



# Crop Prospects and Food Situation

## HIGHLIGHTS

- Prospects for global cereal production in 2016 continued to improve in recent months with significant upward revisions for maize and wheat, reflecting particularly favourable weather conditions in some of the large producing countries.
- **COUNTRIES IN NEED OF EXTERNAL ASSISTANCE:** FAO estimates that 36 countries, including 28 in Africa, are in need of external assistance for food. Persisting conflicts and drought induced production declines are the main causes that have stressed food security in 2016.
- **AFRICA:** Despite expected cereal production increases in East and West Africa, drought-reduced harvests in North and Southern Africa are forecast to pull down the aggregate 2016 cereal output to a below-average level. The impact of the El Niño-induced drought resulted in a significant increase in food insecurity in Southern Africa. Persisting conflicts, notably in Nigeria and in South Sudan, continue to severely impair agricultural production and food security in affected countries.
- **ASIA:** In the Far East, cereal production is forecast to rebound strongly in 2016, after a reduced output in 2015 due to dry weather. Similarly, the output of the Asian CIS subregion is anticipated to increase, benefitting from improved weather conditions, while 2016 production in the Near East is forecast to fall from the bumper level of 2015. Several countries in the Near East continue to be affected by the negative impact of conflicts on agricultural production, livelihoods and food security.
- **LATIN AMERICA AND THE CARIBBEAN:** Despite a record maize crop forecast in Argentina in 2016, drought-reduced outputs in Bolivia (Plurinational State of), Brazil and Paraguay have resulted in a large year-on-year decrease for the aggregate South American cereal output. Moderate production recoveries from last year's drought reduced outputs are expected in most Central American countries, while Mexico is anticipated to harvest a bumper cereal crop in 2016.

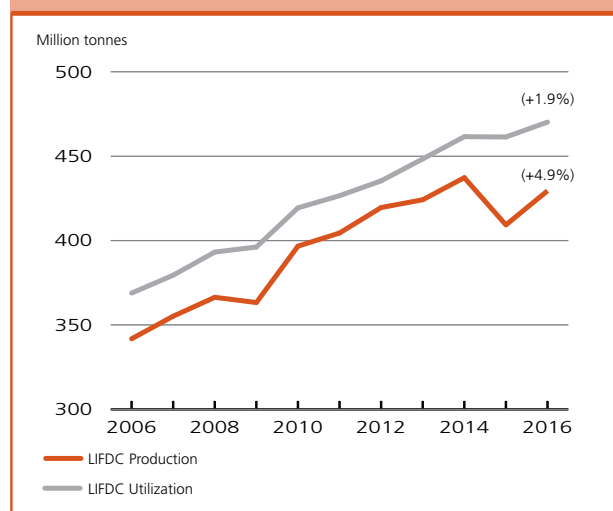
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Global production prospects in 2016 continued to improve, pushing the forecast output just above the projected 2016/17 demand

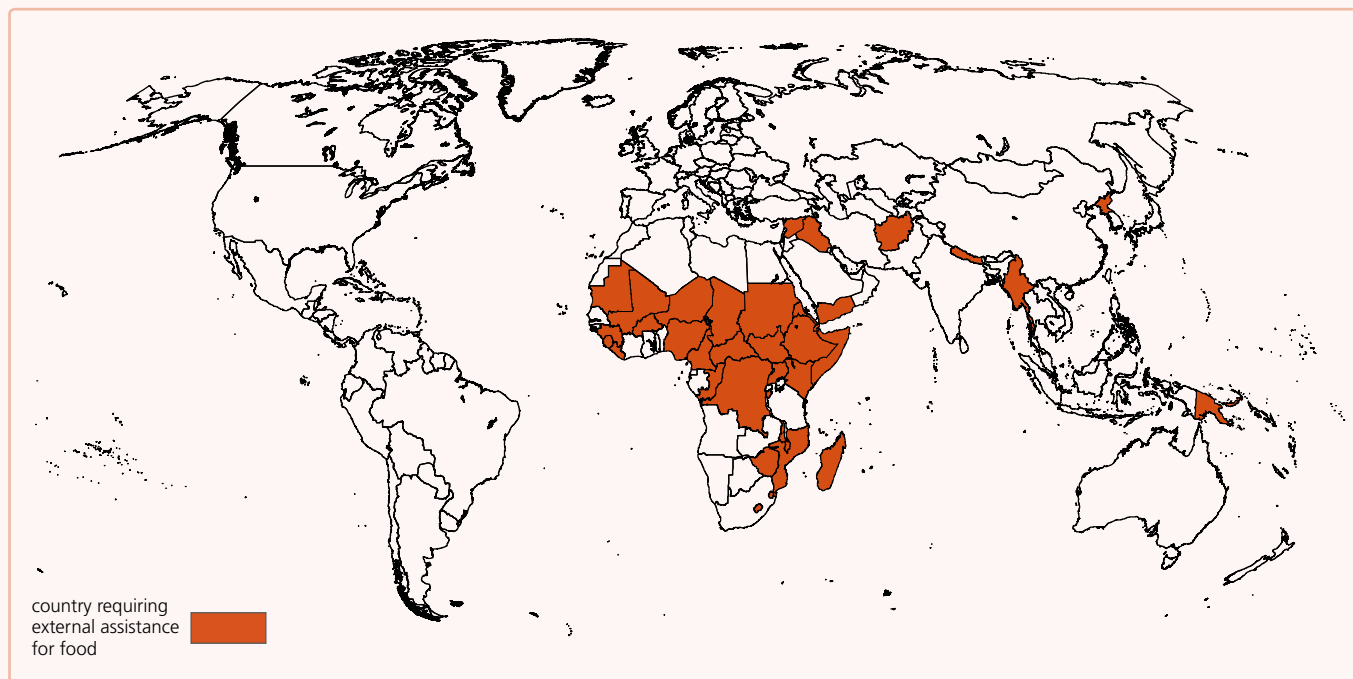


Larger crops in East Africa and in the Far East result in a production recovery in LIFDCs in 2016



# Countries requiring external assistance for food<sup>1</sup>

World: 36 countries



## AFRICA (28 countries)

### EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/SUPPLIES

#### Central African Republic

*Conflict, displacements and food supply constraints*

- The Internally Displaced Person (IDP) caseload declined from 4 482 000 in November 2015 to 384 000 in late July 2016, following a relative improvement of the security situation in some areas of the country. However, the security conditions continue to be volatile. According to the latest Integrated Food Security Phase Classification (IPC), valid for the period November 2015–June 2016, about 1 787 000 people (36 percent of the total population), are in need of urgent assistance (IPC Phase 3: “Crisis” and IPC Phase 4: “Emergency”), 19 percent more than in November 2014. The areas most affected by food insecurity are the sub-prefectures of Kabo (Ouham prefecture) Mbrès (Nana-Gribizi prefecture) and Bambari (Ouaka prefecture).

#### Malawi

*Sharply reduced cereal production in 2016 and higher food prices*

- Maize production in 2016 decreased by one-third compared to the five-year average, resulting in tighter supplies and higher prices.
- The number of people requiring assistance is estimated at 6.5 million.

#### Zimbabwe

*Drought-affected 2016 production*

- The El Niño-induced drought resulted in a sharp decrease in the 2016 cereal production and the loss of livestock.
- An estimated 33 percent of the rural population require assistance during the October–December 2016 period. This number is projected to increase to 44 percent, approximately 4 million people, during the peak of the lean period (January–March 2017).

### WIDESPREAD LACK OF ACCESS

#### Burundi

*Civil insecurity and economic downturn*

- Disruption to markets, farming activities and livelihoods, coupled with limited humanitarian assistance and declining food import capacity, continue to seriously affect food security conditions of households, especially in Kirundo, Muyinga, Rutada and Makamba provinces, as well as rural areas near Bujumbura.
- About 2.3 million people are estimated to be severely food insecure.

#### Chad

*Large caseload of refugees continues to put additional pressure on local food supplies*

- Approximately 388 000 refugees, 106 177 IDPs, as well as an estimated 92 058 Chadian returnees, continue to add pressure on local food supplies, negatively affecting food security.
- Over 1 million people are estimated to be in need of food assistance according to the latest “Cadre Harmonisé” analysis.

#### Democratic Republic of the Congo

*Conflict and displacements in eastern provinces*

- As of early August 2016, the IDP caseload was estimated at 1.7 million. About 43 percent of the displaced population is located in the North Kivu province and the rest mainly reside in Sud-Kivu, Maniema and the former Katanga Province. An estimated 5.9 million people are in need of urgent humanitarian assistance in Eastern and Southern conflict-affected provinces (June 2016).

*Influx of refugees straining on the already limited resources of host communities*

- As of June, refugees from the Central African Republic, mainly hosted in the northern Nord-Ubangi and Sud-Ubangi provinces (former Equateur Province), were estimated at about 112 800.
- Refugees from Burundi, mainly hosted in Sud-Kivu province, were estimated at about 25 000 as of early August.
- In mid-August, refugees from South Sudan, mainly hosted in Haut-Uele province, were estimated at about 18 600.

**Djibouti**

*Inadequate pasture availability due to consecutive unfavourable rainy seasons*

- About 227 000 people are severely food insecure, down from previous estimates, mainly in pastoral southeastern areas and in the Obock Region.

**Eritrea**

*Vulnerability to food insecurity due to El Niño-related drought and economic constraints*

**Ethiopia**

*Lingering effects of the 2015 severe drought on livestock and crop production*

- About 9.7 million people are severely food insecure, mainly in eastern areas of Oromia, Amhara and Tigray regions as well as in Afar and northern Somali regions.

**Lesotho**

*Drought-reduced 2016 production and higher food prices*

- Cereal production declined steeply in 2016, while higher prices are negatively impacting on food access.
- As a result, almost 709 394 people are food insecure.

**Mozambique**

*Drought affected 2016 production and higher food prices*

- Drought conditions resulted in lower cereal outputs in southern provinces and in parts of central provinces, while higher prices are adversely impacting food access.
- Approximately 2 million people are food insecure.

**Niger**

*Recurrent severe food crisis*

- More than 657 000 people are estimated to be in Phase 3: "Crisis" and above according to the last "Cadre Harmonisé" analysis.
- Approximately 60 000 Malian refugees are estimated to be living in the country.
- Almost 114 000 people in the southeast Diffa Region have been displaced due to fear of attacks.

