



# CROP PROSPECTS and FOOD SITUATION

Quarterly Global Report

Countries in need of external assistance for food

45

## COUNTRIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD

FAO assesses that 45 countries, including 33 in Africa, 9 in Asia, 2 in Latin America and the Caribbean, and 1 in Europe, are in need of external assistance for food. Prospects of persisting drought in East Africa raise serious concerns about levels of acute food insecurity. Globally, whilst international prices have softened, local food prices remain high and continue to severely hinder access to food.

Asia	0.4
Africa	-2.3
Central America and the Caribbean	-1.7
South America	+7.9
North America	-4.7
Europe	-5.9
Oceania	1.3
World	-1.3

## World cereal production 2022 over 2021

(yearly percentage change)

- 1.3%

## REGIONAL HIGHLIGHTS

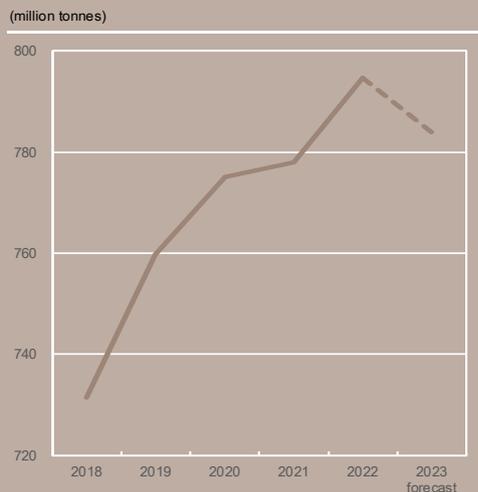
**AFRICA** Rainfall shortages in parts of North Africa and Southern Africa, which has also been hit by cyclones, contain 2023 production prospects, with crops to be harvested in the next months. Forecasts of persisting drought conditions in East Africa heighten the risks of a sixth successive poor season in 2023, with a potential severe impact on acute food insecurity levels. In West Africa, whilst a favourable rainfall outlook bodes well for 2023 crops, conflicts continue to drive up food assistance needs.

**ASIA** Sustained rainfall is needed in Near East and Commonwealth of Independent States (CIS) countries of Asia to shore up 2023 production prospects, following erratic rains earlier in the season. Preliminary prospects for the 2023 wheat output in Far East Asian countries are favourable, reflecting conducive weather conditions and large plantings.

**LATIN AMERICA AND THE CARIBBEAN** In South America, robust export demand is underpinning prospects of a large maize acreage, notably in Brazil where official forecasts also point to a record output in 2023. Although rains improved in recent months in Argentina, earlier deficits affected part of the 2023 maize crop. In Central America and the Caribbean, acute food insecurity is worsening in Haiti due to gang violence, an economic downturn and the effects of natural disasters.

Global wheat production 2023 over 2022

- 1.3%



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# COUNTRIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD

Note: Situation as of February 2023  
Territories/boundaries\*\*

## AFRICA (33 countries)

- Burkina Faso
- Burundi
- Cameroon
- Central African Republic
- Chad
- Congo
- Democratic Republic of Congo
- Djibouti
- Eritrea
- Eswatini
- Ethiopia
- Guinea
- Kenya
- Lesotho
- Liberia
- Libya
- Madagascar
- Malawi
- Mali
- Mauritania
- Mozambique
- Namibia
- Niger
- Nigeria
- Senegal
- Sierra Leone
- Somalia
- South Sudan
- Sudan
- Uganda
- United Republic of Tanzania
- Zambia
- Zimbabwe

## ASIA (9 countries)

- Afghanistan
- Bangladesh
- Democratic People's Republic of Korea
- Lebanon
- Myanmar
- Pakistan
- Sri Lanka
- Syrian Arab Republic
- Yemen

## LATIN AMERICA AND THE CARIBBEAN (2 countries)

- Haiti
- Venezuela (Bolivarian Republic of)

## EUROPE (1 country)

- Ukraine

\*\* See Terminology ([page 7](#))

Source: FAO/GIEWS, 2023. *Crop Prospects and Food Situation No. 1*. Cited 3 March 2023, modified to comply with the United Nations map No. 4170 Rev. 19, 2020.

## AFRICA (33 COUNTRIES)

### EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/ SUPPLIES

#### Central African Republic

*Conflict, population displacement, high food prices*

- According to the latest Integrated Food Security Phase Classification (IPC) analysis, issued in November 2022, the number of people in IPC Phase 3 (Crisis) and above is estimated at 2.7 million between September 2022 and March 2023, including 2 million people in IPC Phase 3 (Crisis) and 642 000 in IPC Phase 4 (Emergency). This is mainly attributed to the impact of civil insecurity and high food prices.
- As of end-2022, over half a million people were internally displaced and 741 000 refugees and asylum seekers were hosted in neighbouring countries, mostly in Cameroon, Chad and the Democratic Republic of the Congo.

#### Kenya

*Drought conditions*

- According to the latest estimates, about 5.4 million people were acutely food insecure between March and June 2022, reflecting consecutive poor rainy seasons since late 2020 that affected crop and livestock production,

mainly in northern and eastern pastoral, agropastoral and marginal agricultural areas.

#### Somalia

*Drought conditions, civil insecurity*

- About 6.5 million people are estimated to face severe acute food insecurity between April and June 2023, including about 223 000 people in IPC Phase 5 (Catastrophe) as a result of consecutive poor rainy seasons since late 2020 and heightened conflict since early 2021.

### WIDESPREAD LACK OF ACCESS

#### Burundi

*Weather extremes, high food prices*

- According to the latest estimates, about 1.4 million people were estimated to be facing acute food insecurity (IPC Phase 3 [Crisis] and above) between October and December 2022. The main drivers are erratic February–May rains in some central and southeastern areas that affected pulses production, the lingering socioeconomic impact of the COVID-19 pandemic and high food prices.

#### Chad

*Civil insecurity, floods, high food prices*

- According to the latest Cadre Harmonisé (CH) analysis, about 1.5 million people are projected

to experience acute food insecurity during the June to August 2023 lean season period, including 32 500 people in CH Phase 4 (Emergency). This would be an improvement compared to the previous year, mostly due to the significantly higher year-on-year cereal output in 2022 after the below-average 2021 production.

- Acute food insecurity is underpinned by persisting insecurity in the Lac and Tibesti regions, which had displaced over 380 000 people by January 2023. Furthermore, elevated food prices, as well as the impact of the severe floods in 2022, which affected approximately 1.5 million people and destroyed about 350 000 hectares of farmland, are compounding food insecurity.
- As of January 2023, about 595 000 refugees, mostly from Cameroon, the Central African Republic, Nigeria and the Sudan, were residing in the country.

### Democratic Republic of the Congo

*Civil insecurity in eastern areas, high food prices*

- According to the October 2022 IPC analysis, 24.5 million people were projected to experience acute food insecurity between January and June 2023. This is due to persisting conflict in eastern provinces of North Kivu, South Kivu and Ituri, which continues to cause displacements, and to high prices of domestic food staples.
- As of end-2022, over 1 million Congolese refugees and asylum seekers were hosted in several neighbouring countries, 474 000 of which are in Uganda.

### Djibouti

*Unfavourable weather, high food prices*

- About 192 000 people were estimated to have faced acute food insecurity (IPC Phase 3 [Crisis] and above) between July and December 2022, mainly due to the impact of insufficient rains in 2021 and 2022, which affected rangelands and pastoral livelihoods, and high food prices.

### Eritrea

*Macroeconomic challenges have increased the population's vulnerability to food insecurity*

### Ethiopia

*Drought conditions in southeastern areas, conflict in Tigray Region, high food prices*

- According to the Mid-Year Review of the 2022 Humanitarian Response Plan, 23.6 million people are officially estimated to be facing acute food insecurity.
- Drought conditions that began in late 2020 are affecting a significant proportion of the population in southern South West, SNNP and Somali regions, and underpin the high prevalence of acute food insecurity.
- In conflict-affected northern Tigray, Amhara and Afar regions, the livelihoods of local households have been severely damaged, and 5.4 million people are estimated to be severely food insecure in the Tigray Region alone.

### Malawi

*Localized shortfalls in cereal production, high food prices*

- An estimated 3.82 million people are expected to experience acute food insecurity (IPC Phase 3 [Crisis]) between October 2022 and March 2023. This number is more than double the estimate for the January to March 2022 period.
- High food prices and the effects of weather-induced localized shortfalls in cereal production in 2022, notably in southern districts, are the primary factors underpinning the increase in acute food insecurity.

### Mauritania

*High food prices*

- According to the latest CH analysis, nearly 695 000 people are projected to be in need of humanitarian assistance during the June to August 2023 lean season, including over 106 000 people in CH Phase 4 (Emergency). This would be an improvement compared to the previous year, mostly due to the substantial cereal production increase in 2022.
- High food prices continue to worsen food security, while flooding in 2022, which affected about 54 000 people, has further aggravated the conditions of vulnerable households.
- As of November 2022 (latest available data), the country was hosting over 100 000 refugees, mostly from Mali.

### Niger

*Conflict, high food prices, floods*

- About 2.87 million people are projected to be acutely food insecure during the June to August 2023 lean season period, including over 143 000 people in CH Phase 4 (Emergency). This would be an improvement on the situation in 2022, mostly reflecting the sharp upturn in crop yields following the below-average cereal output in 2021.
- Persisting insecurity continues to disrupt livelihoods and has displaced over 360 000 people, mostly in the Diffa, Tahoua and Tillabery regions, as of January 2023. High food prices, as well as the floods in 2022 that affected about 327 000 people, are additional factors that have aggravated food insecurity.
- As of January 2023, the country was hosting over 255 000 refugees, mainly from Nigeria and Mali.

### Nigeria

*Conflict in northern areas, floods, high food prices, economic slowdown*

- About 25.3 million people are projected to face acute food insecurity during the June to August 2023 lean season, including about 1.87 million people in CH Phase 4 (Emergency) and nearly 4 000 in CH Phase 5 (Catastrophe). This would be a significant deterioration compared to last year, when 19.45 million people were estimated to be acutely food insecure.
- Acute food insecurity is mostly driven by the deterioration of security conditions and conflicts in northern states, which as of March 2022 (latest data available) have led to the displacement of about 3.17 million people and are constraining farmers' access to their lands. Widespread flooding in 2022, affecting about 4.5 million people across the country, has further compounded conditions, particularly in areas already facing high levels of insecurity. High food prices and the expected slowdown in economic growth in 2023 are additional drivers of acute food insecurity.
- As of January 2023, nearly 92 000 refugees, mostly from Cameroon, were residing in the country.

### South Sudan

*Economic downturn, floods, civil insecurity*

- Despite sustained humanitarian assistance, food insecurity still affects large segments of the population,

owing to rampant inflation and insufficient food supplies, due to a stagnant agricultural production, impact of consecutive years with widespread floods and the escalation of organized violence at the subnational level since 2020. About 7.76 million people, almost two thirds of the total population, are expected to face severe acute food insecurity in the lean season between April and July 2023.

- Particular concern exists for households in Akobo, Canal/Pigi and Fangak counties of Jonglei State and for Leer and Mayendit counties of Unity State, where about 43 000 individuals are expected to face IPC Phase 5 (Catastrophe).

## Zimbabwe

### High food prices

- Based on a government assessment, an estimated 3.8 million people are expected to be in need of humanitarian assistance between January and March 2023. This number is higher than the level estimated in the first quarter of 2022.
- The downturn in food security conditions is largely on account of poor food access, due to prevailing high food prices and reduced incomes owing to the effects of an economic downturn. A decline in cereal production in 2022 has also aggravated conditions.

## SEVERE LOCALIZED FOOD INSECURITY

### Burkina Faso

#### Civil insecurity in the north, high concentration of displaced people, high food prices

- According to the latest CH analysis, about 3.53 million people are projected to face acute food insecurity during the June to August 2023 lean season period, including over 564 000 people in CH Phase 4 (Emergency) and nearly 20 000 in CH Phase 5 (Catastrophe). This would be a slight increase compared to the preceding year.
- Food insecurity is primarily underpinned by worsening insecurity in Centre-Nord and Sahel regions, which, as of December 2022 (latest data available), had displaced about 1.88 million people. High food prices further aggravate conditions of the most vulnerable households.

- As of January 2023, about 35 000 refugees, mostly from Mali, were residing in the country.

### Cameroon

#### Civil insecurity, high food prices, floods

- According to the November 2022 CH analysis, about 3.6 million people were estimated to be acutely food insecure, CH Phase 3 (Crisis) and above, between October and December 2022, as a result of conflict, sociopolitical unrest and high food prices, as well as floods that caused people displacements, damaged standing crops and prevented access to fields.
- As of 31 December 2022, the number of internally displaced people (IDPs) in the Northwest and Southwest regions was estimated at about 598 000, while IDPs in the Far North Region amounted to almost 385 400.

### Congo

#### Refugee influx, floods

- As of end-2022, nearly 30 000 refugees from the Central African Republic and approximately 26 000 from the Democratic Republic of the Congo were residing in the country, mostly in Likouala and Plateaux departments. Host communities face pre-existing food shortages and limited livelihood opportunities, and refugees' food security relies heavily on ongoing humanitarian assistance.
- Above average rainfall amounts since November 2022 triggered flooding in December and January in central and northern parts of the country, displacing people. According to damage assessment reports, about 165 000 people have been affected in 23 districts in the departments of Cuvette, Likouala, Plateaux and Sangha.

### Eswatini

#### High food prices, economic downturn

- The latest IPC analysis indicates that nearly 259 000 people are expected face acute food insecurity between January and March 2023, an improvement compared to the previous year.
- Food insecurity in 2022/23 is driven by the high food prices and a slowdown in economic growth, curbing households' income earning opportunities.

### Guinea

#### High food prices

- About 923 000 people are projected to be acutely food insecure during

the June to August 2023 lean season, including approximately 2 500 people in CH Phase 4 (Emergency), mostly on account of high food prices. The 2022 floods, affecting 48 000 people, have further compromised the conditions of vulnerable households.

- As of January 2023, an estimated 2 200 refugees, mostly from Sierra Leone, were residing in the country.

### Lesotho

#### High food prices, economic downturn

- According to the latest IPC analysis, an estimated 320 000 people were projected to face IPC Phase 3 (Crisis) levels of acute food insecurity between October 2022 and March 2023, a small improvement compared to early 2022.
- Food insecurity conditions are primarily underpinned by the high food prices and a slow economic recovery that is impinging on households' economic capacity to access food.

### Liberia

#### High food prices, macroeconomic challenges

- Over 530 000 people are projected to be acutely food insecure during the June to August 2023 lean season period, including approximately 21 350 people in CH Phase 4 (Emergency).
- Acute food insecurity is associated with high food prices and a slow economic recovery from the pandemic-induced downturn, while the 2022 floods, affecting nearly 90 000 people, have compounded the conditions of vulnerable households.
- As of January 2023, the country was hosting 1 680 refugees.

### Libya

#### Civil insecurity, economic and political instability, high food prices

- The 2023 Humanitarian Needs Overview states that about 300 000 people (less than 4 percent of the population) are estimated to be in need of humanitarian assistance in 2023.

### Madagascar

#### Extreme weather events, slow economic recovery

- Between January and March 2023, an estimated 2.2 million people are projected to face IPC Phase 3 (Crisis) and above levels of acute food insecurity in southern and southeastern areas, due

to successive years of droughts and the impact of cyclones in 2022.

- The passage of cyclone Freddy in February 2023 is expected to have caused disruptions to livelihoods and resulted in crop damage, aggravating food insecurity of the affected population.

## Mali

*Civil insecurity, high food prices*

- According to the latest CH analysis, about 1.25 million people are projected to face acute food insecurity during the June to August 2023 lean season period, including nearly 107 000 people in CH Phase 4 (Emergency) and about 1 700 in CH Phase 5 (Catastrophe). This would be an improvement compared to 2022, partly driven by the yearly increase of cereal production.
- Food insecurity conditions are primarily underpinned by a worsening conflict, which has led to the displacement of over 440 000 people, mostly in central and northern parts of the country, as of December 2022. High food prices as well as flooding in 2022 further aggravated food insecurity.
- As of December 2022, the country was hosting approximately 63 000 refugees, mostly from Burkina Faso, the Niger and Mauritania.

## Mozambique

*Insecurity in northern areas, extreme weather impacts*

- Extreme weather events in 2022 affected a large number of people, while insecurity in the northern province of Cabo Delgado continues to impact livelihoods and underpins the severest levels of acute food insecurity. Food insecurity estimates for 2023 are not yet available, but between April and September 2022 a projected 1.4 million people were facing acute food insecurity (IPC Phase 3 [Crisis] and above).
- The landing of cyclone Freddy in February 2023 is expected to have caused disruptions to livelihoods and resulted in crop damage, aggravating food insecurity of the affected population.

## Namibia

*Localized shortfalls in cereal production, economic downturn, high food prices*

- An estimated 390 000 people are facing acute food insecurity (IPC Phase 3 [Crisis]

and above) in the January to March 2023 period, lower than the figure in the corresponding period of 2022. High food prices and localized weather induced shortfalls in cereal production in 2022 were the key drivers.

## Senegal

*High food prices, floods, reduced incomes*

- The latest CH analysis indicates that about 1.42 million people are projected to be acutely food insecure during the June to August 2023 lean season, including nearly 87 000 people in CH Phase 4 (Emergency). This would be a significant deterioration compared to the previous year, when about 881 000 people were estimated to be in need of humanitarian assistance.
- The main drivers of acute food insecurity are high food prices, the severe effect of floods on livelihoods and food markets, and reduced incomes.
- As of January 2023, an estimated 12 000 refugees, mostly from Mauritania, required humanitarian assistance.

## Sierra Leone

*High food prices, macroeconomic challenges*

- According to the latest CH analysis, about 1.11 million people are projected to be in need of humanitarian assistance between the June to August 2023 lean season, including nearly 20 000 people in CH Phase 4 (Emergency).
- Acute food insecurity is underpinned by elevated food prices and low purchasing power, amid high inflation and the depreciation of the national currency. Furthermore, floods in 2022, which affected about 17 000 people, have increased the affected households' vulnerability to food insecurity.

## Sudan

*Conflict, civil insecurity, high food prices, tight cereal supplies*

- According to the latest estimates, the number of acutely food insecure (IPC Phase 3 [Crisis] and above) people was estimated at 7.7 million between October 2022 and February 2023, mainly due to soaring food prices and intercommunal conflict.

## Uganda

*Weather extremes, insecurity, high food prices*

- The latest IPC analysis, conducted in Karamoja and Teso subregions and in

refugee hosting districts, estimated that 1.1 million people faced acute food insecurity (IPC Phase 3 [Crisis] and above) between September 2022 and January 2023. These conditions reflect the adverse impact of weather shocks, civil insecurity and high food prices.

- About 856 000 refugees from South Sudan and about 481 000 from the Democratic Republic of the Congo are hosted in camps and rely on humanitarian assistance.

## United Republic of Tanzania

*Localized shortfalls in staple food production, high food prices*

- According to the latest IPC analysis, an estimated 1.11 million people were facing severe acute food insecurity between October 2022 and February 2023, 964 000 people in 28 mainland districts and 147 000 in the United Republic of Tanzania, Zanzibar island.
- The main drivers are reduced domestic crop production and high food prices.

## Zambia

*Reduced cereal production, high food prices*

- An estimated 1.95 million people were projected to face acute food insecurity (IPC Phase 3 [Crisis] and above) between October 2022 and March 2023, an increase compared to the 1.6 million people estimated in 2021/22.
- The high level of acute food insecurity is associated with the effects of a below-average cereal harvest and high food prices that adversely impacted households' food availability and access.

## ASIA (9 COUNTRIES)

### EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/SUPPLIES

#### Syrian Arab Republic

*Civil conflict, economic crisis*

- Based on the World Food Programme's Consolidated Approach for Reporting Indicators (CARI), about 15 million people are in need of food and agriculture assistance (representing 68 percent of the total population), including 12.1 million people that are estimated to be acutely food insecure, mostly due to constrained livelihood opportunities and continuously worsening economy.
- Although some international food assistance is being provided,

Syrian refugees are pressuring host communities' resources in neighbouring countries.

