CROP PROSPECTS and
FOOD SITUATION

Triannual Global Report

Countries/territories in need of external assistance for food

46

COUNTRIES/TERRITORIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD

FAO assesses that globally 46 countries/territories, including 33 in Africa, ten in Asia, two in Latin America and the Caribbean and one in Europe, are in need of external assistance for food. Persisting and intensifying conflicts are key drivers of the severest levels of acute food insecurity, with recent concerns centred on the Near East. Despite declining international prices, weak currencies in many low-income countries are sustaining high domestic food prices and hampering households' access to food.

Asia	+1.0
Africa	+0.2
Central America and the Caribbean	-1.4
South America	+1.3
North America	+7.6
Europe	-1.3
Oceania	-31.1
World	**+0.9**

Global cereal production 2023 over 2022
(yearly percentage change)

+0.9

REGIONAL HIGHLIGHTS

AFRICA Reduced 2023 harvests are expected in most East African countries, notably the Sudan, where the conflict restricted access to fields and inputs. Upturns in production are foreseen across most of West Africa in 2023, following overall good weather conditions, although conflicts still affect local agricultural production. Planting of the 2024 crops is underway in North Africa, as well as Southern Africa where forecasts of El Niño-linked dry-weather conditions are weighing on production prospects.

ASIA In Far East Asia, 2024 winter wheat crop is being sown and early indications point to a small increase in plantings. For the 2023 crops, aggregate cereal production is pegged at an above-average level. Favourable weather conditions underlie an upturn in the cereal output in Near East Asia in 2023, following drought-affected harvests in the previous year. Similarly, mostly conducive rainfall conditions pushed up the 2023 harvests in Central Asian countries.
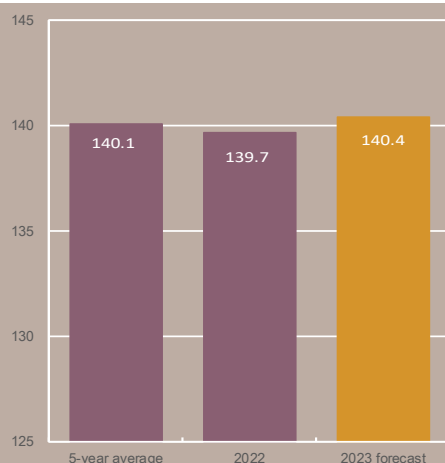
LATIN AMERICA AND THE CARIBBEAN In South America, the 2024 maize plantings are expected to decline from the highs of the previous year, mainly due to less favourable weather conditions. This follows a record cereal outturn in 2023, largely reflecting a bumper harvest in Brazil, which more than offset a production downturn in Argentina. In Central America and the Caribbean, the combination of civil insecurity, an economic downturn and poor weather conditions are adversely affecting agricultural production and acute food insecurity in Haiti.

LIFDC cereal production 2023 over 2022

+0.5

(million tonnes)

5-year average	2022	2023 forecast
140.1	139.7	140.4

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COUNTRIES/TERRITORIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD

Note: Situation as of October 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 (10 countries/territories)

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

LATIN AMERICA AND THE CARIBBEAN (2 countries)

- Haiti
- Venezuela (Bolivarian Republic of)

EUROPE (1 country)

- Ukraine

⊕ *New Entry*

** See Terminology (*page 7*)

Source: FAO/GIEWS, 2023. *Crop Prospects and Food Situation No. 3*. Cited 3 November 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, high food prices, weather extremes
- According to the latest Integrated Food Security Phase Classification (IPC) analysis, the number of severely food insecure people (IPC Phase 3 [Crisis] and above) was projected to reach 2.4 million between April and August 2023, including about 622 000 people in IPC Phase 4 (Emergency). The situation reflects the impact of the conflict and civil insecurity, as well as the effects of flooding and drought conditions that curbed agricultural production.
- As of August 2023, 489 000 people were internally displaced as a result of civil insecurity and armed violence.

Kenya
Weather extremes
- About 1.5 million people are estimated to be acutely food insecure between October 2023 and January 2024, reflecting the lingering impact of a prolonged and severe drought between late 2020 and early 2023 that affected agricultural production, mainly in northern and eastern pastoral, agropastoral and marginal agricultural areas.

Somalia
Drought conditions, civil insecurity
- About 4.3 million people are estimated to face severe acute food insecurity between October and December 2023, owing to consecutive poor rainy seasons between late 2020 and early 2023, and heightened conflict since early 2021.

WIDESPREAD LACK OF ACCESS

Burundi
Weather extremes, high food prices
- About 1.2 million people were estimated to be facing IPC Phase 3 (Crisis) levels of acute food insecurity between June and September 2023, unchanged year-on-year but notably with no populations in IPC Phase 4 (Emergency), unlike 2022. The main drivers are the lingering impact of floods in northern areas in late 2022 and high food prices due, in part, to the depreciation of the national currency.

Chad
Civil insecurity, high food prices, effects of conflict in the Sudan, refugee influx
- According to the latest Cadre Harmonisé (CH) analysis, about 2.3 million people experienced acute food insecurity during the June to August 2023 lean season period, including approximately 218 000 people in CH Phase 4 (Emergency).

- Acute food insecurity is underpinned by persisting insecurity in Lac Region, which hosts about 255 000 Internally displaced persons (IDPs), and Tibesti Region. Food security conditions are particularly concerning in eastern areas where the large majority of the 420 000 refugees that fled the Sudan since mid-April 2023 are located, reflecting increasing pressure on food stocks and local livelihoods, as well as disruptions in trade flows following the closure of the border with the Sudan.

- As of mid-October 2023, a total of 1.03 million refugees were residing in the country.

Democratic Republic of the Congo
Conflict
- According to the September 2023 IPC analysis, 23.4 million people were projected to experience acute food insecurity between July and December 2023. This is due to the intensification of the conflict in northeastern provinces, which, among other factors, has prevented the completion of harvests and will likely reduce food availability in the months to come.

- As of August 2023, 5.8 million people in North Kivu, South Kivu and Ituri had been displaced due to the conflict.

Djibouti
Unfavourable weather, high food prices
- About 250 000 people were estimated to have faced acute food insecurity (IPC Phase 3 [Crisis] and above) between March and June 2023, mainly due to the lingering impact of a prolonged and severe drought between late 2020 and early 2023, as well as high food prices.

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

Ethiopia
Drought in southern areas, conflict in Tigray Region, high food prices
- According to the 2023 Humanitarian Response Plan, about 20.1 million people are officially estimated to be facing severe acute food insecurity, mainly due to the lingering impact of drought conditions in southern areas between late 2020 and early 2023, the conflict in Tigray Region between 2020 and 2022, and high food prices.

Malawi
Weather extremes, high food prices
- The latest IPC analysis puts the number people facing acute food insecurity (IPC Phase 3 [Crisis] and above) at 4.4 million between October 2023 and March 2024, 15 percent more than the corresponding period in 2022/23.

- The impact of Cyclone Freddy, particularly in southern districts, and high food prices, including record prices of maize, are key factors aggravating conditions.

Mauritania
High food prices
- According to the latest CH analysis, over 472 000 people were in need of humanitarian assistance during the June to August 2023 lean period, including about 28 000 people in CH Phase 4 (Emergency). This would be an improvement compared to the previous year, mostly due to a substantial increase in cereal production in 2022.

- Elevated food prices continued to constrain food access of vulnerable households.

- As of September 2023, the country was hosting over 110 000 refugees and asylum seekers, mostly from Mali.

Niger
Conflict, political instability, high food prices
- According to the March 2023 CH analysis, about 3.28 million people were acutely food insecure during the June to August 2023 lean season period, including over 150 000 people in CH Phase 4 (Emergency).

- Acute food insecurity is deteriorating due to the sanctions following the military takeover, which triggered abrupt increases in food prices and constrained the delivery of adequate humanitarian assistance to host households in areas affected by insecurity, where access to income-earning opportunities is already limited.

- As of September 2023, the country was hosting over 325 000 refugees and asylum seekers, mainly from Nigeria and Mali.

Nigeria
Conflict in northern areas, macroeconomic crisis, high food prices
- About 24.9 million people were projected to face acute food insecurity

during the June to August 2023 lean season, including about 1.14 million people in CH Phase 4 (Emergency), which is above the 19.45 million people estimated in 2022. The increase, however, mainly reflects an expanded geographical coverage of the CH analysis.

- Acute food insecurity is mostly the result of civil insecurity and conflicts in northern states, which, as well as disrupting agricultural activities, led to the displacement of about 3.58 million people as of June 2023.

- High inflation rates, driven in part by a steep loss of value of the naira in 2023, is curtailing vulnerable households' economic access to food.

- As of August 2023, nearly 94 000 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 since 2020. According to the latest available data, about 7.76 million people, almost two-thirds of the total population, were 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 were expected to face IPC Phase 5 (Catastrophe).

Zimbabwe
High food prices, localized shortfalls in production
- An estimated 3.5 million people are projected to be in need of humanitarian assistance up until at least March 2024.

- Prevailing high food prices and reduced incomes, owing to the effects of an economic downturn, are key factors underpinning the high levels of acute food insecurity, while localized shortfalls in production in southern and western areas are contributory factors.

SEVERE LOCALIZED FOOD INSECURITY

Burkina Faso
Conflict

- According to the latest CH analysis, about 3.35 million people were projected to face acute food insecurity during the June to August 2023 lean season, including over 604 500 people in CH Phase 4 (Emergency) and nearly 42 700 in CH Phase 5 (Catastrophe). At the aggregate level, this would be a slight decrease compared to 2022, when 3.45 million people were estimated to be in need of humanitarian assistance. However, it marks the highest figure of people in catastrophic conditions (CH Phase 5) that has ever been projected for the country.

- Acute food insecurity is primarily underpinned by a worsening conflict and, in particular, by the use of siege tactics by non-state armed groups. Insecurity is hampering agricultural activities and driving up food prices, while humanitarian access constraints are very high. As of March 2023, civil insecurity resulted in the displacement of about 2.06 million people.

- As of June 2023, nearly 37 000 refugees and asylum seekers, mostly from Mali, were residing in the country.

Cameroon
Civil insecurity, high food prices

- According to the March 2023 CH analysis, about 2.4 million people were estimated to be acutely food insecure (CH Phase 3 [Crisis] and above), between March and August 2023, as a result of the effects of the conflict, sociopolitical unrest and high food prices, as well as floods that caused population displacements and agricultural damage and losses.

- As of June 2023, the number of IDPs is more than 2 300, due to attacks by non state armed groups in Far North Region.

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.

- Flooding in early 2023 affected about 165 000 people, located in the departments of Cuvette, Likouala, Plateaux and Sangha.

Eswatini
High food prices, economic downturn

- The latest IPC analysis points to a 9 percent year-on-year increase in the number of people facing acute food insecurity (IPC Phase 3 [Crisis] and above) between October 2023 and March 2024, projected at 283 000.

- Food insecurity is driven by high food prices and a slowdown in economic growth, which has curbed households' income-earning opportunities.

Guinea
High food prices

- Nearly 710 000 people were projected to be acutely food insecure during the June to August 2023 lean season, including over 12 000 people in CH Phase 4 (Emergency), an improvement compared to 2022 when about 1.22 million people were estimated to face acute food insecurity. Acute food insecurity is mainly driven by elevated food prices.

- As of August 2023, over 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 325 000 people are projected to face IPC Phase 3 (Crisis) levels of acute food insecurity between October 2023 and March 2024, representing a small increase compared to the previous year.

- Food insecurity conditions are primarily underpinned by 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 531 000 people were projected to face acute food insecurity during the June to August 2023 lean season period, including approximately 21 500 people in CH Phase 4 (Emergency).

- Acute food insecurity is associated with high food prices due to high international commodity prices and elevated transport costs.

- As of August 2023, the country was hosting about 1 800 refugees and asylum seekers.

Libya
Civil insecurity, economic and political instability, high food prices, dam destruction

- 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. The dam destruction in the eastern part of the country in September 2023 further increased the needs.

Madagascar
Weather extremes, slow economic recovery

- Between January and March 2024, a projected 1.7 million people are expected to face IPC Phase 3 (Crisis) and above (Emergency) levels of acute food insecurity in southern and southeastern areas, marking a small improvement compared to the previous year.

- The impact of Cyclone Freddy in 2023, as well as the effects of weather shocks in successive preceding years, and high poverty rates, are key factors underlying the acute food insecurity situation.

Mali
Conflict

- According to the latest CH analysis, about 1.26 million people were projected to face acute food insecurity during the June to August 2023 lean season period, including nearly 76 250 people in CH Phase 4 (Emergency) and over 2 500 in CH Phase 5 (Catastrophe); this marks the first time a segment of the population has been assessed to face CH Phase 5 (Catastrophe) levels. In total, however, the number of food insecure people is lower in 2023 compared to 2022.

- Food insecurity conditions are primarily underpinned by the impact of the conflict in northern and central areas, which continues to disrupt livelihoods and markets, and has caused the displacement of over 375 000 people, as of April 2023, while humanitarian access constraints are very high.

- As of September 2023, the country was hosting approximately 66 000 refugees, mostly from Burkina Faso, the Niger and Mauritania.

Mozambique
Insecurity in northern areas, reduced localized harvests

- Insecurity in the northern province of Cabo Delgado continues to impact

livelihoods and underpins the severest levels of acute food insecurity.

- Unfavourable weather conditions in parts of the south and centre caused localized crop failures, aggravating acute food insecurity.

Namibia
Localized shortfalls in cereal production, high food prices

- An estimated 695 000 people are projected to face acute food insecurity (IPC Phase 3 [Crisis] and above) between October 2023 and March 2024, a significant increase over last year's figures.
- Weather and price shocks, as well as subdued economic growth, are key factors driving the high levels of acute food insecurity.

Senegal
High food prices, macroeconomic challenges

- The latest CH analysis indicates that about 1.26 million people were acutely food insecure during the June to August 2023 lean season period, including over 57 000 people in CH Phase 4 (Emergency). This marks 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 macroeconomic challenges and elevated prices of basic food items.
- As of August 2023, over 12 000 refugees and asylum seekers, mostly from Mauritania, required humanitarian assistance.

Sierra Leone
High food prices, macroeconomic challenges

- According to the latest CH analysis, about 1.18 million people were in need of humanitarian assistance during the June to August 2023 lean season period, including nearly 34 500 people in CH Phase 4 (Emergency).
- Acute food insecurity is underpinned by high food prices, in part driven by a weak national currency and low purchasing power of vulnerable households.

Sudan
Conflict, displacements, high food prices

- About 20 million people are in need of emergency food and livelihood

assistance, due to the conflict that broke out in mid-April 2023 which severely damaged livelihoods, paralyzed economic activities, triggered a surge in the already high food prices and caused large-scale displacements.

Uganda
Weather extremes, insecurity, high food prices

- The latest IPC analysis, conducted in the northeastern agropastoral Karamoja Region, estimates that about 342 000 people are facing acute food insecurity (IPC Phase 3 [Crisis] and above) between September 2023 and February 2024. These conditions reflect the adverse impact of weather shocks, crop and livestock diseases, civil insecurity and high food prices.
- About 900 000 refugees from South Sudan and about 500 000 from the Democratic Republic of the Congo are mainly 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 990 000 people were facing severe acute food insecurity between March and May 2023, 839 000 people in 28 mainland districts and 151 000 in Zanzibar Island.
- The main drivers are reduced domestic crop production and high food prices.

Zambia
High food prices

- High food prices, including record high prices of maize, are restricting food access and aggravating acute food insecurity. The number people facing acute food insecurity is projected to be close the previous year's level of 2 million.

ASIA (10 COUNTRIES/TERRITORIES)

WIDESPREAD LACK OF ACCESS

Democratic People's Republic of Korea
Low food consumption levels, poor dietary diversity, economic downturn

- The food security situation is expected to remain fragile, amid persistent weak economic growth.

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. This number increased to 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 the country) between January and April 2023.

Palestine
Conflict

- According to the 2023 Humanitarian Needs Overview (HNO), a total of 1.5 million people (28 percent of the population), were estimated to be in acute food insecurity and needing immediate assistance between May and July 2022: 1.2 million in the Gaza Strip and 353 000 in the West Bank. Conflict escalation in October 2023 further increased humanitarian needs.

Sri Lanka
Poor 2023 cereal production prospects, high food prices

- Cereal production in 2023 is forecast below the five-year average for the second consecutive year, mostly reflecting farmers continuing difficulties in accessing agricultural inputs. Elevated prices of key food items are also constraining economic access to food for a large number of households.
- Most households in the country are food secure, but pockets of acute food insecurity persist in some areas.

Syrian Arab Republic
Civil conflict, economic crisis

- Based on the World Food Programme's (WFP) Consolidated Approach for Reporting Indicators (CARI), about 12.1 million people were assessed to be acutely food insecure (55 percent of the total population) between August and October 2022, 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.

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 15.3 million (35 percent of the population analysed) between May and October 2023.

Bangladesh
Economic constraints, refugee influx

- 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.

Myanmar
Conflict, economic constraints, high prices of main food staple, reduction of 2023 agricultural output

- The protracted political crisis is compromising the fragile conditions of vulnerable households and the Rohingya IDPs. According to the latest figures (October 2023) from the United Nations High Commissioner for Refugees (UNHCR), the number of IDPs is estimated at about 2 million. Most of the IDPs are located in Rakhine, Chin, Kachin, Kayin and Shan states.

- Rice production in 2023, the country's main staple food, is forecast below the five-year average for the second consecutive year, mostly reflecting constraints on farmers' access to agricultural inputs and unfavourable weather conditions.
- Domestic prices of "Emata" rice, the most consumed variety in the country, were at record levels as of September 2023, constraining access to a key staple food.

Pakistan
Weather extremes, 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 November 2023 and January 2024 is projected at 11.8 million, due to the lingering effects of devastating flood impacts in 2022 and high domestic food prices.
- Prices of wheat flour, the country's main staple, were at near-record levels in most markets in September 2023.

LATIN AMERICA AND THE CARIBBEAN (2 COUNTRIES)

WIDESPREAD LACK OF ACCESS

Haiti
High food prices, natural disasters, civil insecurity

- About 4.3 million people (44 percent of the analysed population) are estimated to face severe acute food insecurity and are in need of urgent food assistance between August 2023 and February 2024. The high levels of food insecurity are the result of a sustained economic downturn, reducing domestic food production, elevated food prices, fuel shortage and frequent natural disasters. The situation is exacerbated by worsening civil insecurity, which has limited

access to essential services and caused population displacements.

Venezuela (Bolivarian Republic of)
Economic crisis

- The total number of refugees and migrants from the country is estimated at 7.7 million, with the largest populations located in Colombia (2.89 million), Peru (1.54 million), Brazil (477 500), Ecuador (474 900) and Chile (444 400). The remaining 0.7 million people are spread across other countries in Latin America and the Caribbean, with about 1.2 million people located outside the region. High food inflation rates across host countries as well as limited income earning opportunities are eroding the capacities of Venezuelan refugees and migrants to access food, and thus humanitarian needs are significant. According to 2023 Refugee and Migrant Need Analysis, the number of Venezuelan refugees and migrants (in-destination) in need of food assistance is projected at 3.18 million in 2023, marginally up from the 3.16 million in 2022.

