeks. Tight supplies in Argentina have resulted in high wheat flour prices in the main importing countries - **Brazil** and **Bolivia**, where quotations were at record levels in October, underpinned by reduced wheat outputs last year. Similarly, in **Paraguay**, wheat flour prices remained at record highs reached in previous months due to increased import demand from Brazil and severe frost damage to the 2013 crop being harvested. As a result of the rapidly increasing prices in the region, Brazil and Bolivia have switched to importing wheat from the United States and Canada this season, as Argentina has restricted exports in an attempt to limit price increases in local market. Brazil has also increased its duty-free wheat import quota from 1 million tonnes in April to 3.3 million tonnes in late October, while Bolivia has removed all import duties from non-Mercosur sources for the remainder of 2013. By contrast, in **Ecuador, Peru** and **Chile**, wheat flour prices remained relatively stable in October and generally below their levels of a year earlier reflecting adequate market supplies.

North America, Europe and Oceania

North America

Early estimates point to a larger winter wheat area in United States and growing conditions generally good so far

In the **United States**, winter wheat planting for the 2014 harvest was complete by late-November and the level of crop emergence was close to the five-year average, reported at 93 percent on 24 November. Although final estimates are not available yet, early indications suggest that the area sown to winter wheat, which accounts for over 80 percent of the country's total wheat area, might have increased slightly after a generally ideal planting season. Overall, the condition of the newly emerged plants is better than at the same time last year when some parts were still suffering the lingering effects of 2012 drought. However, ratings declined somewhat in the second half of November with persisting dryness again emerging in some areas, especially in the southern Plains. The latest official estimate of the United States 2013 wheat crop remains at 58 million tonnes, 6 percent down from the 2012 crop. The reduction is largely due to the above-average abandonment last winter, which resulted in a 7 percent decrease in the area harvested. Regarding coarse grains, the latest official estimate puts the 2013 maize output at some 355 million tonnes, almost 30 percent up from last year, and an the largest crop on record. In **Canada**, the bulk of the wheat is spring planted and the 2014 crop will not be sown until March-April next year. Latest information regarding the 2013 cereal harvest put the total wheat output at 33.2 million tonnes, up from earlier forecasts, and 22 percent above the 2012 crop. This year's increase is attributed to a significant increase in plantings combined with higher yields attributable to extremely good growing conditions. The maize crop, mostly grown in Eastern Canada, is forecast similar to last year's level at about 13 million tonnes.

Europe

European Union

Wheat plantings up for 2014 harvest

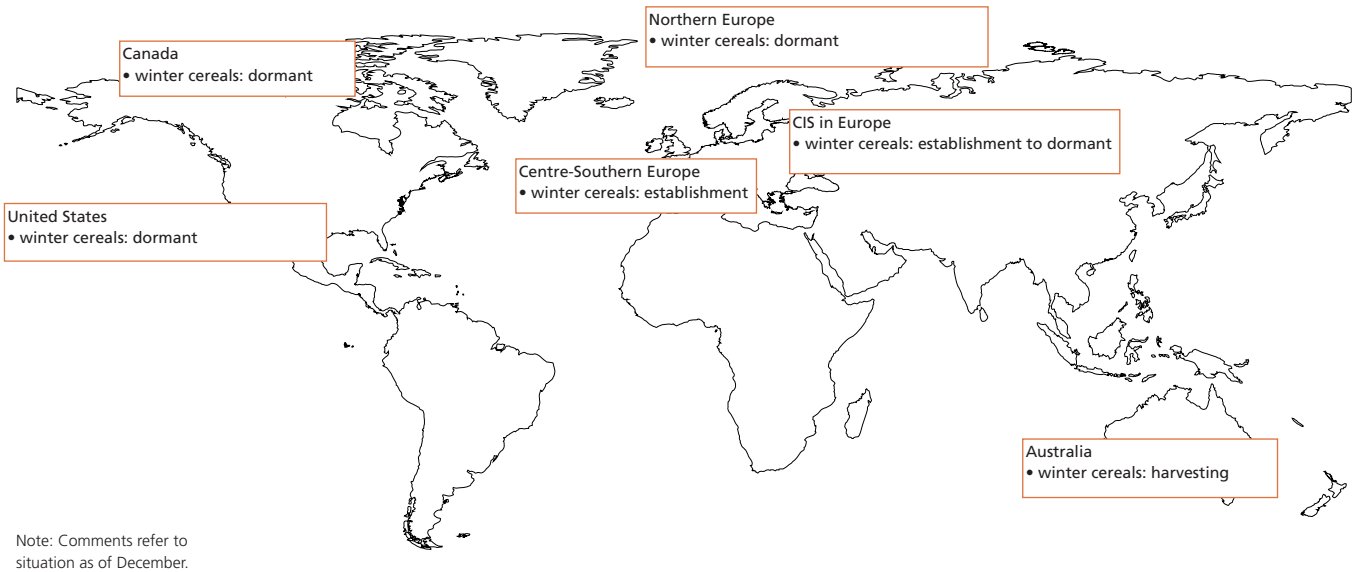
The bulk of the winter grain crops for harvest in 2014 have now been sown throughout the **European Union** under generally satisfactory conditions and early estimates indicate that the winter wheat area may be up by about 4 percent compared to the previous year. The negative impact of sowing delays in some parts, particularly central and eastern France, was largely offset by rapid early development of crops, promoted by above average temperatures and ample moisture supplies.