**Nigeria**

*Economic downturn, population displacements and insecurity in northern areas*

- Approximately 2.2 million people have been internally displaced due to the continuing conflict in northern parts of the country.
- About 3.4 million people, located mostly in Borno and Yobe, are estimated to be in need of food assistance according to the last "Cadre Harmonisé" analysis.
- The sharp depreciation of the naira (national currency), coupled with persisting civil conflict in northern states has contributed to the continuing strong upward trend of food prices.

**South Sudan**

*Conflict, civil insecurity and severe economic downturn*

- Over 4.8 million people are severely food insecure, mainly in the conflict-affected states of Jonglei, Unity and Upper Nile, but also in Northern Bahr el Ghazal State due to insecurity, trade disruptions and high prices.

**SEVERE LOCALIZED FOOD INSECURITY**

**Burkina Faso**

*Food security conditions remain difficult in several regions, especially in Oudalan and Soum provinces, mostly due to rainfall and cereal production deficits in 2015. The country also continues to host a large number of refugees from neighbouring Mali*

- Over 33 000 Malian refugees are estimated to be living in the country.
- About 233 300 people are estimated to be in need of food assistance according to the last "Cadre Harmonisé" analysis.

**Cameroon**

*Influx of refugees putting strain on host communities*

- The number of refugees from the Central African Republic, who mainly entered East, Adamaoua and North regions, was estimated at 274 000 in June 2016. About 66 000 refugees from Nigeria have entered the Far North and North regions since May 2013.
- In February 2016, the number of food insecure people was estimated at 2.4 million, more than twice the level in June 2015. The most affected area is the Far North Region.

*Population displacement*

- In the Far North Region, insecurity along the borders with Nigeria has led to the internal displacement of 150 000 persons.

**Congo**

*Influx of refugees straining the already limited resources of host communities*

- As of late March 2016, about 28 600 refugees from the Central African Republic are sheltering in the country.

**Guinea**

*The Ebola Virus Disease (EVD) epidemic has ended*

- All neighbouring countries have re-opened their borders with Guinea, which has led to a significant increase in trade flows.
- About 148 400 people are estimated to be in need of food assistance according to the last "Cadre Harmonisé" analysis.

**Kenya**

*Adverse weather on pastoral livelihoods during the first semester of 2016*

- About 640 000 people are severely food insecure, mainly located in northeastern and southeastern pastoral areas, following the negative impact of poor March-to-May rains on herds and grazing resources.

**Liberia**

*The EVD epidemic has ended*

- The country is hosting more than 20 000 refugees as of end-February 2016, most of them from Côte d'Ivoire.
- About 24 900 people are estimated to be in need of food assistance according to the latest "Cadre Harmonisé" analysis.

**Madagascar**

*Drought conditions in southern areas*

- Prolonged dryness in southern regions cause a successive annual reduction in the agricultural output, resulting in severe food insecurity in these areas.
- At the national level, rice production is forecast to remain below average, but marginally up on last year's reduced level.

**Mali**

*Population displacements and insecurity in northern areas*

- An estimated 39 182 people have been internally displaced in the country mostly residing in Timbuktu, the most affected region.
- About 115 000 people, located mostly in Timbuktu, Mopti and Bamako regions, are estimated to be in Phase 3: "Crisis" and above, according to the last "Cadre Harmonisé" analysis.

**Mauritania**

*Refugee caseload continues to put additional pressure on local food supplies*

- About 49 700 Malian refugees remain in southeastern Mauritania in the Mbeera camp.
- Over 149 000 people are estimated to be in Phase 3: "Crisis" and above, according to the last "Cadre Harmonisé" analysis.

**Sierra Leone**

*The EVD epidemic has ended*

- The country was declared free of the Ebola virus transmission in the human population in November 2015 resulting in most public gathering restrictions being lifted, improving domestic food markets and trade activities. However, about 420 000 people are estimated to be in need of food assistance according to the latest "Cadre Harmonisé" analysis.

**Somalia**

*Conflict, civil insecurity and localized drought conditions*

- About 953 000 people are estimated to be in need of emergency assistance, mainly IDPs and drought affected agro-pastoral communities in northern regions.

**Sudan**

*Conflict, civil insecurity and high food prices*

- An estimated 4.4 million people are in need of humanitarian assistance, mainly IDPs in conflict affected areas and pastoral communities.

**Swaziland**

*Reduced cereal output following drought conditions*

- The 2016 cereal harvest declined and livestock mortality rates increased on account of the drought conditions.
- Higher food prices are further affecting the food security conditions, with an estimated 638 251 people in need of assistance.

**Uganda**

*Below average crop production*

- About 393 000 people in Karamoja region are estimated to be severely food insecure following consecutive unfavourable rainy seasons.

ASIA (7 countries)

**EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/SUPPLIES**

**Iraq**

*Escalation of conflict and large internal displacement*

- Over 2 million people have been displaced since January 2014.
- Some 1.8 million beneficiaries (IDPs, non-displaced food insecure in conflict areas and food insecure host families) are receiving food assistance.
- Reduced internal trade and access to stocks held in the areas under ISIL control.

**Syrian Arab Republic**

*Worsening civil conflict*

- Agricultural production is significantly affected by conflict.
- About 13.5 million people are in need of humanitarian assistance, with caseloads increasing.
- Although some international food assistance is being provided, Syrian refugees are also putting strain on other host communities in neighbouring countries.
- The World Food Programme (WFP) plans to reach 4.5 million people within the country with food assistance and 2 million people in neighbouring countries.

**WIDESPREAD LACK OF ACCESS**

**Democratic People's Republic of Korea**

*Impact of drought and floods in 2015*

- Heavy rains from late August 2016 reportedly caused some localized floods across northeastern parts of the country, resulting in damage to arable land, housing and infrastructure. These areas were also negatively impacted by the floods in August 2015.
- Despite an expected partial recovery in the 2016 aggregate food production, supplies remain tight and 18 million people remain dependent on Government-distributed food rations.
- Given the overall tight supply situation, most households are anticipated to continue to experience borderline or poor food consumption rates.

**Yemen**

*Conflict, poverty, and high food and fuel prices*

- Around 21.2 million people, 82 percent of the population, require some kind of humanitarian assistance to meet their basic needs or protect their fundamental rights.
- According to the IPC analysis of June 2016, out of the 14.12 million food insecure people (9.4 percent higher than the previous year), about 7 million were in IPC Phase: 4 "Emergency", while 7.1 million were in IPC Phase: 3 "Crisis".
- High risk to crops from increasing locust numbers. The full extent of infestations is not well known due to difficulties in mounting surveys in insecure and remote areas. Torrential rains in July 2016 resulted in floods and landslides.

**SEVERE LOCALIZED FOOD INSECURITY****Afghanistan**

*Continuing conflict and population displacement*

- Some 2.1 million people are classified as very severely food insecure.
- Over 700 000 people are internally displaced, mostly in Helmand Province.
- About 1.7 million people are targeted with food assistance.

**Myanmar**

*Impact of floods for a second consecutive year*

- Floods in 2016 severely affected an estimated 400 000 people.
- Households in Chin and Rakhine states still remain highly vulnerable, as they have not yet recovered from the impact of last year's floods.

**Nepal**

*Lingering impact of the 2015 earthquake and localized floods in 2016*

- An earthquake struck the country in April 2015, mostly impacting central and western parts and resulting in the loss of nearly 9 000 lives.
- Despite overall improved prospects for 2016 cereal production, localized flooding in several locations have caused some damage to the summer crops.

**OCEANIA (1 country)****SEVERE LOCALIZED FOOD INSECURITY****Papua New Guinea**

*Impact of the prolonged drought, frost and forest fires*

- A prolonged El Niño-driven drought and frost in 2015 affected around 2.7 million people.
- Heavy rains in February and March resulted in localized flooding exacerbating the existing levels of vulnerability.
- Severe localized staple food production shortfalls, particularly in the Highlands Region, are expected to worsen the food insecurity situation of vulnerable groups.

**Countries with unfavourable prospects for current crops<sup>2</sup> (total: 3 countries)****AFRICA (1 country)****Central African Republic**

*The widespread conflict, which caused large-scale displacements, the loss and depletion of households' productive assets and input shortages continue to weigh on 2016 production prospects*

**ASIA (1 country)****Timor-Leste**

*Cereal production prospects indicate a reduced 2016 crop for the second consecutive year*

**LATIN AMERICA AND THE CARIBBEAN (1 country)****Paraguay**

*Wheat and maize outputs in 2016 are anticipated to decline by 25 percent and 30 percent, respectively their lowest levels since 2013, as low prices and high costs discouraged farmers from planting*

**Key - Changes since last report (July 2016)**

No change ■ Improving ▲ Deteriorating ▼ New Entry +

**Terminology**

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

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

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

# Global Production Overview<sup>1</sup>

## CEREALS 2016

FAO's current forecast for 2016 world cereal production stands at about 2 566 million tonnes, 22 million tonnes (0.9 percent) above the July forecast, mostly reflecting upward revisions for maize and wheat, and 40 million tonnes (1.6 percent) higher than in 2015.

## COARSE GRAINS 2016

The improved outlook in 2016 mainly rests on better prospects for the global coarse grain output, now put at 1 330 million tonnes, 2.1 percent higher than in 2015. The year-on-year increase is mainly driven by a higher global maize output, forecast at 1 030 million tonnes, 2.6 percent above the 2015 crop, mostly resulting from a significant 39-million-tonne increase forecast in **the United States of America**, where beneficial weather is expected to boost maize yields. In *Latin America*, maize production is also forecast to increase in **Argentina** and **Mexico**, on account of improved yields and an expansion in plantings in the former country. By contrast, **Brazil** is predicted to harvest its smallest crop since 2011, following the adverse impact of El Niño-related dry weather. In *Europe*, the **European Union's** maize crop, despite recent downward revisions on account of hot and dry weather, is expected to recover significantly from last year's drought-affected harvest. Similarly, the maize output in **Ukraine** is forecast to rebound by 12 percent from a reduced

level in 2015. In *Africa*, aggregate production is forecast to fall, mostly due to steep reductions in *Southern African* countries that were affected by drought. The aggregate maize output in *Asia* is foreseen to contract in 2016, mainly a result of a cut in the production forecast for **China**, reflecting farmers' decision to plant more profitable crops at the expense of maize.

Global production of barley in 2016 is forecast at 142 million tonnes, 3.5 percent (5.2 million tonnes) down on

the previous year. The decrease is almost entirely on account of lower production in **Morocco** and **Turkey** resulting from dry weather.