NORTH AMERICA, EUROPE AND OCEANIA (1 COUNTRY)

WIDESPREAD LACK OF ACCESS

Ukraine
Conflict

- Ukraine continues to be a significant supplier of food commodities for the world. However, 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/territories 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/territories 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/territories 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/territory.

Countries/territories 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):

** 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. Final status of Abyei area is not yet 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 production forecast unchanged from last month, utilization and trade up, and stocks down but still foreseen to reach an all-time high

FAO's forecast for world cereal **production** in 2023 is pegged at 2 819 million tonnes, representing a 0.9 percent (26 million tonnes) increase compared to the previous year's outturn.[1]

Global wheat production in 2023 is forecast at 785.1 million tonnes, virtually unchanged from the previous figure of October and 2.2 percent (18 million tonnes) lower than last year's level. Month-on-month downward revisions were made to production forecasts for the European Union and Kazakhstan, where prolonged periods of unfavourable weather late in the season led to lower yields relative to earlier prospects. These cuts have offset increases in production forecasts for Iraq and the United States of America, reflecting higher yield estimates. Global coarse grain production is pegged at 1 510 million tonnes in 2023, unchanged from October's outlook and remaining 2.7 percent (38.8 million tonnes) above last year's outturn. There are, however, several notable changes at country level. The major revision made in November relates to China (mainland), where larger-than-previously anticipated plantings added 4 million tonnes to the harvest forecast. Production forecasts for most West African countries were also lifted in line with recently released official data. These upward revisions countered sizeable cuts to maize and sorghum production forecasts for the United States of America, amid persisting unfavourable weather, and the European Union, where maize yield prospects have diminished on account of dry conditions in eastern parts. FAO's forecast of world rice production in 2023/24 now stands at 523.9 million tonnes, up 0.8 percent from the 2022/23 estimate and 850 000 tonnes higher than previously reported in October. The upward revision primarily reflects an upgrade to India's production forecast,

following revisions to the 2022/23 output estimates for the country. This adjustment overshadowed various other revisions, in particular a further downgrade to Indonesian output prospects given a more pronounced than previously anticipated cut in the country's off-season plantings.

Turning to 2024, winter wheat plantings are underway across the northern hemisphere and area growth is expected to be limited, reflecting softer crop prices this year. In the United States of America, drought conditions have partially dissipated in key producing states, and with above-average rainfall forecast for the next months, weather conditions appear to be more favourable for early stages of the 2024 crop; plantings have progressed at an average pace as of October. In the European Union, comparatively dry and warm conditions are favouring sowing of the winter wheat crop, with plantings already nearing completion in northern countries. In Ukraine, the continuing effects of the war, including constrained access to fields and low farm-gate prices, along with less-than-ideal weather conditions, are seen engendering a reduction in the wheat area. In India, driven by continuing strong domestic prices, wheat sowings are forecast to exceed last year's level, whilst adequate water availability for irrigation should support favourable yield prospects. In Pakistan, the wheat area is forecast well above the last five-year average amid record-high domestic prices, while good supplies of quality seeds, fertilizers and herbicides augur well for yields. In China (mainland), wheat plantings could increase slightly this year, based on expectations of an upturn in domestic demand for wheat.

Table 1. World cereal production

(million tonnes)

	2021	2022 est.	2023 f'cast	Change: 2023 over 2022 (%)
Asia	*1 236.8*	*1 253.4*	*1 265.9*	*+1.0*
Far East	*1 146.5*	*1 148.0*	*1 161.9*	*+1.2*
Near East	*59.5*	*68.5*	*72.1*	*+5.3*
CIS in Asia	*30.8*	*36.9*	*31.8*	*-13.8*
Africa	*202.5*	*199.3*	*199.8*	*+0.2*
North Africa	*35.9*	*31.3*	*31.3*	*+0.0*
West Africa	*63.5*	*68.8*	*69.0*	*+0.3*
Central Africa	*7.1*	*7.0*	*7.1*	*+1.9*
East Africa	*54.9*	*55.0*	*52.9*	*-3.8*
Southern Africa	*41.1*	*37.2*	*39.4*	*+5.9*
Central America and the Caribbean	*42.9*	*42.5*	*41.9*	*-1.4*
South America	*228.6*	*246.5*	*249.6*	*+1.3*
North America	*496.6*	*473.4*	*509.5*	*+7.6*
Europe	*548.8*	*517.9*	*511.2*	*-1.3*
European Union[1]	*296.9*	*269.0*	*272.3*	*+1.2*
CIS in Europe	*214.4*	*211.4*	*201.4*	*-4.7*
Oceania	*55.9*	*60.3*	*41.5*	*-31.1*
World	*2 812.0*	*2 793.3*	*2 819.3*	*+0.9*
- wheat	*778.3*	*803.1*	*785.1*	*-2.2*
- coarse grains	*1 507.8*	*1 470.5*	*1 510.3*	*+2.7*
- rice (milled)	*526.0*	*519.8*	*523.9*	*+0.8*

Notes: Includes rice in milled terms. Totals and percentage changes are computed from unrounded data.

[1] 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.

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[1] For further information on global food markets please see monthly FAO World Food Situation update.

Sowing of the 2024 coarse grain crops is underway in the southern hemisphere countries. In Brazil, early indications point to a pullback in maize plantings of around 5 percent, as cost-price ratios are favouring soybeans. In Argentina, early outlooks point to a marginal year-on-year decline in the maize area in 2024, amid reduced rains in the first season that are hampering the planting. In South Africa, early expectations point to a small uptick in 2024 maize plantings, whilst the El Niño event, generally associated with drier and hotter-than-average weather, poses a downside risk to yields in South Africa and neighboring countries.

World cereal **utilization** in 2023/24 is forecast to reach 2 810 million tonnes, up 6.7 million tonnes since the October report and 1.0 percent higher than in 2022/23. The forecast for total wheat utilization in 2023/24 has been scaled up 6.3 million tonnes in November, mostly attributed to an anticipated increase in the feed use of wheat in China (mainland), raising the global forecast to 789 million tonnes, surpassing the 2022/23 level by 1.4 percent. Despite a 1-million-tonne downward revision this month, largely on lower maize utilization in Indonesia on account of reduced production prospects, global utilization of coarse grains is still set to expand in 2023/24 by 1.2 percent to 1 499 million tonnes. Regarding rice, largely reflecting upgrades to domestic uses in India, the forecast for world rice utilization in 2023/24 has been raised by 1.5 million tonnes since October to 522.0 million tonnes. Nevertheless, the revised level continues to suggest that world

rice total use could stagnate at the 2022/23 somewhat reduced level, as forecast cuts in the feed uses largely offset an increase in the food use component.

The forecast for world cereal **stocks** by the close of seasons in 2024 has been lowered by 2.9 million tonnes since October, to 881 million tonnes, but still points to a 2.6 percent increase above opening levels. Based on the latest stock and utilization forecasts, the 2023/24 world cereals stocks-to-use ratio stands at 30.7 percent, marginally above the 30.5 percent in 2022/23, which is a comfortable supply situation from a historical perspective. The latest month-on-month downward revision to stocks largely stems from a cut (4.2 million tonnes) in the global wheat inventory forecast, resting on lower stocks anticipated in China (mainland) on greater feed consumption, in Kazakhstan on reduced production prospects, and in Türkiye on stronger exports. Following this month's downward revision, global wheat stocks are now expected to remain close to their opening levels, at 315 million tonnes. The forecast for global coarse grain inventories has been lifted this month by 1.0 million tonnes to 367 million tonnes, up 5.9 percent from their opening levels. The upward revision mostly reflects larger expected maize stocks in China (mainland), on account of higher maize production prospects. World rice reserves at the close of 2023/24 marketing seasons are forecast to recover by 1.5 percent year-on-year to a peak of 198.9 million tonnes. However, much of this increase is envisaged to take place in India, where another accumulation, coupled

with carry-out recoveries in Pakistan and the United States of America, could overshadow stock drawdowns in all other major rice exporters. Aggregate inventories held by importers are instead seen recovering only modestly from the 2022/23 reduced level, as increases would chiefly concern China (mainland), Indonesia and the Philippines, outweighing cuts in the combined reserves held by all other importers.

FAO's forecast for global **trade** in cereals in 2023/24 has been raised by 3.0 million tonnes since October to 469 million tonnes, so still seen heading for a 1.6 percent contraction from 2022/23. Stronger import demand than previously expected from the European Union for both maize and wheat boosted the global coarse grain and wheat trade outlooks since last month. On the export side, larger-than-earlier anticipated maize sales from Argentina and Paraguay also underpinned this month's upward revision to the global coarse grain trade forecast. For wheat, the upward revision this month was also supported by larger shipments seen for Türkiye. However, despite these upward revisions, both global coarse grain and wheat trade are forecast to contract in 2023/24, by 2.8 percent and 1.8 percent, respectively, from their 2022/23 levels. International trade in rice in 2024 (January–December) is seen in the order of 52.8 million tonnes, little changed from the October forecast and close to the 2023 reduced level, as lower foreseen purchases, namely from Indonesia and various Eastern African countries, could offset likely import increases by few Far Eastern importers, the European Union and various Latin American countries.

Table 2. Basic facts of world cereal situation

(million tonnes)

	2021/22	2022/23 est.	2023/24 f'cast	Change: 2023/24 over 2022/23 (%)
Production[I]	2 812.0	2 793.3	2 819.3	+0.9
Trade[II]	482.0	476.9	469.2	-1.6
Utilization	2 799.3	2 781.8	2 810.4	+1.0
Per caput cereal food use (kg/year)	148.3	148.5	148.6	+0.1
Stocks[III]	858.3	858.4	881.1	+2.6
World stock-to-use ratio (%)	30.9	30.5	30.7	+ 0.4

Note: Totals and percentage changes are computed from unrounded data.

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

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

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

LOW-INCOME FOOD-DEFICIT COUNTRIES' FOOD SITUATION OVERVIEW

Aggregate cereal production among LIFDC forecast at a near-average level in 2023

Aggregate cereal production of Low-Income Food-Deficit Countries (LIFDCs)² is forecast at 140.1 million tonnes in 2023, virtually unchanged compared to the five-year average.

Among African LIFDCs, total cereal production is forecast at 107.7 million tonnes in 2023, slightly below the average. Reduced harvests are forecast in *East African* LIFDCs, where unfavourable rainfall conditions have curbed production prospects in Kenya, the Sudan, Uganda and the United Republic of Tanzania. Production is forecast to decline substantially in the Sudan, where the conflict has restricted physical access to croplands and markets, and also made agricultural inputs prohibitively expensive. In most *West African* LIFDCs, despite some pockets of unfavourable weather conditions, cumulative amounts and temporal distribution of rains were generally conducive for crop growth, and cereal production is expected to exceed the five-year average. However, in the Niger, unfavourable rainfall conditions and persisting insecurity are seen keeping production below the five-year average. In LIFDCs of *Southern Africa*, although cyclones and consequent flooding caused localized crop losses and damages in Madagascar, Mozambique and Malawi, aggregate cereal production is forecast at an above-average level. Planting of the 2024 crops in *Southern Africa* is expected to start in November and forecasts pointing to generally lower-than-average rainfall amounts during the forthcoming cropping season are weighing on the production outlook.

In *Asia*, aggregate cereal production in 2023 among LIFDCs is pegged at 31.7 million tonnes, slightly above the

Table 3. Basic facts of low-income food-deficit countries (LIFDCs) cereal situation
(million tonnes, rice in milled basis)

	5-year average	2022/23 est.	2023/24 f'cast	Change: 2023/24 over 2022/23 (%)
Cereal production[I]	140.1	139.7	140.4	+0.5
Utilization	182.3	187.2	189.2	+1.0
Food use	138.7	144.9	149.0	+2.8
Per caput cereal food use (kg per year)	142.1	141.2	141.5	+0.2
Feed	20.2	19.9	19.0	-4.1
End of season stocks[II]	46.6	45.9	44.1	-4.1

[I] Data refer to calendar year of the first year shown.

[II] 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	2022 est.	2023 f'cast	Change: 2023 over 2022 (%)
Africa (34 countries)	108.0	108.8	107.7	-1.0
East Africa	56.5	55.0	52.9	-3.8
Southern Africa	11.5	12.0	12.8	+6.5
West Africa	33.0	34.8	34.9	+0.2
Central Africa	7.0	6.9	7.1	+1.9
Asia (8 countries)	31.1	29.9	31.7	+6.0
CIS in Asia	10.0	10.6	10.6	-0.7
Far East	12.9	12.8	12.6	-1.5
Near East	8.2	6.4	8.5	+31.9
Central America and the Caribbean (2 countries)	1.0	1.0	1.0	-1.9
LIFDCs (44 countries)	140.1	139.7	140.4	+0.5

Notes: Includes rice in milled terms. Totals and percentage changes are computed from unrounded data. The five-year average refers to the 2018–2022 period.

five-year average. The production increase is largely concentrated largely in *Central Asia*, where good weather conditions and increased use of agricultural inputs, owing to lower domestic prices, supported an upturn in yields. In *Near East Asian* LIFDCs, beneficial weather conditions underpinned a steep production increase in the Syrian Arab Republic, with the 2023 harvest more than double the level of the previous year. In Afghanistan and Yemen, cereal harvests are estimated at near-average levels.

In *Central America*, cereal production in 2023 is expected at a well below-average level in Haiti, due to constrained availability of agricultural inputs and generally poor weather conditions.

² Please see https://www.fao.org/countryprofiles/lifdc/en/ for further details.

Increased import needs, driven by East Africa

The total cereal import requirement for LIFDCs in the 2023/24 marketing year is forecast at 49.6 million tonnes, 6.2 percent above the five-year average. The foreseen uptick is driven mostly by an increase in import needs among *East African* countries, which reflects two years of drought-stricken harvests and a likely low production in 2023. Small increases in import needs are forecast in *Central American* and *Far East Asian* LIFDCs. Conversely, lower import requirements are foreseen in *Southern African* and *West African* LIFDCs as expected upturns in domestic harvests are seen bolstering national availabilities, limiting needs for external supplies. For similar reasons, imports are forecast to fall in *Asia*, notably in *Central Asian* countries.

Despite the continued fall in international benchmark prices of staple foods, domestic food inflation rates remain high, albeit with some slowdowns in the latter half of 2023. Currency weakness is a key factor propping up the high inflation rates and limiting the transmission of declining global prices to domestic markets. High food prices remain a fundamental factor driving food insecurity in LIFDCs.

Table 5. Cereal imports of LIFDCs

(thousand tonnes)

	2021/22 or 2022	2022/23 or 2023	2023/24 or 2024
	Actual imports	Import estimate	Import requirement[I]
Africa (34 countries)	*29 436*	*28 372*	*29 438*
East Africa	*14 364*	*13 688*	*15 420*
Southern Africa	*3 103*	*3 345*	*3 084*
West Africa	*9 119*	*8 784*	*8 366*
Central Africa	*2 850*	*2 555*	*2 568*
Asia (8 countries)	*18 200*	*18 246*	*18 551*
Central Asia	*5 352*	*6 105*	*5 014*
Far East	*1 617*	*1 252*	*2 679*
Near East	*11 231*	*10 889*	*10 859*
Central America and the Caribbean (2 countries)	*1 442*	*1 462*	*1 587*
LIFDCs (44 countries)	*49 078*	*48 079*	*49 577*

Note: Totals computed from unrounded data.

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

REGIONAL REVIEWS
AFRICA

NORTH AFRICA
Coarse grains: Harvesting
Winter grains: Planting

Note: Situation as of October 2023
▬ ▬ Subregional borders
▬ ▬ Territories/boundaries**

WEST AFRICA
Coastal countries
Cereals (secondary season): Harvesting
Sahel
Cereals: Harvesting

EAST AFRICA
Eritrea, Ethiopia, South Sudan, Sudan, western Kenya
Coarse grains (main season): Harvesting

Somalia, coastal Kenya, Burundi, Rwanda, Uganda
Cereals (secondary season): Growing/harvesting

United Republic of Tanzania
Cereals (main season): Planting
Cereals (secondary bimodal season): Growing

CENTRAL AFRICA
Central parts
Cereals (main season): Harvesting

Democratic Republic of the Congo (southern parts)
Cereals (main season): Planting

SOUTHERN AFRICA
Cereals (main summer season): Planting
Wheat (winter season): Harvesting

Countries with unfavourable cereal production prospects in 2023*

Sudan: conflict and unfavourable weather

*/** 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. 3*. Cited 3 November 2023, modified to comply with the United Nations map No. 4045 Rev. 8, 2018.

Production Overview

With harvesting of the 2023 cereal crops still to be finalized in some countries, total cereal production (rice in paddy terms) in Africa is forecast at 214.2 million tonnes, 1 percent above the five-year average. A production upturn is estimated in Southern Africa, where generally favourable weather conditions resulted in above-average yields. Mostly conducive rainfall conditions across West Africa are also foreseen to result in above-average harvests, but the effects of conflicts, particularly in the Niger, continue to impede agricultural production. Cereal production in East Africa is seen dipping slightly in 2023 which would represent the third consecutive year of a below-average cereal outturn. This follows less-than-favourable weather conditions and the impact of the conflict in the Sudan that physically impeded farmers' access to fields and input markets. Drought conditions in North Africa curbed harvests in 2023. In Central Africa, agricultural production in 2023 continues to be constrained by conflicts and resulting population displacements. Planting of the 2024 crops is underway in North Africa and Southern Africa.

Cereal production
(million tonnes)

WEST
EAST
SOUTHERN
NORTH
CENTRAL

2019 2020 2021 2022 2023 f'cast
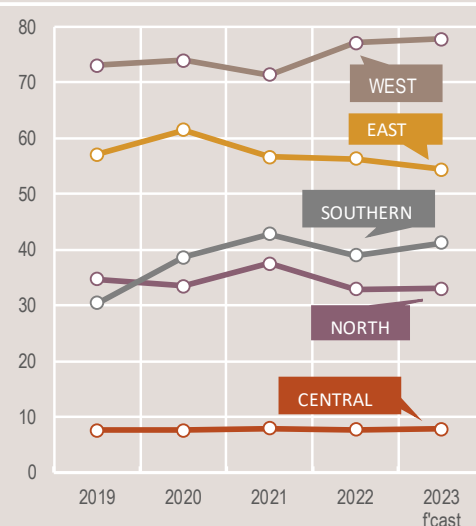
NORTH AFRICA

Sowing of 2024 winter crops about to start

Depending on soil moisture availability following the start of seasonal rainfall from September, sowing of the winter wheat and coarse grains crops usually starts in late October and continues until the end of the year. By mid-October 2023, rainfall amounts were very limited, with almost no rainfall reported in major rainfed cropping areas of central **Morocco**, eastern **Algeria** and parts of **Tunisia**. Although a slight delay of the seasonal rainfall is frequent, the final outturn of the 2024 cereal crops mostly depends on weather conditions during the rest of the season.

In early September 2023, two major natural disasters struck the subregion: an earthquake in southern **Morocco** and a dam collapse in north-eastern **Libya**, resulting in a significant loss of life and material damages. However, while detrimental to livelihood opportunities, the national cereal production is unlikely to be affected.