The EU's aggregate cereal output in 2013 is now estimated at 304.5 million tonnes, 9.1 percent up from 2012. Of the total, wheat accounts for an estimated 143.4 million tonnes, 8.4 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 significant recovery in maize output among the main producing countries, the latest estimate for aggregate coarse grains production in 2013 is also well up on the previous year's level at 158.2 million tonnes.

CIS in Europe

Plantings of the 2013 winter grains declined

In European CIS (**Belarus, the Republic of Moldova, the Russian Federation** and **Ukraine**), planting of the 2014 winter cereal crops is almost complete. The planting area under winter crops (wheat, rye and barley) is expected to be lower than last year's level. In **the Russian Federation** the targeted planted area of 16.4 million



Note: Comments refer to situation as of December.

hectares for winter crops, is unlikely to materialize due to excessive rains and sowing delays. By mid-November the area sown with winter grains was 14.4 million hectares, 88 percent lower than the planned area, and below the 15.7 million hectares reported at the same time a year earlier. To compensate for the contraction in winter grains plantings, an expansion of 2 or 3 million hectares of spring grains, mainly maize, is anticipated. Assuming normal weather conditions in the remainder of the winter season, an average production is forecast.

In **Ukraine**, winter cereal planting was completed. The area planted is estimated slightly lower than last year following delays due to wet conditions. Official reports indicate an area planted of around 8 million hectares (6.7 million hectares under wheat and 1.1 million hectares under barley). By mid-November, some 90 percent of the crops were reported in satisfactory conditions and the early outlook is positive.

In **Belarus**, the area planted to winter cereals is officially estimated to be slightly higher than last year. Similarly, in **the Republic of Moldova**, official forecasts indicate an increase in plantings.

Above average 2013 cereal production

Harvesting of the 2013 crop (except maize) has been completed in all European CIS countries. With the exception of Belarus, cereal outputs have increased significantly from last year's drought-affected harvests, mainly reflecting favourable weather conditions during the cropping seasons. In aggregate, FAO's latest estimate indicates a subregional cereal output of 162 million tonnes, 28 percent higher than last year's poor harvest and 13 percent above the five-year average level.

In **the Russian Federation**, the 2013 cereal output is put at about 91 million tonnes, an increase of 31 percent from the 2012 level and 7 percent higher than the average. Wheat is estimated at 53.6 million tonnes, 42 percent higher than last year's level and almost similar to coarse grains, while the maize harvest reached a record level of over 11 million tonnes. In **Ukraine**, good crop conditions for the winter and spring crops resulted in a record cereal production; aggregate production is put at some 59 million tonnes well above the drought-reduced harvest of the previous year and 24 percent above the five-year average. A potential exportable surplus of around 17 million tonnes of maize is estimated, significantly above last year's level.

In 2013, cereal harvest of **the Republic of Moldova** is estimated at about 3 million tonnes, a recovery from last year's reduced output and the highest level in the past ten years.