## WIDESPREAD LACK OF ACCESS

### Democratic People's Republic of Korea

*Low food consumption levels, poor dietary diversity, economic downturn, reduction in 2022 agricultural output*

- A large portion of the population suffers from low levels of food consumption and poor dietary diversity.
- The food security situation is expected to remain fragile, given persisting economic constraints aggravated by a below-average 2022 agricultural output.

### Lebanon

*Economic crisis*

- According to the IPC Acute Food Insecurity Analysis, about 1.29 million Lebanese residents (33 percent of the resident population) and 0.7 million Syrian refugees (46 percent of the total number of Syrian refugees in the country) were estimated to be in IPC Phase 3 (Crisis) or above between September and December 2022, increasing to 1.46 million Lebanese resident (38 percent of the resident population) and 0.80 million Syrian refugees (53 percent of total number of Syrian refugees in Lebanon) between January and April 2023.

### Sri Lanka

*Serious macroeconomic challenges, unfavourable prospects for 2023 agricultural output, high food prices*

- Severe macroeconomic challenges have had a negative impact on the country's capacity to import cereals, while production prospects for 2023 main cereal production are unfavourable, reflecting constraints on farmers' access to agricultural inputs. Elevated food prices are also constraining economic access to food for a large number of households.
- As a result, food and nutrition security has deteriorated since the beginning of 2022, with a significant proportion of vulnerable households adopting food and livelihood-related coping strategies.

### Yemen

*Conflict, floods, high food and fuel prices*

- Nearly 17 million people or over 53 percent of the population were classified in IPC Phase 3 (Crisis) or worse

between October and December 2022. Of primary concern, are the 6.1 million people classified in IPC Phase 4 (Emergency) and the 4.3 million people who are internally displaced as a result of the conflict.

## SEVERE LOCALIZED FOOD INSECURITY

### Afghanistan

*Civil conflict, population displacement, economic slowdown*

- The latest IPC analysis estimated the number of people in IPC Phase 3 (Crisis) and IPC Phase 4 (Emergency) at 18.9 million between June and November 2022.

### Bangladesh

*Economic constraints, refugee influx, high prices of important food items*

- Food insecurity is expected to remain fragile, given persisting economic constraints.
- About 1 million Rohingya refugees from Myanmar reside in the country, mainly in Cox's Bazar District and on the island of Bhasan Char.
- Domestic prices of wheat flour and palm oil, important food items, were at high levels in January 2023.

### Myanmar

*Conflict, political instability, economic constraints, high prices of main food staple, reduction in 2022 agricultural output*

- The protracted political crisis is compromising the fragile conditions of vulnerable households and the Rohingya IDPs. According to the latest figures (January 2023) from the United Nations High Commissioner for Refugees (UNHCR), the number of IDPs is estimated at about 1.54 million. Most of the IDPs are located in Rakhine, Chin, Kachin, Kayin and Shan states.
- Domestic prices of "Emata" rice, the most consumed variety in the country, were at record levels in late 2022, constraining access to a key staple food.

### Pakistan

*Severe floods, reduced agricultural production, economic constraints, high prices of the main food staple*

- According to the latest IPC analysis, the number of people facing high levels of acute food insecurity (IPC Phase 3 [Crisis] and above) between September and December 2022 was projected to

increase to 8.5 million people, up from 6 million, due to the devastating impact on livelihoods of floods that occurred in July–August 2022.

- Prices of wheat flour, the country's main staple, were at elevated levels in most markets in January 2023, constraining access to a key staple food.

## LATIN AMERICA AND THE CARIBBEAN (2 COUNTRIES)

### WIDESPREAD LACK OF ACCESS

#### Haiti

*High food prices, natural disasters, sociopolitical turmoil, worsening insecurity*

- About 4.7 million people are projected to be facing severe acute food insecurity and are in need of urgent food assistance between March and June 2023. The high levels of food insecurity are the result of elevated food prices, an economic downturn, frequent natural disasters, exacerbated by sociopolitical turmoil and worsening insecurity. The population experiencing IPC Phase 5 (Catastrophe) levels of acute food insecurity is located in the Cité Soleil commune of the capital city, where inter-gang violence severely affects households' access to markets and essential services.

#### Venezuela (Bolivarian Republic of)

*Economic crisis*

- The total number of refugees and migrants from the country is estimated at 7.1 million people, with the largest populations located in Colombia (2.48 million), Peru (1.49 million), Ecuador (502 200), Chile (444 400) and Brazil (388 100). The remaining 0.7 million people are spread across other countries in Latin America and the Caribbean, with about 1 million people located outside the region. Despite a resumption of economic growth since 2021, outflows of refugees and migrants are expected to continue in 2023. High food inflation rates across host countries is limiting access to food of Venezuelan refugees and migrants, and thus humanitarian needs are significant. According to the Regional Refugee and Migrant Response Plan 2023–2024, the number of Venezuelan refugees and migrants (in-destination) in need of food assistance is projected at 3.62 million in 2023, slightly up from 3.57 million in 2022.

## NORTH AMERICA, EUROPE AND OCEANIA (1 COUNTRY)

### WIDESPREAD LACK OF ACCESS

#### Ukraine

##### Conflict

- According to the 2023 Humanitarian Needs Overview, at least 17.6 million people are estimated to be in need of multisectoral humanitarian assistance in 2023 due to the war, including over 11 million in need of food security and livelihood interventions.

## Terminology

**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.
- \* Unfavourable Production Prospects**  
Countries facing unfavourable crop production prospects are countries where current conditions indicate a high likelihood that cereal production would fall below the five-year average, as a result of a reduction of the area planted and/or yields due to adverse weather conditions, plant pests and

diseases, conflicts and other negative factors. This list does not include countries where production declines are mainly driven by deliberate/predetermined economic and/or policy decisions (see Regional Reviews): [page 21 \(Asia\)](#)

**\*\*** The boundaries and names shown and the designations used on the **maps** do not imply the expression of any opinion whatsoever on the part of FAO concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers and boundaries. Dashed lines on maps represent approximate border lines for which there may not yet be full agreement. Final boundary between the Republic of the Sudan and the Republic of South Sudan has not yet been determined. Dotted line represents approximately the Line of Control in Jammu and Kashmir agreed upon by India and Pakistan. The final status of Jammu and Kashmir has not yet been agreed upon by the parties. A dispute exists between the governments of Argentina and the United Kingdom of Great Britain and Northern Ireland concerning sovereignty over the Falkland Islands (Malvinas).

# GLOBAL CEREAL OVERVIEW

## Cereal supply and demand overview

### Global cereal stocks falling in 2022/23; early prospects point to a decline in wheat production in 2023

FAO's latest forecast for world cereal **production** in 2022 has been revised upward by 9 million tonnes in March 2023 since the previous month and now stands at 2 774 million tonnes, still 1.3 percent lower year-on-year.<sup>1</sup> The bulk of the upward revision concerns rice and, to a lesser extent, coarse grains that largely reflect the incorporation of recently released official figures. Regarding rice, February 2023 assessments by Indian officials report a more contained impact of uneven monsoon rains on the main crop output, which coupled with a pronounced increase in secondary crop plantings, just concluded, overturned expectations of an Indian production decline this season. Output was also upgraded for several other countries, most notably Sri Lanka and Thailand. By contrast, official reports in the United Republic of Tanzania suggest that poor rains resulted in a greater output reduction than previously envisaged, while provincial authorities in Pakistan's Punjab indicate a lower area realization, adding to the output losses endured by the country as a result of severe floods, particularly in Sindh. Put together, these changes raised FAO's forecast of global rice production in 2022 by 4.9 million tonnes to 517 million tonnes (milled basis), which while being 1.5 percent below the 2021 all-time high would still constitute an above-average harvest.

At 2 780 million tonnes, the forecast for global cereal **utilization** in 2022/23 is nearly unchanged compared to figures in February 2023 and still pointing to a decline of 0.6 percent below the 2021/22 level. Following a 1.4-million-tonne downward revision this month, total global utilization of coarse grains is forecast to fall in 2022/23 by 1.5 percent below the 2021/22 level stemming from anticipated contractions in the utilization of all major coarse grains (maize, barley and sorghum). By contrast, FAO's forecast of global rice utilization in 2022/23

has been raised by 0.5 million tonnes to 520 million tonnes, but still falls marginally below the 2021/22 all-time high. The upward revision largely mirrors expectations that ample supplies and a strong pace of domestic public procurement may encourage Indian officials to continue releasing supplies from public stocks for ethanol production, thus boosting non-food uses in the country. FAO's forecast of global wheat utilization was also revised upwards since the previous report by 1.8 million tonnes, mostly reflecting greater feed use of wheat in the European Union, where substitution from maize to wheat for feed is expected due to tighter domestic maize supply and higher wheat supply levels. This upward revision brings the total wheat utilization forecast for 2022/23 to 779 million tonnes in 2022/23, up 0.8 percent above the 2021/22 level.

Global cereal **stocks** ending in 2023 are forecast to decline by 1.2 percent from their opening levels, reaching 844 million tonnes, driven by expected drawdowns of global coarse grain and rice stocks that outweigh a rise in wheat stocks. Based on the latest forecasts, the world cereal stocks-to-use ratio in 2022/23 would stand at 29.5 percent, down from 30.7 percent in 2021/22, but still indicating an overall comfortable supply level. A sharp downward revision to Brazil's maize stock estimate following their strong export pace has led to a 3.2-million-tonne cut in the global maize stocks forecast this month. This downward revision further lowers the global coarse grain stocks forecast to 344 million tonnes, pointing to a decline of 5.5 percent below their opening levels almost exclusively attributed to an 8.3 percent fall in global maize stocks. Largely reflecting higher

**Table 1. World cereal production**  
(million tonnes)

	2020	2021	2022 est.	Change: 2022 over 2021 (%)
<b>Asia</b>	1 231.6	1 238.2	1 243.1	+0.4
Far East	1 116.9	1 147.8	1 141.0	-0.6
Near East	79.5	59.7	68.5	+14.8
CIS in Asia	35.2	30.8	33.7	+9.6
<b>Africa</b>	199.6	202.1	197.5	-2.3
North Africa	31.4	36.7	31.3	-14.7
West Africa	66.6	63.9	68.4	+7.0
Central Africa	6.9	7.1	7.0	-2.1
East Africa	57.7	53.2	53.9	+1.2
Southern Africa	37.0	41.2	36.9	-10.3
<b>Central America and the Caribbean</b>	42.6	42.9	42.1	-1.7
<b>South America</b>	232.7	227.6	245.6	+7.9
<b>North America</b>	495.4	496.4	473.3	-4.7
<b>Europe</b>	524.5	548.3	516.0	-5.9
European Union <sup>1</sup>	284.6	296.4	270.1	-8.9
CIS in Europe	204.1	214.4	208.4	-2.8
<b>Oceania</b>	50.5	55.4	56.2	+1.3
<b>World</b>	2 776.8	2 811.0	2 773.8	-1.3
- wheat	775.1	778.0	794.6	+2.1
- coarse grains	1 483.7	1 508.7	1 462.5	-3.1
- rice (milled)	517.9	524.4	516.6	-1.5

Notes: Includes rice in milled term. Totals and percentage change computed from unrounded data.

<sup>1</sup> Data for the European Union from the year 2020 (including the 2020/21 marketing year) excludes the United Kingdom of Great Britain and Northern Ireland.

<sup>1</sup> For further information on global food markets please see [FAO World Food Situation](#).

carryover forecasts for India, FAO's forecast of world rice stocks at the close of the 2022/23 marketing year has been raised by 1.9 million tonnes to 194 million tonnes. The revised forecast puts global stockpiles at 0.8 percent below their 2021/22 record high and at their second highest level on record, as drawdowns in rice importing countries look set to be partly offset by a further increase in carryovers by exporters. At 306 million tonnes, FAO's global wheat inventory forecast for 2022/23 remains near last month's forecast and points to a rise of 4.1 percent above opening levels, with most of that increase concentrated in China (mainland) and the Russian Federation.

World **trade** in cereals in 2022/23 is forecast to fall by 1.8 percent below the 2021/22 level to 473 million tonnes, nearly unchanged from the previous forecast in February 2023. Pegged at 223 million tonnes, FAO's coarse grains trade forecast for 2022/23 (July/June) still points to a decline of 3.3 percent from the 2021/22 level, driven by the expected declines in global barley and sorghum trade, while global maize trade is seen remaining near its 2021/22 level. International trade in rice in 2023 (January–December) is forecast at 53 million tonnes, marginally changed from February and 5.6 percent below the 2022 peak. Import expectations changed little from last month, while on the export side, shipment forecasts were raised for India and cut for Pakistan and Thailand. Despite lingering uncertainties surrounding the duration of India's ban on broken rice exports, which could cause its overall shipments to contract if protracted, exportable supplies of other qualities of rice in India look set to remain ample. This could keep India's overall exports abundant in 2023, likely displacing some shipments by Pakistan and Thailand. By contrast to coarse grains and rice, world wheat trade in 2022/23 (July/June) is set to increase by 1.1 percent above the 2021/22 level to 198 million tonnes.

### Early production outlook for 2023 crops

For 2023, FAO's preliminary forecast for world wheat production points to a year-on-year decline, but at 784 million tonnes the global outturn would still be the second highest on record. In North America, incentivised by high prices, farmers in **the United States of America** increased their 2023 winter wheat sowings to the largest level since 2015. Although dry weather is still a concern in the Central Plains, forecasts of dissipating drought conditions in parts support expectations for an increase in total wheat production from the reduced 2022 outturn to 51 million

tonnes in 2023, which would be the biggest output in three years. In **Canada**, official projections point to an above-average sown area in 2023, as farmers are expected to react positively to the high grain prices. Assuming normal weather conditions, Canada's wheat production is forecast to reach 35 million tonnes. In Europe, provisional prospects point to an overall fall in wheat production. In **the Russian Federation**, reflecting drier-than-average weather conditions in southern regions and a cutback in winter plantings, amid softer domestic prices, wheat production is forecast to decline from the record level in 2022. In **Ukraine**, severe financial constraints, infrastructure damage and obstructed access to fields in parts of the country have resulted in an estimated 40 percent year-on-year reduction in the 2023 winter wheat area, and a well below-average wheat output is anticipated in 2023. Wheat plantings in **the European Union** are seen to remain broadly unchanged in 2023 and with generally conducive weather auguring well for yields, total production is forecast at 136.5 million tonnes, on par with the previous year's good output. A moderate upturn in wheat plantings is forecast in **the United Kingdom of Great Britain and Northern Ireland**, but with yields anticipated to retreat from the highs of 2022, production is seen falling to about 14.4 million tonnes in 2023. In Asia, mixed conditions were present at the start of the year. In **India**, government support programmes encouraged farmers to maintain a near-record wheat area, whilst in **Pakistan**,

an average wheat acreage is estimated, as receded floodwaters and government support facilitated access to land and seeds. Weather conditions have been favourable in both countries and, as a result, 2023 wheat harvests are forecast to surpass their five-year averages. In Near East Asian countries, after uneven rains during the first months of the season, sustained rainfall is needed during the remainder of the season to shore up 2023 production prospects. In North Africa, rainfall deficits have negatively affected crops in **Morocco, Algeria** and **Tunisia**, denting wheat production prospects in 2023, which follows reduced outputs in the previous year.

In Southern Hemisphere countries, the production outlook for the 2023 coarse grain crops, with harvesting operations underway, is generally favourable. Underpinned by robust export demand, total maize plantings are foreseen to increase to a record level in **Brazil**, and buoyed by generally beneficial weather conditions, total production is provisionally forecast at an all-time high of 123.7 million tonnes in 2023. In **Argentina**, early season rainfall shortages adversely affected maize crops, but an uptick in rainfall quantities at the start of 2023 led to a partial recovery in crop conditions for the later-sown crops. In **South Africa**, a modest cutback in maize plantings is expected to drive a year-on-year production decrease in 2023, but with conducive weather supporting good yield prospects, production is nevertheless anticipated to exceed the five-year average.

**Table 2. Wheat production: Leading producers**  
(million tonnes)

	5-year average	2021	2022 est.	2023 f'cast
European Union <sup>1</sup>	138.6	138.1	134.5	136.5
China (mainland)	134.8	136.9	137.7	138.5
India	105.6	109.6	106.8	112.0
Russian Federation	82.2	76.1	102.7	83.0
United States of America	48.7	44.8	44.9	50.8
Canada	31.3	22.3	33.8	34.9
Australia	27.4	36.3	36.6	28.0
Ukraine	26.0	32.2	20.0	17.0
Pakistan	25.6	27.3	26.1	28.4
Turkey	19.4	17.7	19.8	19.5
Argentina	18.4	22.1	12.9	18.5
Iran (Islamic Republic of)	13.2	10.1	13.0	13.0
Kazakhstan	13.0	11.8	13.7	13.6
United Kingdom of Great Britain and Northern Ireland	-	14.0	15.7	14.4
Egypt	9.0	9.0	9.7	9.5
Other countries	71.2	69.7	66.7	66.6
<b>World</b>	<b>764.3</b>	<b>778.0</b>	<b>794.6</b>	<b>784.0</b>

<sup>1</sup>Data for the European Union prior to the year 2020 includes the United Kingdom of Great Britain and Northern Ireland.

# LOW-INCOME FOOD-DEFICIT COUNTRIES' FOOD SITUATION OVERVIEW

## Unfavourable weather diminishes early production prospects for 2023 crops in low-income food-deficit countries

Among the low-income food-deficit countries (LIFDCs),<sup>2</sup> harvesting of the 2023 cereal crop is expected to start from April in *Asia* and *Southern Africa*, while planting operations will soon begin in *Central Africa*, *East Africa* and *West Africa*.

In *Southern Africa*, prospects for 2023 cereal production are mixed. Although adverse weather conditions have had a negative impact on southern parts of **Malawi** and **Zimbabwe**, crop conditions in the main producing areas of both countries appear satisfactory and near-average cereal harvests are foreseen in 2023. In **Madagascar** and **Mozambique**, rainfall shortages since the start of the season in northern parts and the impact of cyclone Freddy that traversed southern areas have dampened overall production expectations. In *East Africa*, there is a concrete risk of an unprecedented sixth successive poor rainy season in the March–May period. If this weather forecast materializes, it will have significant and adverse consequences on what is already a dire food security situation. In addition, notwithstanding some improvement in security conditions in the conflict-affected areas of **South Sudan** as well as in the Tigray and Amhara regions of **Ethiopia**, the situations still remain volatile, undermining the capability of farmers to adequately engage

**Table 3. Basic facts of low-income food-deficit countries (LIFDCs) cereal situation**

(million tonnes, rice in milled basis)

	5-year average	2021/22 est.	2022/23 f'cast	Change: 2022/23 over 2021/22 (%)
<b>Cereal production<sup>I</sup></b>	185.4	184.9	188.2	+1.8
<b>Utilization</b>	239.3	248.2	251.4	+1.3
Food use	178.5	186.4	191.7	+2.9
Per caput cereal food use (kg per year)	152.0	151.5	152.3	+0.5
Feed	26.3	27.6	27.1	-1.5
<b>End of season stocks<sup>II</sup></b>	55.0	56.3	52.2	-7.2

<sup>I</sup> Data refer to calendar year of the first year shown.

<sup>II</sup> May not equal the difference between supply and utilization because of differences in individual country marketing years.

**Table 4. Cereal production of LIFDCs**

(million tonnes)

	5-year average	2021	2022 est.	Change: 2022 over 2021 (%)
<b>Africa (36 countries)</b>	112.0	111.6	114.1	+2.3
East Africa	55.0	53.2	53.9	+1.2
Southern Africa	11.4	14.0	11.8	-15.8
West Africa	38.6	37.3	41.6	+11.4
Central Africa	7.0	7.1	6.9	-2.1
<b>Asia (9 countries)</b>	72.3	72.3	73.1	+1.2
CIS in Asia	9.8	9.8	10.2	+3.6
Far East	54.0	56.1	56.5	+0.9
Near East	8.5	6.4	6.4	-0.1
<b>Central America and the Caribbean (2 countries)</b>	1.1	1.0	1.0	-4.3
<b>LIFDCs (47 countries)</b>	185.4	184.9	188.2	+1.8

Notes: Includes rice in milled terms. Totals and percentage change computed from unrounded data. The five-year average refers to the 2017–2021 period.