Second successive below-average cereal production in 2023

The subregion's aggregate cereal production in 2023 is estimated at 33 million tonnes, similar to the previous year's already drought-stricken harvest and about 10 percent below the five-year average. The aggregate wheat harvest is pegged at 16.7 million tonnes, marginally higher year on year and 9 percent below the average.

The largest relative production decrease occurred in **Tunisia**, where the cereal output is estimated at 300 000 tonnes, over 80 percent below the average, reflecting widespread drought conditions. A decline was also reported in **Algeria**, where the cereal output is estimated at 3.6 million tonnes, 12 percent less than in 2022 and 20 percent below the average. By contrast, in **Morocco**, despite dry weather conditions in some areas, the 2023 cereal output, estimated at 5.6 million tonnes, recovered from the drought-affected 2022 harvest, but remained about 30 percent below the average. In **Egypt** and **Libya**, the 2023 cereal harvests were near average.

All countries in the subregion rely heavily on wheat imports to cover their domestic consumption needs. Reflecting a below-average 2023 output, the subregion's aggregate cereal import requirement, of which wheat accounts for about 60 percent, is forecast at 50 million tonnes in the 2023/24 marketing year (July/June), 2 percent above the five-year average and 7 percent above the previous year's level. The expected year-on-year increase is driven by lower stock levels and consequent efforts by local authorities and traders to boost reserves as a way to dealing with future market shocks. The actual level of imports is likely to be negatively affected by the weakness of currencies in many countries of the subregion.

Food inflation rates remain at elevated levels

Across the subregion, with the exception of **Libya**, year-on-year food inflation rates remained at high levels in the third quarter of 2023, reflecting the delayed transmission from international commodity prices that, with the exception of rice and sugar, declined from their peaks of early 2022 and weak national currencies vis-à-vis the United States dollar.

In **Egypt**, where a large share of unsubsidized products, such as protein sources and perishable fresh foods, has a large weight in the consumer price index, the inflation rate increased from single digits in the last quarter of 2021 to 48 percent in January 2023, and surged to 74 percent in September 2023. In **Morocco**, the annual food inflation rate increased from single digit values in early 2022 to a record high of 20.8 percent in February 2023 and then it gradually decreased up to 10.6 percent in August 2023. In **Tunisia**, in September 2023, the annual food inflation rate reached a level of 13.9 percent, showing a slight decline from the record level of 15.9 percent in May 2023. In **Algeria**, food prices increased by 13.9 percent year-on-year in August 2023, a decline from the record level of 17.3 percent in June 2022. In **Libya**, the annual food inflation rate in July 2023 registered 3.36 percent, the lowest level in the subregion owing to a widespread use of consumer subsidies.

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. The dam destruction in the eastern part of the country in September 2023 further increased the needs.

Table 6. North Africa cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	Change: 2023/2022 (%)
North Africa	18.3	16.6	16.7	11.7	11.0	10.7	5.4	5.4	5.7	35.4	32.9	33.0	+0.3
Algeria	3.2	3.0	2.5	1.4	1.1	1.1	0.0	0.0	0.0	4.6	4.1	3.6	-12.3
Egypt	8.9	9.7	9.7	8.0	8.5	8.1	5.3	5.3	5.6	22.3	23.5	23.4	-0.6
Morocco	4.8	2.5	4.1	1.7	0.8	1.4	0.1	0.0	0.0	6.6	3.3	5.6	+67.8
Tunisia	1.2	1.3	0.3	0.6	0.6	0.0	0.0	0.0	0.0	1.8	1.8	0.3	-83.3

Notes: Totals and percentage changes are computed from unrounded data. The five-year average refers to the 2018–2022 period.

WEST AFRICA

Favourable production prospects for 2023 cereal crops

In southern bimodal rainfall areas of countries along the Gulf of Guinea, harvesting of the 2023 main season maize crops was completed in September. Weather conditions were generally favourable between March and July, maintaining average to above-average yields. In these areas, planting of the second season maize crop recently concluded. In central and northern unimodal rainfall areas, harvesting of cereal crops is underway and will be completed by the end of the year. Overall production prospects in the unimodal rainfall areas are favourable, reflecting adequate cumulative rainfall amounts during the June to October rainy season. However, rainfall deficits between July and September affected parts of northeastern and northwestern **Nigeria**, northern **Benin** and northeastern **Ghana**, which is likely to result in localized shortfalls in production.

In Sahelian countries, harvesting of the 2023 cereal crops is underway and is anticipated to be completed in January 2024. In most producing areas, cumulative rainfall amounts between June and September were average to above average, favouring crop establishment and development. However, in **the Niger**, cereal production is preliminary forecast at a below-average level, as dry spells constrained yields mainly in southern and southwestern areas, and a delayed onset of seasonal rains and persisting insecurity resulted in a reduced planted area. Furthermore, some crop losses may occur in localized areas of southwestern **Burkina Faso**, and southern **Chad** due to below-average rainfall amounts.

For the period between November and December, there is a higher-than-normal probability of above-average rainfall across coastal countries, which is expected to benefit the 2023 second season maize crops. Localized shortfalls in production are expected in conflict-affected areas of the Liptako-Gourma Region (overlapping **Mali**, **the Niger** and **Burkina Faso**), the Lake Chad Basin and northern **Nigeria**, due to constrained access to cropland and agricultural inputs. In particular, in the Liptako-Gourma Region, escalating violence in 2023 caused new population displacements, resulting in a reduction of the planted area.

Aggregate cereal production in 2023 is preliminarily forecast at 77.8 million tonnes, similar to the level of the previous year and 6 percent above the five-year average.

Prices of coarse grains higher year on year in most countries

In **Ghana**, prices of sorghum, millet and maize in August 2023 were between 35 and 70 percent above their year-earlier values. The depreciation of the Ghanaian cedi, high international commodity prices and transport costs, are key factors driving food prices higher. In **Nigeria**, prices of millet, sorghum and maize rose by 60 to 100 percent between May and August, and were 80 to 130 percent higher on a yearly basis, reflecting conflict-related market disruptions and a loss of value of the naira. Higher transport costs, following the removal of a fuel subsidy in May 2023, also contributed to pushing prices up. Moreover, these high fuel prices spilled over into **Benin**, reflecting the large informal imports of fuel from Nigeria. The resulting increase in transport costs contributed to pushing up already elevated sorghum and maize prices between June and August, when they were up to 25 percent higher year on year. In **Togo**, prices of maize were below or near their year-earlier values last September, while prices of sorghum were up to 20 percent higher year on year.

Table 7. West Africa cereal production

(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals[I]			
	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	Change: 2023/2022 (%)
West Africa	*52.5*	*54.6*	*54.1*	*21.4*	*22.4*	*23.6*	*74.0*	*77.2*	*77.8*	*+0.8*
Burkina Faso	*4.6*	*4.7*	*4.8*	*0.4*	*0.4*	*0.5*	*5.0*	*5.2*	*5.2*	*+1.3*
Chad	*2.6*	*2.6*	*2.6*	*0.3*	*0.2*	*0.2*	*2.8*	*2.8*	*2.8*	*+0.6*
Ghana	*3.5*	*3.9*	*4.0*	*1.0*	*1.3*	*1.3*	*4.5*	*5.1*	*5.3*	*+3.7*
Mali	*7.0*	*7.2*	*7.7*	*2.9*	*2.9*	*2.7*	*10.0*	*10.1*	*10.4*	*+3.3*
Niger	*5.2*	*5.8*	*4.7*	*0.1*	*0.1*	*0.1*	*5.3*	*5.9*	*4.9*	*-17.8*
Nigeria	*21.4*	*21.6*	*21.1*	*8.4*	*8.5*	*9.1*	*29.9*	*30.2*	*30.3*	*+0.3*

Notes: Production data is from early November 2022 and does not include figures from the latest CILSS meeting. Totals and percentage changes are computed from unrounded data. The five-year average refers to the 2018-2022 period.

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

In **the Niger**, prices of millet and sorghum rose by 10 to 45 percent between June and September, with seasonal trends exacerbated by reduced supply due to sanctions imposed by the Economic Community of West African States following the military takeover in July 2023, including the suspension of economic and commercial transactions, and the closure of borders with Benin and Nigeria, key sources and transit areas for imported food. Prices of millet and sorghum were up to 15 and 35 percent, respectively, above their year-earlier levels last September. In **Chad**, prices of coarse grains seasonally increased by up to 20 percent between May and August. The increase was compounded by reduced flows of imported grains following the border closure with the Sudan as well as the additional demand by newly arrived Sudanese refugees that fled their country. In the markets of Sarh and Moundou, located in major production areas, prices of sorghum increased by 30 to 40 percent year-on-year in August, reflecting strong demand from cereal-deficit areas. In both **Mali** and **Burkina Faso**, prices of

sorghum and millet were 15 to 40 percent below their very high year-earlier levels. In **Senegal**, national average prices of millet, sorghum and maize were below or near their year-earlier values.

High levels of acute food insecurity

According to the March 2023 "Cadre Harmonisé" (CH) analyses, at the subregional level, about 42.5 million people faced acute food insecurity during the June to August 2023 lean period, up from the 38.3 million people that were acutely food insecure during the same period in 2022. Whilst conflicts and economic challenges are the key drivers of the increase in acute food insecurity, the worsening situation in part reflects an expansion in the geographical coverage of the CH analyses in 2023.

Worsening conflicts and persisting civil insecurity drove high levels of acute food insecurity in the Liptako-Gourma Region, the Lake Chad Basin and northern **Nigeria**. Non-state armed groups (NSAGs) continued to expand their presence in **Burkina Faso** and **Mali**, triggering further population displacements and disrupting trade and agricultural activities. In **Burkina Faso**, 3.4 million people were estimated to be acutely food insecure, including 605 000 people in CH Phase 4 (Emergency) and 42 700 people in CH Phase 5 (Catastrophe) in Boucle du Mouhoun and Sahel regions, marking the highest figure of people in catastrophic conditions ever projected for the country. Humanitarian access remains severely constrained in areas besieged by NSAGs. In **Mali**, 1.3 million people faced acute food insecurity, including 76 000 people in CH Phase 4 (Emergency) and 2 500 people in CH Phase 5 (Catastrophe) in Ménaka Region. This

was the first time that the country had populations estimated to be in catastrophic conditions. Insecurity is expected to deteriorate with the withdrawal of the United Nations Multidimensional Integrated Stabilization Mission in Mali (MINUSMA) by the end of 2023. In **the Niger**, 3.3 million people were acutely food insecure, including 150 000 people in CH Phase 4 (Emergency). Food access remained constrained in the areas affected by insecurity, including Tillabéri, Tahou, Diffa and Maradi regions, where the delivery of humanitarian assistance was hampered by the sanctions following the military takeover. The sanctions also led to increases in prices of food and non-food items across the country, exacerbating the food insecurity conditions of vulnerable households. In **Chad**, 2.3 million people were acutely food insecure, including 218 000 people in CH Phase 4 (Emergency). In eastern regions, which host the majority of the 420 000 refugees that arrived in the country since the start of the armed conflict in the Sudan, acute food insecurity is deteriorating among refugees, returnees and host populations due to increasing pressure on food stocks and local livelihoods, compounded by inadequate humanitarian assistance. Furthermore, in Lac Region, which hosts 255 000 internally displaced persons (IDPs), insecurity continued to disrupt livelihoods and forced displaced persons and host households to resort to crisis adaptation strategies. In **Nigeria**, 24.8 million people were acutely food insecure, including 1.1 million people in CH Phase 4 (Emergency). Northern areas registered a spike in violence against civilians in recent months, partially driven by worsening macroeconomic conditions across the country. Humanitarian access remained significantly constrained in Borno, Adamawa and Yobe states, as well as in North-West Region.

Slow economic growth, currency depreciations and high inflation rates, particularly in **Sierra Leone**, **Ghana**, **Nigeria** and **Gambia**, are also having a negative impact on households' purchasing power and consequently constraining food access.

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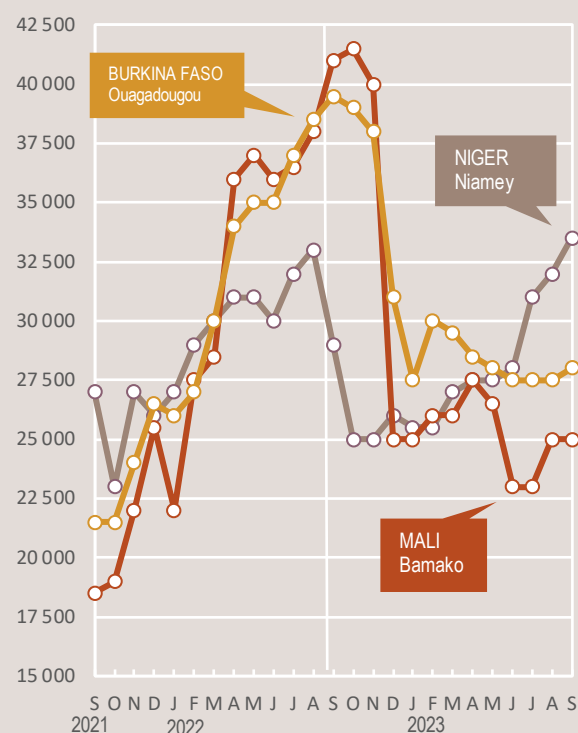
CENTRAL AFRICA

Conflicts and displacements constrain agricultural production

In **Cameroon** and **the Central African Republic**, harvesting of the 2023 millet, sorghum and maize crops is currently ongoing. Planting of the 2023 main season maize crops, to be harvested in December, finalized in the central provinces of **the Democratic Republic of the Congo**, **the Republic of the Congo** and **Gabon**.

Despite generally favourable weather conditions this cropping season, ongoing insecurity and consequent population displacements in **the Central African Republic**, eastern areas of **the Democratic Republic of the Congo** and northwest and southwest regions of **Cameroon** continue to limit farmers' access to crop-growing areas and agricultural inputs. Elevated international prices of fertilizers, largely imported, have also constrained access, particularly for smallholder farmers. The factors are expected to curb yields and reduce the area under cultivation, with negative impacts on 2023 crop production.

Prices of imported food remain high

In **Cameroon**, **the Central African Republic** and **the Democratic Republic of the Congo**, prices of imported food commodities, such as rice, wheat flour and vegetable oil, remained at high levels in the third quarter of 2023 compared to the previous year. According to the International Monetary Fund (IMF), the average annual inflation rates in 2023 are expected to increase moderately year-on-year in **Cameroon**, **the Central African Republic** and **the Republic of the Congo**. By contrast, inflation rates are forecast to decline slightly in **the Democratic Republic of the Congo** and **Gabon**.

Over 30 million people facing severe acute food insecurity

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**, about one-quarter of the aggregate population. Ongoing conflicts continue to cause population displacements and widespread disruptions to agricultural and marketing activities, a key cause underlying the high prevalence of food insecurity. In addition, households' purchasing power has been significantly reduced by the high prices of staple foods. In **the Democratic Republic of the Congo**, according to the latest Integrated Food Security Phase Classification (IPC) analysis, released in September 2023, 25.4 million people (about 25 percent of the total population) were projected to experience severe acute food insecurity (IPC Phase 3 [Crisis] or above) between July and December 2023. In **the Central African Republic**, 2.4 million people (about 45 percent of the total population) were estimated to be in IPC Phase 3 (Crisis) and above between April and August 2023. In **Cameroon**, according to the March 2023 Cadre Harmonisé (CH) analysis, about 3 million people (11 percent of the total population) were estimated to be facing severe acute food insecurity (CH Phase 3 [Crisis] and above) between June and August 2023.

Table 8. Central Africa cereal production

(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals[I]			
	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	Change: 2023/2022 (%)
Central Africa	*5.9*	*5.9*	*6.0*	*1.8*	*1.7*	*1.7*	*7.7*	*7.7*	*7.8*	*+1.6*
Cameroon	*3.5*	*3.5*	*3.5*	*0.3*	*0.3*	*0.3*	*3.8*	*3.8*	*3.8*	*+1.7*
Central African Republic	*0.1*	*0.1*	*0.1*	*0.0*	*0.1*	*0.1*	*0.2*	*0.2*	*0.2*	*+1.2*
Democratic Republic of the Congo	*2.2*	*2.2*	*2.3*	*1.4*	*1.4*	*1.4*	*3.6*	*3.6*	*3.7*	*+1.5*

Notes: Totals and percentage changes are computed from unrounded data. The five-year average refers to the 2018–2022 period.

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

EAST AFRICA

Erratic rainfall and insecurity keeps cereal production at below-average levels

In northern parts of the subregion, including **the Sudan**, **South Sudan**, the Karamoja Region in **Uganda**, **Eritrea**, **Ethiopia** and in central and western **Kenya,** production prospects of the 2023 main season cereal crops, harvested between October and December, are mixed. In **the Sudan**, the ongoing conflict has seriously affected the 2023 cropping season. In Greater Darfur and Greater Kordofan regions, insecurity impeded access to fields, resulting in reduced plantings. In the main crop producing areas in the southeast of the country, the planted area is estimated to be similar to the previous year and the average, as access to fields was mostly unimpeded owing to a better security situation. However, insufficient availability and high prices of key agricultural inputs, including fuel, seeds, fertilizers and pesticides, has curbed yield prospects. In particular, outbreaks of pests and diseases which could not be treated due to the unavailability of pesticides, resulted in significant crop losses. Seasonal rains were characterized by below-average amounts and an erratic temporal distribution, with prolonged dry spells affecting crops in most areas. According to a Rapid Assessment conducted by FAO, production of sorghum and millet is preliminarily forecast to be about 25 and 50 percent, respectively, down from the previous year. In **South Sudan**, seasonal rains have been characterized by average rainfall amounts over the western half of the country, while cumulative rainfall amounts over the eastern half were below average. The rainfall deficits were more severe in southeastern areas, causing shortfalls in crop production which affected the first season harvest. An improved security situation in several areas, combined with a significant influx of South Sudanese returnees from Uganda and the Democratic Republic of the Congo, resulted in an increase in plantings. As a result, cereal production is forecast to be similar to the average of the previous five years. By contrast, crop production is expected to be below average in the agropastoral Karamoja Region of **Uganda,** mainly due to an erratic temporal distribution of rains. In **Eritrea**, average rainfall amounts were recorded during the 2023 "Kiremti" (June–September) rainy season and, despite some dry spells, cereal production prospects are favourable. In **Ethiopia**, overall production prospects for the main "Meher" crops are favourable, as above-average rainfall amounts boosted yields in western key-growing areas of Amhara and Benishangul Gumuz regions. However, insecurity due to conflict in some areas of Amhara and Oromia regions, and insufficient rains in some central and southern areas in Oromia and former SNNP regions have likely resulted in localized shortfalls in cereal production. In key unimodal rainfall growing areas of Central, Rift Valley and Western provinces of **Kenya**, "long-rains" crops benefited from average to above-average rainfall amounts. However, the aggregate "long-rains" maize production is officially estimated at 5 to 10 percent below the five-year average, as erratic rainfall in bimodal rainfall agropastoral and marginal agriculture areas resulted in reduced harvests in these locations.