Higher cereal exports in 2013/14 expected

The total cereal export potential of **the Russian Federation** in the marketing year 2013/14 (July/June) is estimated at about 21 million tonnes, comparing with actual exports of 15.2 million tonnes in the previous year. The total includes 15 million tonnes of wheat. However, this level may not materialize, due to low availabilities of high quality wheat. A significant increase in exportable surplus is estimated in **Ukraine**, of which, over 19 million tonnes is maize. These two countries, jointly with Kazakhstan, have set up a coordination mechanism for identifying grain export opportunities.

Wheat and wheat flour prices started to rise in October after declining in previous three months

Export prices of wheat in **the Russian Federation** and **Ukraine** rose significantly in October, despite the good 2013 wheat outputs, on concerns about the quality of the crop and planting delays of the 2014 wheat crop, due to excessive rains. By contrast, wheat prices in **Kazakhstan** declined following the completion

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**	**88.9**	**91.1**	**347.0**	**310.8**	**398.3**	**8.4**	**9.0**	**8.6**	**435.1**	**408.8**	**498.0**	**21.8**
Canada	25.3	27.2	33.2	23.0	24.5	26.2	0.0	0.0	0.0	48.2	51.7	59.4	14.8
United States	54.4	61.7	58.0	324.0	286.3	372.0	8.4	9.0	8.6	386.9	357.0	438.6	22.8
Europe	**223.6**	**192.9**	**225.8**	**236.2**	**223.5**	**249.6**	**4.4**	**4.4**	**4.1**	**464.2**	**420.7**	**479.6**	**14.0**
Belarus	2.1	2.1	2.0	5.7	6.7	6.3	0.0	0.0	0.0	7.7	8.8	8.2	-6.1
EU	137.6	132.4	143.4	149.1	143.7	158.2	3.2	3.1	2.9	289.9	279.2	304.5	9.1
Russian Federation	56.2	37.7	53.6	34.2	30.8	36.7	1.1	1.1	1.1	91.5	69.6	91.4	31.3
Serbia	2.1	1.9	2.5	7.0	6.7	6.6	0.0	0.0	0.0	9.0	8.6	9.1	5.4
Ukraine	22.3	15.8	21.5	33.4	29.9	37.3	0.2	0.2	0.2	55.9	45.9	59.0	28.6
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.

of the 2013 bumper harvest in late October. Overall, regional wheat export quotations were some 20 percent below their high levels of October 2012.

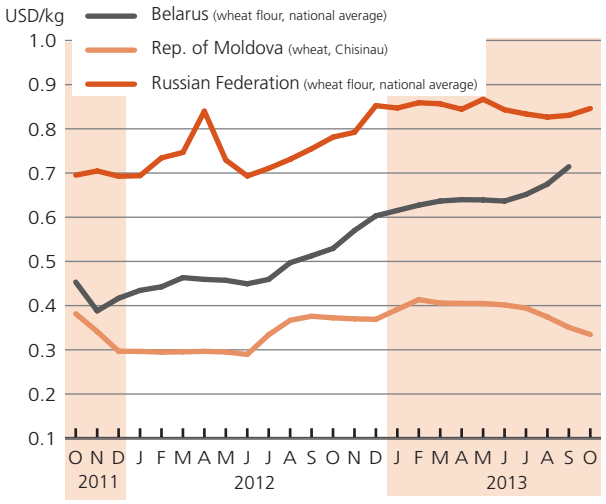
Retail prices of wheat flour continue to increase in Belarus, due inflation and transportation costs, but remained stable in the Republic of Moldova as a result of a record 2013 wheat harvest.

Oceania

Winter grains harvest underway but output expectations down in dry eastern parts

While conditions continued to improve for crops in Western **Australia** during the latter stages of development, dry conditions persisted in some eastern parts, most notably New South Wales, impairing crop development. The latest official forecast from September puts the wheat output in 2013 at 24.8 million tonnes, already down from earlier forecasts because of dry weather in the east, but given the persisting dry conditions in the major producing eastern regions, this figure is likely to be revised further downwards in the next official report in early December.