The forecast for world sorghum production stands at 64.3 million tonnes, 2.9 percent (1.8 million tonnes) up on the previous year. Larger outputs are expected in **Ethiopia** and **the Sudan**, which is anticipated to more than offset a 3-million-tonne cut forecast in **the United States of America's** production in 2016.

**Table 1. World cereal production<sup>1</sup>**  
(million tonnes)

	2014	2015 estimate	2016 forecast	Change: 2016 over 2015 (%)
<b>Asia</b>	<b>1 115.3</b>	<b>1 117.3</b>	<b>1 122.2</b>	<b>0.4</b>
Far East	1 019.0	1 013.2	1 020.9	0.8
Near East	64.4	70.5	66.5	-5.6
CIS in Asia	31.9	33.7	34.8	3.3
<b>Africa</b>	<b>175.9</b>	<b>164.7</b>	<b>160.0</b>	<b>-2.9</b>
North Africa	33.1	37.3	28.8	-22.8
West Africa	52.6	54.4	55.6	2.3
Central Africa	4.7	4.5	4.6	3.6
East Africa	51.6	41.7	47.8	14.7
Southern Africa	34.0	26.8	23.1	-13.9
<b>Central America and Caribbean</b>	<b>41.9</b>	<b>40.3</b>	<b>43.2</b>	<b>7.1</b>
<b>South America</b>	<b>179.0</b>	<b>186.1</b>	<b>172.4</b>	<b>-7.4</b>
<b>North America</b>	<b>491.3</b>	<b>482.5</b>	<b>529.0</b>	<b>9.6</b>
<b>Europe</b>	<b>523.7</b>	<b>497.1</b>	<b>498.3</b>	<b>0.2</b>
European Union	330.6	312.2	301.4	-3.5
CIS in Europe	178.5	172.2	184.0	6.8
<b>Oceania</b>	<b>36.9</b>	<b>38.4</b>	<b>41.4</b>	<b>7.7</b>
<b>World</b>	<b>2 564.0</b>	<b>2 526.4</b>	<b>2 566.4</b>	<b>1.6</b>
Developing countries	1 454.0	1 453.2	1 444.0	-0.6
Developed countries	1 110.1	1 073.2	1 122.3	4.6
- wheat	730.5	733.7	740.7	1.0
- coarse grains	1 338.9	1 302.2	1 329.7	2.1
- rice (milled)	494.6	490.5	495.9	1.1

Note: Totals and percentage change computed from unrounded data.

<sup>1</sup> Includes rice in milled terms.

<sup>1</sup> For further information please see FAO's latest global *Cereal Supply and Demand Brief* and the *Food Price Monitoring and Analysis Bulletin*.

## WHEAT 2016

The outlook for wheat production in 2016 has improved since earlier forecasts, with world output now forecast slightly above the 2015 level, at 741 million tonnes. In *North America*, favourable weather boosted yields in **the United States of America** and **Canada**, offsetting a reduction in plantings, and resulting in a combined 10-million-tonne production increase. In *Europe*, the aggregate output is expected to decline, mostly stemming from a significant cutback in the **European Union's** wheat crop by 16.5 million tonnes, largely due to wet weather damage in France. This would more than offset a large year-on-year production gain in **the Russian Federation**. In *Africa*, dry weather in **Morocco** pushed wheat production down well below the average level in 2016, with a moderate reduction also forecast in **Algeria**. In *Asia*, the outlook is favourable mostly on account of a recovery in **India's** 2016 wheat crop after the reduced harvest of 2015. However, lower outputs are foreseen in **China** and **Turkey**, mostly due to unfavourable weather.

## RICE 2016

With the main crops in Northern Hemisphere countries approaching the harvest stage, world rice production in 2016 is now forecast at almost 496 million tonnes (milled basis), 1.1 percent up from the 2015 level and a new record. The forecasted 5.4-million-tonne expansion stems from a recovery in plantings, much of which concentrated in Northern Hemisphere *Asia*, where after two successive seasons of poor performing rains, crops have benefitted from improved growing conditions. Within the region, sizeable recoveries are expected in **the Philippines, Thailand** and, especially, **India**, while another record crop is forecast in **China** (Mainland).

Combined, these would more than offset reductions in **Indonesia, Malaysia, Sri Lanka** and **Viet Nam**, all linked to adverse weather conditions. Production is similarly set to fall in **Bangladesh**, as plantings in the country were cut in response to unattractive prices and in **the Republic of Korea**, on a combination of sustained area encroachments and State efforts to encourage a substitution of rice for other crops.

Outside of *Asia*, **the United States of America** looks set to gather a record rice crop, as easing drought problems, combined with less attractive prices for competing crops, led to a rebound in plantings. Prospects are also positive in *Africa*, amid expectations of an upturn in **Egypt** due to strong local quotations, and in *West Africa* thanks to generally conducive rains and sustained State

assistance to the sector. The outlook is less favourable elsewhere in the continent, especially for *Southern Africa* due to the impact of El Niño-related dry conditions. In *Latin America and the Caribbean*, this was also the case of various *South American* producers, which saw area cuts resulting from prospects of reduced margins aggravated by floods or droughts associated with the weather anomaly. The resulting output cuts are expected to more than offset improvements in *Central America and the Caribbean*, likely underpinned by a progressive easing of drought conditions that affected the subregion for two successive seasons. In *Oceania*, **Australia** has already gathered a reduced 2016 crop, as plantings fell sharply in response to limited and costly water supplies for irrigation.

**Table 2. Basic facts of world cereal situation**

(million tonnes)

	2014/15	2015/16 estimate	2016/17 forecast	Change: 2016/17 over 2015/16 (%)
<b>PRODUCTION<sup>1</sup></b>				
<b>World</b>	<b>2 564.0</b>	<b>2 526.4</b>	<b>2 566.4</b>	<b>1.6</b>
Developing countries	1 454.0	1 453.2	1 444.0	-0.6
Developed countries	1 110.1	1 073.2	1 122.3	4.6
<b>TRADE<sup>2</sup></b>				
<b>World</b>	<b>378.2</b>	<b>392.5</b>	<b>382.7</b>	<b>-2.5</b>
Developing countries	114.7	130.6	119.4	-8.5
Developed countries	263.5	261.9	263.3	0.5
<b>UTILIZATION</b>				
<b>World</b>	<b>2 496.3</b>	<b>2 517.1</b>	<b>2 556.6</b>	<b>1.6</b>
Developing countries	1 605.8	1 631.7	1 649.7	1.1
Developed countries	890.5	885.4	906.8	2.4
Per caput cereal food use (kg per year)	148.9	148.9	149.2	0.2
<b>STOCKS<sup>3</sup></b>				
<b>World</b>	<b>655.2</b>	<b>659.3</b>	<b>663.7</b>	<b>0.7</b>
Developing countries	490.6	495.6	476.4	-3.9
Developed countries	164.6	163.7	187.3	14.4
<b>WORLD STOCK-TO-USE RATIO (%)</b>	<b>26.0</b>	<b>25.8</b>	<b>25.3</b>	<b>-1.8</b>

Note: Totals and percentage change computed from unrounded data.

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

<sup>2</sup> 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.

<sup>3</sup> 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<sup>2</sup>

## Cereal production of LIFDCs in 2016 forecast to recover from the low of the previous year

The forecast for the aggregate cereal production of Low-Income Food-Deficit Countries (LIFDCs) in 2016 has been raised by 2.3 percent (10 million tonnes) since the previous issue of this publication in June, to 429.5 million tonnes, 4.9 percent up from the reduced 2015 level. The upward adjustment follows improved production prospects in *East African* countries and in the *Far East*, mainly on account of beneficial weather that boosted yield expectations.

Aggregate cereal production in sub-Saharan Africa is forecast to rise in 2016 to 116.3 million tonnes, up 6.1 percent from the reduced 2015 level. In *East Africa*, following dry condition at the start of the season, well-distributed rains thereafter improved production prospects, with large increases forecast in **Ethiopia** and **the Sudan**. Similarly, generally beneficial weather boosted crop expectations in *West Africa* where the aggregate cereal crop is forecast to increase by 2.3 percent, mostly on account of an expansion in **Nigeria**, the main producer in the subregion. In *Central Africa*, with the harvest underway, cereal production is anticipated to remain unchanged and at near-average levels in 2016. In all three subregions, persistent insecurity in parts is continuing to erode farming households' productive capacity, constraining production outcomes and intensifying food insecurity conditions. In *Southern Africa*, 2016 cereal production,

which was severely affected by the El Niño-related drought conditions, is sharply down from the five-year average.

The bulk of the reduction rests on lower outputs in **Lesotho**, **Malawi** and **Zimbabwe**.

**Table 3. Basic facts of the Low-Income Food-Deficit Countries (LIFDCs) cereal situation** (million tonnes, rice in milled basis)

	2014/15	2015/16 estimate	2016/17 forecast	Change: 2016/17 over 2015/16 (%)
<b>Cereal production<sup>1</sup></b>	<b>437.3</b>	<b>409.3</b>	<b>429.5</b>	<b>4.9</b>
<i>excluding India</i>	192.9	181.4	188.1	3.7
<b>Utilization</b>	<b>461.6</b>	<b>461.4</b>	<b>470.2</b>	<b>1.9</b>
Food use	371.5	377.1	385.1	2.1
<i>excluding India</i>	178.5	183.4	187.6	2.3
Per caput cereal food use (kg per year)	146.8	146.4	146.9	0.3
<i>excluding India</i>	144.5	145.1	145.0	-0.1
Feed	35.1	34.1	34.4	0.8
<i>excluding India</i>	21.5	20.2	20.4	1.2
<b>End of season stocks<sup>2</sup></b>	<b>96.5</b>	<b>84.2</b>	<b>83.4</b>	<b>-0.9</b>
<i>excluding India</i>	41.9	37.7	36.0	-4.3

<sup>1</sup> Data refer to calendar year of the first year shown.

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

**Table 4. Cereal production<sup>1</sup> of LIFDCs** (million tonnes)

	2014	2015 estimate	2016 forecast	Change: 2016 over 2015 (%)
<b>Africa (37 countries)</b>	<b>119.7</b>	<b>109.7</b>	<b>116.3</b>	<b>6.1</b>
East Africa	51.6	41.7	47.8	14.7
Southern Africa	11.0	9.2	8.3	-9.2
West Africa	52.6	54.4	55.6	2.3
Central Africa	4.6	4.4	4.6	3.6
<b>Asia (12 countries)</b>	<b>316.1</b>	<b>298.4</b>	<b>311.3</b>	<b>4.3</b>
CIS in Asia	10.5	10.2	10.2	-0.1
Far East	295.6	278.3	292.3	5.0
- India	244.4	227.9	241.4	5.9
Near East	10.0	9.9	8.8	-11.7
<b>Central America and the Caribbean (3 countries)</b>	<b>1.5</b>	<b>1.2</b>	<b>1.9</b>	<b>53.2</b>
<b>Oceania (2 countries)</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>
<b>LIFDC (54 countries)</b>	<b>437.3</b>	<b>409.3</b>	<b>429.5</b>	<b>4.9</b>

Note: Totals and percentage change computed from unrounded data.