In southern parts of the subregion, planting of the 2023 second season cereal crops, for harvest between late 2023 and early 2024, has been recently concluded in bimodal rainfall areas covering most of **Uganda**, southern **South Sudan**, northeastern **United Republic of Tanzania** ("Vuli"), **Somalia** ("Deyr") and marginal and coastal agricultural areas of southeastern **Kenya** ("short-rains"). Planting operations of "2024A" season crops have been recently completed in **Rwanda** and **Burundi**. El Niño conditions, currently present and forecast to continue early next year, are likely to lead to above-average October–December rainfall amounts across the subregion, boosting yield expectations. However, given the increased risk of floods, significant crop and livestock losses may occur in localized areas.

In pastoral areas of southern **Ethiopia**, central and eastern **Somalia** and northern and eastern **Kenya**, abundant March–May rains marked the end of an exceptionally prolonged and severe drought which began in late 2020 and resulted in widespread animal deaths. The forecast above-average October-December rainfall amounts are expected to support the drought recovery, which, however, to be complete in terms of livestock numbers, would take several favourable rainy seasons due to the

Table 9. East Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Total cereals[I]			
	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	Change: 2023/2022 (%)
East Africa	*6.6*	*6.7*	*6.6*	*46.9*	*45.8*	*43.6*	*58.0*	*56.3*	*54.4*	*-3.5*
Ethiopia[II]	*5.5*	*5.8*	*5.7*	*23.1*	*22.9*	*22.5*	*28.8*	*29.0*	*28.4*	*-1.9*
Kenya	*0.3*	*0.3*	*0.3*	*3.9*	*3.3*	*3.6*	*4.4*	*3.8*	*4.1*	*+9.7*
Sudan	*0.7*	*0.5*	*0.5*	*6.6*	*7.0*	*4.9*	*7.3*	*7.5*	*5.4*	*-27.3*
Uganda	*0.0*	*0.0*	*0.0*	*3.5*	*3.1*	*3.1*	*3.8*	*3.3*	*3.4*	*+1.6*
United Republic of Tanzania	*0.1*	*0.1*	*0.1*	*7.6*	*7.2*	*7.2*	*11.2*	*10.2*	*10.4*	*+2.6*

Notes: Totals and percentage changes are computed from unrounded data. The five-year average refers to the 2018–2022 period.

[I] Total cereals include wheat, coarse grains and rice (paddy).

[II] Official production estimates for Ethiopia by the Ethiopian Statistics Service from 2020 onwards do not include Tigray Region.

magnitude of animal losses caused by the drought.

The subregion's 2023 aggregate cereal output, including production expectations for the second season, is forecast at a near-average level of 52.9 million tonnes.

## Exceptionally high coarse grain prices in the Sudan and South Sudan

In **the Sudan**, prices of main staples, sorghum and millet, surged by up to 60 percent between in April and August 2023 due to trade and market disruptions caused by the conflict, reaching new record highs. Prices were also supported by a difficult macroeconomic situation, resulting in high prices of fuel and agricultural inputs that pushed up production and transport costs. In **South Sudan**'s capital, Juba, prices of maize and sorghum increased by 15 and 20 percent between April and June 2023, as the national currency depreciated on the parallel market. Subsequently, prices remained mostly stable between June and September as the exchange rate remained firm. Prices of maize and sorghum in September were at exceptionally high levels, 27 and 12 percent, respectively, up from the already high year-earlier values, mainly due to protracted macroeconomic challenges and insufficient domestic

supplies. In **Uganda**, prices of maize declined by about 25 percent between July and August 2023 as the first season harvest increased market availabilities. Prices in August were about 20 percent below year-earlier values. Similarly, in **Kenya**, prices of maize declined by 20 to 35 percent between June and September 2023 with the "long-rains" harvest. Prices in September were 5 to 25 percent lower than year-earlier levels. Prices of maize declined by 18 percent between March and August 2023 in **the United Republic of Tanzania**, as local harvests and reduced exports due to trade restrictions increased domestic availability. However, prices remained 10 percent higher than the previous year due to a reduced production in 2023. In **Somalia**, prices of locally produced sorghum and maize remained firm in recent months as the main "Gu" harvest, completed in July, was estimated at a below-average level. On a yearly basis, prices in July were lower, in part reflecting downward pressure from food assistance programmes. In **Ethiopia**, prices of locally produced maize increased by 20 to 55 percent between January and August 2023, reaching record levels. The continuous depreciation of the national currency and consequent imported inflationary pressure is a key factor driving up prices, amplifying normal seasonal patterns.

Dire food insecurity situation in the Sudan due to the ongoing conflict

In **the Sudan**, the conflict that broke out in mid-April 2023 has severely disrupted livelihoods, paralyzed economic activities and triggered large-scale population displacements. About 20 million people, over 42 percent of the population, were estimated to require emergency food and livelihood assistance in 2023. The food security situation is not expected to improve substantially during the harvest period, between October 2023 and January 2024, as the conflict continues to hamper physical and economic access to food, reflecting market disruptions and high prices. In **Somalia**, northern and eastern **Kenya** and southern **Ethiopia**, the current dire food security situation is mainly a consequence of the prolonged drought between late 2020 and early 2023, which caused consecutive failed crop harvests and widespread livestock deaths. Favourable March to June 2023 rainy seasons marked the end of the drought and resulted in a decline of the prevalence and severity of food insecurity compared to the peaks reached in early/mid-2023. In **Somalia**, about 4.3 million people are estimated to face severe acute food insecurity between October and December 2023. This figure includes about 1 million people in IPC Phase 4 (Emergency),

Retail prices of maize and sorghum in the Sudan
(Sudanese pound/kg)
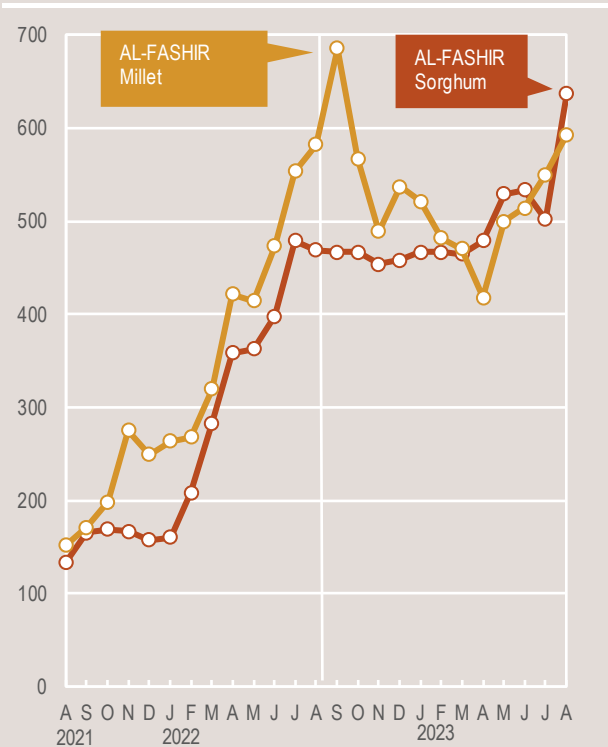
Wholesale prices of maize in selected East African markets
(Kenya shilling/tonne)   (Tanzanian shilling/tonne)
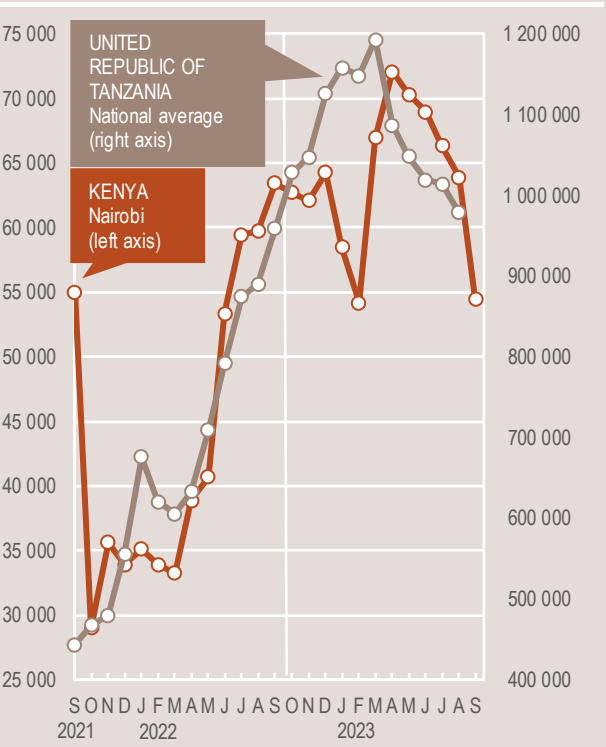
representing about 25 percent of the analysed population, compared to 33 percent in the same period in 2022. In **Kenya**, in the 23 counties classified as rural Arid and Semi-Arid Lands (ASAL), covering most of the country, about 1.5 million people are estimated to face severe acute food insecurity between October 2023 and January 2024. This figure amounts to about 10 percent of the analysed population, compared to almost 30 percent in the same period of the previous year. In **Ethiopia**, according to the 2023 Humanitarian Response Plan, released in late 2022, about 20.1 million people were estimated to face severe acute food insecurity in the first half of 2023. Currently, this figure is likely to be lower as the food security situation of the drought-affected people in southern pastoral areas has improved due to the favourable March to May rainy season. In **South Sudan**, according to the latest estimates, about 7.76 million people faced severe acute food insecurity between April and July 2023, slightly up from the same period in 2022. This figure amounted to almost two-thirds of the total population and included 2.9 million facing IPC Phase 4 (Emergency) and 43 000 people facing IPC Phase 5(Catastrophe) levels of acute food insecurity. The main drivers of the dire food insecurity situation are the protracted macroeconomic crisis, insufficient food supply, livelihood losses in areas affected by floods and episodes of intercommunal violence.

SOUTHERN AFRICA
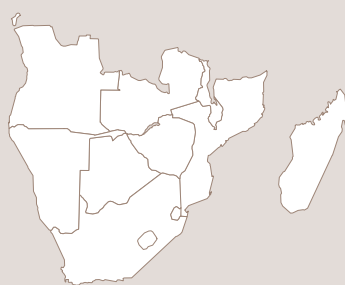
El Niño conditions underpin unfavourable 2024 production outlooks

Land preparation for the 2024 cereal crops is underway and the harvest period is expected to start next March. The prevailing El Niño climate event, normally associated with below-average rainfall amounts, is the primary factor underlying an early unfavourable production outlook. Current subregional weather forecasts point to generally hotter and drier-than-normal conditions across most areas during the entire cereal cropping cycle, from October 2023 to March 2024, raising the risk of potentially lower harvested areas and yields. However, some climate models point to an increased likelihood of above-average rainfall amounts from early 2024 in western parts of the subregion that are, however, not key arable zones.

In addition, despite the recent easing of international fertilizer prices, farmers'

access to agricultural inputs is being constrained by weak national currencies in multiple countries, which are maintaining elevated domestic prices. To help ameliorate input access, the governments of Malawi, Zambia and Zimbabwe are continuing to implement large-scale input subsidy programmes.

In consideration that rainfed agricultural systems are prevalent in the subregion and that maize, the key food staple, is particularly susceptible to drought stress compared to other cereal crops, prospects of a poor rainy season is particularly worrisome for crop production and food security in 2024. Scaling up of anticipatory actions to support farmers' productive capacities is essential to prevent significant negative effects on agriculture. Additionally, regular and updated analysis on agricultural conditions and potential harvest outcomes, particularly given the context of this season, are essential to guide policy decisions and enable early actions.

Ample cereal supply in 2023/24

Reflecting an upturn in domestic production in 2023, the subregional cereal supply is ample and import requirements are estimated at a near-average level of 8.6 million tonnes in the 2023/24 marketing year (generally April/March).

With the minor winter wheat crop almost harvested, total cereal production in the is

Table 10. Southern Africa cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	Change: 2023/2022 (%)
Southern Africa	0.0	2.9	2.8	29.6	30.8	33.1	4.7	5.2	5.3	36.7	39.0	41.2	+5.8
excl. South Africa	0.0	0.7	0.7	14.2	14.2	15.5	4.7	5.2	5.3	19.3	20.1	21.4	+6.7
Madagascar	0.0	0.0	0.0	0.2	0.2	0.2	4.1	4.6	4.8	4.3	4.8	5.0	+3.9
Malawi	0.0	0.0	0.0	3.8	3.9	3.7	0.1	0.1	0.1	3.9	4.0	3.8	-5.7
Mozambique	0.0	0.0	0.0	2.3	2.3	2.3	0.4	0.4	0.4	2.7	2.7	2.7	+1.9
South Africa	0.0	2.2	2.1	15.4	16.6	17.6	0.0	0.0	0.0	17.4	18.9	19.8	+4.8
Zambia	0.0	0.3	0.3	2.9	2.7	3.3	0.0	0.1	0.1	3.1	3.1	3.7	+20.1
Zimbabwe	0.0	0.4	0.3	1.8	1.8	2.6	0.0	0.0	0.0	2.0	2.2	2.9	+35.5

Notes: Totals and percentage changes are computed from unrounded data. The five-year average refers to the 2018–2022 period.

estimated at 41.2 million tonnes in 2023, about 12 percent above the previous five-year average. The good output reflects generally beneficial weather conditions, but periods of rainfall deficits and tropical cyclones resulted in localized shortfalls in several areas. In **South Africa**, the leading producer, cereal production in 2023 is estimated at 19.8 million tonnes, the second largest output on record. Zambia also registered a bumper output, estimated at 3.7 million tonnes, 11 percent above the five-year average, driven by a sizeable expansion in plantings. In **Zimbabwe**, official production estimates indicate that the country harvested about 3 million tonnes of cereals, while near-average cereal harvests were estimated in **Malawi** and **Mozambique**, where cyclones and rainfall deficits caused extensive crop damage. Dry weather conditions late in the season in **Angola** and **Namibia** kept production levels unchanged year-on-year but cereal harvests were nevertheless above the five-year averages.

Cereal imports in the subregion mostly comprise of wheat, rice and maize, in order of magnitude. Wheat is mainly sourced from countries outside of the subregion and, although prices have fallen on the international market in 2023, currency weakness across most countries is propping up high import costs. Rice imports largely originate from Asia and, unlike wheat, global prices have risen steeply in 2023, which along with the effects of depreciated currencies could slow down the import pace. Maize imports are expected to be sourced mainly from within the subregion, principally from **South Africa**, where exports are forecast at an above-average level of 3.6 million tonnes in 2023/24, with about one-fifth destined for neighbouring countries, whilst the bulk of the remaining amount is anticipated to be shipped to East Asian countries.

Prices of maize hit record highs

Prices of maize reached record levels in **Malawi** and **Zambia** in September, as currency weakness continued to support rapid price growth. Reduced domestic supply in Malawi and strong export demand for Zambian maize have also contributed to the price spikes in 2023. In **Zimbabwe**, following a short period of disinflation, food price rises quickened in September, pushing the inflation rate to 23 percent, amid a moderate depreciation of the national currency. Prices of maize meal, the key national food staple, were more than four times higher in September compared to the year-earlier values. In **Angola**, the headline and food inflation rates increased between June and September, reflecting the effects of a steep loss of value of the national currency and the removal of fuel subsidies that have contributed to increasing production and distribution costs. A more stable currency in recent months and a cut in the Value added tax (VAT) in August on many basic food items, may ease upward pressure on prices in the last quarter of 2023. In **South Africa**, following two months of declines, wholesale prices of maize grain increased moderately in September, though were still 18 percent lower on a yearly basis, fundamentally reflecting a good domestic supply situation. At the retail level, the annual food inflation rate decelerated to 8 percent in August, from nearly 10 percent in July. In the net importing countries of **Botswana**, **Eswatini**, **Lesotho** and **Namibia**, retail prices of maize meal have generally declined in the July–August period, mirroring earlier falling prices in South Africa, the main source of cereals for these countries.

Acute food insecurity could intensify with El Niño

Food insecurity assessments have not been completed in all countries that would allow for an aggregated subregional perspective. However, in **Malawi** and **Namibia**, acute food insecurity conditions have worsened notably compared to the previous year, with the number of food insecure people (IPC Phase 3 [Crisis] levels and above) increasing to 4.4 million (15 percent higher) and 0.7 million (78 percent higher), respectively. These increases are largely attributed to localized shortfalls in production and high inflation rates. In **Lesotho** and **Eswatini**, small increases in acute food insecurity levels were projected in 2023/24, due to the high cost of living, whilst persistent double-digit inflation rates and weak economic growth are key factors driving food insecurity in **Zimbabwe**, where an estimated 3.5 million people are in need of urgent humanitarian assistance.

Looking further ahead, the anticipated adverse effects of El Niño pose a heightened risk for food insecurity. Concerns mostly relate to the poor production outlook, and the potential ramifications that reduced harvests would have on food availability, as well as food access due to losses of income for rural households. In addition, production downturns could trigger supply-related price spikes across the subregion and curb import availabilities, particularly if production declined in **South Africa**.