Figure 13. Retail wheat and wheat flour prices in Belarus, Russian Federation and Republic of Moldova



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

Statistical appendix

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	24.6	28.7	26.4	26.4	22.8	24.3
Coarse grains	15.7	16.9	14.7	15.3	14.0	17.9
Rice	28.0	29.8	30.9	33.8	35.6	35.9
Total cereals	20.8	22.9	21.5	22.3	20.9	23.5
2. Ratio of major grain exporters' supplies to normal market requirements (%)	120.9	124.5	115.9	118.3	108.1	120.2
3. Ratio of major exporters' stocks to their total disappearance (%)						
Wheat	17.5	21.7	20.8	18.1	14.0	14.9
Coarse grains	12.9	15.5	10.6	10.7	8.3	13.7
Rice	20.3	21.6	20.7	25.2	28.2	28.1
Total cereals	16.9	19.6	17.4	18.0	16.9	18.9
	Annual trend growth rate 2003-2012	**Change from previous year**				
		2009	**2010**	**2011**	**2012**	**2013**
4. Changes in world cereal production (%)	2.2	-0.8	-0.4	4.3	-2.0	8.4
5. Changes in cereal production in the LIFDCs (%)	2.8	-0.2	7.6	1.6	4.0	0.0
6. Changes in cereal production in the LIFDCs less India (%)	3.0	4.9	7.2	-2.1	5.2	0.4
	Average 2006-2010	**Change from previous year (%)**				
		2009	**2010**	**2011**	**2012**	**2013***
7. Selected cereal price indices:						
Wheat	165.2	-35.5	10.6	31.8	-4.8	-3.6
Maize	162.5	-25.5	12.0	57.6	2.2	-10.7
Rice	210.5	-10.3	-10.0	6.6	-4.6	1.2

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-November average.

Table A2. World cereal stocks[1]

(million tonnes)

	2009	2010	2011	2012	2013 estimate	2014 forecast
TOTAL CEREALS	**491.7**	**521.0**	**499.8**	**519.2**	**504.5**	**572.3**
Wheat	**160.3**	**189.0**	**184.5**	**180.6**	**158.3**	**171.8**
held by:						
- main exporters[2]	49.7	55.4	51.6	43.4	36.1	36.9
- others	110.6	133.6	132.9	137.2	122.2	134.9
Coarse grains	**200.2**	**194.5**	**170.1**	**177.5**	**171.8**	**221.5**
held by:						
- main exporters[2]	86.3	87.7	62.6	59.1	46.9	85.8
- others	113.9	106.8	107.5	118.4	124.9	135.7
Rice (milled basis)	**131.3**	**137.6**	**145.2**	**161.1**	**174.4**	**179.0**
held by:						
- main exporters[2]	36.1	33.4	33.3	41.5	46.9	48.5
- others	95.2	104.2	111.9	119.6	127.5	130.5
Developed countries	**178.0**	**191.3**	**152.5**	**148.9**	**117.0**	**160.8**
Australia	6.6	7.4	9.5	7.3	4.3	4.6
Canada	13.0	13.6	11.2	9.4	8.0	13.1
European Union	48.4	45.7	32.5	32.7	25.7	35.7
Japan	4.6	4.8	4.8	4.9	5.2	5.1
Russian Federation	18.1	21.1	17.8	14.8	7.4	11.6
South Africa	2.5	3.1	4.0	2.5	3.1	2.4
Ukraine	8.0	6.7	5.1	10.7	6.4	6.5
United States	65.9	75.9	57.3	49.3	44.3	67.4
Developing countries	**313.7**	**329.7**	**347.3**	**370.2**	**387.5**	**411.5**
Asia	**258.8**	**273.9**	**283.7**	**303.8**	**330.3**	**347.7**
China	154.9	163.7	167.1	172.1	188.3	203.5
India	37.9	33.7	36.7	44.5	49.1	48.7
Indonesia	6.4	8.3	10.4	12.4	13.6	13.9
Iran (Islamic Republic of)	3.2	6.0	4.7	3.6	8.2	9.5
Korea, Republic of	2.8	3.8	4.3	4.2	4.3	3.9
Pakistan	3.8	4.2	2.9	3.5	2.6	2.7
Philippines	4.1	4.3	3.3	2.6	3.1	3.1
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	5.1
Africa	**25.3**	**30.3**	**35.4**	**38.5**	**35.4**	**33.0**
Algeria	2.7	3.6	3.9	4.3	4.7	4.7
Egypt	5.6	6.6	5.9	8.1	5.7	5.7
Ethiopia	0.8	1.5	1.9	1.9	2.1	2.0
Morocco	1.4	3.1	4.0	4.6	3.4	4.0
Nigeria	1.3	1.2	1.4	1.3	0.8	1.2
Tunisia	1.5	1.5	1.0	1.1	1.3	1.5
Central America	**6.2**	**4.4**	**6.0**	**4.7**	**5.1**	**6.0**
Mexico	4.2	2.4	3.7	2.3	2.6	3.4
South America	**23.0**	**20.8**	**21.9**	**22.8**	**16.3**	**24.4**
Argentina	3.7	2.3	5.9	5.7	2.4	3.4
Brazil	12.7	11.8	8.5	8.6	5.7	11.5