<sup>1</sup> Includes rice in milled terms.

<sup>2</sup> 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 IDA assistance (i.e. USD 1 945 in 2011). The current list of the LIFDCs stands at 54 countries, one country less than in 2014 list but with some changes. The Congo, the Philippines and Sri Lanka all graduated out based on income criterion (for the Philippines in particular partly due to the World Bank revision of income data). The 2015 list of LIFDCs also includes South Sudan, for which data were previously unavailable, and the Syrian Arab Republic, which was previously taken off the list, but now does not satisfy the three criteria for exclusion. For full details see: <http://www.fao.org/countryprofiles/lifdc/en/>



In *Asia*, aggregate cereal production in the *Far East* in 2016 is forecast to rebound strongly, almost entirely resting on a 13.5-million-tonne increase in **India's** cereal crop, mostly on account of a return to average yields. Small production gains are expected elsewhere in the subregion, except in **Bangladesh**, due to flood damage. In the *Near East*, production is forecast to be well below the five-year average and slightly down from 2015. Despite generally favourable weather,

the conflicts in **Afghanistan, the Syrian Arab Republic** and **Yemen** continue to severely undermine the agriculture sector, resulting in reduced outputs in 2016.

### Aggregate imports forecast to increase marginally in 2016/17, mainly reflecting larger requirements in Southern Africa

The forecast for aggregate cereal imports by LIFDCs in the 2016/17 marketing year points to a moderate 1.5 percent increase

compared to the previous year. The rise is mainly on account of higher requirements in *Southern Africa* following the sharp production decline in 2016. Imports in *West* and *Central Africa* are also foreseen to rise, but by a much smaller rate, while in *East Africa* the favourable production outlook this year has led to a cut in the import forecast. In *Asia*, cereal imports are expected to remain largely unchanged from the previous year. Reduced imports are forecast in *CIS Asian* countries as a

result of higher 2016 domestic outputs, and in the *Near East*, where conflict continues to constrain import capacities. These declines more than offset a rise in the import forecast for India, reflecting increased demand for high quality wheat despite the production increase this year. In *Central America*, imports are foreseen to fall slightly in 2016/17 mostly reflecting the partial recovery in cereal production this year.

**Table 5. Cereal imports of LIFDCs**  
(thousand tonnes)

	2014/15 or 2015	2015/16 or 2016		2016/17 or 2017	
	Actual imports	Import forecast	of which food aid	Import requirement <sup>1</sup>	of which food aid
<b>Africa</b> (37 countries)	<b>32 326</b>	<b>31 129</b>	<b>1 187</b>	<b>33 145</b>	<b>891</b>
East Africa	10 459	10 433	873	10 327	582
Southern Africa	2 718	2 801	37	4 109	40
West Africa	17 247	16 125	129	16 767	119
Central Africa	1 903	1 770	148	1 941	149
<b>Asia</b> (12 countries)	<b>19 601</b>	<b>22 765</b>	<b>808</b>	<b>21 736</b>	<b>819</b>
CIS in Asia	4 138	4 337	1	3 941	1
Far East	6 455	8 406	206	8 028	208
Near East	9 007	10 022	602	9 767	610
<b>Central America and the Caribbean</b> (3 countries)	<b>1 973</b>	<b>2 159</b>	<b>37</b>	<b>2 055</b>	<b>14</b>
<b>Oceania</b> (2 countries)	<b>473</b>	<b>481</b>	<b>0</b>	<b>470</b>	<b>0</b>
<b>Total</b> (54 countries)	<b>54 372</b>	<b>56 534</b>	<b>2 032</b>	<b>57 406</b>	<b>1 723</b>

Note: Totals computed from unrounded data.

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

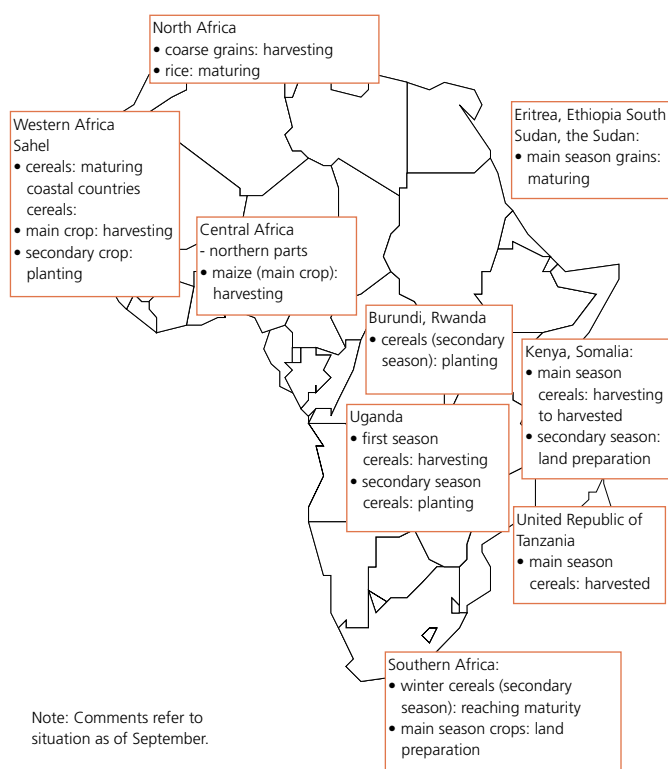
# Regional reviews

## NORTH AFRICA

### Below average cereal output expected in 2016

The 2016 wheat and barley crops were harvested by July, while the maize and rice harvests in Egypt usually commence in early October. Overall, crop prospects remain favourable in **Egypt**, western parts of **Tunisia** and eastern parts of **Algeria**, mainly owing to timely and widespread precipitation during critical crop development stages. However, large swathes of land in **Morocco**, central **Tunisia** and western **Algeria** were adversely affected by drought conditions, reducing production expectations in these areas.

As a result, provisional estimates indicate an aggregate 2016 cereal output (including paddy rice) of 30.8 million tonnes, almost 22 percent down from last year's above-average output and 18 percent below the five-year average. Total 2016 wheat production decreased by almost 28 percent over 2015 to 15.1 million tonnes, while the coarse grain harvest is provisionally estimated at 9.4 million tonnes, about 20 percent below the five-year average and about 24 percent lower than the previous year. The biggest year-on-year decline in wheat production is recorded in **Morocco**, where only 2.7 million tonnes of wheat were harvested compared to 8 million tonnes in 2015. This decrease is mainly on account of poor rains that delayed planting activities, reduced the area sown and significantly restricted yields. In **Algeria**, cereal production is expected to decrease by some 17 percent on a yearly basis, following a loss of about one-third of the area planted (almost 1 million hectares) due to water deficits. Unlike in the previous year, however, the grain in Algeria is considered to be of good quality. Production in **Tunisia** and **Egypt** remained at a similar level to last year's harvest which, in the case of Tunisia, was below average.



### Cereal import requirements remain above average

With a significantly below-average 2016 harvest, the subregion's aggregate cereal import requirement (of which wheat accounts for about 60 percent) for the 2016/17 marketing year (July/June) is estimated at approximately 50.7 million tonnes, some 17 percent above the average of the previous five years. A larger increase in import requirements was limited by ample carryover stocks from last year's above-average harvest, particularly in **Morocco**. At 20 million and 13 million tonnes respectively, cereal import requirements in **Egypt** and **Algeria** are about the same as in the previous year. The below-average 2016 harvest in Morocco

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

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	Change: 2016/2015 (%)
<b>North Africa</b>	<b>18.0</b>	<b>20.9</b>	<b>15.1</b>	<b>10.7</b>	<b>12.3</b>	<b>9.4</b>	<b>6.3</b>	<b>5.9</b>	<b>6.3</b>	<b>35.0</b>	<b>39.1</b>	<b>30.8</b>	<b>-21.4</b>
Algeria	1.9	2.8	2.2	1.3	1.3	1.2	0.0	0.0	0.0	3.2	4.1	3.4	-17.0
Egypt	9.3	9.0	9.0	6.6	6.8	6.8	6.2	5.9	6.3	22.1	21.7	22.1	1.9
Morocco	5.1	8.0	2.7	1.9	3.7	0.8	0.0	0.0	0.0	7.0	11.7	3.5	-69.8
Tunisia	1.5	0.9	1.0	0.8	0.4	0.4	0.0	0.0	0.0	2.3	1.3	1.4	9.0

Note: Totals and percentage change computed from unrounded data.

increased the forecast for cereal imports to 8.8 million tonnes (20 percent above 2015/16) while a slightly improved crop in **Tunisia** decreased the import requirement by about 7 percent compared to last year.

### Food price inflation increases seasonally

In June and July 2016, food price inflation increased across the subregion, as is typical for the Ramadan period. Increases

in **Algeria, Morocco** and **Tunisia** were relatively contained, not exceeding 5 percent, while in **Egypt** the annual food inflation rate reached 18.3 percent in July. In **Libya**, overall yearly inflation is estimated at over 13 percent, driven by supply chain disruptions offsetting the impact of high fuel and food subsidies.

## WEST AFRICA

### Overall favourable prospects for 2016 cereal crops

In the Sahel belt, in spite of localized rainfall deficits, beneficial precipitation has been generally widespread since the beginning of the growing season. Only in **Senegal**, irregular and insufficient rains at the start of the cropping season in May/June delayed plantings of coarse grains; however, a notable increase in rains in recent weeks has significantly improved soil water reserves and crop prospects. In the coastal countries of the Gulf of Guinea, crop prospects are favourable and harvesting of the first maize crop has started in the south, while harvesting of coarse grains will begin in October in the north, an area only with one rainy season. **Liberia, Sierra Leone**, parts of **Benin, Togo** and **Nigeria** experienced a late start of the rainy season but precipitation improved significantly since July over the main producing areas, replenishing water reserves, providing relief to stressed crops and improving crop prospects in these countries. Although potential yields may be reduced in the areas affected by the earlier dry conditions, overall prospects for the 2016 harvest remain favourable.