<sup>2</sup> The inclusion of a country in the low-income food-deficit countries (LIFDCs) group is based on three criteria: 1) the level of the annual per capita Gross National Income (GNI); 2) the net food trade position; and 3) self-exclusion (when countries that meet the first two criteria request to be excluded from the category). For full details see: [www.fao.org/countryprofiles/lifdc](http://www.fao.org/countryprofiles/lifdc)

in agricultural activities. In *West Africa*, sowing of the 2023 cereal crops will begin in March. Weather forecasts point to a high probability of above-average rainfall amounts in the next months, with likely beneficial impact on the development of the 2023 crops. However, persisting conflicts in several countries are expected to continue to hinder farmers' access to inputs and fields.

In *Near East Asian* countries, following an erratic temporal distribution of rainfall and below-average amounts, sustained rains are needed in coming months to shore up production prospects of the 2023 cereal crops. Furthermore, continuing difficult socioeconomic circumstances in **Afghanistan** and **the Syrian Arab Republic** are constraining farmers' capacity to access sufficient inputs. In *CIS Asian* countries, reduced rainfall amounts at the start of the season and forecasts indicating a continuation of low precipitation in the spring months are denting production prospects of the 2023 winter wheat crop.

A further concern for all LIFDCs in 2023 are the elevated global fertilizer prices, despite easing since mid-2022. The high prices are lowering affordability and could potentially curb application rates, with implication for crop yields.

### Aggregate cereal production exceeds the average in 2022

FAO's latest estimate for the aggregate 2022 cereal outturn among LIFDCs stands at 188.2 million tonnes, slightly above

**Table 5. Cereal imports of LIFDCs**

(thousand tonnes)

	2020/21 or 2021 Actual imports	2021/22 or 2022 Import estimate	2022/23 or 2023 Import requirement <sup>1</sup>
<b>Africa (36 countries)</b>	<b>32 276</b>	<b>33 103</b>	<b>32 474</b>
East Africa	12 681	14 439	13 562
Southern Africa	3 647	3 046	3 423
West Africa	13 251	12 762	12 839
Central Africa	2 696	2 856	2 650
<b>Asia (9 countries)</b>	<b>28 729</b>	<b>28 608</b>	<b>28 653</b>
CIS in Asia	5 715	5 357	5 271
Far East	12 530	12 020	12 534
Near East	10 484	11 231	10 849
<b>Central America and the Caribbean (2 countries)</b>	<b>1 483</b>	<b>1 542</b>	<b>1 569</b>
<b>LIFDCs (47 countries)</b>	<b>62 488</b>	<b>63 252</b>	<b>62 696</b>

Note: Totals computed from unrounded data.

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

the five-year average. Good outputs were harvested in West African and Southern African countries, including Ghana and Madagascar, as well as in Bangladesh. Conversely, production downturns were registered in several East African countries on account of prolonged dry weather spells, and in Afghanistan and the Syrian Arab Republic due to adverse weather conditions and persisting difficult economic conditions.

### Import requirements increase amid high global prices

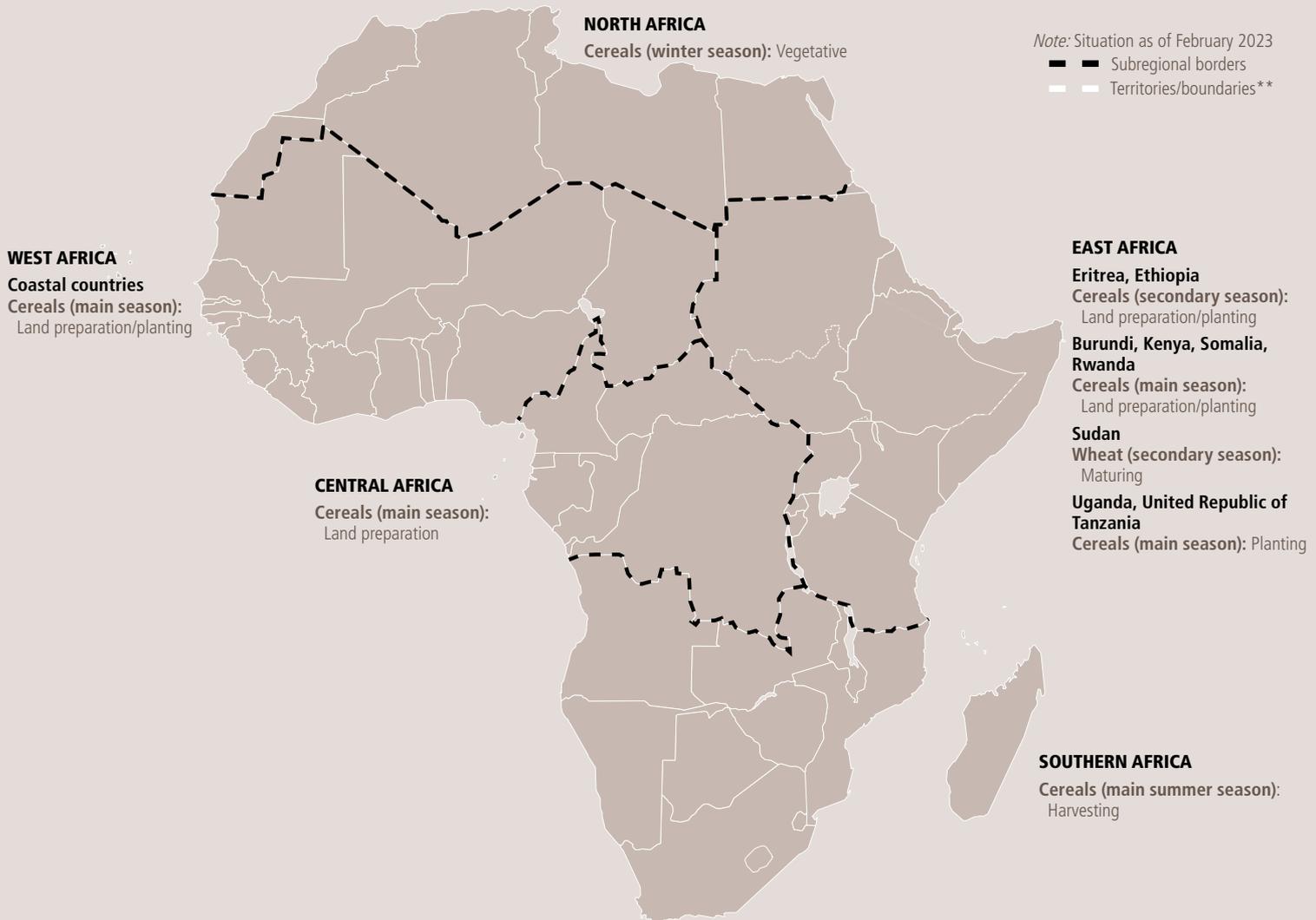
The total cereal import requirement for LIFDCs is forecast at 62.7 million tonnes in the 2022/23 marketing year, nearly

3 million tonnes higher than the five-year average. The bulk of the growth in import needs is linked with East African countries, owing to drought-reduced harvests in both 2021 and 2022. An increase in imports is also forecast in the Far East Asian countries of Afghanistan and Nepal, on account of lower harvests in 2022.

Although international benchmark prices of cereals have softened since their peaks in early 2022, global prices remain high by historical standards. Reflecting the elevated prices as well as currency depreciations in several countries, import bills of LIFDCs are expected to be at high levels in 2022/23.

# REGIONAL REVIEWS

## AFRICA



\*/\*\* See Terminology (page 7).

Final boundary between the Republic of the Sudan and the Republic of South Sudan has not yet been determined.

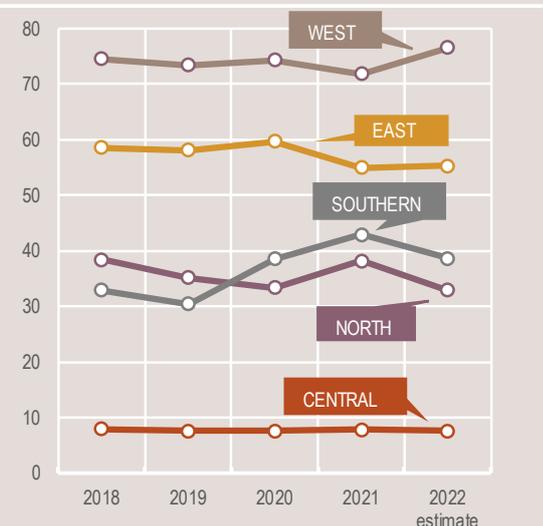
Source: FAO/GIEWS, 2023. *Crop Prospects and Food Situation No. 1*. Cited 3 March 2023, modified to comply with the United Nations map No. 4045 Rev. 8, 2018.

### Production Overview

Total cereal production in Africa is forecast at 211 million tonnes (rice in paddy terms) in 2022, down year-on-year and only slightly above the five-year average. This production outcome largely reflects the damaging impact of unfavourable rainfall patterns in several North African and Southern African countries, and the effect of multi-season droughts in East Africa. In West Africa, despite widespread flooding, an aggregate production upturn was registered in 2022, while in Central Africa production remained broadly unchanged compared to the previous year and the average.

Harvesting of the 2023 cereal crops is expected to begin from April onwards in Southern Africa and although overall conditions appear to be favourable, rainfall deficits in parts and cyclones that impacted Madagascar and Mozambique, are containing production expectations. In North Africa, droughts are impairing the production outlook for 2023 crops in western areas, which follows an already reduced harvest in 2022. Planting of the 2023 crops in West Africa, East Africa and Central Africa will start from April.

Cereal production  
(million tonnes)



## NORTH AFRICA



### Drought in western areas curbs 2023 production prospects

Sowing of the 2023 winter cereals, for harvest from May, was completed in early January. In **Algeria**, **Morocco** and **Tunisia**, where cereal cultivation is mostly rainfed, rainfall amounts and distribution were adequate at the onset of the season to allow planting operations. However, estimated cumulative rainfall amounts between November 2022 and the first decade of February 2023 accounted for only 60 percent of the average in **Tunisia** and about 80 percent in **Morocco** and **Algeria**. Geographical rainfall distribution within countries varied, with relatively favourable conditions in coastal areas, while pockets of drought persisted inland. If weather conditions improve during the rest of the season, a substantial outturn of the 2023 cereal crops is still feasible, following the drought-stricken harvest in 2022. In **Egypt**, most cereal crops are irrigated and preliminary wheat production forecasts point to a slightly above-average output of 9.5 million tonnes on account of larger planted area driven by higher procurement prices.

### Below-average cereal production in 2022

The subregion's aggregate cereal production in 2022 is estimated at 33 million tonnes, about 10 percent

below the previous five-year average. The aggregate wheat harvest is pegged at 16.6 million tonnes, almost 20 percent below the average. The largest production decrease was recorded in **Morocco**, where the cereal output is estimated at almost 3.3 million tonnes, almost 60 percent below the average, reflecting widespread drought conditions. By contrast, in **Algeria**, the 2022 cereal output partially recovered from the drought-affected 2021 harvest but remained still 10 percent below the average. Elsewhere in the subregion, the 2022 cereal harvests were close to, or slightly above, the previous five-year average.

All countries in the subregion rely heavily on wheat imports to cover their domestic consumption needs, even in years of ample domestic production. Reflecting the below-average 2022 output, the subregion's aggregate cereal import requirement, of which wheat accounts for about 60 percent, is forecast at 51 million tonnes in the 2022/23 marketing year (July/June), 2 percent above the five-year average. Despite the elevated international prices and the uncertainty on the global commodity markets, part of the wheat and rice imports are going to be used to boost domestic stocks with the aim to improve local preparedness in case of future market shocks.

### Food inflation rates at elevated levels

Across the subregion, with the exception of **Libya**, year-on-year food inflation rates continued to linger at substantially high levels or increased further in the fourth quarter of 2022, reflecting elevated international commodity prices as well as

balance of payments challenges that have contributed to a weakening of national currencies. However, the continued presence of consumer subsidies for many basic food items has prevented the complete transmission of the elevated international food prices to retail markets.

In **Morocco**, the annual food inflation rate increased from single digit values in early 2022 to over 10 percent in June 2022, and thereafter fluctuated between 10 and 15 percent, reaching a record high of 15.5 percent in December 2022. In **Egypt**, where a large share of unsubsidized products, such as protein sources, fresh foods and vegetables, is present in the Consumer price index (CPI), the inflation rate increased from single digits in the last quarter of 2021 to 22 percent in September 2022 and steeply accelerated to 48 percent in January 2023, a new record. In **Tunisia**, in December 2022, the annual food inflation rate eased slightly from its record level of 15 percent registered in October 2022 to 14.1 percent but remained at the elevated levels. In **Algeria**, food prices increased by 13.3 percent year-on-year in December 2022, a decline from the record level of 17.3 percent in June 2022. In **Libya**, the annual food inflation rate between December 2021 and December 2022 (incomplete series with missing data points) fluctuated between 3.5 and 5.8 percent, the lowest levels in the subregion. According to the 2023 Libya Humanitarian Needs Overview, about 300 000 people (less than 4 percent of the population) are estimated to be in need of humanitarian assistance in 2023, down from 800 000 people (10 percent of the population) in 2022.

**Table 6. North Africa cereal production**  
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year average	2021	2022 est.	Change: 2022/2021 (%)									
<b>North Africa</b>	18.9	20.4	16.6	12.4	12.9	11.0	5.7	4.9	5.4	37.0	38.2	33.0	-13.8
Algeria	3.2	2.5	3.0	1.4	1.0	1.1	0.0	0.0	0.0	4.6	3.5	4.1	+17.1
Egypt	8.8	9.0	9.7	8.2	8.5	8.5	5.6	4.9	5.3	22.6	22.3	23.5	+5.3
Morocco	5.7	7.5	2.5	2.1	2.9	0.8	0.1	0.1	0.1	7.9	10.5	3.3	-68.4
Tunisia	1.2	1.2	1.3	0.6	0.5	0.6	0.0	0.0	0.0	1.7	1.7	1.8	+9.3

Notes: Totals and percentage change computed from unrounded data. The five-year average refers to the 2017–2021 period.

## WEST AFRICA



### Land preparation and planting of 2023 main season crops are underway in coastal countries

Land preparation and planting of the 2023 main season cereal crops are ongoing in southern parts of countries along the Gulf of Guinea under generally favourable weather conditions. In Sahelian countries, planting activities will start in April in southern areas. Regional weather forecasts indicate a high likelihood of above-average precipitation amounts across the Sahel between March and May, which are expected to support crop establishment. However, rainfall amounts are expected to be below average over parts of **Côte d'Ivoire**, southern **Guinea**, **Nigeria** and northern **Sierra Leone**. Furthermore, there are concerns that the persisting conflicts in the regions of Liptako-Gourma, Lake Chad and northeast Nigeria will continue to undermine farmers' productive capacity and consequently limit local outputs.

### Aggregate cereal production in 2022 estimated at an above-average level

Harvesting of the 2022 off-season crops was completed in the first quarter of 2023 in Sahelian countries and northern areas of countries along the Gulf of Guinea, following the completion of the 2022 main season harvest in December 2022. The subregion's

aggregate cereal output in 2022 is estimated at 76.6 million tonnes, about 6 percent above the five-year average. Generally conducive weather conditions, coupled with support to farmers provided by national governments, mainly in terms of the provision of subsidized inputs, led to above-average cereal outputs in most countries. The intensification and spreading of the central Sahel security crisis resulted in localized production shortfalls in **Burkina Faso**, **Mali**, **Chad** and **Nigeria** and in some areas of northern **Benin**, **Côte d'Ivoire**, **Ghana** and **Togo**. In addition, widespread floods across the subregion led to crop losses, mainly in parts of **Nigeria** and **Chad**.

In most countries of the subregion, the pastoral situation has improved compared to the same period last year. Abundant rainfall amounts received between May and September 2022 boosted fodder production, estimated at average to above-average levels, resulting in good livestock body conditions. However, in northeastern **Mali**, as well as northern and western parts of **the Niger**, persisting insecurity limited herds' access to pastoral resources, leading to a deterioration of livestock body conditions and increasing the likelihood of an early start of the pastoral lean season, which normally starts in April. Compared to the previous year, the terms of trade for livestock-to-cereals deteriorated across the subregion, reflecting the high prices of cereals and the depreciation of several national currencies, in particular the Ghanaian cedi and the Nigerian naira.

### Prices of coarse grains well above year-earlier levels

In several countries of the Gulf of Guinea, prices of coarse grains stood well above their year-earlier levels in December 2022

and January 2023. In **Ghana**, after unseasonal increases during the last quarter of 2022, prices of coarse grains were up to 150 percent higher on a yearly basis in January 2023. The annual food inflation reached a record level of about 60 percent in December 2022, reflecting persistent inflationary pressures from strong export demand, a depreciation of the national currency and high international commodity prices. In **Nigeria**, prices of coarse grains were near or above their year-earlier values in December 2022. Despite levelling off in December, prices of rice were up to 40 percent higher year-on-year, underpinned by currency weakness. In **Benin** and **Togo**, prices of coarse grains were near or below their year-earlier levels in January 2023.

In Sahelian countries, tight market availabilities due to low carryover stocks and reduced trade flows, coupled with market disruptions due to local conflicts, supported an increase in cereal prices. These effects were particularly prevalent in **Chad**, where prices of coarse grains unseasonably increased in the last months of 2022 and were 25 to 45 percent above their year-earlier levels. In **Mali**, prices of coarse grains remained stable or declined from November onwards, but, by January 2023, were still 10 to 30 percent higher on a yearly basis. Localized production shortfalls and market disruptions due to insecurity in the Liptako-Gourma Region, added pressures on coarse grain prices. In **Burkina Faso**, prices of coarse grains followed similar trends and were between 5 and 20 percent higher year-on-year, mostly supported by market disruptions due to the ongoing conflict. In **Senegal**, national average prices of coarse grains were 45 to 60 percent higher on a

**Table 7. West Africa cereal production**

(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals <sup>1</sup>			
	5-year average	2021	2022 est.	5-year average	2021	2022 est.	5-year average	2021	2022 est.	Change: 2022/2021 (%)
<b>West Africa</b>	<b>51.6</b>	<b>50.4</b>	<b>54.4</b>	<b>20.9</b>	<b>21.3</b>	<b>22.0</b>	<b>72.6</b>	<b>71.9</b>	<b>76.6</b>	<b>+6.5</b>
Burkina Faso	4.4	4.3	4.5	0.4	0.5	0.4	4.8	4.7	4.9	+4.4
Chad	2.6	2.4	2.6	0.3	0.2	0.3	2.8	2.6	2.9	+10.0
Ghana	3.2	3.9	3.8	0.9	1.1	1.1	4.1	5.0	5.0	-0.6
Mali	6.9	6.4	7.4	2.9	2.4	2.9	9.8	8.8	10.3	+16.7
Niger	5.1	3.4	5.6	0.1	0.1	0.1	5.3	3.5	5.8	+65.5
Nigeria	21.2	21.5	21.6	8.2	8.3	8.5	29.5	29.9	30.2	+1.0

Notes: This production data is from early November and does not include figures from the latest CILSS meeting. Totals and percentage change computed from unrounded data. The five-year average refers to the 2017–2021 period.

<sup>1</sup> Total cereals includes wheat, coarse grains and rice (paddy).

yearly basis, mostly due to high production and transportation costs, as well as a depreciation of the national currency. In **the Niger**, after decreasing seasonally for three consecutive months, prices of coarse grains stabilized between December 2022 and January 2023, and they were below their year-earlier values.