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 - 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	374	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
2013 - October	333	289	343	201	207	204
2013 - November	317	274	353	199	207	196

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 Countries[1], 2012/13 or 2013 estimates

(thousand tonnes)

		2011/12 or 2012 Actual imports			2012/13 or 2013 Import position[2]			
	Marketing year	Commercial purchases	Food aid	Total commercial and aid	Total import requirements *(excl. re-exports)*	Total commercial and aid	Food aid allocated, committed or shipped	Commercial purchases
AFRICA		**44 436.5**	**2 441.7**	**46 878.2**	**40 101.5**	**30 517.6**	**999.8**	**29 517.8**
North Africa		**18 871.0**	**0.0**	**18 871.0**	**13 971.0**	**13 971.0**	**0.0**	**13 971.0**
Egypt	July/June	18 871.0	0.0	18 871.0	13 971.0	13 971.0	0.0	13 971.0
Eastern Africa		**6 790.6**	**1 523.2**	**8 313.8**	**7 512.6**	**5 121.5**	**591.3**	**4 530.2**
Burundi	Jan./Dec.	106.0	17.9	123.9	149.8	33.5	13.8	19.7
Comoros	Jan./Dec.	59.1	0.0	59.1	59.5	17.9	0.0	17.9
Djibouti	Jan./Dec.	85.3	3.6	88.9	100.7	87.7	9.4	78.3
Eritrea	Jan./Dec.	376.0	7.0	383.0	406.0	27.3	0.0	27.3
Ethiopia	Jan./Dec.	435.1	734.1	1 169.2	1 033.6	169.5	124.9	44.6
Kenya	Oct./Sept.	2 023.6	235.4	2 259.0	1 910.8	1 305.4	76.7	1 228.7
Rwanda	Jan./Dec.	83.4	1.7	85.1	104.8	73.5	2.8	70.7
Somalia	Aug./July	346.9	199.1	546.0	540.1	540.1	201.3	338.8
Sudan	Nov./Oct.	2 159.3	296.6	2 455.9	1 809.8	1 719.4	146.1	1 573.3
Uganda	Jan./Dec.	386.5	7.0	393.5	459.6	209.4	7.1	202.3
United Rep. of Tanzania	June/May	729.4	20.8	750.2	937.9	937.9	9.3	928.6
Southern Africa		**2 265.5**	**203.3**	**2 468.8**	**2 245.1**	**2 245.1**	**231.0**	**2 014.1**
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	105.2	105.2	18.2	87.0
Mozambique	April/March	959.1	84.5	1 043.6	883.0	883.0	120.8	762.2
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		**14 730.5**	**559.9**	**15 290.4**	**14 363.7**	**8 072.7**	**129.7**	**7 943.0**
Coastal Countries		***11 134.1***	***164.0***	***11 298.1***	***10 707.5***	***6 002.0***	***14.0***	***5 988.0***
Benin	Jan./Dec.	385.4	11.6	397.0	447.0	447.0	0.0	447.0
Côte d'Ivoire	Jan./Dec.	1 833.9	14.6	1 848.5	1 775.0	1 224.8	8.9	1 215.9
Ghana	Jan./Dec.	999.0	31.0	1 030.0	945.0	577.2	1.5	575.7
Guinea	Jan./Dec.	515.2	21.8	537.0	477.0	107.4	2.3	105.1
Liberia	Jan./Dec.	228.6	71.7	300.3	384.0	144.1	0.0	144.1
Nigeria	Jan./Dec.	6 787.0	0.0	6 787.0	6 320.0	3 245.8	0.0	3 245.8
Sierra Leone	Jan./Dec.	120.0	12.8	132.8	114.0	151.2	1.3	149.9
Togo	Jan./Dec.	265.0	0.5	265.5	245.5	104.5	0.0	104.5
Sahelian Countries		***3 596.4***	***395.9***	***3 992.3***	***3 656.2***	***2 070.8***	***115.8***	***1 955.0***
Burkina Faso	Nov./Oct.	354.4	30.1	384.5	454.1	72.7	9.1	63.6
Chad	Nov./Oct.	108.9	75.0	183.9	177.8	80.7	36.5	44.2
Gambia	Nov./Oct.	169.5	25.5	195.0	212.5	96.6	3.8	92.8
Guinea-Bissau	Nov./Oct.	147.5	6.8	154.3	154.3	4.4	2.6	1.8
Mali	Nov./Oct.	337.7	38.8	376.5	250.1	193.9	15.7	178.2
Mauritania	Nov./Oct.	401.5	39.6	441.1	470.5	366.2	9.2	357.0
Niger	Nov./Oct.	353.4	127.3	480.7	461.9	88.5	33.6	54.9
Senegal	Nov./Oct.	1 723.5	52.8	1 776.3	1 475.0	1 167.9	5.4	1 162.5
Central Africa		**1 778.9**	**155.3**	**1 934.2**	**2 009.1**	**1 107.3**	**47.8**	**1 059.5**
Cameroon	Jan./Dec.	937.0	3.5	940.5	880.1	621.1	2.8	618.3
Cent.Afr.Rep.	Jan./Dec.	46.4	11.9	58.3	51.0	26.6	8.4	18.2
Congo	Jan./Dec.	284.8	5.2	290.0	311.0	137.5	1.8	135.7
Dem.Rep.of the Congo	Jan./Dec.	493.7	134.7	628.4	750.0	315.9	34.6	281.3
Sao Tome and Principe	Jan./Dec.	17.0	0.0	17.0	17.0	6.2	0.2	6.0