### Coarse grain prices followed mixed trends in Sahelian countries and reached record highs in Nigeria

In the Sahel belt, coarse grain prices remained mostly stable in **Mali** and **Burkina Faso** in recent months, reflecting adequate market availabilities from the 2015 outputs and favourable prospects for the 2016 crops, to be harvested from September.

**Table 7. West Africa cereal production**  
(million tonnes)

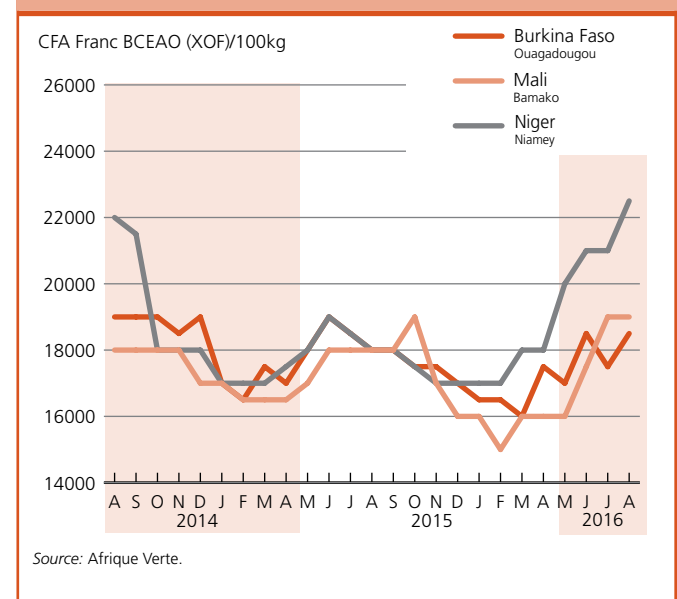
	Coarse grains			Rice (paddy)			Total cereals <sup>1</sup>			
	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	Change: 2016/2015 (%)
<b>West Africa</b>	<b>43.6</b>	<b>45.0</b>	<b>46.0</b>	<b>14.0</b>	<b>14.6</b>	<b>15.0</b>	<b>57.7</b>	<b>59.7</b>	<b>61.1</b>	<b>2.3</b>
Burkina Faso	4.1	3.9	4.2	0.3	0.3	0.4	4.5	4.2	4.5	8.5
Chad	2.4	2.2	2.2	0.3	0.2	0.3	2.7	2.5	2.5	1.0
Ghana	2.2	2.1	2.2	0.6	0.6	0.7	2.8	2.8	2.8	3.3
Mali	4.8	5.7	5.3	2.2	2.3	2.5	7.0	8.1	7.8	-3.9
Niger	4.8	5.3	5.4	0.1	0.1	0.1	4.9	5.4	5.5	2.0
Nigeria	19.5	19.2	20.2	4.9	4.8	4.9	24.4	24.0	25.2	4.6

Note: Totals and percentage change computed from unrounded data.

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

In **the Niger**, prices increased seasonally in northern and eastern markets, while they remained stable elsewhere as a result of adequate supplies. In **Chad**, millet prices have been mostly stable and were generally below their year-earlier levels despite the reduced crop in 2015, reflecting adequate imports from neighbouring countries. By contrast, in coastal countries, maize prices remained well above their year-earlier levels after the increases in recent months. In **Nigeria**, the steep depreciation of the naira (national currency) continued to put upward pressure on local and imported food prices in June. As a result, coarse grain prices continued the strong upward trend of recent months and in Kano market, sorghum and maize prices more than doubled from their year-earlier values, while those of millet were nearly 80 percent higher. In **Benin** and **Togo**, maize prices have been following a sustained upward

**Figure 1. Millet prices in selected West African markets**



Source: Afrique Verte.

trend in recent months; prices in June were up to 33 percent and 30 percent, respectively, higher than their year-earlier levels.

### Food security affected by civil insecurity

In spite of the above-average 2015 cereal harvest, the humanitarian situation remains critical in the subregion, due to the continuing civil conflict in northern Nigeria, which has resulted in large population displacements internally and in the neighbouring countries of Cameroon, Chad and the Niger. The conflict has also caused widespread disruption to agricultural and marketing activities. According to OCHA, about 2.3 million people have been internally displaced. In Borno State, northern Nigeria, about 124 000 new Internally Displaced Persons (IDPs) were discovered earlier this year in the difficult-to-reach Local Government Areas (LGAs) of Dikwa (52 000), Mongonu (35 000), Bama (25 000) and Damboa (9 500). In addition, as of June 2016, about 138 000 people are estimated to have left Nigeria for the Niger, nearly 65 000 people have taken refuge in Cameroon and about 7 300 in Chad. The conflict has disrupted commodity movements which, combined with the steep depreciation of the local currency (naira), has pushed food prices to record levels. A significant portion of the population is left without access to adequate food, water and health services, prompting the Nigerian Minister of Health to declare a "nutrition emergency" in Borno State. Acute food insecurity is widespread in northeast Nigeria, with the March 2016 "Cadre Harmonisé" estimating that more than 3 million people are in CH/IPC Phase 3: "Crisis" or worse, and in need of urgent humanitarian assistance. Available information, though limited, suggests that the LGAs adjacent to the Sambisa Forest and in northern Borno are the two areas of particular concern.

**Chad** has also seen increased numbers of refugees and returnees due to the civil conflict in the Sudan, the Central African Republic, Nigeria and Libya. Overall, over 388 000 refugees are estimated to be living in Chad, while about 80 000 Chadians have returned to their country. The refugee crisis has exacerbated an already fragile food security situation. Moreover, the areas of Chad affected by irregular rains in 2015 are expected to experience increased food insecurity and malnutrition in the 2015/16 marketing year. In the EVD-affected countries of **Guinea, Liberia and Sierra Leone**, in spite of the relatively low impact of the outbreak on agricultural production at the national level, its impact on economic activities and livelihoods has continued

to affect household food security. As a result of the shocks mentioned above, the aggregate number of people in Phase 3: "Crisis" and above in the subregion is estimated to be over 6.6 million, according to the latest "Cadre Harmonisé" analysis. More than half of the people in need of food assistance live in Nigeria.

## CENTRAL AFRICA

### Average prospects for 2016 crops; agricultural production continues to be affected by conflict in parts

In **Cameroon** and **the Central African Republic**, harvesting of the 2016 main maize crop in central and southern bi-modal rainfall areas is well underway, while in the northern uni-modal rainfall areas, harvesting of millet and sorghum crops has just started. Crop growing conditions in Cameroon have been favourable in most central and southern areas following above-average rainfall. However, below-average rainfall in July in southern parts had a negative impact on "long-cycle" crops, and rainfall volumes and distribution in the coming weeks will be crucial for "long-cycle" crop development. By contrast, in the uni-modal north, the outlook for sorghum and millet crops is uncertain: in the Far North Region, agricultural operations continue to be disrupted by civil unrest that spread from neighbouring Nigeria in late 2014 and resulted in the displacement of people, caused input shortages and depleted households' productive assets that were already inadequate due to recurrent climatic shocks. This has eroded the resilience capacity of a large number of households and is likely to result in a second consecutive reduced agricultural output this year in the Far North Region. In **the Central African Republic**, despite above average precipitation, crop production is expected to be adversely impacted by the widespread conflict, which caused the loss and depletion of already inadequate household productive assets, and resulted in shortages and soaring prices of inputs; a reduced crop output for the third consecutive year

**Table 8. Central Africa cereal production**  
(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals <sup>1</sup>			
	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	Change: 2016/2015 (%)
<b>Central Africa</b>	<b>4.3</b>	<b>4.1</b>	<b>4.3</b>	<b>0.6</b>	<b>0.5</b>	<b>0.5</b>	<b>4.9</b>	<b>4.7</b>	<b>4.8</b>	<b>3.5</b>
Cameroon	2.8	2.7	2.8	0.2	0.2	0.2	3.0	2.9	3.0	5.6
Central African Republic	0.1	0.1	0.1	0.0	0.0	0.0	0.1	0.1	0.1	0.0
Democratic Republic of the Congo	1.3	1.3	1.3	0.3	0.3	0.3	1.6	1.6	1.6	0.0

Note: Totals and percentage change computed from unrounded data.

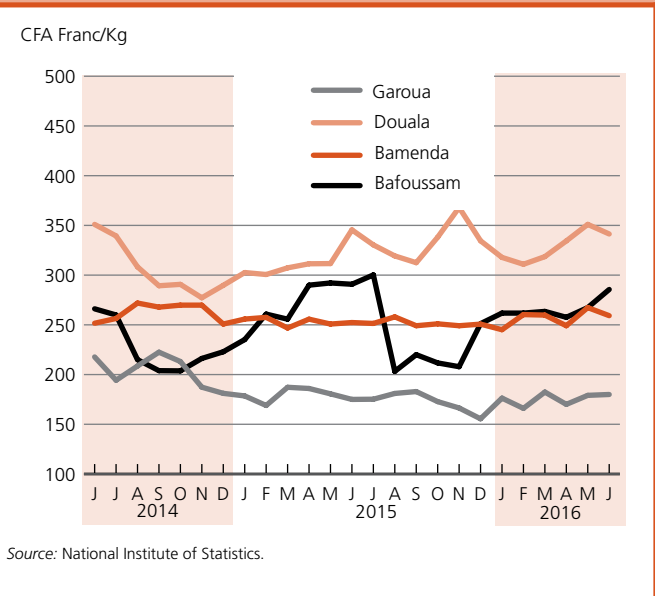
<sup>1</sup> Total cereals includes wheat, coarse grains and rice (paddy).

is, therefore, highly likely. To help avert a full-scale nutrition and food security crisis in the coming months and to respond to the needs of the crisis-hit farmers, FAO, along with WFP and NGO partners, has so far provided crop production support to 62 200 vulnerable households across the country. For the main planting season, each assisted family was provided with 31 kg of crop seeds and three hoes, and with WFP's provision of seed protection rations. In addition, about 712 000 heads of cattle and 138 000 small ruminants have been vaccinated, benefiting 18 000 households, with the programme expected to continue until May 2017. In **the Democratic Republic of the Congo**, the main season maize crop was sown in July/August in the northern Equateur and Oriental provinces and will be harvested from October. According to remote sensing analysis, rainfall levels at the start of the cropping season have been average. Earlier in the year, the second season maize crop benefited from abundant precipitation. However, heavy rainfall, linked to the strong El Niño episode, triggered widespread floods in 10 out of the 26 provinces, damaging more than 5 500 hectares of cropped land. In **the Congo** and **Gabon**, the second season maize crop, harvested in June-July, was affected by erratic rainfall, resulting in below-average vegetation conditions in several cropping areas. In both of these countries, however, the bulk of the national cereal requirement is imported. FAO's provisional forecast for the subregion points to a 2016 cereal production similar to the average level of 2015.