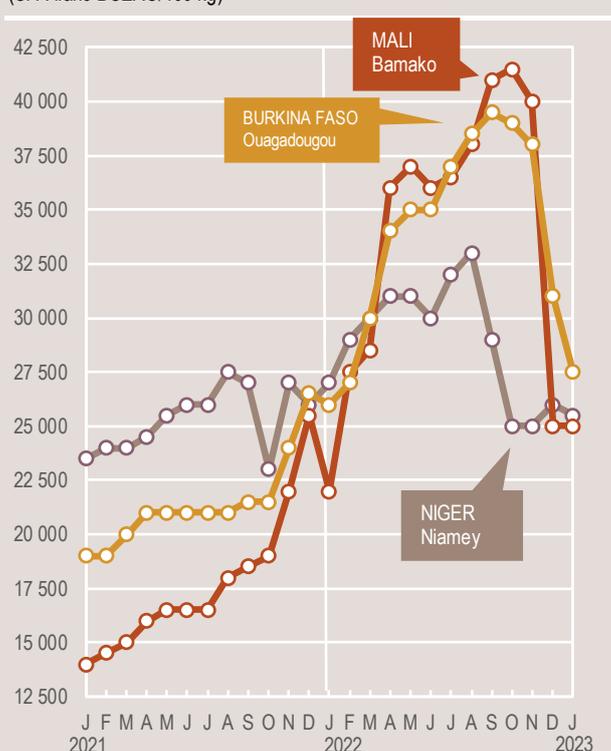
### Acute food insecurity projected to worsen significantly in 2023

According to the latest “Cadre Harmonisé” (CH) analysis, an estimated 29 million people were facing acute food insecurity (CH Phase 3 [Crisis] and above) in the subregion between October and December 2022, including about 1.42 million people in CH Phase 4 (Emergency) and about 4 800 people in CH Phase 5 (Catastrophe). The highest number of acutely food insecure was reported in **Nigeria**, where about 17 million people needed urgent food assistance, followed by **Burkina Faso** (2.62 million), **the Niger** (2.04 million), **Senegal** (876 000), **Côte d’Ivoire** (850 000), **Ghana** (823 180) and **Chad** (810 000). During the peak lean season, between June and August 2023, about 42 million people are projected to face acute food insecurity, if appropriate humanitarian measures and responses are not implemented. This would be the highest level on record since the first CH analysis was conducted in 2014 and

above the 38.3 million people in need of humanitarian assistance estimated one year before. The projected figure includes nearly 3.06 million people in CH Phase 4 (Emergency) and 25 500 people facing CH Phase 5 (Catastrophe).

Conflict is one of the main drivers behind the projected increase in acute food insecurity. Worsening insecurity in the Sahel and the spread of violence into northern areas of coastal countries are disrupting livelihoods, with alarming numbers of displaced people. According to the United Nations High Commissioner for Refugees (UNHCR), as of December 2022, nearly 6.25 million people were internally displaced in **Burkina Faso, Chad, Mali, the Niger** and **Nigeria**. These countries also host about 1.03 million refugees. Violent incidents continue to constrain the delivery of essential humanitarian assistance, in particular in the Est, Centre-North, Nord and Sahel regions of **Burkina Faso** and in northeastern states of Borno, Adamawa and Yobe in **Nigeria**. In addition, the widespread floods in 2022 affected 6.8 million people across the subregion, increasing their vulnerability to food insecurity. Elevated prices of food commodities are also limiting food access, while persisting macroeconomic challenges, in particular in **Ghana, Liberia, Nigeria** and **Sierra Leone** are expected to continue to compound the food security conditions of the most vulnerable households.

Millet prices in selected West African markets (CFA franc BCEAO/100 kg)



## CENTRAL AFRICA



### Agricultural production continues to be constrained by conflicts, displacements and high input prices in 2023

Sowing of the 2023 secondary season maize crop, to be harvested from May, is underway in bimodal rainfall areas of **the Republic of the Congo**, **Gabon** and in northern provinces of **the Democratic Republic of the Congo**. Weather conditions have been overall conducive since December 2022 in most cropland areas. In central provinces of **the Democratic Republic of the Congo**, sowing of the 2023 secondary season maize crop, to be harvested between March and May, started in November 2022 under favourable weather conditions in most areas. In South Kivu and North Kivu provinces, above-average rainfall amounts in November and December 2022 triggered localized flooding and hampered planting operations. In the southernmost unimodal rainfall areas of **the Democratic Republic of the Congo**, planting of maize crops, to be harvested from May, finalized in January. Planting of the 2023 main season maize crop will begin in mid-March in **Cameroon** and in **the Central African Republic**, and the harvest is expected to take place from July.

Weather forecasts until April 2023 point to near-average rainfall amounts across the subregion, with likely positive impact on yields. Nevertheless, the ongoing insecurity and displacements in **the Central African Republic**, eastern areas in **the Democratic Republic of the Congo** and Far North, Northwest and Southwest regions of **Cameroon** are expected to continue affecting agricultural activities. In addition, elevated international prices of fertilizers and improved seeds, both largely imported, are constraining farmers' access to agricultural inputs, resulting in either low application rates, with negative effects on yields and/or area planted.

### Transport costs and prices of imported food remain at high levels

Due to high international quotations, domestic prices of imported food products, such as rice, wheat flour and vegetable oil, remained at high levels in the last quarter of 2022 compared to previous years. As of December 2022, prices of rice were on average about 15 percent higher than a year before in **Cameroon** and the **Central African Republic**. In **Cameroon**, prices of wheat flour were up to 50 percent above their levels in December 2021. In **the Central African Republic**, food prices surged in early 2023, following the government's decision to suspend the state subsidy for the sale of fuel, which resulted in a sharp increase of transport costs.

### Over 30 million people acutely food insecure in early 2023

During the first quarter of 2023, about 30.8 million people are estimated to be facing severe acute food insecurity in **the Democratic Republic of the Congo**, **Cameroon** and **the Central African Republic**, one-quarter of the aggregate population. Conflicts and insecurity continued to cause population displacements and widespread disruption of agricultural and market activities with negative consequences on food availability and access. The high food prices and transport costs, coupled with very the limited employment opportunities, have substantially reduced households' purchasing power, especially in urban areas, where most households rely on markets to access food.

In **the Central African Republic**, the most recent Integrated Food Security Phase Classification (IPC) analysis estimated that about 2.7 million people (almost half of the total population) were in IPC Phase 3 (Crisis) and above between September 2022 and March 2023. In **Cameroon**, according to the November 2022 Cadre Harmonisé (CH) analysis, the number of acutely food insecure people (CH Phase 3 [Crisis] and above) was estimated at about 3.6 million (13 percent of the total population) between October and December 2022. In **the Democratic Republic of the Congo**, according to the latest IPC analysis, 24.5 million people (about 25 percent of the total population) are projected to experience acute food insecurity between January and June 2023.

**Table 8. Central Africa cereal production**

(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals <sup>1</sup>			
	5-year average	2021	2022 est.	5-year average	2021	2022 est.	5-year average	2021	2022 est.	Change: 2022/2021 (%)
<b>Central Africa</b>	<b>6.0</b>	<b>5.9</b>	<b>5.9</b>	<b>1.7</b>	<b>1.9</b>	<b>1.7</b>	<b>7.7</b>	<b>7.8</b>	<b>7.6</b>	<b>-2.9</b>
Cameroon	3.5	3.4	3.5	0.3	0.3	0.3	3.8	3.7	3.8	+1.3
Central African Republic	0.1	0.1	0.1	0.0	0.0	0.0	0.2	0.1	0.2	+4.2
Democratic Republic of the Congo	2.2	2.3	2.2	1.4	1.6	1.4	3.6	3.9	3.6	-7.2

Notes: Totals and percentage change computed from unrounded data. The five-year average refers to the 2017–2021 period.

<sup>1</sup> Total cereals includes wheat, coarse grains and rice (paddy).

## EAST AFRICA



### Dire food security situation in Somalia and in parts of Ethiopia and Kenya due to unprecedented multi-season drought

In **Somalia**, northern and eastern **Kenya** and southern **Ethiopia**, a prolonged drought, which began in late 2020 and is assessed as the worst in the last 40 years, has severely damaged livelihoods of local households. According to latest estimates, the drought is affecting about 36.4 million people, including 24.1 million in **Ethiopia**, 7.8 million in **Somalia** and 4.5 million in **Kenya**. With forecasts pointing to average to below-average precipitation during the 2023 March to May rainy season, the acute food insecurity situation is likely to deteriorate.

In **Somalia**, about 6.5 million people (almost 40 percent of the total population) are estimated to face severe acute food insecurity between April and June 2023. This figure includes about 223 000 people in IPC Phase 5 (Catastrophe) and is almost 60 percent higher than one year earlier. In northern and eastern pastoral, and

marginal agriculture areas of **Kenya**, the number of acutely food insecure people is estimated at 5.4 million between March and June 2023, more than 50 percent higher on a yearly basis. In **Ethiopia**, according to the Mid-Year Review of the 2022 Humanitarian Response Plan, about 23.6 million people are estimated to be facing acute food insecurity, 5.6 million more than the previous year. This figure includes 11.8 million people who are located in the drought-affected southern regions (SNNPR, Oromia and Somali) and 5.4 million in the conflict-affected Tigray Region. In **South Sudan**, about 7.76 million people are expected to face severe acute food insecurity between April and July 2023, slightly up from the same period of the previous year and almost two-thirds of the total population. Major concerns exist for households in Akobo, Canal/Pigi and Fangak counties of Jonglei State and for Leer and Mayendit counties of Unity State, where about 43 000 people are expected to face IPC Phase 5 (Catastrophe). The main drivers are the protracted macroeconomic crisis, insufficient food supplies, livelihood losses in the areas affected by floods and episodes of intercommunal violence. In **the Sudan**, about 7.7 million people were estimated to be acutely severely food insecure between October 2022 and February 2023, about 30 percent more on a yearly basis. The high prevalence of acute food insecurity is mainly caused by the persistent macroeconomic crisis, which resulted in rampant inflation and the escalation of intercommunal violence, mainly in the Greater Darfur and Greater Kordofan regions and in Blue Nile State.

### Poor rains severely affected harvests and livestock in Somalia, Kenya and Ethiopia

Harvesting of the 2022 secondary season cereal crops was recently concluded in bimodal rainfall areas of **Uganda**, southern **South Sudan**, northeastern **United Republic of Tanzania** (“Vuli”), southern and central **Somalia** (“Deyr”) and in marginal and coastal agricultural areas of southeastern **Kenya** (“short-rains”). In **the Sudan**, the main 2022 cereal harvest was recently completed. Below-average rainfall amounts and an erratic temporal distribution characterized the October–December 2022 rainy season, especially over Somalia, northern and eastern Kenya and southeastern Ethiopia. In key cropping areas of central and southern **Somalia** and in marginal agricultural areas of southeastern and coastal **Kenya**, seasonal precipitation amounts were up to 60 percent below the average, causing reduced plantings, widespread germination failures and crop wilting. As a result, in **Somalia**, the aggregate “Deyr” cereal production is officially estimated at 40 to 60 percent below the average, while in southeastern and coastal areas of **Kenya** maize production is officially estimated to be 50 and 80 percent, respectively, below average. The recently concluded harvests are the fifth and the fourth consecutive seasons with a reduced cereal production in Somalia and southeastern Kenya, respectively.

In bimodal rainfall areas covering most of **Uganda** and northeastern and coastal **United Republic of Tanzania**, the October to December rains had a comparatively better performance, as cumulative rainfall

**Table 9. East Africa cereal production**  
(million tonnes)

	Wheat			Coarse grains			Total cereals <sup>1</sup>			
	5-year average	2021	2022 est.	5-year average	2021	2022 est.	5-year average	2021	2022 est.	Change: 2022/2021 (%)
<b>East Africa</b>	6.2	6.2	6.1	46.0	43.7	45.3	56.6	55.0	55.3	+0.4
Ethiopia <sup>II</sup>	5.1	5.2	5.2	22.8	22.8	22.1	28.2	28.3	27.6	-2.5
Kenya	0.3	0.3	0.3	3.9	3.4	3.6	4.4	3.9	4.1	+5.0
Sudan	0.6	0.6	0.5	6.2	4.5	7.2	6.9	5.1	7.7	+50.3
Uganda	0.0	0.0	0.0	3.6	3.4	3.3	3.8	3.6	3.5	-2.3
United Republic of Tanzania	0.1	0.1	0.1	7.4	7.6	7.0	11.0	11.7	9.9	-15.1

Notes: Totals and percentage change computed from unrounded data. The five-year average refers to the 2017–2021 period.

<sup>1</sup> Total cereals includes wheat, coarse grains and rice (paddy).

<sup>II</sup> Official production estimates for Ethiopia by the Ethiopian Statistics Service from 2020 onwards do not include Tigray Region.

amounts were near average, but the temporal distribution of the rains was erratic. As a result, the outputs of both the “Vuli” harvest in **the United Republic of Tanzania** and the second season harvest in **Uganda** are estimated at below-average levels.

In **the Sudan**, the harvest of sorghum and millet was completed in January, while the minor irrigated wheat crop will be harvested in March 2023. Cereal production is estimated at an above-average level in 2022, reflecting conducive seasonal rains. In **South Sudan**, with harvesting of the 2022 cereal crop recently completed, national production is expected at an above-average level. This reflects an overall improvement of the security situation that contributed to an increase in plantings and beneficial rains in the second half of the season that raised yield prospects. However, floods and episodes of intercommunal violence caused localized crop losses.

The 2022 total subregional cereal output is estimated at a near-average level of 55.3 million tonnes, as the above-average output in **the Sudan** mostly offset production shortfalls in **Uganda, Kenya** and in **the United Republic of Tanzania**.

In pastoral and agropastoral areas of southern **Ethiopia**, central and northern **Somalia**, and northern and eastern **Kenya**, where the exceptionally prolonged drought since late 2020 has resulted in widespread animal deaths, poor October to December rains hampered the regeneration of rangeland and water resources, fostering only a marginal improvement of livestock body conditions. The dismal animal conditions resulted in abortions and very low birth rates. Herd sizes have declined to significantly low levels and pastoral households entered the 2023 January to March “Jilaal” dry season with insufficient resources, often with just a small number of emaciated animals.

**Land preparation is underway for 2023 main season crops**

Land preparation for the 2023 main season cereal crops has started in the major growing areas of Central, Rift Valley and Western provinces of **Kenya** (“long-rains” season), in southern and central **Somalia** (“Gu” season) and in bimodal rainfall areas of southern **South Sudan** and **Uganda**. In **Ethiopia**, planting of the secondary “Belg” season crops is currently underway

in eastern Amhara, eastern Oromia, southern Tigray and northeastern SNNP regions. In conflict-affected Tigray and Amhara regions, the security situation improved since the signing of a cease-fire agreement in early November 2022, but remained volatile, and plantings are likely to be reduced. In central and southern unimodal rainfall areas of **the United Republic of Tanzania**, the November to April “Msimu” rain amounts were average to above average, with a favourable impact on vegetation conditions. However, in central Singida and Dodoma provinces, an erratic temporal distribution of the rains affected crop planting and establishment. In **Rwanda** and **Burundi**, harvesting of the “2023A” season crops concluded in January 2023. In both countries, the September to November 2022 “short-rains” season was characterized by below-average precipitation amounts in the first half of the season, followed by above-average rains during the second half. The improved late season rains benefited crops but were insufficient for a complete recovery, and cereal and pulse production are estimated at below-average levels in both countries.

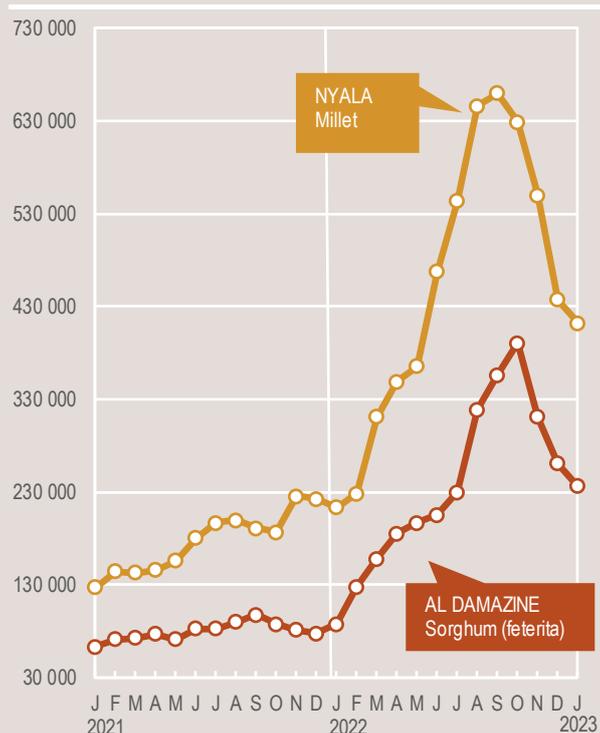
According to several meteorological models, average to below-average rainfall amounts are forecast for the 2023 March to May rainy season, with the concrete risk of an unprecedented sequence of six consecutive poor rainy seasons. The scale and severity of the acute food insecurity situation in **Somalia**, southern **Ethiopia** and northern and eastern **Kenya** is already substantial, and a further potential shock raises the risk of prolonging and worsening the situation.

**Prices of coarse grains remain at exceptionally high levels in South Sudan and the Sudan**

In **South Sudan's** capital, Juba, prices of sorghum and maize reached new record highs in December 2022, as preceding seasonal upward trends were compounded by a further

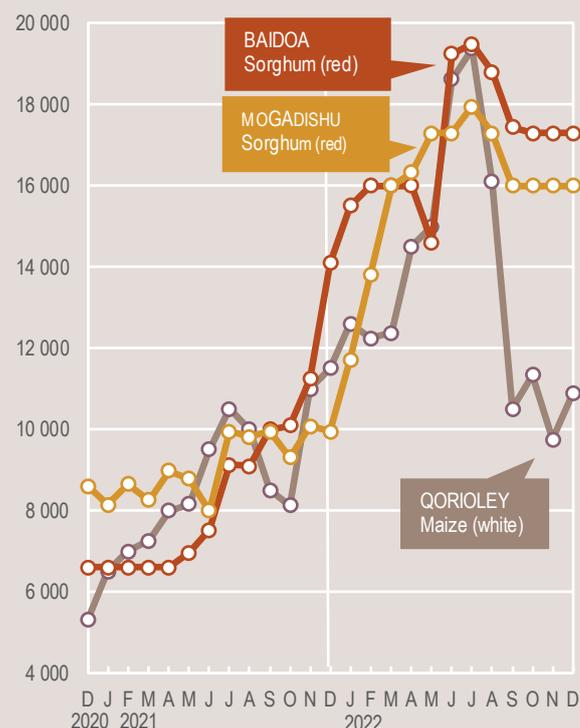
depreciation of the national currency. Prices levelled off in January 2023 as the second season harvest increased market supplies. The exceptionally high price levels are mainly due to the protracted difficult macroeconomic situation and low domestic supplies. In **the Sudan**, prices of sorghum and millet declined seasonally by up to 50 percent between October 2022 and January 2023 with the commercialization of the newly harvested 2022 crops. However, prices in January 2023 were two to three times above their year-earlier levels, mainly due to the continuous depreciation of the national currency and high costs of production due to soaring prices of agricultural inputs. In **Somalia**, between October and December 2022, prices of maize and sorghum were firm or began to seasonally increase. By December 2022, prices were around the already elevated values of a year earlier, reflecting insufficient supplies. In Baidoa market, prices were about 25 percent higher year-on-year, as the local “Gu” main harvest failed due to the severe drought. In **Uganda**, prices of maize decreased by 40 and 45 percent between November 2022 and January 2023 as the newly harvested second season crops increased market supplies. However, despite the recent declines, prices in January 2023 were 30 to 45 percent higher

**Wholesale prices of selected cereals in the Sudan**  
(Sudanese pound/tonne)



**Retail prices of maize and sorghum in Somalia**

(Somali shilling/kg)



than their year-earlier levels due to a below-average cereal production in 2022 coupled with sustained export demand. In **Ethiopia**, prices of domestically produced maize, which had increased continually since early 2022, declined moderately in January 2023 with the completion of the “Meher” harvest by over 10 percent in Bahirdar market, located in a key producing area, and by 5 percent in the capital, Addis Ababa. By contrast, prices continued to increase in Diredawa market, located in a cereal deficit area. Prices of maize in January 2023 were about 20 to 35 percent higher than a year earlier, mainly owing to the continuous depreciation of the national currency.