Table A4b. Cereal import requirements of Low-Income Food-Deficit Countries[1], 2012/13 or 2013 estimates

(thousand tonnes)

		2011/12 or 2012 Actual imports			2012/13 or 2013 Import position[2]			
	Marketing year	Commercial purchases	Food aid	Total commercial and aid	Total import requirements *(excl. re-exports)*	Total commercial and aid	Food aid allocated, committed or shipped	Commercial purchases
ASIA		**36 353.4**	**966.8**	**37 320.2**	**32 812.4**	**30 894.9**	**457.6**	**30 437.2**
Cis in Asia		**4 738.3**	**2.0**	**4 740.3**	**3 620.2**	**3 620.4**	**3.7**	**3 616.6**
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	0.1	1 087.9
Uzbekistan	July/June	2 924.0	0.0	2 924.0	2 020.0	2 020.0	0.0	2 020.0
Far East		**21 332.7**	**686.8**	**22 019.5**	**19 230.2**	**18 495.1**	**287.8**	**18 207.3**
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	21.2	1.8	19.4
D.P.R. of Korea	Nov./Oct.	303.2	408.1	711.3	398.6	398.6	101.6	297.0
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	10 623.1	10 623.1	1.0	10 622.1
Lao, P.D.R.	Jan./Dec.	41.1	4.2	45.3	24.9	10.1	6.1	4.0
Mongolia	Oct./Sept.	118.1	0.0	118.1	115.8	115.8	0.0	115.8
Nepal	July/June	527.3	24.5	551.8	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	40.0	4 165.3
Sri Lanka	Jan./Dec.	1 139.3	30.0	1 169.3	1 139.0	434.0	2.2	431.8
Near East		**10 282.4**	**278.0**	**10 560.4**	**9 962.0**	**8 779.4**	**166.1**	**8 613.3**
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	2 317.4	50.0	2 267.4
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**	**162.0**	**0.0**	**162.0**
Kiribati	Jan./Dec.	8.7	0.0	8.7	8.7	0.7	0.0	0.7
Papua New Guinea	Jan./Dec.	390.2	0.0	390.2	390.2	151.6	0.0	151.6
Solomon Islands	Jan./Dec.	43.0	0.0	43.0	43.0	9.7	0.0	9.7
TOTAL		**82 846.8**	**3 489.5**	**86 336.3**	**75 225.1**	**63 443.8**	**1 557.9**	**61 885.9**

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 November 2013.