### Inflation rates forecast to increase in 2016 but still remain low in most countries except in the Central African Republic

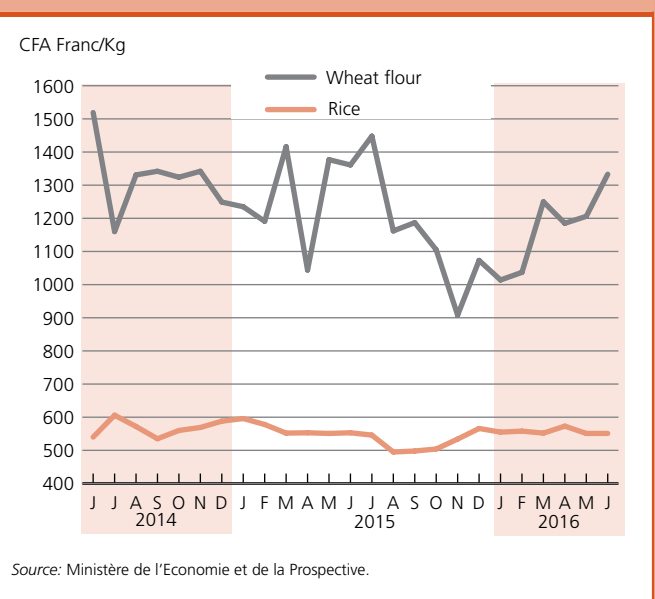
In **the Central African Republic**, the inflation rate is forecast to fall to 4.9 percent in 2016 from the highs of 2014 and 2015; however, this rate is still above the convergence rate of 3 percent set by the "Communauté économique et monétaire de l'Afrique centrale". In **the Democratic Republic of the Congo**, the rates of inflation are forecast to increase slightly to 1.7 percent in 2016, due to the relatively strong economic growth and a loosening fiscal policy that is expected to boost domestic demand. In **the Congo**, inflation rates are forecast to rise moderately to 2.3 percent in 2016, partly on account of an increase in public sector wages. Similarly, in **Gabon**, consumer prices are forecast to increase to 2.5 percent in 2016. Prices of imported wheat, the most important staple, increased in the capital, Libreville, by about 30 percent in the first semester of 2016. In June, however, they were still slightly below their levels of 12 months earlier. By contrast, prices of rice were relatively stable in recent months and around their levels of one year earlier. In **Cameroon**, by contrast, the inflation rate in 2016 is forecast to decline from 2.8 percent in 2015 to 2.2 percent in 2016. Prices of maize, the most consumed cereal, rose seasonally in some markets between January and

Figure 2. Retail prices of maize in selected Cameroon markets



May 2016, subsequently levelling off or declining slightly in June in anticipation of the main season harvest. Prices of wheat and rice, mostly sourced from the international market and mainly consumed in the urban areas, were stable in the first semester of 2016 in Douala, the largest urban centre and the main entry port for imports. By contrast, in the capital, Yaoundé, prices of wheat and rice were more volatile. Overall, prices of maize, wheat and rice in June were around their levels of the same month of the

Figure 3. Retail prices in Libreville, Gabon



previous year. By contrast, millet prices were up on their year earlier levels on account of a low 2015 output, further compounded by market disruptions caused by widespread insecurity in northern regions, where the cereal is predominantly grown.

### Acute food insecurity situation in the Central African Republic, the Democratic Republic of the Congo and parts of Cameroon due to conflict

Continued civil insecurity in the **Central African Republic** and in the eastern **Democratic Republic of the Congo** has resulted in massive population displacements and hindered access to food for the affected population. As of June 2016, about 488 000 refugees from the Central African Republic have sought refuge in neighbouring **Cameroon** (274 000), **the Democratic Republic of the Congo** (112 800), **Chad** (72 900) and **the Republic of the Congo** (28 600), straining the already limited resources of the hosting communities. The IDP caseload in the **Central African Republic** steadily declined in 2016 following a relative improvement of the security situation in some areas of the country and, in late July, it was estimated at 384 000, 15 percent less than the peak recorded in November 2015, after the resurgence of inter-communal violence in the capital, Bangui, and in other areas of the country. However, the security situation continues to be volatile, with episodes of violence causing the loss of life and new displacements. For instance, clashes in northwestern Ouham and Ouham-Pendé prefectures in April have disrupted relief activities and resulted in the displacement of more than 30 000 individuals. Three consecutive years of reduced harvests, compounded by access constraints due to market disruptions and declining purchasing power, resulted in a sharp deterioration of the food security situation. According to the latest Integrated Food Security Phase Classification (IPC), valid for the period November 2015–June 2016, about 1 787 000 people (36 percent of the total population), were in need of urgent assistance (IPC Phase 3: “Crisis” and IPC Phase 4: “Emergency”), 19 percent more than estimated in November 2014. Eleven out of sixteen prefectures are in IPC Phase 3: “Crisis”, and some localized areas are in IPC Phase 4: “Emergency” levels of food insecurity in the sub-prefectures of Kabo (Ouham Prefecture) and Mbrès (Nana-Gribizi Prefecture) in the northwest and Bambari (Ouaka Prefecture) in the centre. Similarly, in the **Democratic Republic of the Congo**, the escalation of the civil conflict since 2013, especially in the eastern provinces, has severely damaged local livelihood

systems and caused massive population displacements. As of early August 2016, the IDP caseload was estimated at 1.7 million, of which about 43 percent are located in the North Kivu Province and the rest mainly reside in Sud-Kivu, Maniema and the former Katanga Province. The country also hosts about 25 000 refugees from Burundi and about 18 600 refugees from South Sudan. According to the latest available IPC analysis, in June 2016, the number of people in acute food insecurity and livelihood crisis (IPC Phase 3: “Crisis” and IPC Phase 4: “Emergency”) was estimated at about 5.9 million, about 10 percent less than a year earlier, due to a relative improvement in the security situation in the conflict-affected Tanganyika, Sud-Kivu, Nord-Kivu, Maniema and Ituri provinces, where more than half of the total national food insecure population reside. In **Cameroon**, as of mid-August 2016, the Far North Region hosted about 66 000 refugees fleeing civil unrest in Nigeria, which has spread into neighbouring countries and has also resulted in the displacement of 157 000 Cameroonians. The number of food insecure people in Cameroon was estimated in February 2016 at 2.4 million, more than twice the level of June 2015. The area most affected by food insecurity is the Far North Region, where 35 percent of the population is food insecure.

## EAST AFRICA

### Mixed prospects for 2016 main season crops

Harvesting of the 2016 first season cereal crops has been recently completed in southern parts of the subregion with mixed outcomes. In **Somalia**, production of the main “gu” season coarse grain crops is estimated at below average levels in southern, central and northeastern regions following unfavourable rains that were characterized by reduced volumes, erratic spatial and temporal distribution as well as an early cessation in May. In addition, heavy rains in the Ethiopian highlands led to river floods along the Juba and Shabelle valleys with significant

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

	Wheat			Coarse grains			Total cereals <sup>1</sup>			Change: 2016/2015 (%)
	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	
<b>East Africa</b>	<b>5.3</b>	<b>4.7</b>	<b>5.3</b>	<b>44.1</b>	<b>34.5</b>	<b>40.1</b>	<b>52.7</b>	<b>43.0</b>	<b>49.1</b>	<b>14.3</b>
Ethiopia	4.2	3.6	4.2	19.2	15.0	18.3	23.6	18.7	22.6	21.2
Kenya	0.3	0.4	0.4	3.9	4.0	3.7	4.3	4.5	4.3	-6.2
Sudan	0.5	0.5	0.4	7.4	2.9	6.2	7.9	3.4	6.7	93.1
Uganda	0.2	0.1	0.1	7.9	7.2	6.7	10.7	10.3	9.8	-4.7
United Republic of Tanzania	0.0	0.0	0.0	3.3	3.2	3.0	3.6	3.4	3.3	-3.8

Note: Totals and percentage change computed from unrounded data.

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

damage to standing crops. Similarly, unfavourable long rains affected yields of cereal and bean crops in most southeastern and coastal marginal agricultural areas of **Kenya** and production is estimated to be up to 40 percent below average. In both **Rwanda** and **Burundi**, the output of the “2016B season” crop is estimated at an average to above-average level. This is reflective of abundant and well-distributed rains in April and May that favoured crop development in most cropping areas, except in some drought-prone districts of eastern Rwanda where yields have been affected by the late onset and the early cessation of the rainy season. In **Uganda**, in bi-modal rainfall areas, the 2016 first season production is estimated at average to below-average levels. Reduced yields are expected in northwestern, central and eastern areas following a two-dekad late onset of seasonal rains and a prolonged dry spell between mid-May and mid-June. By contrast, crops in western and southern areas received better rainfall amounts and outputs in these areas are estimated at an average level. In **the United Republic of Tanzania**, production of main “msimu” crops in southern and central uni-modal areas is estimated at above-average levels, while the output of minor “masika” crops in northeastern bi-modal areas has been seriously compromised by erratic rains in April-May. In **South Sudan**, the green harvest of the first season crops is ongoing in southern areas and, despite favourable rains, production has been affected by renewed fighting since mid-July that caused new displacements and reduced access to farms.

In central and northern parts of the subregion, the main season cereal crops are at vegetative or maturing stages and production prospects are mixed. In **Ethiopia, Eritrea, the Sudan** and central and northern **South Sudan**, crops are progressing well as seasonal rains have been abundant and well distributed. Rainfall is expected to be above average until the start of the harvest in October, with likely positive benefits for yields and pasture availability. However, heavy rains, especially in the Sudan and in the highlands of Ethiopia and Eritrea, have triggered floods that caused localized crop losses. In **Kenya**, the “long-rains” maize output is expected at a below-average level in key-growing areas of Rift Valley and Western provinces. After a late onset of the rains, a prolonged dry spell from mid-May to mid-June caused moisture stress and wilting that affected crop development. In agro-pastoral areas of the Karamoja region of **Uganda**, the cereal harvest has just started and production is forecast at a below-average level following dry weather conditions between mid-May and mid-June. Planting operations of second season crops in bi-modal rainfall areas of southern **South Sudan** are underway and area planted is expected to be well below average due to insecurity, displacements and shortage of seeds.