**SOUTHERN AFRICA**



**Mostly satisfactory conditions for the 2023 cereal crops, but cyclones, areas of dryness and high input prices curb overall production prospects**

Harvesting of the main 2023 season cereal crops is anticipated to begin in April. Remotely sensed vegetation indicators from early February depicted near-average values across large swathes of the subregion, indicating mostly satisfactory crop conditions. There are, however, several areas that have been affected by rainfall deficits and

**Table 10. Southern Africa cereal production**

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year average	2021	2022 est.	5-year average	2021	2022 est.	5-year average	2021	2022 est.	5-year average	2021	2022 est.	Change: 2022/2021 (%)
<b>Southern Africa</b>	<b>2.3</b>	<b>2.9</b>	<b>2.6</b>	<b>30.2</b>	<b>34.9</b>	<b>30.8</b>	<b>4.4</b>	<b>5.2</b>	<b>5.2</b>	<b>36.8</b>	<b>42.9</b>	<b>38.6</b>	<b>-9.9</b>
excl. South Africa	0.4	0.6	0.4	14.5	17.3	14.3	4.4	5.2	5.2	19.3	23.0	19.8	-13.9
Madagascar	0.0	0.0	0.0	0.2	0.2	0.2	3.8	4.6	4.6	4.1	4.8	4.8	-0.0
Malawi	0.0	0.0	0.0	3.7	4.7	3.9	0.1	0.1	0.1	3.9	4.9	4.0	-17.9
Mozambique	0.0	0.0	0.0	2.4	2.0	2.3	0.4	0.4	0.4	2.8	2.4	2.7	+11.9
South Africa	1.9	2.3	2.2	15.7	17.6	16.6	0.0	0.0	0.0	17.6	19.9	18.8	-5.3
Zambia	0.2	0.2	0.2	3.1	3.7	2.8	0.0	0.1	0.1	3.3	4.0	3.0	-22.9
Zimbabwe	0.2	0.3	0.1	1.9	3.1	1.8	0.0	0.0	0.0	2.1	3.4	1.9	-44.8

Notes: Totals and percentage change computed from unrounded data. The five-year average refers to the 2017–2021 period.

high temperatures, including northern parts of **Madagascar, Mozambique** and **Namibia**, and southern areas of **Angola** and **Zimbabwe**, curtailing yield prospects. Furthermore, the impact of tropical storms and cyclone Freddy in February, which had caused flooding, is expected to result in crop damages. More broadly, the high prices of fertilizers may deter their use and could contain national yields at average to slightly below-average levels in 2023.

In **South Africa**, the leading cereal producer in the subregion, the area planted with the 2023 maize crop is estimated at slightly above the five-year average, but down 3 percent compared to 2022. Weather conditions have been generally favourable, supporting good yield prospects, but the effects of nationwide power interruptions on irrigation systems and potentially reduced fertilizer application rates could curtail crop production. In **Malawi** and **Zambia**, weather conditions in the key producing areas have been mostly satisfactory and national maize outputs are expected to be close to average levels. Mixed crop conditions are evident in **Madagascar** and **Mozambique**, where rainfall deficits in northern areas are impairing yield prospects, while weather conditions have been more conducive in the main central cereal-producing regions. Although

ground assessments are not yet available, the impact of cyclone Freddy, which hit Madagascar and Mozambique in February, is expected to have caused crop damage and localised losses. Following a slow start of seasonal rains in **Angola** and **Namibia**, precipitation amounts increased since December 2022, fostering an upturn in vegetation conditions in January. The heavy rains also caused localized inundation in northern Namibia when crops were at germination and emergence stages, a period when they are particularly susceptible to flood damage. In **Eswatini** and **Lesotho**, countries that import large quantities of cereals to fulfil their consumption needs, production prospects are satisfactory. In **Botswana**, also an import dependent country, heat waves and rainfall shortages have degraded vegetation conditions in cropped and pasture areas, lowering harvest expectations in 2023.

### Ample stocks limit import needs in 2022/23

At subregional level, 2022 cereal production is estimated at 38.6 million tonnes, 5 percent above the five-year average, but 10 percent below the record high of 2021. Reflecting the drop in maize production in 2022, import requirements increased slightly in the 2022/23 marketing year (generally April/March), while an estimated drawdown in stocks is helping to fulfil

consumption needs. In total, cereal imports in 2022/23 were pegged at a near-average level of 8.6 million tonnes, consisting of wheat, rice and maize, in order of magnitude. Although import quantities are forecast to remain stable at the aggregate level, import bills are likely to increase in 2022/23, reflecting the elevated international cereal prices and currency weakness in almost all countries.

### Cereal prices at significantly high levels, but increases started to ease

In **South Africa**, wholesale prices of maize declined in December 2022 and January 2023, though they remained about

25 percent higher on a yearly basis. The recent decreases come, amid favourable production prospects for the 2023 crop, some decline in international benchmark prices and a moderate appreciation of the national currency. Similarly, mirroring international trends, wholesale prices of wheat continued to fall in January 2023 from the peak reached in mid-2022. In **Botswana, Eswatini** and **Namibia**, maize meal prices surged in November and December 2022, driven by high import costs that reflect currency weakness and the still elevated prices on international markets. At the end of last year, prices of maize meal were at record highs. In **Angola**, the headline inflation rate slowed considerably over the course of 2022, owing in part to an appreciation of the national currency in annual terms. In **Malawi** and **Zambia**, national average prices of maize grain reached new all-time highs in January 2023, underpinned by tight domestic supplies, currency weakness and high prices of energy that have inflated production and distribution costs. In **Zimbabwe**, the annual food inflation rate is estimated at 264 percent, largely reflecting the deep-rooted currency weakness that amplified the transmission of elevated global prices to the domestic market. In recent months there has been a slowdown in price increases, owing to a stabilization of the exchange rate and some easing of prices at the international level.

### Reduced harvests and high prices amplify food insecurity needs

The number of people facing acute food insecurity during the peak lean period, between January and March 2023, is estimated at 15.9 million, excluding South Africa, based on Integrated Food Security Phase Classification (IPC) analysis and, where they are not available, on national official estimates. This is above the 13 million people in need of humanitarian assistance one year before. The reduced cereal harvests and elevated prices of food commodities are the key drivers of the higher prevalence of acute food insecurity in 2023, while a slowdown in economic growth is affecting income-earning opportunities and further eroding households' capacity to access food. The highest levels of acute food insecurity are in southern areas of **Angola, Madagascar, Malawi** and **Zimbabwe**, and in the northern province of Cabo Delgado in **Mozambique**.

**Maize grain prices in selected Southern African markets**  
(Zambian kwacha/kg) (Malawi kwacha/kg)



# REGIONAL REVIEWS

## ASIA



### Countries with unfavourable cereal production prospects in 2023\*

**Sri Lanka:** Shortages of agrochemicals and high prices of fuel

\*/\*\* See Terminology (page 7).

Dotted line represents approximately the Line of Control in Jammu and Kashmir agreed upon by India and Pakistan. The final status of Jammu and Kashmir has not yet been agreed upon by the parties.

Source: FAO/GIEWS, 2023. *Crop Prospects and Food Situation No. 1*. Cited 3 March 2023, modified to comply with the United Nations map No. 4140 Rev. 4, 2011.

### Production Overview

The aggregate cereal output in Asia is pegged at 1 477 million tonnes (rice in paddy terms) in 2022, an all-time high. Upturns in cereal harvests in Far East Asian countries underpin the substantial aggregate output, notably in India, where 2022 cereal production increased by about 6 percent compared to the five-year average. With the exception of Türkiye, where production grew year-on-year, stable or reduced outputs were registered in most Near East Asian and CIS Asian countries, driven by less-than-ideal weather conditions and effects of conflicts in parts.

The 2023 wheat crop is expected to be harvested from April 2023 onwards in Far East Asia and production prospects point to a second consecutive above-average harvest, underpinned by large plantings and mostly beneficial weather. Conversely, following an erratic first half of the rainy season, sustained rainfall is required in Near East Asia and CIS Asia to shore up production prospects in 2023.

**Cereal production**  
(million tonnes)



## FAR EAST



### Favourable production prospects for 2023 winter crops

Harvesting of the 2023 winter wheat crop, mostly produced under irrigation, is expected to take place between March and June, and production prospects are favourable in most countries. At subregional level, wheat acreage is estimated above the five-year average, largely driven by high domestic prices. Favourable weather conditions since September 2022 in key producing areas boosted yield prospects. In **China (mainland)**, recent field assessments indicated that wheat crop conditions and soil moisture levels were near average in the main producing areas. In **India**, government programmes promoting wheat production prompted farmers to maintain a near-record wheat acreage of about 34.3 million hectares. In **Pakistan**, crop conditions are currently favourable and the area planted is officially estimated at a near-average level, as standing waters from the 2022 record

floods receded on time for plantings, while coordinated efforts by the government and donor community ensured an adequate supply of seeds and fertilizers. In countries along and south of the Equator, planting of 2023 main paddy crops and coarse grains began in the last quarter of 2022. Seasonal progress has been generally normal, although in **Sri Lanka** concerns exist over the impact of lingering access constraints to agricultural inputs, mostly fertilizers and pesticides, on cereal production. In March 2023, a joint FAO and WFP Crop and Food Security Assessment Mission (CFSAM) will visit the country to assess the 2023 cereal crops and evaluate the overall food security situation.

### Cereal production in 2022 forecast at a near-average level

The 2022 subregional cereal output, including the secondary crops to be harvested in the first half of 2023, is forecast at a near-average level of 1 373 million tonnes (rice in paddy equivalent). Cereal outputs are forecast at average to above-average levels in most countries, but reduced harvests are expected in **Bhutan**, **the Democratic People's Republic of Korea** and **the Lao People's Democratic Republic**. In **Myanmar** and **Sri Lanka**, cereal outputs are anticipated well below the five-year averages, as limited availability and high prices of agricultural inputs caused reductions in the area planted and yields. In **Pakistan**, extensive flooding between July and August 2022 caused significant losses of the 2022 "Kharif" summer cereal

crops. The subregional paddy output is forecast at 695 million tonnes, 1 percent below the record 2021 level, reflecting expectations that harvests will be above the five-year averages in **Bangladesh**, **Cambodia**, **India**, **the Philippines** and **Thailand**, while production in the remaining countries, including **China (mainland)**, **Myanmar**, **Pakistan**, **Sri Lanka** and **Viet Nam** are seen at below-average levels. Aggregate production of maize in the subregion is forecast at 373.23 million tonnes in 2022, 5 percent above the five-year average, on expectations of bumper outputs in the subregion's main producers **China (mainland)**, **India** and **Indonesia**, owing to demand-driven area expansions. The 2022 wheat harvest was finalized in June 2022 and the aggregate output is estimated at an above-average level of 275.5 million tonnes.

### Cereal exports forecast above the five-year average in 2022/23

In the 2022/23 marketing year, subregional cereal exports are forecast at 59.2 million tonnes (rice in milled terms), 19 percent more than the five-year average. Most of this quantity is milled rice, forecast in the 2023 calendar year at 45.8 million tonnes, 5 percent below the record high volume of 2022, but well above the five-year average. Small quantities of maize and wheat are exported annually and shipments in 2022/23 are expected at a well above-average level, due to continued robust export demand.

**Table 11. Far East cereal production**

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year average	2021	2022 est.	5-year average	2021	2022 est.	5-year average	2021	2022 est.	5-year average	2021	2022 est.	Change: 2022/2021 (%)
<b>Far East</b>	<b>268.4</b>	<b>278.9</b>	<b>275.5</b>	<b>382.3</b>	<b>401.3</b>	<b>402.7</b>	<b>683.2</b>	<b>702.1</b>	<b>694.9</b>	<b>1 333.9</b>	<b>1 382.3</b>	<b>1 373.0</b>	<b>-0.7</b>
Bangladesh	1.1	1.1	1.2	3.7	4.7	4.8	54.9	56.8	57.4	59.7	62.6	63.4	+1.3
Cambodia	0.0	0.0	0.0	1.0	0.7	0.7	11.1	12.2	11.6	12.1	12.9	12.3	-4.8
China (mainland)	134.1	136.9	137.7	271.6	283.1	287.5	211.8	212.8	208.5	617.5	632.8	633.7	+0.1
India	103.9	109.6	106.8	48.1	51.2	49.8	180.6	194.2	196.2	332.5	355.0	352.9	-0.6
Japan	1.0	1.1	1.0	0.2	0.3	0.2	10.6	10.6	10.4	11.8	12.0	11.6	-3.2
Myanmar	0.1	0.1	0.1	2.4	2.6	2.5	26.4	24.9	23.7	28.9	27.5	26.4	-4.2
Nepal	2.0	2.1	2.0	3.1	3.1	3.0	5.4	5.1	5.5	10.5	10.3	10.5	+2.1
Pakistan	25.7	27.3	26.1	8.5	11.2	9.5	11.9	14.0	10.4	46.1	52.4	46.0	-12.2
Philippines	0.0	0.0	0.0	8.0	8.3	8.3	19.3	19.9	20.0	27.3	28.2	28.3	+0.1
Republic of Korea	0.0	0.0	0.0	0.2	0.2	0.2	5.1	5.2	5.0	5.3	5.4	5.2	-3.7
Sri Lanka	0.0	0.0	0.0	0.3	0.5	0.2	4.2	5.1	3.4	4.5	5.6	3.6	-36.3
Thailand	0.0	0.0	0.0	4.9	5.0	5.4	31.7	33.0	34.4	36.6	37.9	39.8	+4.8
Viet Nam	0.0	0.0	0.0	4.8	4.4	4.3	43.4	43.9	42.7	48.1	48.3	47.0	-2.7

Notes: Totals and percentage change computed from unrounded data. The five-year average refers to the 2017–2021 period.

The total subregional import requirement of cereals in the 2022/23 is forecast at 165.4 million tonnes, 9 percent above the five-year average, on account of strong demand for coarse grains to be used primarily for feed. Wheat imports are projected above the five-year average, owing to increased import needs from **China (mainland), Bangladesh, Pakistan and the Republic of Korea**, as these countries seek to boost national supplies and curb high domestic prices. Imports of rice in the 2023 calendar year are forecast

at 16.3 million tonnes, an 11 percent year-on-year decline.

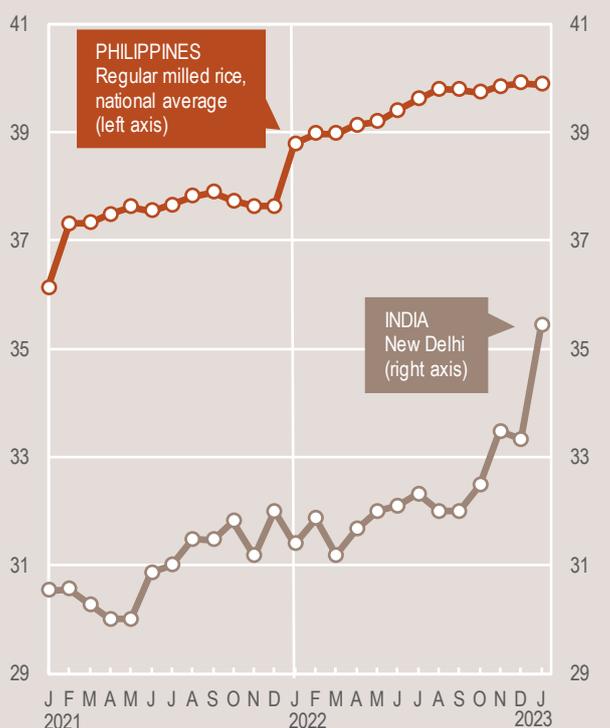
### Domestic prices of rice and wheat increase

Domestic retail prices of rice followed an increasing trend since November 2022 and, as of January 2023, prices were above their year-earlier levels in most countries of the subregion. Strong export demand contributed to the price increases in **India, Thailand and Viet Nam**. In **Myanmar**, retail prices of the widely consumed

“Emata” rice variety reached record levels in January 2023, supported by tight market availabilities following two consecutive years of reduced output and high production and transportation costs. In **Bangladesh**, domestic prices of rice declined seasonally since November 2022 and in January 2023 were only marginally higher year-on-year. In **Sri Lanka**, despite some declines between August and December 2022, domestic prices of most food items, including the main food staple, rice, were still double their year-earlier values as of January 2023,

### Rice retail prices in selected Far East countries

(Philippine peso/kg) (Indian rupee/kg)



### Wheat flour retail prices in selected Far East countries

(Sri Lanka rupee/kg) (Indian rupee/kg)

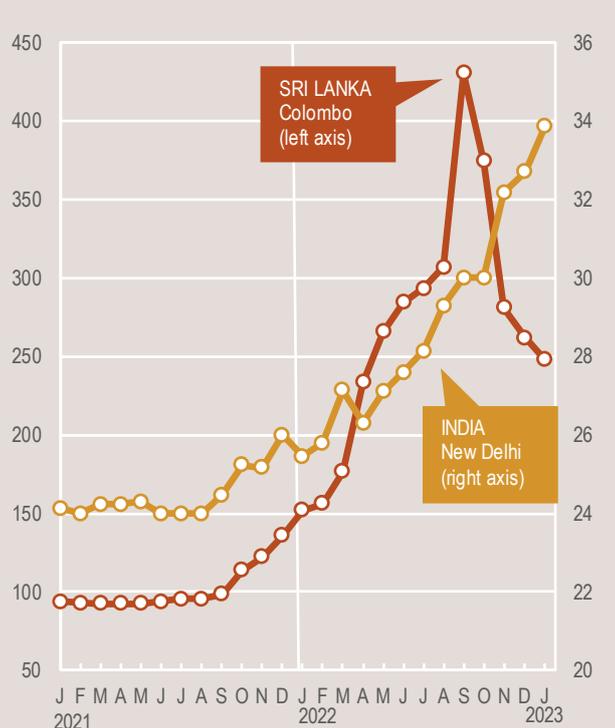


Table 12. Far East cereal production and anticipated trade in 2022/23

(thousand tonnes)

	5-year average (2017/18 to 2021/22)	2021/22	2022/23	Change: 2022/23 over 2021/22 (%)	Change: 2022/23 over 5-year average (%)
<b>Coarse grains</b>					
Exports	4 776	7 093	6 025	-15.1	+26.2
Imports	82 175	98 275	88 037	-10.4	+7.1
Production	382 305	401 258	402 656	+0.3	+5.3
<b>Rice (milled)</b>					
Exports	41 310	48 153	45 763	-5.0	+10.8
Imports	15 238	18 242	16 301	-10.6	+7.0
Production	454 703	467 649	462 845	-1.0	+1.8
<b>Wheat</b>					
Exports	3 974	9 114	7 126	-21.8	+79.3
Imports	54 410	59 509	58 551	-1.6	+7.6
Production	268 435	278 874	275 459	-1.2	+2.6

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

**Wheat flour retail prices in selected Far East countries**  
(Pakistan rupee/kg) (Taka/kg)



reflecting the effects of the protracted difficult economic situation and production downturns. Prices of wheat and wheat flour have increased throughout 2022 and in January 2023 were well above their year-earlier levels. In **Pakistan**, domestic prices of wheat flour surged between November 2022 and January 2023, increasing by 20 to 140 percent throughout the country, reflecting high agricultural and transportation costs. In **Bangladesh**, prices of wheat flour were at least 70 percent above their year-earlier levels as of January 2023, due to a considerable slowdown in imports in 2022. Domestic prices of wheat flour increased seasonally in **China (mainland)** and **India**.

**Large number of people remain food insecure in several countries**

High food prices, economic downturns and shortfalls in cereal production continue to worsen the acute food insecurity in several countries of the subregion, including in **the Lao People’s Democratic Republic** and **Sri Lanka**. In **Pakistan**, according to the latest Integrated Food Security Phase Classification (IPC) analysis, the number of people facing high levels of acute food insecurity (IPC Phase 3 [Crisis] and above) between September and December 2022 was projected to increase from 6 million to 8.5 million people due to the devastating impact of floods in July and August 2022. In **Bangladesh**, about 1 million Rohingya refugees from Myanmar, who reside mostly in the Cox’s Bazar District and the island of Bhasan Char, remain highly dependent on humanitarian assistance. In **Myanmar**, the protracted political crisis has been compromising the already difficult food security situation of the Rohingya’s internally displaced persons. In **the Democratic People’s Republic of Korea**, the food security situation is expected to remain fragile, given the below-average output estimated in 2022.