Table A5. Cereal import requirements of Low-Income Food-Deficit Countries[1], 2013/14 estimates

(thousand tonnes)

		2012/13 Actual imports			2013/14 Import position[2]			
	Marketing year	Commercial purchases	Food aid	Total commercial and aid	Total import requirements *(excl. re-exports)*	Total commercial and aid	Food aid allocated, committed or shipped	Commercial purchases
AFRICA		**18 481.2**	**518.3**	**18 999.5**	**21 578.8**	**2 692.0**	**63.7**	**2 628.3**
Northern Africa		**13 971.0**	**0.0**	**13 971.0**	**15 371.0**	**1 731.7**	**0.0**	**1 731.7**
Egypt	July/June	13 971.0	0.0	13 971.0	15 371.0	1 731.7	0.0	1 731.7
Eastern Africa		**2 496.1**	**287.3**	**2 783.4**	**3 772.2**	**228.1**	**53.0**	**175.1**
Kenya	Oct./Sept	1 228.7	76.7	1 305.4	2 360.0	5.0	5.0	0.0
Somalia	Aug./July	338.8	201.3	540.1	570.0	47.6	47.6	0.0
United Rep. of Tanzania	June/May	928.6	9.3	937.9	842.2	175.5	0.4	175.1
Southern Africa		**2 014.1**	**231.0**	**2 245.1**	**2 435.6**	**732.2**	**10.7**	**721.5**
Lesotho	April/March	261.0	5.0	266.0	228.0	69.1	1.2	67.9
Madagascar	April/March	319.3	26.6	345.9	448.0	35.6	8.8	26.8
Malawi	April/March	87.0	18.2	105.2	114.6	78.5	0.0	78.5
Mozambique	April/March	762.2	120.8	883.0	855.0	362.2	0.7	361.5
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	186.8	0.0	186.8
ASIA		**27 417.6**	**296.0**	**27 713.7**	**27 487.8**	**5 336.6**	**15.4**	**5 321.2**
CIS in Asia		**3 616.6**	**3.7**	**3 620.4**	**3 393.2**	**814.0**	**0.0**	**814.0**
Kyrgyzstan	July/June	508.7	3.7	512.4	465.2	105.8	0.0	105.8
Tajikistan	July/June	1 087.9	0.1	1 088.0	912.0	202.9	0.0	202.9
Uzbekistan	July/June	2 020.0	0.0	2 020.0	2 016.0	505.4	0.0	505.4
Far East		**17 455.1**	**176.2**	**17 631.3**	**17 457.6**	**4 324.0**	**15.4**	**4 308.6**
Bangladesh	July/June	1 838.3	133.0	1 971.3	1 340.0	732.9	15.4	717.5
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	60.3	0.0	60.3
Indonesia	April/March	10 622.1	1.0	10 623.1	10 504.1	2 978.1	0.0	2 978.1
Mongolia	Oct./Sept.	115.8	0.0	115.8	131.8	0.0	0.0	0.0
Nepal	July/June	530.1	1.7	531.8	621.8	0.0	0.0	0.0
Philippines	July/June	4 165.3	40.0	4 205.3	4 687.0	552.7	0.0	552.7
Near East		**6 345.9**	**116.1**	**6 462.0**	**6 637.0**	**198.6**	**0.0**	**198.6**
Afghanistan	July/June	1 151.0	101.0	1 252.0	1 397.0	43.1	0.0	43.1
Iraq	July/June	5 194.9	15.1	5 210.0	5 240.0	155.5	0.0	155.5
CENTRAL AMERICA		**1 768.9**	**100.4**	**1 869.3**	**1 929.4**	**227.3**	**4.1**	**223.2**
Haiti	July/June	597.7	82.4	680.1	724.1	58.2	3.2	55.0
Honduras	July/June	758.3	16.7	775.0	790.0	117.8	0.0	117.8
Nicaragua	July/June	412.9	1.3	414.2	415.3	51.3	0.9	50.4
TOTAL		**47 667.7**	**914.7**	**48 582.4**	**50 996.0**	**8 255.9**	**83.2**	**8 172.7**

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 1 915 in 2010), 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 November 2013.

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This report is based on information available as of early-November 2013.

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