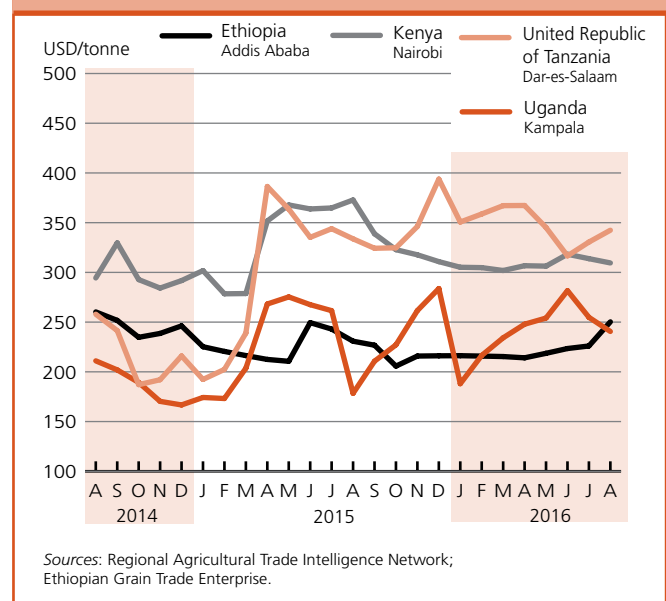
If the La Niña meteorological episode develops during the last quarter of 2016, the October to December rains are expected to be below average with negative effects on crops that are about

to be planted in **Somalia** (“deyr”), southern and coastal areas of **Kenya** (“short-rains”) and **Uganda** (second season), as well as on pastoral resources of southern and southeastern **Ethiopia**.

### Cereal prices at very high levels in South Sudan

Prices of cereals have followed mixed trends in recent months, mainly reflecting the prevailing supply-demand dynamics at national level. In **South Sudan**, prices of cereals that have been soaring since late 2015 on account of a general economic downturn and widespread insecurity, skyrocketed in July 2016 due to the intensification of the conflict, almost doubling in Juba’s market and reaching new record highs. Subsequently, prices of maize and sorghum decreased in August as a partial resumption of the imports from neighbouring Uganda and the harvest of first season crops in southern bi-modal rainfall areas increased supplies. However, despite the recent declines, prices of sorghum and maize in August were about four to five times above their year-earlier levels. In **the Sudan**, prices of locally-produced coarse grains, after sharply increasing at the start of 2016, as household stocks from the drought-reduced 2015 harvest were exhausted earlier than usual, remained firm in the following months, except in conflict-affected Darfur and South Kordofan, where they increased further. In August, prices were up to 63 percent higher than 12 months earlier, mainly resulting from the tight supply situation and market disruptions due to insecurity. In **Kenya**, prices of maize remained firm or increased in August despite the harvest in coastal and southeastern areas, due to a reduced crop output. Overall, prices in August were around or below their year-earlier levels in most markets, reflecting

Figure 4. Maize prices in selected East African markets



adequate carryover stocks from the above-average 2015 harvest. In **Ethiopia**, prices of maize, which were relatively stable in recent months, increased in August by 8-14 percent despite the recent “belg” harvest, as heavy rains and floods caused crop losses and disrupted marketing operations. August prices were up to 24 percent higher than one year earlier. In **the United Republic of Tanzania**, prices of maize declined by up to 33 percent between April and July as crops from the “msimu” harvest increased supplies. Subsequently, prices started to seasonally increase in August, when they were up to 22 percent lower than 12 months earlier due to adequate domestic availabilities. In **Uganda**, prices of maize decreased by 12-14 percent between June and August, following the commercialization of crops from the 2016 first season harvest. Despite the recent declines, maize prices in August were up to 42 percent above their year-earlier levels due to localized production shortfalls and sustained export demand from neighbouring countries. In **Somalia**, maize prices declined in August in several markets, including in the capital, Mogadishu, while those of sorghum remained generally stable.

### Conflict and lingering effects of 2015 El Niño episode drive food insecurity to exceptionally high levels

The lean season is peaking in **Ethiopia, Eritrea, the Sudan**, western **Kenya**, northern bi-modal areas of **South Sudan** and the Karamoja region in **Uganda**, while food security conditions are generally improving in **Somalia**, southern **Kenya, Uganda, Rwanda, Burundi** and **the United Republic of Tanzania**, where recently-harvested crops have boosted market and household supplies. Driven by ongoing conflicts and lingering effects of the 2015 El Niño-induced drought, the number of people in need of humanitarian assistance in the subregion is currently estimated at about 24 million (including 9.7 million in Ethiopia, 4.8 million in South Sudan, 4.4 million in the Sudan, 2.3 million in Burundi, 640 000 in Kenya, 950 000 in Somalia, 390 000 in Uganda and 227 000 in Djibouti), up 40 percent compared to the same period in 2015.

In **South Sudan**, despite the availability of recently-harvested first season crops in southern areas and the start of green crop consumption in the rest of the country, access to food for most urban households continues to be significantly constrained by steep price increases and very limited job opportunities as a consequence of the long-lasting and dramatic economic downturn. In particular, the already critical food security situation in the capital, Juba, has worsened further after the violent events of July. In most markets, food availability is very limited and prices are extremely high as supplies are curtailed by insecurity along most trade routes, while the depreciation of the South Sudanese pound has driven up the costs of imports. As a result of the renewed conflict, the humanitarian operations

and delivery capacity has been drastically reduced following the mass evacuation of humanitarian workers, loss of large food and agricultural input stocks and the introduction of new movement restrictions. Compared to the previous year, food insecurity has increased in magnitude and scope, spreading outside the initial conflict-affected areas of Greater Upper Nile region and into the market-dependent states of Northern and Western Bahr El Ghazal as well as the surplus-producing State of Western Equatoria.

In **the Sudan**, food insecurity is being driven by the El Niño-related drought that decimated crop production in 2015 as well as by the protracted conflict in the states of Darfur, South Kordofan and Blue Nile which caused displacement and disruption of livelihoods and markets. Conflict is also a major driver of food insecurity in **Burundi** where, despite the recent favourable “2016B season” harvest, the number of severely food insecure people continues to escalate as a consequence of displacements and poor macroeconomic conditions. The continuing depreciation of the local currency and the low foreign reserves is also severely reducing the country's capacity to import food.

## SOUTHERN AFRICA

### El Niño-induced drought results in sharply lower 2016 harvest

With harvesting of the main summer cereal crops complete, the subregional 2016 cereal output is forecast by FAO at 24.5 million tonnes, 22 percent (7 million tonnes) lower than the five-year average. The bulk of the decrease results from a sharply lower maize harvest, forecast at 17.2 million tonnes, 28.5 percent (3.9 million tonnes) below 2015's output. Only Namibia and Zambia registered year-on-year production gains for maize, although the outputs still remained below average. This year's steep production decline was driven by the severe and extensive El Niño-induced drought that afflicted all countries, particularly in southern areas that normally suffered the strongest effects of the El Niño weather patterns in the subregion. The seasonal rainfall deficits and higher-than-average temperatures depressed cereal yields and increased crop losses, while the delayed start of seasonal rains curbed plantings, further contributing to the reduced output.

At the country level, **South Africa** accounts for the bulk of the subregional cereal production decline in 2016. Estimated at 7.7 million (commercial and non-commercial sectors), total maize production is down by nearly 3 million tonnes (38 percent) from the already below-average harvest obtained in 2015. Large declines are also estimated in **Malawi** and **Zimbabwe**, where southern areas were particularly affected. In **Mozambique** and **Angola**, prolonged dryness in southern provinces caused



**Table 10. Southern Africa cereal production**  
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	Change: 2016/2015 (%)
<b>Southern Africa</b>	<b>2.0</b>	<b>1.7</b>	<b>2.0</b>	<b>28.9</b>	<b>22.3</b>	<b>18.2</b>	<b>4.6</b>	<b>4.3</b>	<b>4.3</b>	<b>35.6</b>	<b>28.3</b>	<b>24.5</b>	<b>-13.2</b>
<b>- excl. South Africa</b>	<b>0.3</b>	<b>0.3</b>	<b>0.3</b>	<b>13.4</b>	<b>11.1</b>	<b>10.0</b>	<b>4.6</b>	<b>4.3</b>	<b>4.3</b>	<b>18.2</b>	<b>15.6</b>	<b>14.7</b>	<b>-6.2</b>
Madagascar	0.0	0.0	0.0	0.4	0.4	0.3	4.0	3.7	3.8	4.3	4.1	4.1	0.7
Malawi	0.0	0.0	0.0	4.1	2.9	2.4	0.1	0.1	0.1	4.2	3.0	2.5	-15.8
Mozambique	0.0	0.0	0.0	1.6	2.1	2.1	0.4	0.4	0.3	2.0	2.5	2.4	-3.6
South Africa	1.8	1.4	1.7	15.6	11.2	8.2	0.0	0.0	0.0	17.3	12.6	9.9	-21.8
Zambia	0.2	0.2	0.3	3.4	2.7	2.9	0.0	0.0	0.0	3.7	2.9	3.2	10.0
Zimbabwe	0.0	0.0	0.0	1.7	0.8	0.6	0.0	0.0	0.0	1.8	0.9	0.6	-26.9

Note: Totals and percentage change computed from unrounded data.

extensive crop losses, however, beneficial rains were received in parts of the main cereal-producing central and northern provinces in both countries, partly compensating for lower outputs in the south. Sharply reduced cereal outputs are estimated in the import-dependent countries of **Botswana**, **Lesotho** and **Swaziland**. While in **Namibia** the harvest remains well below the average despite a small year-on-year production gain. In contrast to the subregional trend, **Zambia's** 2016 maize output is estimated at 2.9 million tonnes, 10 percent up on a yearly basis, mainly reflecting beneficial rains in 2016 following early seasonal dryness. In **Madagascar**, severe dryness in the south resulted in sharp cereal production declines from last year's already reduced output; however, national rice production is forecast to be marginally up on the previous year's level reflecting beneficial rains in the main producing central regions and no cyclone damage. A joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM) was conducted in July and August and the results are expected to be released in October.

Land preparation for the 2016/17 cropping season is expected to begin in October. Regional rainfall forecasts for the season point to an increased likelihood of normal to above-normal rainfall between October 2016 and March 2017 across most of the subregion. This forecast incorporates a 55-60 percent chance of a La Niña meteorological episode developing towards the end of the year, which is historically associated with increased rains in the subregion.