## NEAR EAST



### Despite recent improvements, sustained rainfall for the rest of the season is still needed

Planting of the 2023 winter grain crops, for harvest from May, finished in January. Temporal and spatial rainfall distribution across the subregion was uneven between October 2022 and mid-February 2023 with below-average cumulative precipitation amounts in parts, yet still generally sufficient for crop establishment. As of mid-February, crop conditions were mostly favourable, with the exception of rainfed areas of the northern **Iraq**, northwestern **Islamic Republic of Iran** and central **Türkiye** that were affected by dry weather conditions. A wave of extreme cold in **Afghanistan** in January 2023 resulted in a large number of livestock deaths, while the extent of frost damage on sown crops still needs to be assessed. However, sustained rainfall and favourable weather conditions during the remainder of the season would improve crop production prospects. In countries experiencing difficult socioeconomic circumstances due to conflicts or economic crises, including **Afghanistan, Lebanon, the Syrian Arab Republic** and **Yemen**, farmers' access to inputs remains constrained by the lack of liquidity and high prices of generally imported inputs.

On 6 February 2023, a severe earthquake led to losses of life and significant material damages and destruction in **the Syrian Arab Republic** and **Türkiye**. While earthquakes tend not to lead to substantial damages to planted field crops, they result in the loss of livestock as well as damages on agricultural and general infrastructure, which will complicate upcoming agricultural operations, including harvest and post-harvest activities. Although the bulk of the devastation occurred in **Türkiye**, the socioeconomic challenges and the remnants of the conflict are likely to complicate earthquake recovery in **the Syrian Arab Republic**.

The preliminary forecast for wheat production in **Türkiye** points to a near-average output of 19.5 million tonnes in 2023, assuming favourable weather conditions for the remainder of the season, and a near-average production of 13 million tonnes is foreseen in **the Islamic Republic of Iran**.

### Close-to-average cereal production in 2022

In the subregion, total cereal production in 2022 is estimated at 70.6 million tonnes, about 0.5 million tonnes below the previous five-year average, but about 12 percent above the drought-affected output harvested in 2021. The partial production recovery at the aggregate level is mostly accounted for by increases in **the Islamic Republic of Iran** and **Türkiye**. In **Türkiye**, the official estimate for total cereal production stands at 38.4 million tonnes in 2022, over 20 percent above the previous year and 10 percent above the five-year average. Similarly, in **the Islamic Republic**

**of Iran**, cereal production recovered and is estimated at 20.8 million tonnes, an increase of 17 percent compared to 2021, but it is still slightly below the average. In other countries, 2022 cereal harvests were stable or declined year-on-year, mostly due to unfavourable weather conditions.

The subregional cereal import requirement in the 2022/23 marketing year (July/June) is forecast at a near-average level of 75.7 million tonnes, a reduction of about 7 percent compared to the previous year, reflecting the improved regional availability of grains from domestic harvests. Despite the lower import requirements in 2022/23, the national import bills are increasing due to the elevated global food commodity prices, coupled with currency depreciations. The impact on domestic balance of payments is expected to be less in oil exporting countries, such as **Iraq**, given the prevailing high prices of hydrocarbons.

### Large number of people remain acutely food insecure

Lingering conflicts, high international commodity prices, economic downturns and reduced livelihood opportunities continue to have a significant impact on acute food security conditions in many countries. In **Afghanistan**, according to the latest Integrated Food Security Phase Classification (IPC) analysis, 18.9 million people were projected to face IPC Phase 3 (Crisis) or above between June and November 2022. In **Yemen**, nearly 17 million people, over half of the population, were classified in IPC Phase 3 (Crisis) or worse between October and December 2022. Of

Table 13. Near East cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year average	2021	2022 est.	Change: 2022/2021 (%)									
<b>Near East</b>	43.9	37.9	41.4	21.4	18.5	23.8	5.6	5.1	5.1	70.8	61.5	70.3	+14.3
Afghanistan	4.4	3.9	3.8	0.3	0.3	0.3	0.6	0.6	0.6	5.2	4.8	4.7	-2.3
Iran (Islamic Republic of)	13.4	10.1	13.0	3.7	3.2	4.1	3.7	3.0	3.5	20.8	16.3	20.6	+26.4
Iraq	4.0	4.2	2.8	1.1	0.6	0.4	0.0	0.4	0.0	5.5	5.2	3.2	-38.2
Türkiye	19.7	17.7	19.8	14.1	13.3	17.7	1.0	1.0	1.0	34.8	32.0	38.4	+20.2

Notes: Totals and percentage change computed from unrounded data. The five-year average refers to the 2017–2021 period.

primary concern, about 6.1 million people classified in IPC Phase 4 (Emergency) and about 4.3 million people who have been internally displaced by the conflict.

In the **Syrian Arab Republic**, based on the World Food Programme’s (WFP) Consolidated Approach for Reporting Indicators (CARI), about 15 million people are in need of food and agriculture assistance (representing 68 percent of the total population), including 12.1 million people that are estimated to be acutely food insecure as in 2021.

In **Lebanon**, the first ever IPC Acute Food Insecurity Analysis indicated that about 1.29 million Lebanese residents (33 percent of the resident population) and 0.7 million Syrian refugees (46 percent of the total number of Syrian refugees in Lebanon) were estimated to be in IPC Phase 3 (Crisis) or above between September and December 2022. The same IPC analysis projected that, as a result of the deterioration of the economic situation and the depreciation of the Lebanese pound, the protracted inflation rate and elevated international prices, about 1.46 million Lebanese residents (38 percent of the resident population) and 0.80 million Syrian refugees (53 percent of the total number of Syrian refugees in Lebanon) will be in IPC Phase 3 (Crisis) or above between January and April 2023.

## CIS IN ASIA



### Poor rains impacting 2023 winter cereal crops

Planting of the 2023 winter cereals, to be harvested between June and September 2023, finalized in November 2022 and the total area planted is estimated to be near the five-year average. In **Kazakhstan, Turkmenistan** and **Uzbekistan**, cumulative precipitation amounts since the planting period in September until December 2022 were below average. Although monthly precipitation quantities increased in January 2023, weather forecasts point to a higher-than-normal probability of below-average rainfall until April 2023. The earlier rainfall shortages and current weather prospects are impairing yield expectations and could also result in limited replenishment of water reservoirs to be used for irrigation during the summer months (June to September 2023).

### Near-average wheat production obtained in 2022

The aggregate 2022 subregional<sup>3</sup> cereal output is estimated at a near-average level of 33.8 million tonnes. Production of wheat, which accounts for more than 70 percent of the total cereal output, reached a slightly above-average level of 24.6 million tonnes, reflecting good harvests in **Azerbaijan, Kazakhstan, Kyrgyzstan** and **Uzbekistan**. The estimate for the 2022 subregional coarse grain output stands at 8.4 million tonnes, slightly below the five-year average.

### Domestic prices of wheat flour higher than a year before

In **Kazakhstan**, average retail prices of wheat flour in January 2023 increased by about 30 percent year-on-year, due to strong export demand that tightened domestic availabilities. In **Armenia, Georgia** and **Kyrgyzstan**, prices of wheat flour remained stable albeit at high levels, amid higher production and transportation costs. In **Azerbaijan**, prices increased gradually since September 2022 in line with seasonal trends and by December 2022 were 25 percent above year-earlier values. In **Tajikistan**, prices of wheat flour decreased between August and December 2022, and were close to their year-earlier levels.

**Table 14. CIS in Asia cereal production**

(million tonnes)

	Wheat			Coarse grains			Total cereals <sup>1</sup>			
	5-year average	2021	2022 est.	5-year average	2021	2022 est.	5-year average	2021	2022 est.	Change: 2022/2021 (%)
<b>CIS in Asia</b>	<b>24.0</b>	<b>22.0</b>	<b>24.6</b>	<b>8.7</b>	<b>8.0</b>	<b>8.4</b>	<b>33.7</b>	<b>31.1</b>	<b>34.1</b>	<b>+9.5</b>
Armenia	0.1	0.1	0.1	0.1	0.1	0.1	0.2	0.2	0.2	+52.3
Azerbaijan	2.0	1.9	2.0	1.3	1.5	1.3	3.3	3.4	3.3	-1.4
Georgia	0.1	0.1	0.1	0.3	0.3	0.3	0.4	0.4	0.4	-13.4
Kazakhstan	13.3	11.8	13.7	4.8	3.8	4.4	18.5	16.2	18.6	+14.8
Kyrgyzstan	0.6	0.4	0.6	1.1	1.0	1.1	1.7	1.4	1.8	+29.3
Tajikistan	0.8	0.9	0.8	0.4	0.4	0.4	1.3	1.4	1.4	-3.4
Turkmenistan	1.1	0.9	1.1	0.1	0.1	0.1	1.3	1.0	1.2	+19.6
Uzbekistan	5.9	6.0	6.1	0.7	0.9	0.8	6.9	7.2	7.2	+0.2

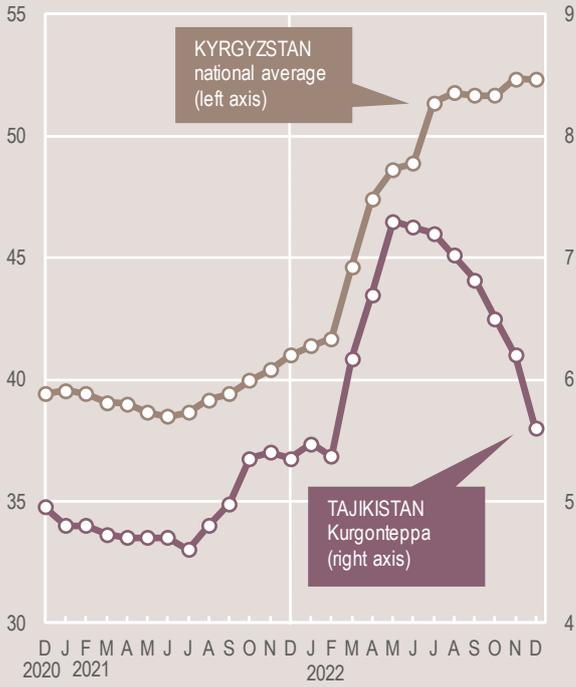
Notes: Totals and percentage change computed from unrounded data. The five-year average refers to the 2017–2021 period.

<sup>1</sup> Total cereals includes wheat, coarse grains and rice (paddy).

<sup>3</sup> Georgia is no longer a member of Commonwealth of Independent States (CIS) but its inclusion in this group is maintained for the time being.

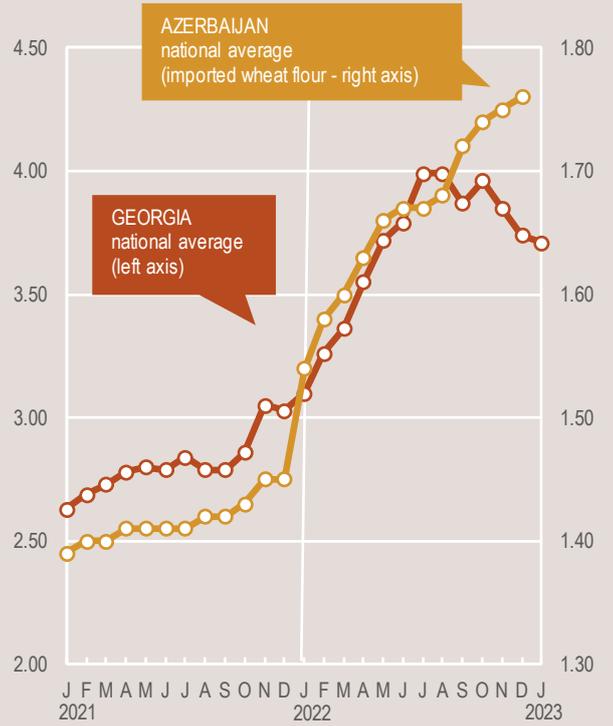
**Retail wheat flour prices in selected CIS in Asia countries**

(Som/kg) (Somon/kg)



**Retail wheat flour prices in selected CIS in Asia countries**

(Lari/kg) (Azerbaijani manat/kg)



# REGIONAL REVIEWS

## LATIN AMERICA AND THE CARIBBEAN



\*\* See Terminology (page 7).

A dispute exists between the governments of Argentina and the United Kingdom of Great Britain and Northern Ireland concerning sovereignty over the Falkland Islands (Malvinas).

Source: FAO/GIEWS, 2023. *Crop Prospects and Food Situation No. 1*. Cited 3 March 2023, modified to comply with the United Nations map No. 4170 Rev. 19, 2022.

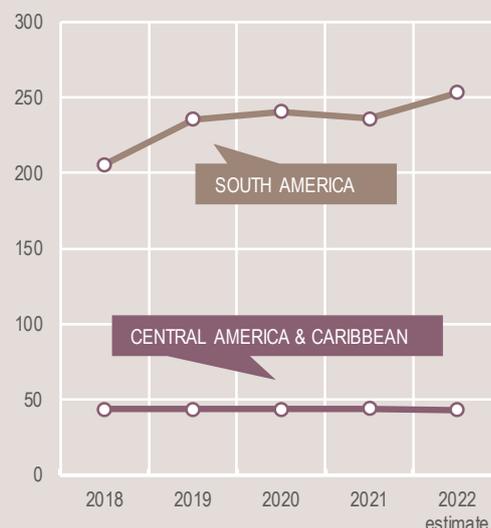
### Production Overview

Cereal production in Latin America and the Caribbean is estimated at a record-high level of 296.5 million tonnes (rice in paddy terms) in 2022, driven by bumper maize outputs in South America. By contrast, wheat production was below average, owing to a drought-affected harvest in Argentina. In Central America, the 2022 maize output is pegged at a below-average level.

Regarding the 2023 cereal crops, large maize plantings are expected in the main South American producing countries, in response to robust export demand. In Central America, early indications in Mexico point to slightly above-average wheat plantings in 2023, albeit moderately lower than levels in 2022.

### Cereal production

(million tonnes)



## CENTRAL AMERICA AND THE CARIBBEAN



### Wheat plantings at above-average levels in 2023

In **Mexico**, planting of the 2023 main season (mainly irrigated) wheat crop was completed at the end of February 2023 and sowings are officially estimated at a level slightly above the average, but 10 percent down compared to the large area sown in 2022. Despite dry weather conditions forecast for the March to May period, average yields are expected on account of adequate availabilities of irrigation water in reservoirs in the key producing northwestern region.

With regard to Mexico’s 2023 maize crop, planting of the first minor season crop was nearing completion in February 2023 and the area sown is expected at an average level. Forecasts of drier-than-average weather conditions raise concerns over planting operations of the main season crop, mainly rainfed, which will take place

during the second quarter of 2023. To support smallholder farmers, amid the rising cost of production, the government has increased the guaranteed procurement price for maize.

### Maize output in 2022 estimated below the five-year average

Harvesting of the 2022 minor season maize crop is ongoing in northern **Guatemala** and **Nicaragua**. Subregional 2022 maize production is expected at 30.7 million tonnes, 4 percent below the five-year average. In **Mexico**, the largest cereal producing country of the subregion, total production is estimated at a near-average level, reflecting above-average yields that offset a contraction in plantings. Elsewhere, despite overall favourable weather conditions, maize outputs are expected at slightly below-average levels as farmers were discouraged to plant, amid high prices of agricultural inputs. In some localized areas of northeastern **Guatemala** and eastern **Nicaragua**, torrential rains in October and November 2022 triggered floods and affected standing crops.

In **Haiti**, harvesting of the 2022 third season maize crop will conclude in March 2023 and, according to satellite imagery, crop conditions were generally unfavourable prior to the harvest, reflecting

reduced rainfall amounts. Overall, total maize and paddy outputs in Haiti are expected at below-average levels owing to low plantings and reduced yields, as farmers struggled to access adequate quantities of agricultural inputs, reflecting low availabilities and high prices. In addition, dry weather conditions affected yields of the main and third season crops. For the 2023 main cereal crops, average precipitation amounts are forecast for the March to May period and this is likely to encourage farmers to expand plantings. In **the Dominican Republic**, 2022 aggregate paddy output is estimated at an above-average level of 1.1 million tonnes, on account of excellent yields of the first season crop, which accounts for one-half of the annual production.

### Cereal imports anticipated to be slightly above average in 2022/23

Underpinned by strong demand for yellow maize for feed and wheat for human consumption, cereal imports have been increasing since 2014. In the 2022/23 marketing year (September/August), cereal imports are forecast at 36.7 million tonnes, slightly above the five-year average, with consumption requirements expected to be partially met by a drawdown in stocks, which were built up following large import quantities in 2021/22.

**Table 15. Central America and the Caribbean cereal production**

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year average	2021	2022 est.	Change: 2022/2021 (%)									
<b>Central America and the Caribbean</b>	3.2	3.3	3.6	37.9	37.8	36.8	2.9	2.8	2.8	43.9	43.9	43.2	-1.7
El Salvador	0.0	0.0	0.0	0.9	1.0	1.0	0.0	0.0	0.0	1.0	1.0	1.0	-3.8
Guatemala	0.0	0.0	0.0	2.0	2.0	2.0	0.0	0.0	0.0	2.0	2.0	2.0	-1.1
Honduras	0.0	0.0	0.0	0.7	0.6	0.7	0.1	0.1	0.0	0.7	0.7	0.7	+2.6
Mexico	3.2	3.3	3.6	33.0	33.0	32.1	0.3	0.3	0.3	36.5	36.6	35.9	-1.7
Nicaragua	0.0	0.0	0.0	0.5	0.4	0.4	0.4	0.4	0.4	0.8	0.9	0.8	-3.1

Notes: Totals and percentage change computed from unrounded data. The five-year average refers to the 2017–2021 period.

### Maize and bean prices above their year-earlier levels

Prices of maize and beans were at higher year-on-year levels in January 2023, supported by elevated production and transportation costs. In **El Salvador**, **Honduras** and **Nicaragua**, wholesale prices of white maize increased at the start of 2023, as well as in **Guatemala**, owing to reduced market supplies from domestic harvests and imports from Mexico. In **Mexico**, prices were stable or declined in December 2022 and January 2023 as the ongoing main season harvest bolstered market supplies.

In **El Salvador**, **Honduras** and **Nicaragua**, prices of red beans resumed an increasing trend in January 2023, following a short-lived decline in December 2022, and were 40 to

60 percent higher year-on-year. Regarding black beans, prices in **Guatemala** and **Mexico** were stable or declined in December 2022 and January 2023, in line with seasonal trends.

In **Haiti**, following a slight improvement of the security situation in urban areas in December 2022, market supplies increased and provided downward pressure on prices of black beans, rice and sorghum in the capital, Port-au-Prince. Elsewhere, prices of locally produced maize and black beans generally strengthened during the last quarter of 2022, due to elevated transportation costs and reduced supplies from the 2022 below-average harvests. Prices of imported rice and wheat flour also increased as a result of the depreciation of the national currency, which lost over 40 percent of its value in 2022.

### More than 4.7 million people in Haiti face acute food insecurity

Acute food insecurity in **Haiti** has been worsening due to the economic downturn, low agricultural production and frequent natural disasters, exacerbated by persistent political instability and worsening civil insecurity. According to the latest Integrated Food Security Phase Classification (IPC) analysis, about 4.7 million people are projected to face acute food insecurity between March and June 2023, up from the 4.5 million estimated in 2022. The 2023 figure includes 1.65 million people in IPC Phase 4 (Emergency) and 19 000 in IPC Phase 5 (Catastrophe). The population experiencing “Catastrophe” levels of acute food insecurity is in the Cité Soleil commune of the capital city, where intergang violence has severely affected households’ access to food markets and essential services.