Maize grain prices in selected Southern African markets

(Zambian kwacha/kg)   (Malawi kwacha/kg)

REGIONAL REVIEWS
ASIA

SOUTH CAUCASUS AND CENTRAL ASIA
Wheat (winter season): Planting

Note: Situation as of October 2023
▬ ▬ Subregional borders
▭ ▭ Territories/boundaries**

FAR EAST ASIA
China (mainland)
Rice (late double season): Harvesting
Wheat (winter season): Planting

Southeastern Far East Asia
Maize and rice (secondary season): Planting
Rice (main season): Harvesting

NEAR EAST ASIA
Coarse grains (winter season): Planting to establishment

FAR EAST ASIA
Southern Far East Asia
Coarse grains: Harvesting
Rice (main season): Harvesting
India
Coarse grains and rice (Kharif season): Harvesting
Maize and wheat (Rabi season): Planting

Countries with unfavourable cereal production prospects in 2023*

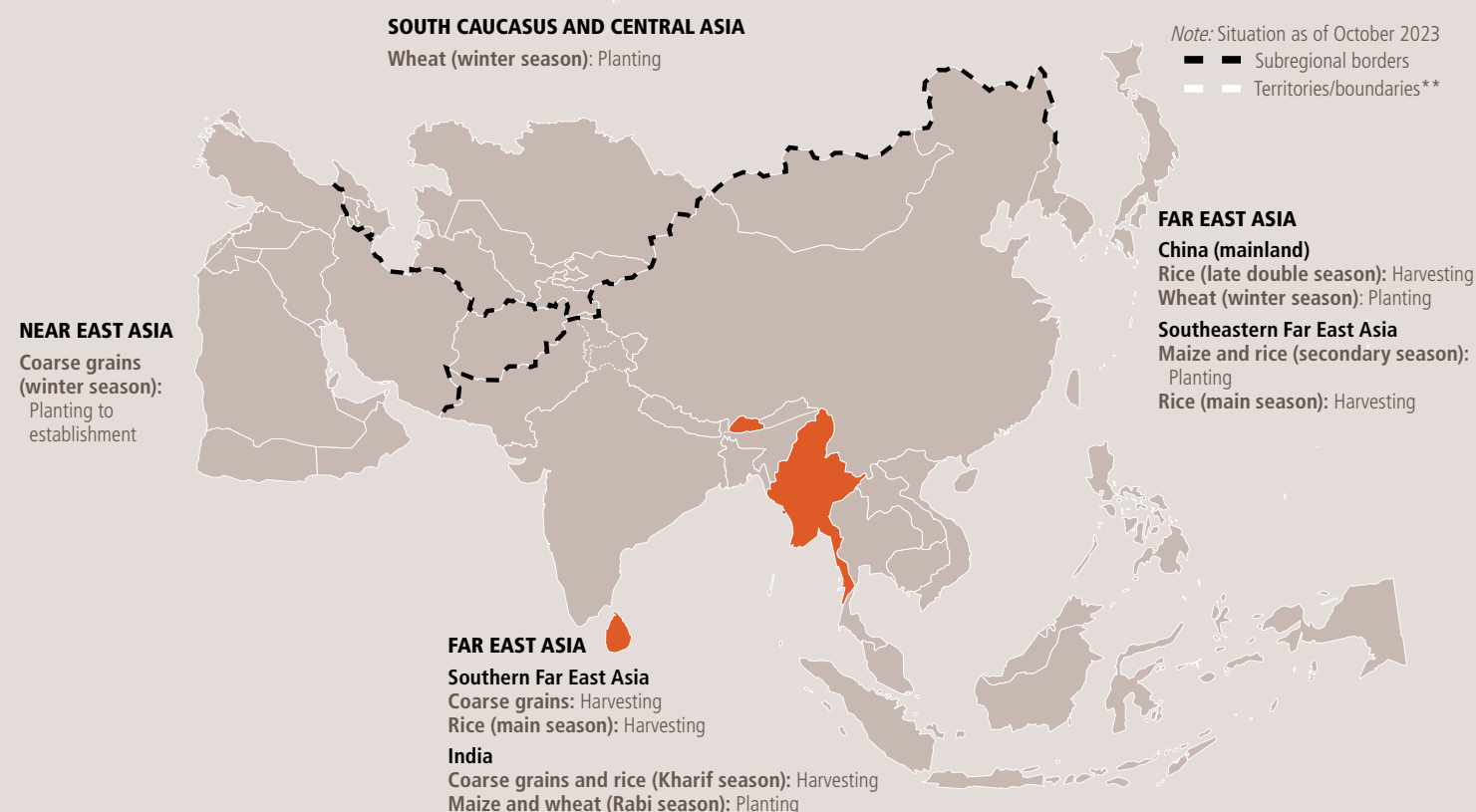**Bhutan:** limited availability of agricultural inputs and localized unfavourable weather conditions

Myanmar: limited availability of agricultural inputs and localized unfavourable weather conditions

Sri Lanka: limited availability of agricultural inputs and localized unfavourable weather conditions

*/** 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. 3*. Cited 3 November 2023, modified to comply with the United Nations map No. 4140 Rev. 4, 2011.

Production Overview

Total regional cereal production (rice in paddy terms) is pegged at a well above-average level of 1 502 million tonnes in 2023. This forecast is largely driven by sizeable production upturns in Far East Asia, mostly concentrated in the leading producers China (mainland) and India, reflecting area increases. Following widespread rainfall deficits in the previous year, weather conditions were generally favourable across the Near East in 2023 and most countries are forecast to attain above-average harvests, notably in the Syrian Arab Republic, where production more than doubled in 2023. In Central Asia, except in Kazakhstan, where dry weather conditions dragged down yields and consequently production, conducive weather conditions supported near to above-average cereal harvests. Planting of the 2024 wheat crops has started, and preliminary data points to an increase in plantings in the main producing countries namely China (mainland), India and Pakistan.

Cereal production
(million tonnes)

FAR EAST (left axis)

NEAR EAST (right axis)

CIS IN ASIA (right axis)
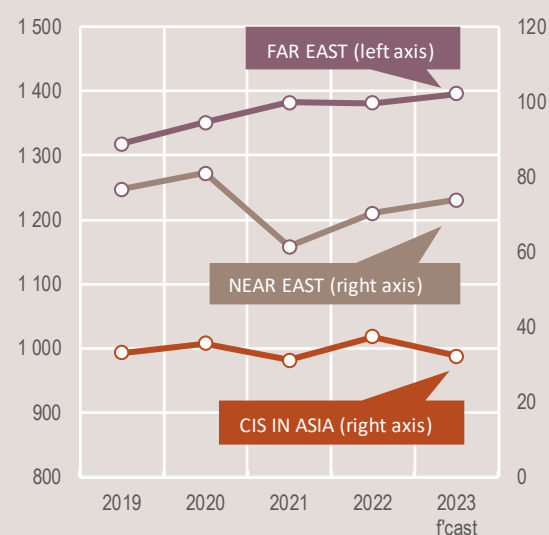
FAR EAST

Area planted with 2024 wheat crop forecast to increase

Planting of the mostly irrigated 2024 winter wheat crop, to be harvested between March and June 2024, is ongoing under generally adequate soil moisture conditions. In **China (mainland)**, the area planted with wheat is expected to increase slightly from last year's near-average level, underpinned by strong domestic demand in part reflecting the recovery in economic activities. In **India**, wheat sowings are forecast to surpass last year's high level, driven by high domestic prices and a year-on-year increase in the Minimum Support Price. Adequate water availability for irrigation is also supporting favourable yield prospects. In **Pakistan**, the area planted with wheat is forecast at a level well above the five-year average, driven by record prices, while good supplies of quality seeds, fertilizers and herbicides augurs well for yields.

Cereal output in 2023 forecast at an above-average level

With harvesting of secondary crops still to be completed, the 2023 subregional aggregate cereal output is forecast at an above-average level of 1 396 million tonnes (rice in paddy equivalent). The expected large outturn reflects an increase in plantings that is seen to offset lower yields in some countries following an erratic distribution of the June to September monsoon rains.

Production of paddy, the major staple in the subregion, is forecast at an above-average level of 701 million tonnes, reflecting expectations of large outputs in **Bangladesh**, **Cambodia**, **India**, **the Lao People's Democratic Republic**, **Pakistan** and **Thailand**. In **Viet Nam**, **Malaysia** and **the Philippines**, paddy production is forecast at near-average levels, while below-average outputs are expected in **Bhutan**, **China (mainland)**, **Indonesia** **Japan**, **Myanmar**, **Nepal** and **Sri Lanka**.

Production of coarse grains, mostly maize, is forecast at 413.2 million tonnes, 6 percent above the five-year average, mainly reflecting large plantings due to strong demand by the feed industry. Bumper maize outputs are forecast in the subregion's main producers, including **Bangladesh**, **China (mainland), India**, **Pakistan** and **the Philippines**. By contrast, a below-average output is expected in **Viet Nam,** owing to low sowings as

farmers preferred to grow more profitable vegetables and cash crops, and in **Cambodia, Nepal** and **the Lao People's Democratic Republic** where dry weather conditions affected yields.

The 2023 wheat harvest was completed in June and based on official data, the output is estimated at an above-average level of 282 million tonnes.

Consistent with the prevailing El Niño event, weather forecasts indicate a high likelihood of below-average precipitation amounts between November 2023 and March 2024 in several countries of the subregion, including in parts of **Indonesia**, **the Philippines**, **Timor-Leste** and **Sri Lanka**. If this forecast materializes, production from the 2023 secondary season crops in the northern hemisphere countries may be affected.

Cereal exports forecast above the five-year average in 2023/24

In the 2023/24 marketing year, subregional cereal exports are forecast at 55.4 million tonnes (rice in milled terms), 6 percent above the five-year average. Most of this quantity is rice, forecast in the 2024 calendar year at 45.4 million tonnes, as an expected increase in exports from **Thailand, Pakistan, Myanmar, Cambodia** is seen to mostly compensate for reduced shipments by **Viet Nam** and especially **India**, the latter following the implementation of several rice export restrictions since September 2022. Increase

Table 11. Far East cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	Change: 2023/2022 (%)
Far East	271.0	276.6	282.0	388.7	405.9	413.2	689.4	698.9	700.9	1 349.0	1 381.4	1 396.1	+1.1
Bangladesh	1.1	1.2	1.2	3.9	4.5	4.5	56.0	57.8	58.5	61.0	63.4	64.2	+1.2
Cambodia	0.0	0.0	0.0	0.9	0.7	0.8	11.3	11.6	12.8	12.2	12.3	13.6	+10.3
China (mainland)	134.8	137.7	136.5	276.1	287.5	295.5	211.0	208.5	208.9	621.9	633.7	640.9	+1.1
India	105.7	107.7	112.7	49.4	53.2	53.1	186.6	199.1	198.0	341.7	360.1	363.8	+1.0
Japan	1.0	1.0	1.1	0.2	0.2	0.2	10.5	10.4	10.3	11.7	11.6	11.6	-0.1
Myanmar	0.1	0.1	0.1	2.4	2.4	2.4	26.6	24.7	25.9	29.2	27.2	28.5	+4.7
Nepal	2.1	2.1	2.1	3.3	3.4	3.2	5.5	5.5	5.3	10.8	11.0	10.6	-4.0
Pakistan	25.7	26.2	27.6	9.2	10.7	10.7	11.9	11.0	13.0	46.7	47.8	51.3	+7.2
Philippines	0.0	0.0	0.0	8.1	8.3	8.2	19.4	20.1	19.6	27.5	28.4	27.8	-2.0
Republic of Korea	0.0	0.0	0.1	0.2	0.2	0.2	5.0	5.0	4.9	5.3	5.2	5.2	-1.5
Sri Lanka	0.0	0.0	0.0	0.3	0.2	0.3	4.4	3.4	4.0	4.7	3.6	4.3	+20.4
Thailand	0.0	0.0	0.0	4.9	5.1	4.9	32.0	34.4	33.4	36.9	39.4	38.3	-2.7
Viet Nam	0.0	0.0	0.0	4.6	4.4	4.3	43.4	42.7	43.1	48.0	47.1	47.4	+0.6

Notes: Totals and percentage changes are computed from unrounded data. The five-year average refers to the 2018–2022 period.

compared with average exports of maize are usually limited, and in 2023/24 they are expected to increase due to robust export demand. Wheat shipments in 2023/24 are forecast at well below average, reflecting reduced export prospects in **India**, the leading exporter in the subregion, following restrictions on wheat exports since May 2022.

The total subregional cereal import requirement in the 2023/24 marketing year is forecast at 167.5 million tonnes, almost 7.3 percent above the five-year average, due to strong demand for coarse grains by the feed industry. Rice imports in calendar year 2024 are forecast to decrease year on year. Wheat imports are forecast near the five-year average.

Domestic rice prices significantly above year-earlier levels in most countries

Domestic retail prices of rice, the subregions main staple food, increased in most countries of the subregion and, last September, they were significantly up year on year. In **Thailand** and **Viet Nam**, the main exporting counties, rice prices last September were between 40 and 50 percent above their year-earlier levels, on expectations of strong international demand from reduced exports from India. In **Myanmar**, "Emata" rice, a widely consumed variety, increased gradually since early 2022 and reached record levels in September, driven by tight market

Wheat flour retail prices in selected Far East countries

(Sri Lanka rupee/kg)   (Indian rupee/kg)
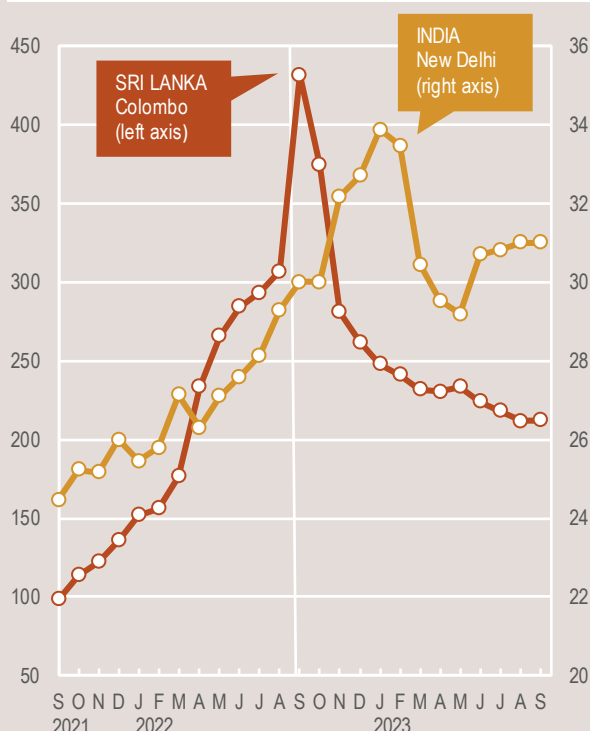
Rice retail prices in selected Far East countries

(Philippine peso/kg)   (Indian rupee/kg)
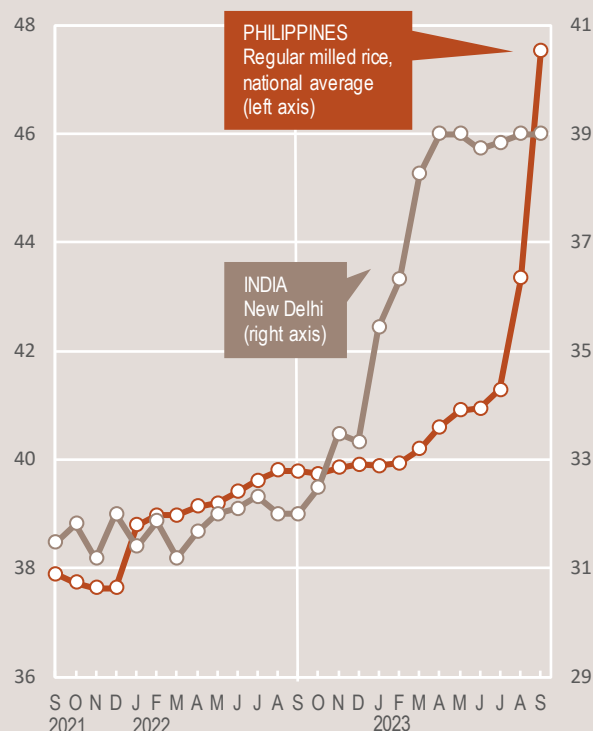
Table 12. Far East cereal production and anticipated trade in 2023/24

(thousand tonnes)

	5-year average (2018/19 to 2022/23)	2022/23	2023/24	Change: 2023/24 over 2022/23 (%)	Change: 2023/24 over 5-year average (%)
Coarse grains					
Exports	5 522	6 589	6 436	-2.3	+16.6
Imports	85 628	83 979	90 704	+8.0	+5.9
Production	388 694	405 943	413 244	+1.8	+6.3
Rice (millled)					
Exports	41 296	45 836	45 380	-1.0	+9.9
Imports	15 295	17 957	17 348	-3.4	+13.4
Production	455 015	465 485	466 728	+0.3	+2.6
Wheat					
Exports	4 868	6 832	2 879	-57.9	-40.9
Imports	55 542	58 090	57 568	-0.9	+3.6
Production	270 976	276 558	281 971	+2.0	+4.1

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

availabilities and conflict-related market disruptions. In **Sri Lanka**, following decreases between July 2022 and July 2023, rice prices increased by more than 10 percent month-on-month in September, on reduced market availability owing to a below-average 2023 output. Between July and September 2023, retail prices of wheat flour were stable or increased marginally in **India** and, in September, were well above their year-earlier levels, after strong increases in 2022, driven by robust international demand and reduced domestic stocks. In **Pakistan**, prices of wheat flour, a key staple food, declined slightly between July and September 2023, due to the increasing market availability from the 2023 above-average harvest, but prices were still about 70 percent higher year on year in September, mostly reflecting high agricultural input costs and inflationary pressure.

Wheat flour retail prices in selected Far East countries

(Pakistan rupee/kg)   (Taka/kg)
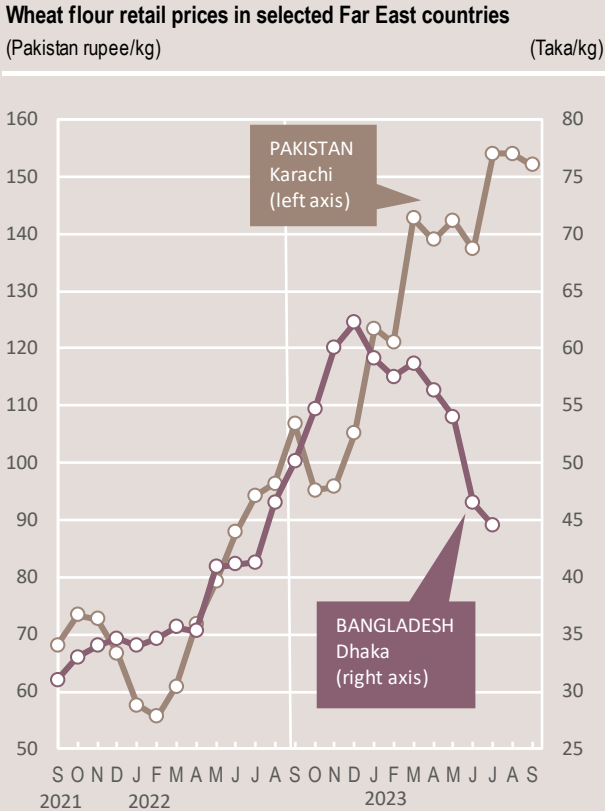
Large number of people remain food insecure in several countries

High food prices and reduced incomes, due to economic downturns, have diminished the purchasing power of vulnerable households, limiting their access to food. This is the fundamental driver of acute food insecurity in several countries of the subregion. In **Pakistan**, according to the latest IPC analysis, the number of people facing high levels of acute food insecurity (IPC Phase 3 [Crisis] and above) between November 2023 and January 2024 is projected at 11.8 million, compared to 10.5 million people in the April to October 2023 period. In **Timor-Leste**, the latest IPC projection indicates that 262 000 people (40 percent of the total population) faced high levels of acute food insecurity from May to September 2023. In consideration of the poor 2024 production outlook, on account of unfavourable weather forecasts and, if high rice prices persist, acute food insecurity could worsen further during the November 2023 to February 2024 lean period. In **Myanmar**, an increase in the intensity of the conflict since mid-2022 and record high food prices have caused a severe deterioration of the local food security situation. As of October 2023, the conflict has caused the internal displacement of about 2 million people, who almost entirely rely on humanitarian aid. In **Bangladesh**, the IPC estimates indicate that 11.9 million people faced high levels of acute food insecurity (IPC Phase 3 [Crisis] and above) from May to September 2023, up from 8.9 million estimated in the March to April 2023 period. In addition, about 1 million Rohingya refugees from Myanmar, who reside mostly in Cox's Bazar District, are highly dependent on humanitarian assistance. In **the Democratic People's Republic of Korea**, the food security situation is expected to remain fragile.

NEAR EAST

Sowing of winter cereal crop ongoing

Sowing of the 2024 winter wheat and coarse grains crops is currently underway and, depending on location and soil moisture conditions, it will continue until next January. Early season dryness affected crop planting operations in parts of western **Türkiye**, and ample precipitation is needed in the following months to erase moisture deficits. Elsewhere, seasonal rainfall amounts were relatively favourable for winter grain planting and establishment.

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, which is expected to have a negative impact on the extent of the area planted and yields.

Above-average 2023 cereal production lowers cereal import requirement

The 2023 total subregional cereal production is estimated at 73.9 million tonnes, about 5 percent above the previous year's average harvest.

Compared to the previous year, production recovered in 2023 in all major producing countries on account of more favourable weather conditions. The largest year-on-year increases were recorded in **the Syrian Arab Republic** and **Iraq**. In **the Syrian Arab Republic**, cereal production more than doubled to 3.4 million tonnes from the drought-stricken 2022 harvest and it was about 20 percent above average. An increase in production of over 70 percent in **Iraq** to an estimated 5.5 million tonnes (close to the five-year average) is attributed to better rainfall amounts and distribution, coupled with an increased use of irrigation with underground water resources in a quest to reduce wheat import requirements. Year-on-year changes in the production in other countries in the subregion were more contained.

The subregional cereal import requirement in the 2023/24 marketing year (July/June) is forecast at 74.7 million tonnes, about 3 percent below the five-year average and 7 percent below the previous year's level, reflecting improved domestic harvests in 2023. The wheat import requirement is forecast at 34.2 million tonnes, about 2 percent below the average and 14 percent below the previous year's imports.

Large number of people remain acutely food insecure

Lingering conflicts, elevated international commodity prices, particularly for rice and sugar, economic downturns and reduced livelihood opportunities continue to have a significant impact on acute food insecurity levels in many countries of the subregion.

In **Afghanistan,** according to the latest IPC analysis, approximately 15.3 million people

(35 percent of the population analysed) were projected to face severe acute food insecurity (IPC Phase 3 [Crisis] and above) between May and October 2023, including about 2.8 million people in IPC Phase 4 (Emergency). Although the earthquakes that occurred in the western part of the country in October 2023 did not have a significant impact on aggregate agricultural production, local livelihoods have been adversely affected by material damages, including losses of agricultural assets.

In **Yemen,** nearly 17 million people, over half of the national population, were classified in IPC Phase 3 (Crisis) or worse between October and December 2022. There are major concerns for 6.1 million people classified in IPC Phase 4 (Emergency) and about 4.3 million people who were internally displaced as a result of the conflict. In 2023, a partial IPC analysis was conducted in areas controlled by the Government of the Republic of Yemen and it indicated that approximately 25 percent of the population that are facing acute food insecurity are located in these areas, illustrating the persisting dire conditions.

In **the Syrian Arab Republic,** according to the latest available analysis based on the World Food Programme's (WFP) Consolidated Approach for Reporting Indicators (CARI), about 12.1 million people were estimated to be acutely food insecure (55 percent of the total population) between August and October 2022.

In **Lebanon,** according to the latest IPC analysis, about 2.3 million people (42 percent of the population analysed), including 1.5 million Lebanese residents and 800 000 Syrian refugees, were

Table 13. Near East cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	Change: 2023/2022 (%)
Near East	*43.2*	*41.4*	*45.4*	*22.1*	*23.8*	*23.6*	*5.6*	*5.1*	*4.9*	*70.9*	*70.3*	*73.9*	*+5.1*
Afghanistan	*4.3*	*3.8*	*4.0*	*0.3*	*0.3*	*0.3*	*0.6*	*0.6*	*0.6*	*5.2*	*4.7*	*4.9*	*+3.1*
Iran (Islamic Republic of)	*13.2*	*13.0*	*13.5*	*3.8*	*4.1*	*4.1*	*3.7*	*3.5*	*3.5*	*20.8*	*20.6*	*21.1*	*+2.4*
Iraq	*4.0*	*2.8*	*4.3*	*1.1*	*0.4*	*1.2*	*0.0*	*0.0*	*0.0*	*5.4*	*3.2*	*5.5*	*+71.4*
Türkiye	*19.4*	*19.8*	*20.5*	*14.9*	*17.7*	*16.0*	*1.0*	*1.0*	*0.9*	*35.2*	*38.4*	*37.4*	*-2.8*

Notes: Totals and percentage changes are\ computed from unrounded data. The five-year average refers to the 2018–2022 period.

projected to face IPC Phase 3 (Crisis) or worse conditions, including 354 000 in IPC Phase 4 (Emergency), between January and April 2023. The situation is mainly due to the multifaceted crisis that the country is facing and it is likely to worsen due to the spillover effects from the conflict in Israel and Palestine.

In **Palestine**, according to the 2023 Humanitarian Needs Overview (HNO), a total of 1.5 million people (28 percent of the population) were estimated to be in acute food insecurity and needing immediate assistance between May and July 2022: 1.2 million people in the Gaza Strip and 353 000 people in the West Bank. This equated to 53 percent of Gaza's population and 11 percent of the population of the West Bank. The escalation of the conflict in October 2023 is likely to increase humanitarian and emergency assistance needs, while access to the affected areas remains a concern.

SOUTH CAUCASUS AND CENTRAL ASIA

Unfavourable weather conditions may affect 2024 winter cereal crops

Planting of the 2024 winter cereal crops, mainly wheat, to be harvested from June next year, started in October 2023. At the aggregate subregional level, early indications point to an area planted similar to the five-year average. Following drier-than-average weather conditions in September 2023, adequate rainfall amounts in the coming months are needed for proper

crop establishment and development as well as to replenish water reservoirs for irrigation in summer months (June to September). However, according to prevailing weather forecasts, there is a high likelihood of below-average cumulative precipitation levels in the subregion which may affect 2024 cereal production.

Wheat production estimated at near-average levels in 2023

Regarding the 2023 cropping season, harvesting of the winter cereals finalized in August, while harvesting of the spring crops was completed in October. Total subregional cereal production is estimated at a near-average level of about 32 million tonnes in 2023. The wheat output, accounting for about 70 percent of the total cereal production, is estimated at an above-average level of 22.4 million tonnes. In **Kazakhstan**, the leading cereal producer in the subregion, wheat production is forecast

Table 14. South Caucasus and Central Asia cereal production

(million tonnes)

	Wheat			Coarse grains			Total cereals[I]			
	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	Change: 2023/2022 (%)
South Caucasus and Central Asia	24.3	27.4	22.4	8.9	8.9	8.6	34.2	37.3	32.2	-13.6
Armenia	0.1	0.1	0.1	0.1	0.1	0.1	0.2	0.2	0.2	+1.1
Azerbaijan	2.0	1.9	2.0	1.3	1.3	1.4	3.3	3.2	3.4	+8.7
Georgia	0.1	0.2	0.1	0.3	0.2	0.3	0.4	0.4	0.4	+16.3
Kazakhstan	13.6	16.4	11.2	4.8	4.6	4.4	18.9	21.5	16.1	-24.9
Kyrgyzstan	0.6	0.6	0.5	1.2	1.3	1.2	1.8	1.9	1.7	-10.0
Tajikistan	0.8	0.8	1.1	0.4	0.4	0.3	1.3	1.3	1.5	+9.2
Turkmenistan	1.2	1.1	1.1	0.1	0.1	0.1	1.3	1.2	1.2	-0.1
Uzbekistan	6.0	6.3	6.3	0.8	0.9	0.9	7.1	7.6	7.6	+0.0

Notes: Totals and percentage changes are computed from unrounded data. The five-year average refers to the 2018–2022 period.

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

at a near-average level of 11.2 million tonnes. Close-to-average wheat outputs are also estimated in **Armenia**, **Georgia**, **Kyrgyzstan** and **Uzbekistan**. In **Tajikistan**, according to the preliminary results of the 2023 FAO/WFP Crop and Food Security Assessment Mission (CFSAM), wheat production in 2023 is pegged at 1.05 million tonnes, mostly due to favourable rainfall and irrigation conditions, while agricultural inputs, particularly fertilizers, were more accessible to farmers owing to lower prices on local markets. The aggregate subregional production of barley and maize are near the five-year average, with an estimated output of 5 million and 3 million tonnes, respectively.

## Cereal exports forecast at above-average levels in 2023/24

In the 2023/24 marketing year (July/June), subregional cereal exports are forecast at 10.1 million tonnes, slightly above the five-year average. Wheat shipments are projected at a near-average level of 9.4 million tonnes, while barley exports are anticipated at 600 000 tonnes, well below the previous five-year average on account of low export expectations from **Kazakhstan**, the leading exporter in the subregion. Total subregional import requirements of cereals, mainly wheat, are forecast at a below-average level of 8.7 million tonnes, as a consequence of an upturn in domestic production in 2023.

Domestic prices of wheat flour decreased

In **Kazakhstan**, average retail prices of wheat flour declined slightly from February to August 2023, with the arrival of new season crops. Domestic retail prices of wheat flour decreased moderately in **Armenia**, **Georgia** and **Tajikistan** from April to August 2023, due to improved market availability from the ongoing harvest. In **Kyrgyzstan** and **Azerbaijan**, wheat flour prices increased slightly between April and September 2023, but on a yearly basis were stable.

Retail wheat flour prices in selected South Caucasus and Central Asia countries
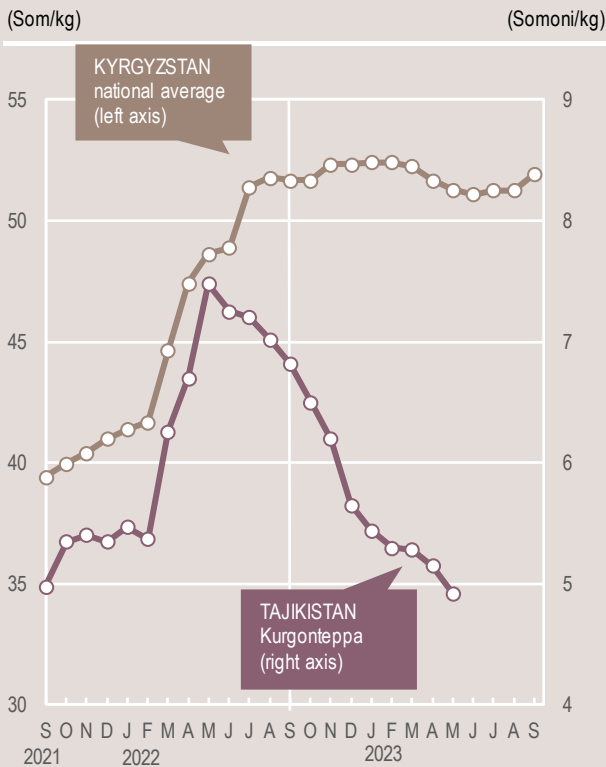
Retail wheat flour prices in selected South Caucasus and Central Asia countries
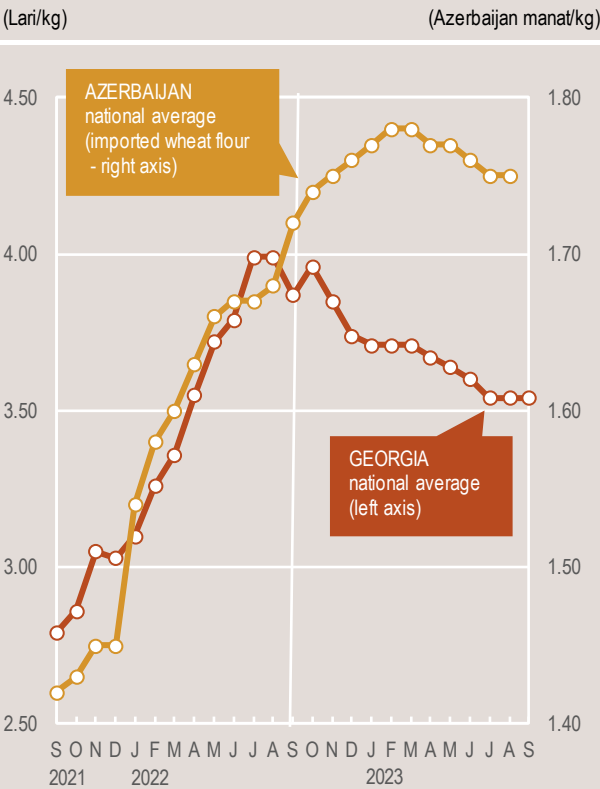
REGIONAL REVIEWS
LATIN AMERICA AND THE CARIBBEAN

Note: Situation as of October 2023

▬ ▬ Subregional borders

▬ ▬ Territories/boundaries**

CENTRAL AMERICA AND THE CARIBBEAN

Mexico
Maize and rice (summer season): Harvesting
Wheat (winter season): Planting

Central America
Maize (second season): Harvesting

SOUTH AMERICA

Brazil, Argentina
Coarse grains: Planting
Wheat (winter season): Harvesting

Countries with unfavourable cereal production prospects in 2023*

Argentina: drought conditions

Haiti: contraction in area sown and adverse weather conditions

** 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. 3*. Cited 3 November 2023, modified to comply with the United Nations map No. 4170 Rev. 19, 2022.

Production Overview

Total cereal production in Latin America and the Caribbean is forecast at an all-time high of 300.2 million tonnes (rice in paddy terms) in 2023. This large output principally reflects a record maize outturn in Brazil, underpinned by a substantial increase in maize plantings, as well as high yields. The bumper Brazilian output more than compensated for below-average harvests elsewhere in South America due to prolonged dry spells, especially in Argentina where drought conditions are expected to result in a 15 percent decrease in cereal production compared to the five-year average. In Central America, aggregate cereal production is expected to be slightly below the average in 2023, primarily driven by El Niño-associated rainfall deficits.

Cereal production
(million tonnes)

SOUTH AMERICA

CENTRAL AMERICA & CARIBBEAN

2019   2020   2021   2022   2023
f'cast
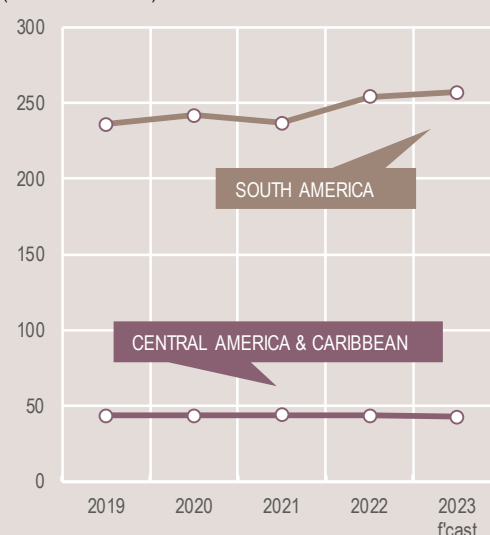
CENTRAL AMERICA AND THE CARIBBEAN

Wheat production anticipated at an above-average level in 2023

In **Mexico**, harvesting of the 2023 minor wheat crop, which accounts for about 5 percent of the annual output, is ongoing and production is forecast at a below-average level, reflecting a decline in sowings due to dry weather conditions at planting time. In total, subregional wheat production is forecast at 3.5 million tonnes in 2023, about 8 percent above the five-year average, due to excellent yields of the earlier-harvested main season crop.

Slightly below-average maize output expected in 2023

In **Mexico**, harvesting of the 2023 main season maize crop started in November and production is forecast to be below the five-year average, as rainfall deficits since June negatively affected the extent of sowings as well as caused crop losses in central and northern producing areas. In addition, strong winds and torrential precipitation brought by Hurricane Otis caused crop losses in localized areas in the major maize producing states of Guerrero where it made landfall on 25 October. Aggregate maize production in 2023, including an above-average minor

season crop harvested between May and July, is expected at 26.8 million tonnes, slightly below the five-year average.

Elsewhere in the subregion, harvesting of the 2023 main season maize crop was completed in October, later than usual. In **Guatemala**, below-average rainfall amounts at the beginning of the season and subsequent torrential rains caused crop losses in areas predominantly cultivated by subsistence farmers. According to official estimates, about 6.5 percent of the total area planted with maize was affected as of mid-October 2023. In the Dry Corridor of **El Salvador** and **Nicaragua**, below-average yields were attained due to low precipitation amounts and above-average temperatures, conditions typically associated with the El Niño phenomenon, while conditions were generally favourable in **Honduras**, except in the northern minor producing areas. The 2023 minor season maize crop, which was planted with some delay due to soil moisture deficits in some areas, is currently at flowering and grain-filling stages. Reflecting below-average rainfall amounts between August and mid-October, coupled with persistent above-average temperatures, satellite imagery as of mid-October indicated below-average vegetation conditions in localized cropland areas in northern regions of both **Guatemala** and **Nicaragua**. In aggregate, excluding Mexico, maize production is expected at a slightly below-average level of 4.3 million tonnes in 2023.

In **Haiti**, harvesting of the 2023 second minor maize and paddy crops is ongoing, and production is expected to at a

below-average level, on account of the reduced availability of seeds, in part caused by low harvests from the main season. For the third minor maize crop, average rainfall amounts are forecast between December 2023 and February 2024, and are expected to provide conducive cropping conditions. However, high production costs are likely to continue to curb acreages. In total, national cereal production in 2023 is forecast at a below-average level, reflecting both reduced plantings and low yields. In **the Dominican Republic**, with the 2023 paddy harvest nearing completion, a slightly above-average output is expected, as excellent yields that were obtained in the first half of the year more than offset a contraction in plantings of the second season crop.

Cereal imports forecast at above-average levels in 2023/24

Triggered by high international prices, cereal imports declined in the 2022/23 marketing year, halting the upward trend of the preceding years. However, in the 2023/24 marketing year (September/August), imports are forecast to resume the long-term increasing trend, supported by high demand of yellow maize by the feed industry and of wheat for human consumption.

Prices of red beans well above year-earlier values

Wholesale prices of red beans decreased in August and September 2023 in **El Salvador**, **Honduras** and **Nicaragua**, amid a seasonal uptick in market supplies with the minor season harvest. However, prices were still well above their year-earlier levels in September, reflecting high

Table 15. Central America and the Caribbean cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	Change: 2023/2022 (%)
Central America and the Caribbean	3.2	3.6	3.5	37.5	37.1	36.8	2.8	2.7	2.7	43.6	43.5	42.9	-1.4
El Salvador	0.0	0.0	0.0	0.9	0.9	0.9	0.0	0.0	0.0	0.9	1.0	0.9	-1.7
Guatemala	0.0	0.0	0.0	2.0	2.0	1.9	0.0	0.0	0.0	2.0	2.0	1.9	-3.7
Honduras	0.0	0.0	0.0	0.7	0.7	0.6	0.0	0.0	0.0	0.7	0.7	0.7	-6.0
Mexico	3.2	3.6	3.5	32.8	32.4	32.2	0.3	0.2	0.2	36.3	36.3	35.9	-1.0
Nicaragua	0.0	0.0	0.0	0.4	0.4	0.4	0.4	0.4	0.4	0.8	0.9	0.9	-1.0

Notes: Totals and percentage changes are computed from unrounded data. The five-year average refers to the 2018–2022 period.

quotations of Nicaraguan beans, the main supplier in the subregion, and concerns about crop yields due to dryness. Prices of black beans strengthened between June and September 2023 in **Guatemala**, amid a delayed start of the minor season harvest. In **Mexico**, prices rose in August and September 2023 in most markets and were up from a year earlier due to low production in 2022 and early 2023. Prices of white maize increased between June and September in **Nicaragua**, reaching levels that were 40 percent higher year-on-year, while they started to decline seasonally in August in **Guatemala** and **Honduras**, and in September in **El Salvador**. In **Haiti**, retail prices of domestically produced maize meal and black beans declined seasonally in July and

August 2023, but remained well above their year-earlier levels. An appreciation of the Haitian gourde triggered declines in prices of imported food items, such as rice, vegetable oil and wheat flour, between May and August.