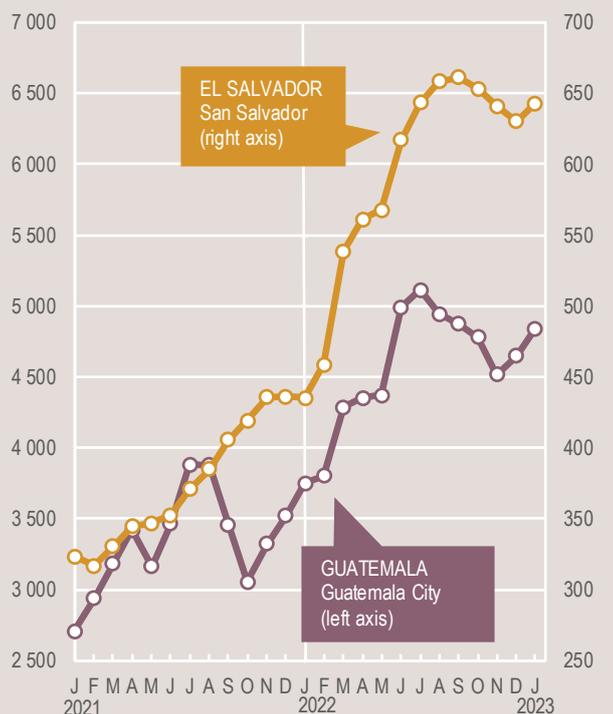
#### Wholesale white maize prices in selected Central America countries

(Córdoba/tonne) (Honduran lempira/tonne)



#### Wholesale white maize prices in selected Central America countries

(Quetzal/tonne) (US dollar/tonne)



## SOUTH AMERICA



### Strong export demand drives up maize plantings to above average levels

In the key maize producing countries of Argentina, Brazil and Paraguay, strong export demand and high international prices have incentivized farmers to increase plantings to levels well above the five-year average. In **Brazil**, harvesting of the 2023 minor season maize crop is underway and official forecasts indicate an above-average output, underpinned by high yields. Planting of the 2023 main season maize crop, which represents 75 percent of the annual production, is expected to conclude in mid-March. Predominantly reflecting the a record aggregate maize acreage from all seasons, total maize production is forecast at an all-time high of 123.7 million tonnes in 2023. In **Paraguay**, planting of the 2023 main season maize crop is ongoing, with adequate soil moisture levels in the major producing southeastern region. In **Argentina**, dry weather conditions during the last quarter of 2022 curbed yield prospects of the early-planted crops, which accounted for an estimated

30 percent of the total maize area in 2023, compared to an average of 50 percent in preceding years. Rainfall had improved since mid-January 2023, preventing damage to the later-sown crops. Rainfall shortages between October 2022 and mid-February 2023 also constrained crop yield potentials in **Chile**, where the maize area is estimated at a record-low level for the second consecutive year, as farmers shift to more profitable horticulture crops. Poor rains were also observed in **Uruguay**, where, however, the area sown with maize is estimated to be above average in 2023. In northern parts of the subregion, the 2023 first season maize crop is being harvested in **Colombia** and **Peru**, and is at vegetative and flowering stages in **Ecuador** and **Bolivia (Plurinational State of)**. In these countries, weather forecasts point to generally favourable conditions between March and May, which support good yield prospects.

Harvesting of the 2023 paddy crop is anticipated to start in March 2023 in most countries of the subregion. In **Brazil**, 2023 output is officially forecast at a below-average level of 10.1 million tonnes reflecting reduced plantings that were nearly 15 percent below the five-year average. The contraction in the sown area is largely the result of dry weather conditions during the planting period in the key producing southern region and more remunerative prices for competing crops, such as maize and soybeans. In **Colombia**, plantings of the 2023 minor paddy crop are officially estimated at an average level and more than 15 percent higher year-on-year. An expansion in sowings is also expected in **Ecuador**,

supported by adequate soil moisture levels at planting time and a year-on-year decline in production costs. In **Uruguay**, where the 2023 harvest started in early February 2023, a near-average output is expected.

### Record high cereal production in 2022 boosted export volumes

The 2022 subregional cereal output is estimated at an all-time high of 253.3 million tonnes, underpinned by a record maize output estimated at 186.2 million tonnes. As a result, exports of cereals are also estimated at a record level of 110.7 million tonnes in the 2022/23 marketing year (March/February), with maize exports up 40 percent compared to the five-year average. Despite a below-average paddy output in 2022 (24 million tonnes), rice exports are estimated at an above-average level of 4 million tonnes. Regarding wheat, a sharp decline in the 2022 production, mostly due to a drought-affected harvest in Argentina, is seen reducing exports to a below-average level in 2022/23.

### Maize and wheat prices at higher year-on-year levels

In most countries of the subregion, prices of yellow maize and wheat were higher year-on-year levels in January 2023, primarily reflecting elevated production and transportation costs. A notable exception were the lower year-on-year prices of maize and wheat in **Brazil**, on account of the record outputs in 2022. In **Argentina**, prices of maize and wheat were twice their year-earlier levels, linked to strong export demand and upward pressure from the low 2022

**Table 16. South America cereal production**  
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year average	2021	2022 est.	5-year average	2021	2022 est.	5-year average	2021	2022 est.	5-year average	2021	2022 est.	Change: 2022/2021 (%)
<b>South America</b>	28.8	33.1	27.4	174.6	177.0	202.1	25.0	25.9	23.8	228.5	236.0	253.3	+7.3
Argentina	19.5	22.1	12.9	61.2	70.0	67.2	1.3	1.5	1.2	82.0	93.5	81.3	-13.1
Brazil	5.8	7.7	10.6	97.1	90.8	117.8	11.6	11.8	10.8	114.4	110.2	139.1	+26.3
Chile	1.3	1.1	1.1	1.7	1.5	1.4	0.2	0.1	0.1	3.2	2.8	2.6	-7.0
Colombia	0.0	0.0	0.0	1.4	1.5	1.5	2.8	2.9	2.5	4.2	4.4	4.1	-7.9
Peru	0.2	0.2	0.2	1.8	1.9	1.9	3.4	3.5	3.4	5.3	5.6	5.4	-2.5

Notes: Totals and percentage change computed from unrounded data. The five-year average refers to the 2017–2021 period.

wheat output as well as concerns over the performance of the 2023 maize crop. Prices of yellow maize in January 2023 were up from the levels a year earlier in **Bolivia (Plurinational State of)**,

**Colombia, Ecuador** and **Uruguay**. Prices of wheat were stable or declined in **Bolivia (Plurinational State of)**, **Chile** and **Peru**, in the three months to January, in line with a recent weakening in international

prices, while they rose in **Uruguay**, due to significant export flows during the last quarter of 2022. Prices of rice increased in January in **Brazil** and **Uruguay**, supported by a recent uptick in exports, together

**Wholesale maize prices in selected countries in South America**

(Brazilian real/tonne) (Argentine peso/tonne)



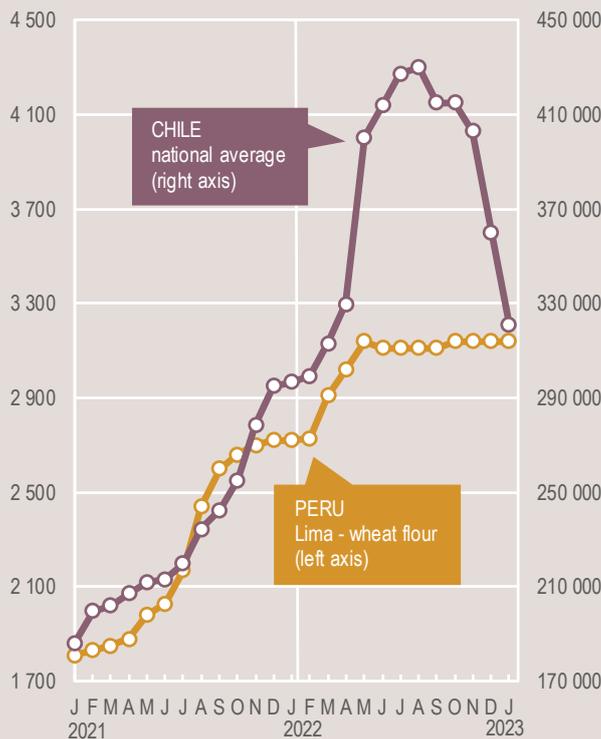
**Wholesale wheat prices in selected countries in South America**

(Brazilian real/tonne) (Argentine peso/tonne)



**Wholesale wheat prices in selected countries in South America**

(Nuevo sol/tonne) (Chilean peso/tonne)



**Wholesale rice prices in selected countries in South America**

(Brazilian real/tonne) (Colombian peso/tonne)



with expectations of a year-on year decline in 2023 outputs. Rice prices had also increased between November 2022 and January 2023 in **Colombia** and **Peru**, driven by high production costs and a decline in 2022 paddy production.

### **More than half of Venezuelan migrants in Colombia experienced high levels of acute food insecurity**

As of December 2022, the number of refugees and migrants from **the Bolivarian Republic of Venezuela** was estimated at 7.1 million, a result of

the severe and prolonged macroeconomic crisis between 2014 and 2020. The largest groups of Venezuelans are located in Colombia (2.48 million), Peru (1.49 million), Ecuador (0.5 million), Chile (0.44 million) and Brazil (0.39 million). Despite some recovery in economic growth since 2021, outflows of refugees and migrants are expected to continue in 2023. The Regional Refugee and Migrant Response Plan 2023–2024 estimates the number of Venezuelan refugees and migrants (in-destination) in need of food assistance at 3.62 million in 2023, slightly up from the 3.57 million in 2022.

According to an Emergency Food Security and Nutrition Assessment (EFSA) published by the World Food Programme (WFP) in November 2022, among the 2.48 million Venezuelan migrants who have the intention to settle in Colombia, 1.3 million people were estimated to be moderately or severely food insecure between June and August 2022. Higher rates of food insecurity (over 70 percent) were found among pendular and in-transit migrants. In addition to the limited income-earning opportunities, elevated food prices are further stressing food security conditions of Venezuelan refugees and migrants.

# REGIONAL REVIEWS

## NORTH AMERICA, EUROPE AND OCEANIA

*Note: Situation as of February 2023  
Territories/boundaries\*\**



### NORTH AMERICA

#### Canada

Cereals (winter season):  
Dormant to vegetative

#### United States of America

Cereals (winter season): Vegetative



### EUROPE

#### Northern Europe

Cereals (winter season): Dormant to vegetative

#### Centresouthern Europe

Cereals (summer season): Planting  
Cereals (winter season): Vegetative

#### CIS in Europe:

Cereals (winter season): Dormant to vegetative

### OCEANIA

#### Australia

Cereals (summer season): Harvesting



Source: FAO/GIEWS, 2023. *Crop Prospects and Food Situation No. 1*. Cited 3 March 2023, modified to comply with the United Nations map No. 4170 Rev. 19, 2020.

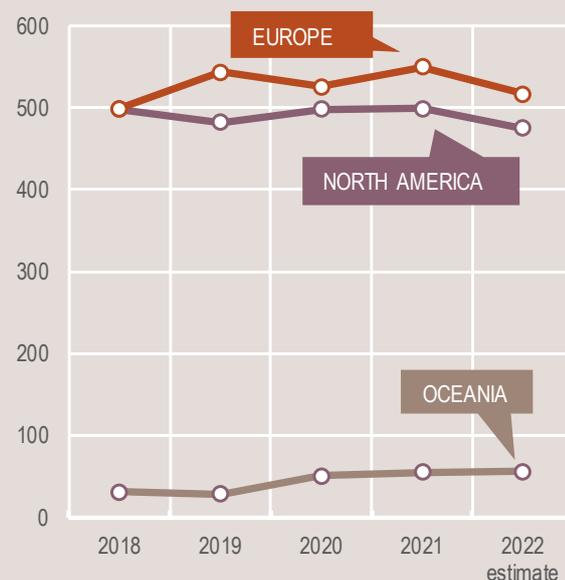
## Production Overview

*In the United States of America, based on an expansion in winter plantings and forecasts of dissipating drought conditions in parts, total wheat production is seen increasing to 51 million tonnes in 2023, which would be the largest output in three years. In Canada, official forecasts point to a second consecutive above-average annual wheat output in 2023.*

*In the European Union, wheat plantings are seen to remain broadly unchanged in 2023, and with generally conducive weather auguring well for yields, total production is forecast at 136.5 million tonnes, comparable to the previous year's output. In Ukraine, the effects of the war, including infrastructure damage and continual obstruction to fields, are expected to result in a well below-average wheat output in 2023. In the Russian Federation, reflecting drier-than-average weather conditions in southern regions and a cutback in winter plantings, amid softer domestic prices, wheat production is forecast to decline from the record level in 2022.*

*In Australia, harvesting of the 2022 wheat crop recently concluded and production is estimated at an all-time high, which follows the previous record in 2021.*

Cereal production  
(million tonnes)



## NORTH AMERICA



### Winter wheat plantings up in 2023, but drought conditions continue to affect key producing states

In the United States of America, incentivised by high prices, farmers increased 2023 winter wheat plantings by 10 percent compared to previous year's level to about 15 million hectares, the largest area since 2015. Whilst the area upturn bodes well for production prospects, dry weather conditions are still prevalent across some of the main producing states in the Central Plains and this has resulted in inferior crop conditions compared to average levels. Weather conditions have, however, improved in north-west states and drought conditions are forecast to dissipate in parts of the Central Plains in next months.

Taking into consideration potential weather improvements, total wheat production is tentatively pegged at an above-average level of 51 million tonnes, which would be principally driven by larger plantings.

Planting of the coarse grain crops is expected to start in April and preliminary official forecasts indicate that the maize output could reach an above-average level of 383 million tonnes in 2023, following the weather-stricken outturn in 2022.

In Canada, most of the wheat crop is planted during the summer months between May and June. Official projections indicate that total wheat plantings are set to increase for a second consecutive year in 2023 to an above-average level of 10.25 million hectares, as farmers are expected to react to the high grain prices. Assuming favourable weather conditions in the spring and summer period, the total 2023 wheat production is foreseen to reach about 35 million tonnes, higher than the previous five-year average.

## EUROPE



### Beneficial weather for 2023 winter cereal crops

In the European Union, planting of the 2023 minor spring wheat crop is underway and the aggregate area, including the main winter crop planted in the last quarter of 2022, is forecast to increase moderately in 2023. Rainfall amounts have been adequate in the key producing areas and crop conditions are reportedly satisfactory. Record high temperatures over the winter period led to an earlier-than-normal de-hardening of winter wheat crops. Assuming a continuation of conducive weather, with forecasts pointing to a high probability of above-average temperatures in following months, wheat production is forecast at 138.5 million tonnes, on par with the previous year's good output.

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

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year average	2021	2022 est.	5-year average	2021	2022 est.	5-year average	2021	2022 est.	5-year average	2021	2022 est.	Change: 2022/2021 (%)
<b>North America</b>	<b>79.8</b>	<b>67.1</b>	<b>78.7</b>	<b>406.1</b>	<b>423.3</b>	<b>389.5</b>	<b>9.1</b>	<b>8.7</b>	<b>7.3</b>	<b>495.0</b>	<b>499.0</b>	<b>475.5</b>	<b>-4.7</b>
Canada	30.6	22.3	33.8	27.3	25.2	30.6	0.0	0.0	0.0	57.9	47.5	64.5	+35.8
United States of America	49.2	44.8	44.9	378.8	398.1	358.8	9.1	8.7	7.3	437.1	451.6	411.0	-9.0
<b>Europe</b>	<b>260.9</b>	<b>269.3</b>	<b>280.9</b>	<b>263.9</b>	<b>276.6</b>	<b>233.2</b>	<b>4.0</b>	<b>3.8</b>	<b>2.9</b>	<b>528.8</b>	<b>549.8</b>	<b>517.1</b>	<b>-5.9</b>
Belarus	2.4	2.4	2.5	4.7	4.5	5.3	0.0	0.0	0.0	7.1	6.9	7.8	+12.6
European Union <sup>I</sup>	142.0	138.1	134.5	158.1	156.7	134.4	2.9	2.7	2.1	303.0	297.5	271.0	-8.9
Russian Federation <sup>II</sup>	78.9	76.1	102.7	41.3	40.4	43.1	1.1	1.1	0.8	121.3	117.6	146.5	+24.6
Serbia	2.8	3.4	3.1	7.1	6.8	5.1	0.0	0.0	0.0	9.9	10.2	8.3	-19.2
Ukraine <sup>III</sup>	27.2	32.2	20.0	43.8	53.4	32.6	0.1	0.0	0.0	71.0	85.6	52.6	-38.6
<b>Oceania</b>	<b>24.7</b>	<b>36.8</b>	<b>37.0</b>	<b>15.0</b>	<b>18.4</b>	<b>18.7</b>	<b>0.4</b>	<b>0.4</b>	<b>0.7</b>	<b>40.1</b>	<b>55.6</b>	<b>56.4</b>	<b>+1.5</b>
Australia	24.3	36.3	36.6	14.4	17.7	18.1	0.4	0.4	0.7	39.1	54.5	55.3	+1.5

Notes: Totals and percentage change computed from unrounded data. The five-year average refers to the 2017–2021 period.

<sup>I</sup> Data for the European Union from the year 2020 (including the 2020/21 marketing year) excludes the United Kingdom of Great Britain and Northern Ireland.

<sup>II</sup> Information provided by the Russian Federation includes statistical data for the Autonomous Republic of Crimea and the city of Sevastopol, Ukraine, temporarily occupied by the Russian Federation and is presented without prejudice to relevant UN General Assembly and UN Security Council resolutions, including UN General Assembly resolution 68/262 of 27 March 2014 and UN Security Council resolution 2202 (2015) of 17 February 2015, which reaffirm the territorial integrity of Ukraine.

<sup>III</sup> Information provided by Ukraine excludes statistical data concerning the Autonomous Republic of Crimea, the city of Sevastopol and certain areas of the Donetsk and Luhansk regions. The information is presented without prejudice to relevant UN General Assembly and UN Security Council resolutions, including UN General Assembly resolution 68/262 of 27 March 2014 and UN Security Council resolution 2202 (2015) of 17 February 2015, which reaffirm the territorial integrity of Ukraine.

A moderate upturn in wheat plantings is forecast in **the United Kingdom and Northern Ireland**, but with yields anticipated to retreat from the highs of 2022, production is seen falling to about 14.4 million tonnes.

## CIS IN EUROPE

### Wheat production expected to fall in 2023 in the Russian Federation

Planting of the 2023 winter cereal crops, currently dormant and to be harvested between July and August 2023, was completed in November 2022. The total sown area at the subregional level is estimated to be below the previous five-year average, predominantly reflecting reduced plantings in **Ukraine**, where severe financial constraints, infrastructure damage and obstructed access to fields in parts of the country have resulted in an estimated 40 percent year-on-year reduction in the 2023 winter wheat area. In **the Russian Federation**, total wheat production in 2023 is forecast to decline from the record high in 2022, reflecting a small cutback in winter plantings, while drier-than-average weather conditions persisted into the start

of 2023 in parts of the main producing southern areas. In **the Republic of Moldova**, weather conditions since the planting period in the last quarter of 2022 have been mostly beneficial for crops.

### Near-average subregional cereal output obtained in 2022

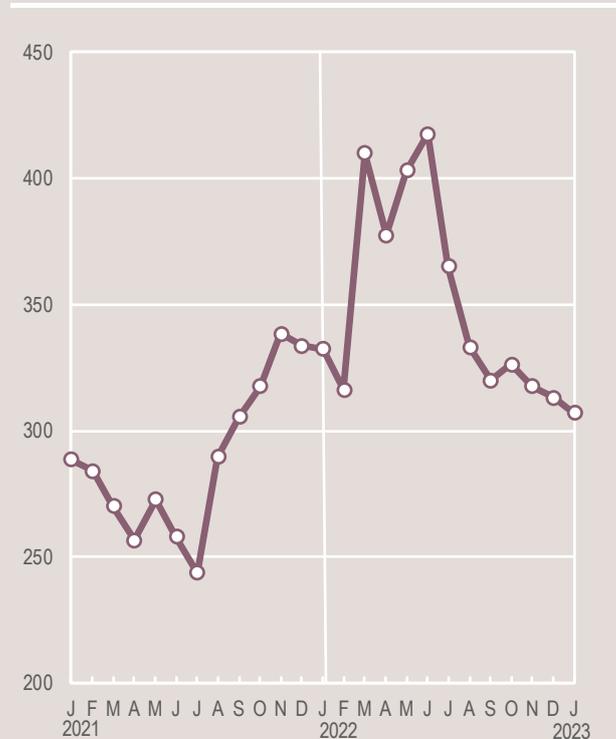
The 2022 subregional cereal output is estimated at 208 million tonnes, close to the five-year average. This amount includes 126 million tonnes of wheat, 15 percent above the five-year average, and 39 million tonnes of maize, 25 percent below the average. Barley production is estimated at a near-average level of 29.6 million tonnes. In **the Russian Federation**, wheat production is officially estimated at an all-time high of 102.7 million tonnes, largely underpinned by conducive weather conditions that supported exceptionally high yields. In **Ukraine**, 2022 cereal production is estimated at a well below-average level due to the impact of the war, which severely hampered crop production and marketing activities. Moreover, prohibitively high production costs and low farmgate prices impelled a significant proportion of farmers to leave part of their maize crop unharvested.

February 2023, about 19.2 million tonnes of cereals were shipped from Black Sea ports of Ukraine, compared to 42.6 million tonnes in the corresponding period in the previous year. Uncertainty about the extension of the Black Sea Grain Initiative beyond March 2023 has also thwarted export prospects. In **Belarus** and in **the Republic of Moldova**, national average retail prices of wheat flour remained stable between October and December 2022 and were about 10 to 15 percent above their year-earlier levels, reflecting high transportation and production costs.

### At least 17.6 million people in need of humanitarian assistance and protection in Ukraine

According to the 2023 Humanitarian Needs Overview, at least 17.6 million people are estimated to be in need of multisectoral humanitarian assistance in 2023, including over 11 million in need of food security and livelihood interventions. About 5.3 million people were estimated to be displaced in the country as of late January 2023 (International Organization for Migration [IOM]), while about 8.1 million Ukrainian refugees were recorded in European countries as of 15 February 2023 (United Nations High Commissioner for Refugees [UNHCR]).

Wheat export prices in the Russian Federation (US dollar/tonne)



### Russian export prices of wheat slightly below year-earlier levels

In **the Russian Federation**, export prices of milling wheat continued to decline in January 2023, in line with trends of other origins. Large domestic availabilities provided downward pressure on prices, which reached levels around 8 percent below those of January 2022. However, steady demand from importing countries limited the decline. In **Ukraine**, logistical challenges related to vessel inspections under the Black Sea Grain Initiative constrained export flows, already limited by the effects of the war. Since the start of the 2022/23 marketing year in July 2022 until early

## OCEANIA



### Wheat production hits record high in 2022

In **Australia**, harvesting of the 2022 winter wheat and barley crops recently concluded. Wheat production is pegged at 36.6 million tonnes in 2022, an all-time high output that reflects record yields due to favourable weather conditions throughout the season. However, in the leading wheat-producing state of New South Wales, excessive rainfall amounts caused oversaturated soils and inundations, with consequent crop losses. Barley production is estimated at an above-average level 13.4 million tonnes.

# STATISTICAL APPENDIX

**Table A1. Global cereal supply and demand indicators**

	5-year average (2017/18–2021/22)	2018/19	2019/20	2020/21	2021/22	2022/23
<b>Ratio of world stocks to utilization (%)</b>						
Wheat	37.6	36.7	37.4	37.9	37.7	38.7
Coarse grains	24.9	25.4	23.9	23.3	24.6	22.2
Rice	36.9	37.3	36.8	37.2	37.7	37.1
Total cereals	30.6	30.7	30.0	29.9	30.7	29.5
<b>Ratio of major cereal exporters' supplies to market requirements (%)<sup>I</sup></b>						
	117.6	116.6	118.5	115.1	114.9	114.7
<b>Ratio of major exporters' stocks to their total disappearance (%)<sup>II</sup></b>						
Wheat	17.2	18.1	15.6	15.2	16.0	18.1
Coarse grains	14.1	15.6	14.2	11.8	13.4	12.4
Rice	24.8	22.6	26.1	28.5	28.7	29.7
Total cereals	18.7	18.8	18.6	18.5	19.4	20.1
<b>Average growth rate</b>						
	2012–2021	2018	2019	2020	2021	2022
<b>Annual growth in world cereal production (%)</b>						
	2.2	-1.8	2.6	2.3	1.2	-1.3
<b>Annual growth in cereal production in the LIFDCs (%)</b>						
	1.7	4.9	2.6	2.9	-4.8	1.8
<b>Selected cereal price indices<sup>III</sup></b>						
		2019	2020	2021	2022*	Change 2022* over 2021*
Wheat		100.7	132.1	164.9	145.8	-3.7%
Maize		101.9	144.8	169.5	161.9	3.1%
Rice		110.2	105.8	108.8	125.8	23.3%

Notes: Utilization is defined as the sum of food use, feed and other uses. Cereals refer to wheat, coarse grains and rice; grains refer to wheat and coarse grains (barley, maize, millet, sorghum and cereals NES).

<sup>I</sup> Major wheat exporters are: Argentina, Australia, Canada, the European Union, Kazakhstan, the Russian Federation, Ukraine and the United States of America. Major coarse grains exporters are: Argentina, Australia, Brazil, Canada, the European Union, the Russian Federation, Ukraine and the United States of America. Major rice exporters are: India, Pakistan, Thailand, the United States of America and Viet Nam.

<sup>II</sup> Disappearance is defined as domestic utilization plus exports for any given season.

<sup>III</sup> Price indices: The wheat price index is constructed based on the International Grains Council (IGC) wheat price index, rebased to 2014–2016 = 100; The coarse grains price index is constructed based on the IGC price indices for maize and barley and one sorghum export quotation, rebased to 2014–2016 = 100. For rice, data refers to the FAO All Rice Price Index, 2014–2016 = 100, which is based on 21 rice export quotations.

\*January–February average.

**Table A2. World cereal stocks**

(million tonnes)

	2018	2019	2020	2021	2022 est.	2023 f'cast
<b>TOTAL CEREALS</b>	<b>856.0</b>	<b>832.2</b>	<b>828.1</b>	<b>836.5</b>	<b>854.2</b>	<b>844.3</b>
<b>Wheat</b>	<b>288.9</b>	<b>274.1</b>	<b>284.6</b>	<b>292.7</b>	<b>293.8</b>	<b>305.7</b>
held by:						
- main exporters <sup>1</sup>	84.6	71.3	63.3	60.1	62.6	72.8
- others	204.3	202.8	221.3	232.6	231.2	232.9
<b>Coarse grains</b>	<b>390.0</b>	<b>371.4</b>	<b>356.0</b>	<b>349.8</b>	<b>364.4</b>	<b>344.3</b>
held by:						
- main exporters <sup>1</sup>	127.3	128.2	122.1	102.8	116.5	105.1
- others	262.7	243.2	233.9	247.0	247.9	239.2
<b>Rice (milled basis)</b>	<b>177.1</b>	<b>186.7</b>	<b>187.5</b>	<b>194.1</b>	<b>196.0</b>	<b>194.4</b>
held by:						
- main exporters <sup>1</sup>	32.2	39.6	45.8	52.4	55.9	57.9
- others	144.9	147.1	141.7	141.7	140.1	136.5
<b>Developed countries</b>						
Australia	7.4	7.1	5.7	7.2	8.2	9.4
Canada	11.1	9.4	9.5	9.7	7.5	9.5
European Union <sup>II</sup>	41.3	41.0	41.6	35.9	43.0	39.6
Japan	6.7	6.5	6.9	7.4	6.8	7.1
Russian Federation	23.7	15.3	13.6	17.6	18.1	34.3
South Africa	5.1	3.6	2.6	3.9	4.6	4.9
Ukraine	8.3	7.7	5.6	5.9	23.2	16.7
United States of America	88.8	91.3	80.7	58.4	57.9	51.2
<b>Developing countries</b>						
<b>Asia</b>						
China (mainland)	401.1	386.2	382.7	391.3	395.1	399.1
India	44.0	52.0	64.3	68.9	66.6	63.4
Indonesia	10.2	11.5	9.1	7.6	8.2	8.4
Iran (Islamic Republic of)	10.6	9.2	10.0	11.7	12.4	12.2
Pakistan	5.4	3.3	2.0	4.4	6.4	5.4
Philippines	4.1	5.5	4.5	4.6	4.8	4.9
Republic of Korea	4.1	2.6	2.6	3.0	3.2	3.5
Syrian Arab Republic	2.1	2.2	3.2	4.1	2.5	0.8
Türkiye	7.1	6.6	10.1	10.5	9.2	10.2
<b>Africa</b>						
Algeria	5.3	6.6	6.7	6.3	5.4	5.8
Egypt	6.9	5.1	5.3	4.6	3.3	3.9
Ethiopia	5.5	6.2	7.1	7.5	6.9	5.7
Morocco	6.7	7.3	5.8	3.6	5.7	4.6
Nigeria	2.9	2.6	1.9	2.0	1.4	1.3
Tunisia	1.1	1.0	1.2	1.0	1.0	1.1
<b>Central America and the Caribbean</b>						
Mexico	7.7	7.6	7.4	6.9	8.0	6.3
<b>South America</b>						
Argentina	12.3	12.6	12.7	11.0	8.1	8.6
Brazil	20.2	16.9	16.7	17.5	13.8	9.2

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

<sup>1</sup> Major wheat exporters are: Argentina, Australia, Canada, the European Union, Kazakhstan, the Russian Federation, Ukraine and the United States of America; major coarse grains exporters are: Argentina, Australia, Brazil, Canada, the European Union, the Russian Federation, Ukraine and the United States of America; major rice exporters are: India, Pakistan, Thailand, the United States of America and Viet Nam.

<sup>II</sup> Data for the European Union from the year 2020 (including the 2020/21 marketing year) excludes the United Kingdom of Great Britain and Northern Ireland.

**Table A3. Selected international prices of wheat and coarse grains**

(USD/tonne)

	Wheat			Maize		Sorghum
	US No.2 Hard Red Winter Ord. Protein <sup>I</sup>	US Soft Red Winter No.2 <sup>II</sup>	Argentina Trigo Pan <sup>III</sup>	US No.2 Yellow <sup>I</sup>	Argentina <sup>III</sup>	US Gulf
<b>Annual (July/June)</b>						
2008/09	270	201	234	188	180	184
2009/10	209	185	224	160	168	167
2010/11	316	289	311	254	260	258
2011/12	300	256	264	281	269	286
2012/13	348	310	336	311	278	304
2013/14	318	265	335	217	219	244
2014/15	266	221	246	173	177	247
2015/16	211	194	208	166	170	192
2016/17	197	170	190	156	172	172
2017/18	230	188	203	159	165	190
2018/19	232	210	233	166	166	183
2019/20	220	219	231	163	163	190
2020/21	269	254	263	220	225	308
2021/22	431	358	415	321	305	345
<b>Monthly</b>						
2021 - February	291	278	272	246	248	341
2021 - March	274	274	267	246	236	343
2021 - April	281	278	267	266	253	367
2021 - May	298	294	280	304	272	398
2021 - June	285	263	274	295	251	389
2021 - July	291	251	276	279	235	355
2021 - August	324	272	285	254	237	327
2021 - September	337	270	291	235	240	296
2021 - October	353	302	302	238	246	298
2021 - November	378	330	314	249	252	306
2021 - December	379	329	318	266	260	317
2022 - January	374	324	304	277	272	324
2022 - February	390	339	312	293	288	344
2022 - March	486	447	412	336	336	404
2022 - April	495	427	420	348	316	402
2022 - May	521	441	467	346	315	389
2022 - June	460	380	480	336	299	373
2022 - July	383	311	425	306	271	325
2022 - August	383	315	408	294	281	318
2022 - September	419	344	403	313	294	360
2022 - October	439	352	422	344	308	371
2022 - November	423	336	415	321	301	367
2022 - December	387	315	394	302	312	361
2023 - January	380	314	375	303	311	365
2023 - February	395	312	364	298	313	363

<sup>I</sup> Delivered United States of America f.o.b. Gulf.<sup>II</sup> Delivered United States of America Gulf.<sup>III</sup> Up River f.o.b.

**Table A4a. Estimated cereal import requirements of low-income food-deficit countries in 2021/2022 or 2022**  
(thousand tonnes)

Marketing year	2020/21 or 2021	2021/22 or 2022
	Total imports	Total imports
<b>AFRICA</b>	<b>32 275.9</b>	<b>33 102.6</b>
<b>East Africa</b>	<b>12 681.1</b>	<b>14 438.6</b>
Burundi	190.8	199.9
Comoros	67.6	70.8
Eritrea	459.0	459.7
Ethiopia	2 275.0	1 950.0
Kenya	3 629.0	4 358.6
Rwanda	309.6	282.6
Somalia	1 020.0	1 070.0
South Sudan	715.0	720.0
Sudan	2 378.0	3 599.0
Uganda	667.1	813.0
United Republic of Tanzania	970.0	915.0
<b>Southern Africa</b>	<b>3 647.0</b>	<b>3 045.9</b>
Lesotho	179.8	159.6
Madagascar	737.4	915.5
Malawi	81.3	156.5
Mozambique	1 804.3	1 482.9
Zimbabwe	844.2	331.4
<b>West Africa</b>	<b>13 251.4</b>	<b>12 762.0</b>
<b>Coastal Countries</b>	<b>7 700.2</b>	<b>6 997.0</b>
Benin	522.7	682.0
Côte d'Ivoire	2 392.1	2 362.3
Ghana	1 990.3	1 282.7
Guinea	1 326.1	1 210.5
Liberia	417.1	391.0
Sierra Leone	568.2	603.0
Togo	483.7	465.5
<b>Sahelian Countries</b>	<b>5 551.2</b>	<b>5 765.0</b>
Burkina Faso	542.6	578.4
Chad	192.6	222.6
Gambia	255.8	289.7
Guinea-Bissau	166.7	122.3
Mali	593.4	606.0
Mauritania	507.9	372.0
Niger	661.6	563.0
Senegal	2 630.6	3 011.0
<b>Central Africa</b>	<b>2 696.4</b>	<b>2 856.1</b>
Cameroon	1 581.0	1 532.0
Congo	301.5	387.9
Central African Republic	72.5	73.2
Democratic Republic of the Congo	719.0	838.5
Sao Tome and Principe	22.4	24.5

Notes: The low-income food-deficit countries (LIFDCs) group includes net food deficit countries with annual per caput income below the level used by the World Bank to determine eligibility for International Development Association (IDA) assistance (i.e. USD 1 945 in 2019); for full details see <http://www.fao.org/countryprofiles/lifdc>

**Table A4b. Estimated cereal import requirements of low-income food-deficit countries in 2021/2022 or 2022**

(thousand tonnes)

Marketing year	2020/21 or 2021		2021/22 or 2022	
		Total imports		Total imports
<b>ASIA</b>		<b>28 728.9</b>		<b>28 607.9</b>
<b>Cis in Asia</b>		<b>5 715.1</b>		<b>5 357.1</b>
Kyrgyzstan	Jul/Jun	633.6		795.9
Tajikistan	Jul/Jun	1 129.8		1 069.0
Uzbekistan	Jul/Jun	3 951.7		3 492.2
<b>Far East</b>		<b>12 529.8</b>		<b>12 019.8</b>
Bangladesh	Jul/Jun	10 533.7		10 449.0
Democratic People's Republic of Korea	Nov/Oct			—*
Nepal	Jul/Jun	1 996.1		1 570.8
<b>Near East</b>		<b>10 484.0</b>		<b>11 231.0</b>
Afghanistan	Jul/Jun	2 754.0		3 774.0
Syrian Arab Republic	Jul/Jun	2 470.0		2 782.0
Yemen	Jan/Dec	5 260.0		4 675.0
<b>CENTRAL AMERICA AND THE CARIBBEAN</b>		<b>1 483.4</b>		<b>1 541.7</b>
Haiti	Jul/Jun	678.1		661.7
Nicaragua	Jul/Jun	805.3		880.0
<b>TOTAL</b>		<b>62 488.2</b>		<b>63 252.2</b>

Notes: The low-income food-deficit countries (LIFDCs) group includes net food deficit countries with annual per caput income below the level used by the World Bank to determine eligibility for International Development Association (IDA) assistance (i.e. USD 1 945 in 2019); for full details see <http://www.fao.org/countryprofiles/lifdc>

\* Estimates not available.

**Table A5. Estimated cereal import requirements of low-income food-deficit countries in 2022/2023**

(thousand tonnes)

		2021/22	2022/23
	Marketing year	Total imports	Total import requirements
<b>AFRICA</b>		<b>19 473.5</b>	<b>19 289.8</b>
<b>East Africa</b>		<b>10 662.6</b>	<b>9 945.0</b>
Kenya	Oct/Sept	4 358.6	4 390.0
Somalia	Aug/Jul	1 070.0	1 185.0
South Sudan	Nov/Oct	720.0	700.0
Sudan	Nov/Oct	3 599.0	2 705.0
United Republic of Tanzania	Jun/May	915.0	965.0
<b>Southern Africa</b>		<b>3 045.9</b>	<b>3 423.2</b>
Lesotho	Apr/Mar	159.6	251.6
Madagascar	Apr/Mar	915.5	971.0
Malawi	Apr/Mar	156.5	156.5
Mozambique	Apr/Mar	1 482.9	1 581.0
Zimbabwe	Apr/Mar	331.4	463.1
<b>West Africa</b>		<b>5 765.0</b>	<b>5 921.6</b>
Burkina Faso	Nov/Oct	578.4	704.0
Chad	Nov/Oct	222.6	239.6
Gambia	Nov/Oct	289.7	337.0
Guinea-Bissau	Nov/Oct	122.3	164.0
Mali	Nov/Oct	606.0	826.0
Mauritania	Nov/Oct	372.0	535.0
Niger	Nov/Oct	563.0	655.0
Senegal	Nov/Oct	3 011.0	2 461.0
<b>ASIA</b>		<b>23 932.7</b>	<b>23 054.5</b>
<b>CIS in Asia</b>		<b>5 356.9</b>	<b>5 270.6</b>
Kyrgyzstan	Jul/Jun	795.9	666.6
Tajikistan	Jul/Jun	1 069.0	1 142.0
Uzbekistan	Jul/Jun	3 492.0	3 462.0
<b>Far East</b>		<b>12 019.8</b>	<b>11 679.9</b>
Bangladesh	Jul/Jun	10 449.0	9 659.9
Nepal	Jul/Jun	1 570.8	2 020.0
<b>Near East</b>		<b>6 556.0</b>	<b>6 104.0</b>
Afghanistan	Jul/Jun	3 774.0	3 454.0
Syrian Arab Republic	Jul/Jun	2 782.0	2 650.0
<b>CENTRAL AMERICA AND THE CARIBBEAN</b>		<b>1 541.7</b>	<b>1 569.0</b>
Haiti	Jul/Jun	661.7	699.0
Nicaragua	Jul/Jun	880.0	870.0
<b>TOTAL</b>		<b>44 947.9</b>	<b>43 913.3</b>

Notes: Countries included in this table are only those that have entered the new marketing year. The low-income food-deficit countries (LIFDCs) group includes net food deficit countries with annual per caput income below the level used by the World Bank to determine eligibility for International Development Association (IDA) assistance (i.e. USD 1 945 in 2019); for full details see <http://www.fao.org/countryprofiles/lifdc>



## GIEWS - Global Information and Early Warning System on Food and Agriculture

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**Crop Prospects and Food Situation** is published by the Markets and Trade Division of FAO under the Global Information and Early Warning System on Food and Agriculture (GIEWS). It is published four times a year and focuses on developments affecting the food situation of developing countries and low-income food-deficit countries (LIFDCs) in particular. The report provides a review of the food situation by geographic region, a section dedicated to the LIFDCs and a list of countries requiring external assistance for food. It also includes a global Cereal supply and demand overview to complement the biannual analysis in the **Food Outlook** publication. **Crop Prospects and Food Situation** is available in English, French and Spanish in electronic format.

The data used to create the charts and tables are taken from the following sources:

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This report is based on information available as of **February 2023**.

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