## Acute food insecurity situation remains dire

According to the latest Integrated Food Security Phase Classification (IPC) analysis, the number of acutely food insecure people requiring urgent humanitarian assistance between September 2023 and February 2024 is estimated at 3.1 million in **Guatemala**, marginally down compared to the previous year. In **Guatemala**, **El Salvador**, **Honduras** and **Nicaragua**, WFP estimates that the

food security and nutrition situation of about 1.6 million people are likely to be affected by drought conditions associated with the El Niño phenomenon. In **Haiti**, about 4.3 million people (44 percent of the analysed population) are estimated to experience high levels of acute food insecurity between August 2023 and February 2024, lower than the corresponding period in 2022/23, when violent protests affected the mobility of people and commodities, and access to essential services. However, despite the slight year-on-year improvement, the food security situation continues to be severely affected by macroeconomic difficulties, the decline in domestic food production and widespread gang violence.

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)
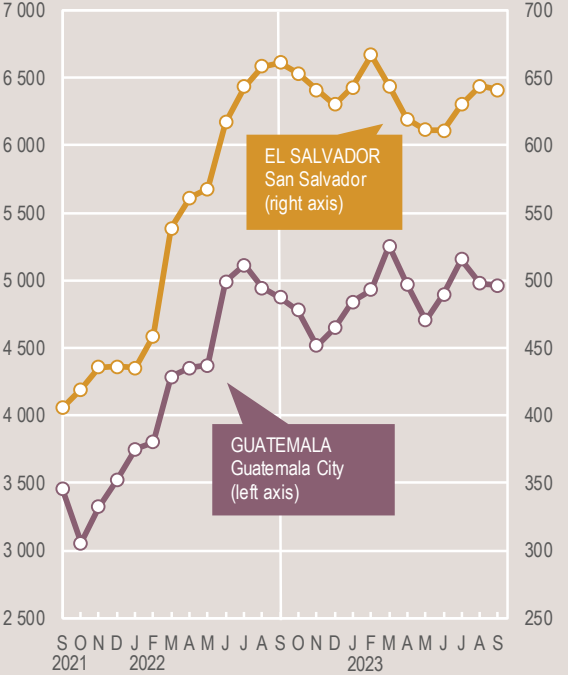
SOUTH AMERICA

Unfavourable weather forecasts raise concerns for 2024 maize crops

Planting of the 2024 first season maize crop is ongoing in Argentina and Brazil. In **Brazil**, above-average rainfall amounts in September 2023 hampered the germination of the minor season maize crop in the key producing southern region. Rains are forecast to continue at above-average levels between December 2023 and February 2024 in the south, and excessive wetness could curb crop yields. By contrast, in central regions, where cultivation of the main maize crop is concentrated, below-average precipitation is forecast. Low soil moisture levels could have a negative impact on the main season plantings, which will take place in the first quarter of 2024, and crop germination. According to official sources, total maize plantings in 2024 are expected at an above-average level of 21.2 million hectares, a decline of 5 percent compared to a year earlier, reflecting expectations that some farmers could shift to the more remunerative soybean crop. In **Argentina**, the 2024 planted area is officially forecast at 10.4 million hectares, down 1 percent from 2023's level but still about 6 percent above the five-year average. Prolonged dry weather conditions delayed sowing of the first season crops

and, as a result, farmers are expected to increase the second season maize acreage to compensate for lower first season plantings. Weather forecasts indicate a high probability of above-average precipitation amounts between December 2023 and February 2024. Similar to Brazil, if excessive rains materialize, it could hamper planting operations of the second season crop and depress yield potential.

A 5 percent year-on-year increase in paddy plantings is forecast in **Brazil**, the subregion's leading rice producer. The upturn is driven by high prices. However, despite the yearly increase, the planted area is expected to remain below the five-year average following a sustained contraction in the past decade. Excessive soil moisture delayed the start of planting operations and a continuation of above-average rains forecast between December 2023 and February 2024 may impair yields.

Above-average maize production estimated in 2023

The 2023 subregional maize production is estimated at an above-average level of 185.5 million tonnes, reflecting a bumper output in Brazil that more than offset production downturns in most other countries. Underpinned by strong domestic and export demand, maize sowings in **Brazil** increased for a fifth consecutive year in 2023, reaching a new record. Combined with well above-average yields, maize production in Brazil is officially estimated at a record high of 131.9 million tonnes, more than 36 percent above the five-year average. In **Colombia** and **Peru**, maize harvests are pegged at an above-average level, owing to a price-driven expansion in plantings. By contrast, in **Argentina, Uruguay, Paraguay** and **Bolivia (Plurinational State of)**, prolonged dry spells resulted in below-average maize

outturns. In **Chile**, maize production is estimated at a record-low level, as low crop profitability is pushing plantings to a well below-average level. In **Ecuador**, where harvesting of the 2023 minor crop is nearing completion, the 2023 aggregate maize output is expected to be close to the five-year average.

Harvesting of the 2023 wheat crop is ongoing and the subregional output is forecast at an above-average level of 30.8 million tonnes, despite expectations of a reduced output in **Argentina**, the principal producer in the subregion. In **Brazil**, the 2023 wheat harvest is officially forecast at 10.5 million tonnes, 50 percent above the five-year average, as a record wheat acreage more than offset the decline in yields due to excessive rainfall amounts in September in the key producing Rio Grande do Sul State. An above-average wheat harvest is also anticipated in **Uruguay**, on account of large plantings as well as excellent yields. By contrast, in **Argentina**, prolonged dry weather conditions curtailed sowings and yields, and the 2023 production is forecast at a below-average level of 16.5 million tonnes. Similarly, in **Paraguay**, a below-average wheat outturn is forecast, resulting from high temperatures and fungal diseases that caused yield reductions. Above-average precipitation is forecast between December 2023 and January 2024 over **Uruguay**, southern **Brazil**, eastern **Argentina** and southern **Paraguay**, which could hamper the progress of harvesting operations.

Rice harvests concluded earlier in the year in most countries and the aggregate 2023 paddy production is estimated at a below-average level of 24 million tonnes, mainly due to record-low plantings caused by a low profitability of paddy in **Brazil** and crop losses in **Ecuador** due to excessive

Table 16. South America cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	Change: 2023/2022 (%)
South America	*29.1*	*27.5*	*30.8*	*181.0*	*202.7*	*202.6*	*24.8*	*24.2*	*24.0*	*235.0*	*254.3*	*257.3*	*+1.2*
Argentina	*18.3*	*12.6*	*16.5*	*63.3*	*67.0*	*48.5*	*1.3*	*1.2*	*1.2*	*82.9*	*80.8*	*66.1*	*-18.1*
Brazil	*7.0*	*10.6*	*10.5*	*100.5*	*117.8*	*138.4*	*11.3*	*10.8*	*10.0*	*118.8*	*139.1*	*158.9*	*+14.2*
Chile	*1.3*	*1.3*	*1.2*	*1.5*	*1.2*	*1.3*	*0.2*	*0.1*	*0.1*	*3.0*	*2.6*	*2.5*	*-2.2*
Colombia	*0.0*	*0.0*	*0.0*	*1.4*	*1.5*	*1.6*	*2.8*	*2.6*	*3.0*	*4.2*	*4.2*	*4.6*	*+10.4*
Peru	*0.2*	*0.2*	*0.2*	*1.8*	*1.9*	*1.9*	*3.4*	*3.4*	*3.4*	*5.4*	*5.5*	*5.5*	*+0.1*

Notes: Totals and percentage changes are computed from unrounded data. The five-year average refers to the 2018–2022 period.

rains. Above-average outputs were attained in **Colombia**, where favourable domestic prices elicited an increase in plantings, and in **Uruguay**, reflecting high yields.

Cereal exports forecast above average in 2023/24

Aggregate cereal exports in the 2023/24 marketing year (March/February) are forecast at an above-average level of 101.7 million tonnes, but down from the quantity exported in 2022/23. Shipments of maize, the major cereal export, are anticipated to decrease by about 10 percent in 2023/24 compared to the all-time high in 2022/23, reflecting the lower output in **Argentina**. However, subregional maize exports are still anticipated at an above-average level, sustained by the record production in **Brazil**. Exports of wheat in 2023/24 (December/November) are forecast to increase to an above-average level in 2022/23, driven by good export prospects in **Brazil** that are seen to offset a likely dip in exports from **Argentina**.

## Prices of yellow maize declined seasonally in most countries

In most countries of the subregion, prices of yellow maize declined seasonally between June and September 2023, and were lower year-on-year. The notable

exception was **Argentina**, where prices rose sharply in August and September following a devaluation of the Argentine peso. As of September 2023, maize prices were double their year-earlier levels, with the drought-reduced 2023 harvest providing further support.

Between June and September 2023, prices of wheat declined and were lower year-on-year in **Brazil** and **Uruguay**, on account of ample domestic supplies. In **Argentina**, after a short-lived decline in July, wheat prices continued to increase, reflecting tight market supplies from the drought-affected 2022 output and the unfavourable prospects for the 2023 harvest. In importing countries, prices of wheat flour fell in **Colombia**, **Bolivia (Plurinational State of)** and **Ecuador**, while they increased in **Peru**; in all four countries wheat prices were near or below their year-earlier levels.

Prices of rice rose sharply between June and September in **Ecuador** due to tight supplies following a poor 2023 main season output. In **Brazil** and **Uruguay**, prices increased in August and September 2023

Wholesale maize prices in selected countries in South America
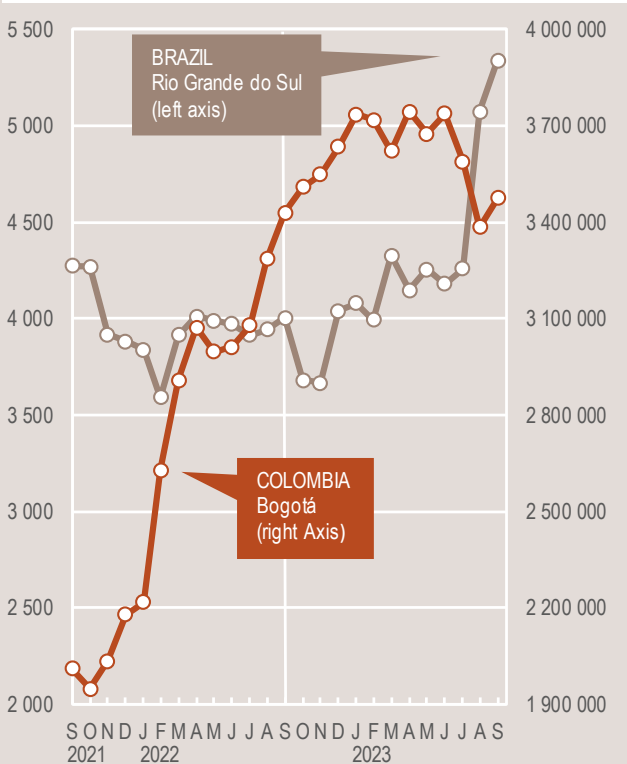(Brazilian real/tonne)   (Argentine peso/tonne)
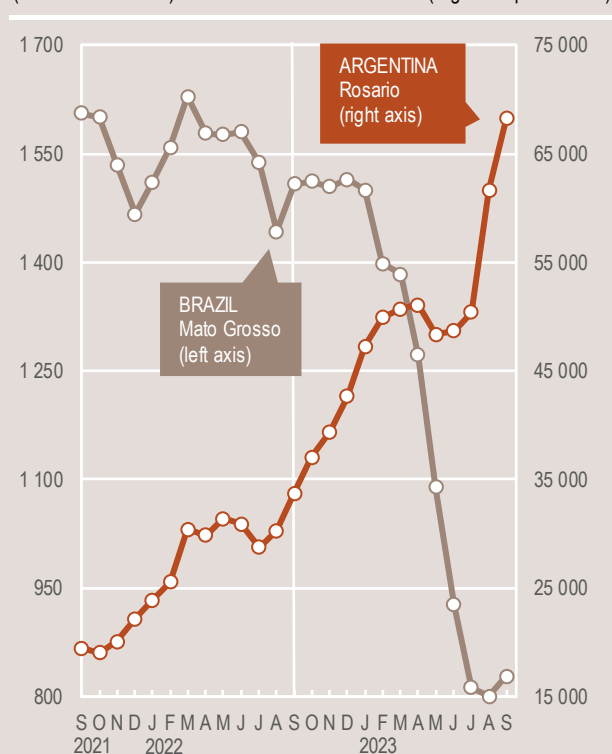
Wholesale wheat prices in selected countries in South America
(Brazilian real/tonne)   (Argentine peso/tonne)
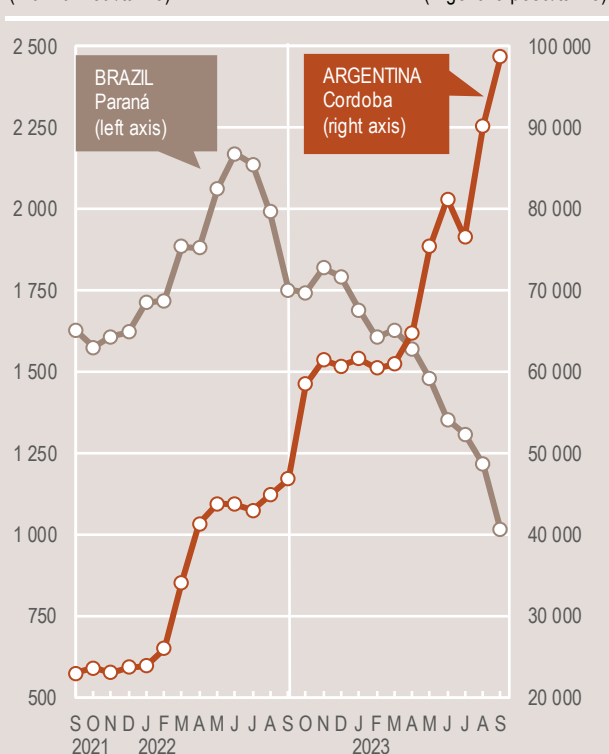
Wholesale wheat prices in selected countries in South America
(Uruguayan peso/tonne)   (Chilean peso/tonne)

Wholesale rice prices in selected countries in South America

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

in line with the upward trends of international quotations of "Indica" rice. In **Brazil**, prices in September were well up from a year earlier, driven by below-average harvests in 2022 and 2023, and increased export demand in the first half of 2023. Between June and September, prices weakened seasonally in **Colombia,** but remained higher year-on-year owing to the below-average 2022 harvest.

Food assistance needs of Venezuelan refugees and migrants remain high in 2023

As of August 2023, the number of refugees and migrants from **the Venezuela (Bolivarian Republic of)** were estimated at 7.7 million people, as a result of the severe and prolonged macroeconomic crisis in the country. After a partial recovery in 2021 and 2022, the economy is expected to contract in 2023. The largest groups of Venezuelans are located in **Colombia** (2.89 million), **Peru** (1.54 million), **Brazil** (0.48 million), **Ecuador** (0.47 million) and **Chile** (0.44 million). According to the 2023 Refugee and Migrant Need Analysis, an estimated 3.18 million Venezuelan refugees and migrants (in-destination) are in need of food assistance in 2023, marginally up from 3.16 million people in 2022. In addition to the limited income-earning opportunities, elevated food prices are further stressing food security conditions of Venezuelan refugees and migrants. The UN Office for the Coordination of Humanitarian Affairs (OCHA) Humanitarian Response Plan has targeted food and livelihoods assistance for 2 million people in **the Venezuela (Bolivarian Republic of)** and for 0.5 million people in **Colombia** in 2023.

REGIONAL REVIEWS
NORTH AMERICA, EUROPE AND OCEANIA

Note: Situation as of October 2023

— — Territories/boundaries**

NORTH AMERICA
Canada, United States of America
Cereals (winter season): Dormant

EUROPE
Northern Europe
Cereals (winter season): Dormant
Centre-southern Europe
Cereals (winter season): Establishment
CIS in Europe:
Cereals (winter season): Establishment to dormant

OCEANIA
Australia
Cereals (winter season): Harvesting

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

Production Overview

In the United States of America, cereal production in 2023 is forecast to exceed the five-year average, driven by a large maize outturn owing to a strong upturn in plantings. In Canada, cereal production in 2023 is expected to decline, as the main spring wheat crop suffered from drought conditions and, as a result, yields are forecast at low levels.

Cereal production in the European Union in 2023 is forecast to increase marginally compared to the previous year, attributed to a larger coarse grains output. The 2024 winter wheat crop is being planted, amid broadly conducive weather conditions.

In Oceania, wheat production is forecast to drop sharply in 2023, as poor rains have curbed yield prospects.

Cereal production
(million tonnes)
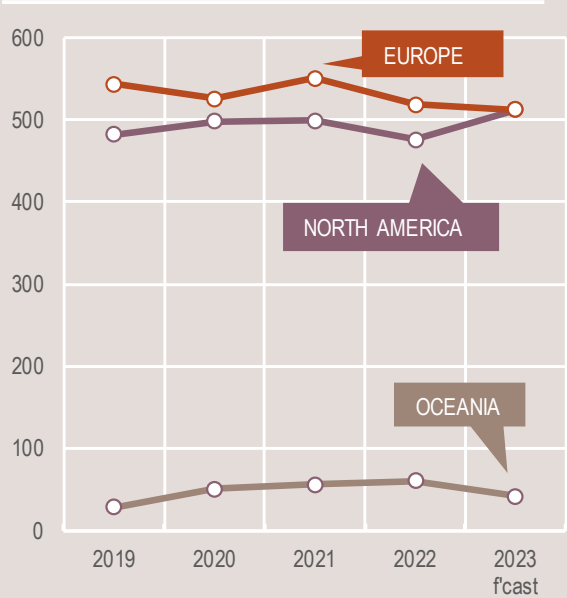
NORTH AMERICA

Large plantings drive up maize production in 2023

In **the United States of America**, total cereal production in 2023 is forecast at 456.8 million tonnes, 6 percent above the five-year average. Production growth is mainly driven by maize, with the 2023 output forecast at 382.9 million tonnes, just below the record registered in 2016. Despite generally uneven weather conditions containing yields, significantly above-average plantings underlie the production upturn. Wheat production is forecast marginally above the five-year average at 49.3 million tonnes, also driven by an increase in plantings, reflecting high prices in late 2022 when the main winter crop was planted. Drier-than-average weather conditions kept yields at average levels.

Planting of the 2024 winter wheat crop is underway and progressing at an average pace. Drought conditions, which affected crops in the last three years, have partially dissipated in key producing states and, with above-average rainfall forecast for the next months, early weather outlooks appear to be favourable for the 2024 crops.

In **Canada**, the total 2023 cereal production is forecast at 55.7 million tonnes in 2023, about 7 percent less than the five-year average. Wheat production, mostly spring crops harvested by October, stands at 29.8 million tonnes, 5 percent lower than the average. The below-average output is principally due to the prolonged drought conditions in some key producing western states that lowered yield prospects. Similar, barley production is forecast to decrease by 16 percent compared to the average, due to the effects of rainfall deficits on yields.

EUROPE

Cereal production in the European Union forecast to increase moderately in 2023

In **the European Union**, harvesting of the 2023 cereal crops is expected to conclude in November. The 2023 aggregate cereal outturn is forecast at 273.2 million tonnes, marginally up on the preceding year. With wheat production virtually unchanged year on year in 2023, the small uptick in the cereal outturn stems from an increase in coarse grains production, forecast at 137.5 million tonnes in 2023, mostly owing to better yields.

Planting of the 2024 winter wheat crop is underway and nearing completion in northern countries, amid generally

Table 17. North America, Europe and Oceania cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	5-year average	2022 est.	2023 f'cast	Change: 2023/2022 (%)
North America	80.1	79.2	79.1	401.7	389.1	423.3	9.0	7.3	10.0	490.8	475.6	512.5	+7.7
Canada	31.4	34.3	29.8	28.1	30.6	25.8	0.0	0.0	0.0	59.6	65.0	55.7	-14.3
United States of America	48.7	44.9	49.3	373.6	358.5	397.5	9.0	7.3	10.0	431.2	410.7	456.8	+11.2
Europe	262.6	280.9	269.8	261.2	235.1	239.3	3.8	3.0	3.3	527.6	519.1	512.4	-1.3
Belarus	2.4	2.5	2.5	4.8	5.3	5.1	0.0	0.0	0.0	7.2	7.8	7.6	-2.0
European Union[I]	138.4	133.9	133.4	153.7	133.9	137.5	2.7	2.1	2.2	294.9	269.9	273.2	+1.2
Russian Federation[II]	82.2	102.7	92.0	41.1	43.1	41.7	1.1	0.9	1.1	124.4	146.7	134.7	-8.1
Serbia	3.0	3.1	3.0	7.2	5.1	7.3	0.0	0.0	0.0	10.2	8.3	10.3	+24.9
Ukraine[III]	26.1	20.7	22.2	43.8	34.8	34.4	0.0	0.0	0.0	70.0	55.5	56.6	+2.0
Oceania	28.4	40.1	25.8	16.6	19.7	15.3	0.4	0.7	0.5	45.3	60.5	41.7	-31.1
Australia	28.0	39.7	25.4	15.9	19.1	14.7	0.4	0.7	0.5	44.3	59.4	40.6	-31.6

Notes: Totals and percentage changes are computed from unrounded data. The five-year average refers to the 2018–2022 period.

[I] 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.

[II] 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.

[III] 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.

favourable dry and warm weather conditions.

Wheat production in **the United Kingdom of Great Britain and Northern Ireland** is forecast at 14.1 million tonnes in 2023, down from the previous year, owing to a lower plantings, as well as a reduction in yields compared to the bumper highs of 2022.

Planting of the 2024 winter crop underway in CIS Europe and Ukraine

Planting of the 2024 winter cereal crops, mainly wheat, to be harvested from July next year, started last October. The area sown with winter cereals at the subregional level is likely to decline compared to the previous five-year average level, reflecting a likely contraction in **Ukraine**, where the war continues to impede access to fields and reduce the profitability of cereal production. In addition, weather conditions have been unfavourable at the beginning of the sowing period, with low rainfall amounts and above-average temperatures in the southern and central regions where crops are typically planted early. In **the Russian Federation,** the

planted area with winter crops is forecast at an above-average level of 11 million hectares. In **the Republic of Moldova** and in **Belarus**, planting of winter cereals is ongoing, amid generally conducive weather conditions.

Near-average 2023 cereal output in CIS Europe and Ukraine

Harvesting of the 2023 winter cereals, mainly wheat, concluded last August, while harvesting of spring crops is expected to finalize in November. The aggregate 2023 cereal output in CIS Europe and Ukraine is forecast at a near-average level of 201.5 million tonnes. This amount consists of an above-average wheat output, pegged at 117 million tonnes, a below-average maize outturn of 43 million tonnes and a near-average barley output, expected to reach 27 million tonnes.

In **Ukraine**, the 2023 wheat production is estimated at 22.2 million tonnes, 6 percent more than the previous year, but still 15 percent below the five-year average. Maize production, with crops still being harvested, is tentatively pegged at 27 million tonnes, about 20 percent below the five-year average, due to a reduction in the area planted. There is still significant uncertainty regarding the final harvest figure, as the war and potential attacks to the energy infrastructure would limit farmers' capacity to properly dry grains and by extension discourage harvesting activities. As a result, the total 2023 domestic cereal output is expected at a well below-average level of 56.6 million tonnes. In **the Russian Federation**, the aggregate 2023 wheat output stands at an above-average level of 92 million tonnes. With maize and barley outputs also expected at above-average levels, total cereal production in the Russian Federation is forecast at about 134.7 million tonnes in 2023. In **the Republic of**

Moldova, 2023 aggregate cereal production stands at a below-average level of 2.8 million tonnes, reflecting favourable weather conditions. In **Belarus**, the 2023 total cereal output is forecast at a near average level of 7.6 million tonnes.

Low cereal exports forecast in 2023/24

Total cereal exports from CIS Europe and Ukraine, in the 2023/24 marketing year (July/June) are forecast at 91 million tonnes, about 5 percent below the five-year average reflecting reduced shipments from Ukraine. Exports of maize and wheat from **Ukraine** are forecast at 20 million and 10 million tonnes, respectively, the lowest levels in the last eight years. The substantial decline is underpinned by the uncertainty regarding shipments following the cessation of the Black Sea Grain Initiative in July 2023, damages to domestic transport and storage infrastructures, and supply chain bottlenecks. In **the Russian Federation**, total cereal exports in 2023/24 are forecast at an above-average level of 57 million tonnes, including 49 million tonnes of wheat.

Russian export prices of wheat below year-earlier levels

In **the Russian Federation**, export prices of milling wheat decreased by 10 percent between May and September 2023, and were more than 25 percent below their year-earlier levels. The reduced base price for calculating the wheat export duty in the country, which came into force on 1 June 2023, resulted in a lower export duty on this commodity, putting additional downward pressure on export prices. In **Belarus** and **the Republic of Moldova**, the national average retail price of wheat flour remained stable between May and August 2023.

About 17.6 million people in need of humanitarian assistance in Ukraine

According to the 2023 Humanitarian Needs Overview, about 17.6 million people are estimated to be in need of multisectoral humanitarian assistance in 2023. As of late May 2023, about 5.1 million people were estimated to be displaced in the country (International Organization for Migration [IOM]), with about 73 percent of Ukrainian refugees recorded in European countries.

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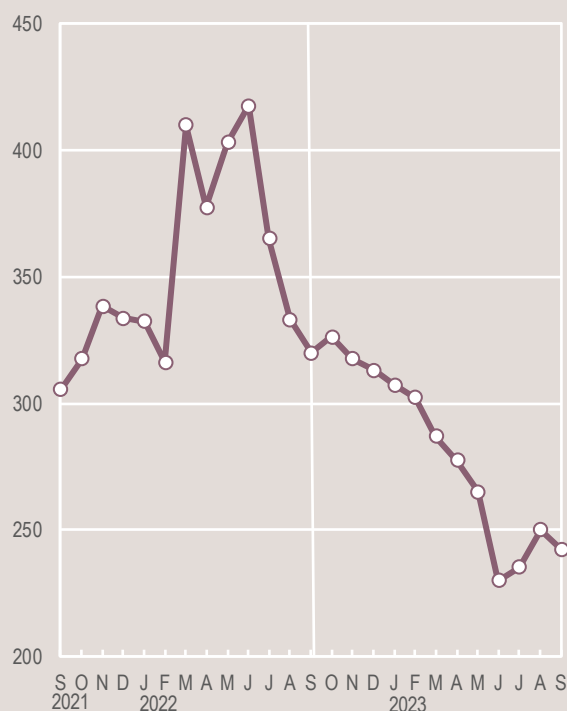
OCEANIA

Persistent dry weather conditions drag down wheat yield prospects

In **Australia**, with harvesting of the 2023 main season cereal crops underway, national wheat production is forecast at 25.4 million tonnes, 9 percent lower than the five-year average. The reduced output is largely attributed to low yields, reflecting persistent dry weather conditions in key northern growing areas. Barley production, with crops to be harvested in the last quarter of 2023, is forecast to decrease by 15 percent compared to the average, also due to unfavourable weather conditions, and is pegged at 10.5 million tonnes.

STATISTICAL APPENDIX

Table A1. Global cereal supply and demand indicators

	5-year average (2018/19 – 2022/23)	2019/20	2020/21	2021/22	2022/23	2023/24
Ratio of world stocks to utilization (%)						
Wheat	38.1	37.5	38.0	38.0	40.0	39.5
Coarse grains	24.1	24.0	23.3	24.7	23.1	23.7
Rice	37.4	36.9	37.3	37.8	37.6	37.8
Total cereals	**30.5**	**30.1**	**30.0**	**30.9**	**30.5**	**30.7**
Ratio of major cereal exporters' supplies to market requirements (%)[I]	116.2	118.5	115.0	114.8	116.0	115.7
Ratio of major exporters' stocks to their total disappearance (%)[II]						
Wheat	16.9	15.6	15.3	16.1	19.4	20.5
Coarse grains	13.3	14.0	11.5	13.1	12.1	14.3
Rice	27.1	26.1	28.5	28.7	29.8	30.9
Total cereals	**19.1**	**18.6**	**18.4**	**19.3**	**20.4**	**21.9**

	Average growth rate 2013–2022	2019	2020	2021	2022	2023
Annual growth in world cereal production (%)	1.0	2.5	2.6	1.1	-0.7	0.9
Annual growth in cereal production in the LIFDCs (%)	1.4	2.1	5.2	-7.6	2.6	0.5

		2020	2021	2022	2023*	Change 2023* over 2022*
Selected cereal price indices[III]						
Wheat		100.7	132.1	164.9	129.6	-22.6%
Maize		101.9	144.8	169.5	137.6	-19.4%
Rice		110.2	105.8	108.8	130.4	21.6%

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).

[I] 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.

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

[III] 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–October average.

Table A2. World cereal stocks

(million tonnes)

	2019	2020	2021	2022	2023 est.	2024 f'cast
TOTAL CEREALS	**835.9**	**832.1**	**840.2**	**858.3**	**858.4**	**881.1**
Wheat	**274.9**	**286.0**	**294.5**	**295.7**	**315.6**	**315.1**
held by:						
- main exporters[I]	71.3	63.3	60.3	63.0	78.8	80.3
- others	203.6	222.7	234.2	232.7	236.8	234.8
Coarse grains	**373.9**	**358.2**	**350.5**	**365.3**	**346.8**	**367.1**
held by:						
- main exporters[I]	127.7	120.6	100.5	113.8	103.5	121.4
- others	246.2	237.6	250.0	251.5	243.3	245.7
Rice (milled basis)	**187.1**	**188.0**	**195.2**	**197.2**	**196.0**	**198.9**
held by:						
- main exporters[I]	39.6	45.8	52.4	55.9	58.5	61.3
- others	147.5	142.2	142.8	141.3	137.5	137.6
Developed countries	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**
Australia	6.6	4.2	5.0	6.0	6.8	5.0
Canada	9.4	9.5	9.7	7.5	7.5	7.1
European Union[II]	41.0	41.7	36.0	42.7	44.7	39.5
Japan	6.6	6.9	7.0	7.1	6.9	6.8
Russian Federation	15.3	13.6	17.6	18.1	38.0	39.8
South Africa	3.7	2.7	4.0	4.7	4.9	4.7
Ukraine	7.7	5.6	5.9	23.2	11.5	18.0
United States of America	91.3	80.7	58.4	57.9	53.8	76.0
Developing countries	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**
Asia	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**
China (mainland)	387.3	384.5	393.0	397.4	399.7	401.0
India	52.0	64.4	69.4	66.8	64.2	70.4
Indonesia	11.5	9.6	7.8	8.0	6.7	7.6
Iran (Islamic Republic of)	9.2	10.0	11.3	12.0	12.1	11.9
Pakistan	3.5	2.1	4.6	5.7	4.9	5.1
Philippines	5.5	4.5	4.6	4.8	3.8	3.5
Republic of Korea	3.8	4.6	4.5	4.6	4.7	4.7
Syrian Arab Republic	2.2	3.2	4.2	2.6	1.0	1.2
Türkiye	6.6	10.1	10.5	9.2	12.7	10.1
Africa	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**
Algeria	6.6	6.7	6.3	5.0	5.3	5.6
Egypt	5.2	5.2	4.8	4.3	3.1	3.2
Ethiopia	6.2	7.1	7.4	7.0	6.6	6.0
Morocco	7.3	5.8	3.6	5.7	4.0	4.9
Nigeria	2.6	1.9	2.0	1.4	1.1	1.2
Tunisia	1.0	1.2	1.0	1.0	1.1	1.0
Central America and the Caribbean	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**
Mexico	7.6	7.4	6.9	8.0	7.1	6.7
South America	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**
Argentina	12.6	12.7	11.0	8.1	10.0	6.4
Brazil	16.9	16.7	17.5	14.0	9.0	12.6

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.

[I] 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.

[II] 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[I]	US Soft Red Winter No.2[II]	Argentina Trigo Pan[III]	US No.2 Yellow[II]	Argentina[III]	US Gulf
Annual (July/June)						
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	399	343	348	288	275	279
2022/23	389	305	385	299	289	343
Monthly						
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	308	364	298	313	363
2023 - March	370	283	349	285	299	343
2023 - April	378	278	345	291	285	342
2023 - May	365	248	366	267	253	307
2023 - June	346	260	358	268	238	292
2023 - July	344	257	336	238	227	277
2023 - August	311	225	311	214	228	243
2023 - September	315	231	313	224	237	247

[I] Delivered United States of America f.o.b. Gulf.

[II] Delivered United States of America Gulf.

[III] Up River f.o.b.

Table A4a. Estimated cereal import requirements of low-income food-deficit countries in 2022/2023 or 2023

(thousand tonnes)

	Marketing year	2021/22 or 2022 Total imports	2022/23 or 2023 Total imports
AFRICA		**29 435.7**	**28 371.8**
East Africa		**14 363.6**	**13 688.4**
Burundi	Jan/Dec	199.9	196.0
Comoros	Jan/Dec	70.8	82.0
Eritrea	Jan/Dec	459.7	470.0
Ethiopia	Jan/Dec	1 875.0	1 850.0
Kenya	Oct/Sept	4 358.6	4 596.6
Rwanda	Jan/Dec	282.6	295.8
Somalia	Aug/Jul	1 070.0	1 170.0
South Sudan	Nov/Oct	720.0	700.0
Sudan	Nov/Oct	3 599.0	2 690.0
Uganda	Jan/Dec	813.0	623.0
United Republic of Tanzania	Jun/May	915.0	1 015.0
Southern Africa		**3 102.9**	**3 344.8**
Lesotho	Apr/Mar	159.6	201.6
Madagascar	Apr/Mar	915.5	1 081.5
Malawi	Apr/Mar	150.0	149.5
Mozambique	Apr/Mar	1 482.9	1 369.9
Zimbabwe	Apr/Mar	394.9	542.3
West Africa		**9 119.0**	**8 783.6**
Coastal Countries		**3 329.0**	**3 245.0**
Benin	Jan/Dec	682.0	752.0
Guinea	Jan/Dec	1 204.5	1 090.5
Liberia	Jan/Dec	394.0	384.0
Sierra Leone	Jan/Dec	583.0	593.0
Togo	Jan/Dec	465.5	425.5
Sahelian Countries		**5 790.0**	**5 538.6**
Burkina Faso	Nov/Oct	548.4	534.0
Chad	Nov/Oct	222.6	217.6
Gambia	Nov/Oct	300.7	368.0
Guinea-Bissau	Nov/Oct	83.0	143.0
Mali	Nov/Oct	606.0	751.0
Mauritania	Nov/Oct	372.0	505.0
Niger	Nov/Oct	521.0	509.0
Senegal	Nov/Oct	3 136.3	2 511.0
Central Africa		**2 850.2**	**2 555.0**
Cameroon	Jan/Dec	1 532.0	1 340.0
Congo	Jan/Dec	374.9	368.0
Central African Republic	Jan/Dec	80.3	75.0
Democratic Republic of the Congo	Jan/Dec	838.5	750.0
Sao Tome and Principe	Jan/Dec	24.5	22.0

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 2 045 in 2021); for full details see http://www.fao.org/countryprofiles/lifdc

Table A4b. Estimated cereal import requirements of low-income food-deficit countries in 2022/2023 or 2023

(thousand tonnes)

	Marketing year	2021/22 or 2022 Total imports	2022/23 or 2023 Total imports
ASIA		**18 200.0**	**18 245.5**
Central Asia		**5 351.7**	**6 104.6**
Kyrgyzstan	Jul/Jun	792.3	665.6
Tajikistan	Jul/Jun	1 070.0	1 142.0
Uzbekistan	Jul/Jun	3 489.4	4 297.0
Far East		**1 617.3**	**1 251.9**
Democratric People's Republic of Korea	Nov/Oct	*	*
Nepal	Jul/Jun	1 617.3	1 251.9
Near East		**11 231.0**	**10 889.0**
Afghanistan	Jul/Jun	3 774.0	3 424.0
Syrian Arab Republic	Jul/Jun	2 782.0	2 720.0
Yemen	Jan/Dec	4 675.0	4 745.0
CENTRAL AMERICA AND THE CARIBBEAN		**1 442.0**	**1 462.1**
Haiti	Jul/Jun	671.7	632.9
Nicaragua	Jul/Jun	770.3	829.2
TOTAL		**49 077.7**	**48 079.4**

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 2 045 in 2021); 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 2023/2024

(thousand tonnes)

	Marketing year	2022/23 Total imports	2023/24 Total import requirements
AFRICA		**5 030.9**	**5 573.2**
East Africa		**1 985.0**	**2 150.0**
Somalia	Aug/Jul	1 070.0	1 185.0
United Republic of Tanzania	Jun/May	915.0	965.0
Southern Africa		**3 045.9**	**3 423.2**
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
ASIA		**13 483.7**	**13 394.6**
Central Asia		**5 356.9**	**5 270.6**
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
Far East		**1 570.8**	**2 020.0**
Nepal	Jul/Jun	1 570.8	2 020.0
Near East		**6 556.0**	**6 104.0**
Afghanistan	Jul/Jun	3 774.0	3 454.0
Syrian Arab Republic	Jul/Jun	2 782.0	2 650.0
CENTRAL AMERICA AND THE CARIBBEAN		**1 541.7**	**1 569.0**
Haiti	Jul/Jun	661.7	699.0
Nicaragua	Jul/Jun	880.0	870.0
TOTAL		**20 056.3**	**20 536.8**

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 2 045 in 2021); for full details see http://www.fao.org/countryprofiles/lifdc

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