### Tighter subregional maize supplies result in reduced export availabilities, while import requirements rise steeply

In response to the reduced harvests, aggregate maize imports in the 2016/17 marketing year (generally May/April) are forecast to rise by three-quarters compared to the previous year. Most of the year-on-year increase reflects larger requirements in **South Africa**, which is forecast to import approximately 3.5 million tonnes (mostly yellow maize varieties for feed), compared to a

five-year average of 0.5 million tonnes, and **Zimbabwe** which is set to procure close to 1 million tonnes. **Malawi** is expected to be the third largest maize importer in the subregion, following two consecutive seasons of reduced harvests.

Despite the tighter supplies, **South Africa** is still exporting to neighbouring countries, mostly to **Botswana**, **Lesotho**, **Namibia**, **Swaziland** and **Zimbabwe**, which have quickened their monthly importation rates compared to the previous year. **Zambia** is expected to start exporting its 2016 maize crop from October, but forecast at around 0.5 million tonnes, the volume is below the previous years on account of the overall tighter supplies. At the international level, there are ample maize supplies inferring good export availabilities for the subregion, however, most of the global production is yellow maize and white maize (the main food staple in *Southern Africa*) which is produced in much smaller quantities, limiting the quantity for import. Moreover, while international prices are generally stable and lower than their year earlier values, currency depreciations, despite some strengthening in recent months, are anticipated to raise import costs in several countries in the subregion.

### Maize prices begin to rise following seasonal declines and are well above year-earlier levels

The significant upward price pressure, stemming from the sharply reduced harvests, resulted in record maize prices earlier in the year. However, prices fell seasonally from March/April before increasing again in July/August to levels well above their year-earlier values. In **South Africa**, the appreciation of the rand in recent months, combined with decreasing international quotations and harvest pressure, helped drive prices lower from their earlier highs. However, overall tighter supplies have kept prices well above their year-earlier levels. The high dependence on South African maize supplies by **Lesotho**, **Namibia** and **Swaziland** is reflected in comparable price trends and, as a result, maize meal prices were over one-third higher than their year-earlier values in July 2016. In **Malawi**, prices began to rise in June and July, almost

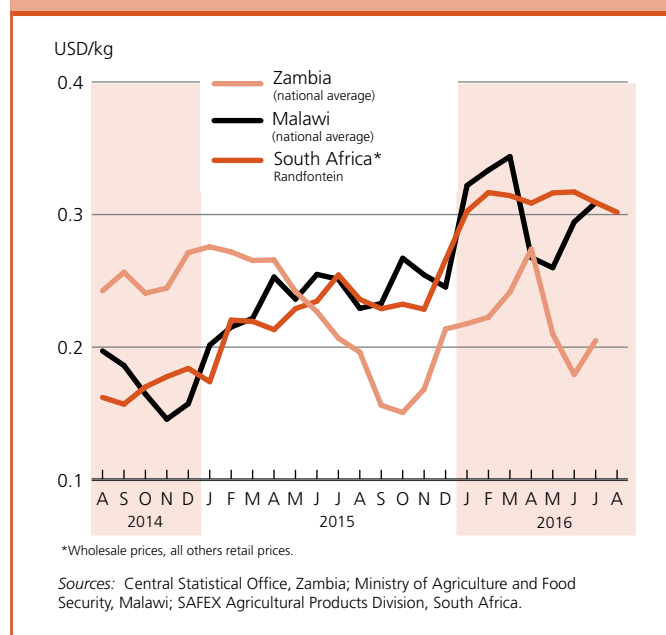
reversing the seasonal declines of the preceding three months. At the July level, the national average maize price was nearly double its year-earlier level, mostly due to the tight supply situation and the effect of the regional drought. In **Zambia**, price movements have been more moderate compared to neighbouring Malawi, reflecting the good 2016 output and the more favourable supply situation, however, the national average maize grain price was still 28 percent up on a yearly basis as of July. In **Zimbabwe**, maize meal prices rose in June in the drought-affected southern and western provinces, but remained below their year-earlier values, mainly as a result of a stronger US dollar, the country's main currency.

### Sharp deterioration in food security in 2016

The 2016 drought resulted in several countries (**Lesotho, Malawi, Namibia, Swaziland** and **Zimbabwe**), declaring national emergencies (while **Mozambique** issued provincial *red alerts*), with the Southern African Development Community (SADC) announcing a region-wide drought disaster in the first quarter of 2016. The reduced crop harvests, livestock losses and rising food prices have caused a substantial increase in food insecurity in 2016/17, with almost 17.6 million people<sup>3</sup> expected to require assistance during the peak of the lean period (January-March 2017), up from 10.8 million in the previous year, according to the 2016 Vulnerability Assessment Committees' (VACs) evaluations. Moreover, comparatively stagnate economies in some countries, due in part to lower commodity prices and weaker currencies, have also exacerbated the impact of the drought, weakening households' capacity to effectively respond to the current situation.

In absolute terms, **Malawi** and **Zimbabwe** are forecast to have the highest numbers of food insecure, estimated at 6.5 million and 4.1 million people, respectively. **Mozambique** registered a sharp deterioration in food security conditions, mainly in the drought-affected southern provinces, while significant rises in

Figure 5. White maize prices in selected Southern African markets



food insecure numbers were estimated in the import-dependent countries of **Botswana, Lesotho, Namibia** and **Swaziland**. Consecutive seasons of reduced agricultural outputs in southern regions of **Madagascar** have resulted in severe food insecurity in these areas.

A region-wide appeal<sup>4</sup> was launched by the SADC, requiring USD 2.7 billion to support the humanitarian needs of the drought-affected population. FAO is currently implementing a region-wide response programme in close cooperation with national governments to help build more resilient agricultural livelihoods and provide immediate support to farmers for the next cropping season, whose productive capacity has been eroded due to consecutive reduced harvests.

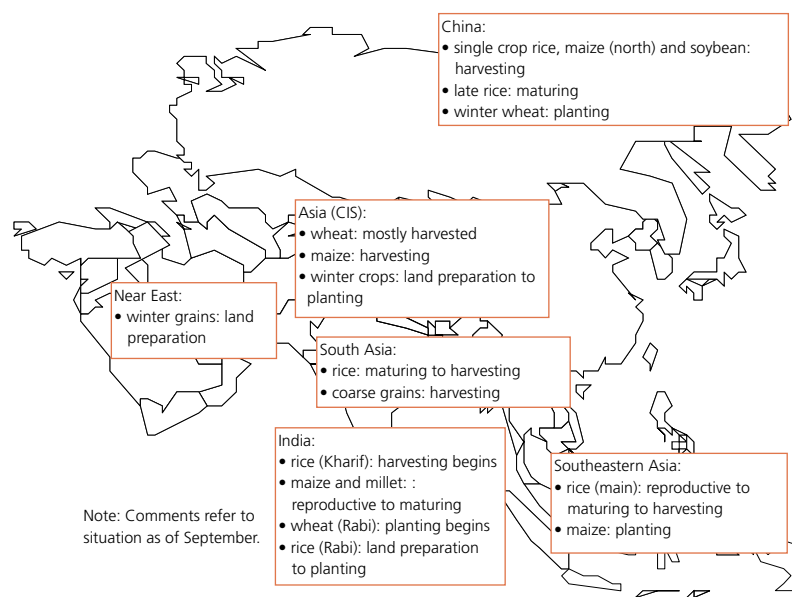
<sup>3</sup> This figure excludes the Democratic Republic of the Congo, the United Republic of Tanzania and South Africa.

<sup>4</sup> Including the Democratic Republic of the Congo, the United Republic of Tanzania and South Africa.

## FAR EAST

### Aggregate cereal production in 2016 forecast to rebound strongly to a record high

Harvesting of the 2016 main season rice and maize crops is underway in Northern Hemisphere countries, while Far Eastern countries along or south of the Equator, namely **Indonesia, Malaysia, Sri Lanka** and **Viet Nam** are currently gathering the 2016 secondary season crops. After a reduced output in 2015 due to dry weather linked to the 2015/16 El Niño episode, abundant monsoon rains and improved water availabilities for irrigation in the current 2016/17 agricultural season have boosted 2016 crop prospects in most countries. However, the above-average rains have also resulted in severe localized floods in several countries, causing crop losses, although the overall impact on the 2016 output is expected to be minimal. As a result, and assuming no major setbacks during the remainder of the season, FAO has recently raised its forecast for the subregion's 2016 aggregate cereal output by 5.1 million tonnes to 1 245.9 million tonnes (rice in paddy terms), which would be a strong recovery from the weather-affected 2015 harvest and a new record high. The bulk of this year's increase would result from a 14.8-million-tonne (5 percent) recovery in **India's** cereal production to 294.4 million tonnes (paddy terms), reflecting a return to near normal yields. Similarly, the 2016 cereal output is expected to return to near-average levels in **Democratic People's Republic of Korea, Mongolia, Myanmar, Nepal, the Lao People's Democratic**



**Republic, the Philippines** and **Pakistan**. By contrast, dry weather during the 2016 main season weakened crop prospects in **Indonesia, Viet Nam** and **Timor-Leste**.

Production of paddy rice, the major staple in the subregion, is tentatively forecast at 669.8 million tonnes, up 7.2 million tonnes from the reduced level of the previous year. The largest year-on-year increase, in absolute terms, is foreseen in **India**, where paddy production is projected at 159 million tonnes, 3 percent above last year's reduced level. In **China** (Mainland), despite severe localized floods in July and August, the official forecast indicates a record output of 209.1 million tonnes, as flood-induced losses are expected to be more than offset by an increased output in non-flood affected areas, mainly in northeastern regions. Improved water availability

**Table 11. Far East cereal production**

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	Change: 2016/2015 (%)
<b>Far East</b>	<b>252.9</b>	<b>246.7</b>	<b>252.5</b>	<b>322.3</b>	<b>326.5</b>	<b>323.6</b>	<b>668.2</b>	<b>662.6</b>	<b>669.8</b>	<b>1 243.5</b>	<b>1 235.8</b>	<b>1 245.9</b>	<b>0.8</b>
Bangladesh	1.3	1.4	1.4	2.6	2.7	2.7	51.8	52.4	52.3	55.7	56.5	56.3	-0.3
Cambodia	0.0	0.0	0.0	0.5	0.4	0.8	9.3	9.3	9.4	9.9	9.7	10.2	4.4
China	126.2	130.2	128.6	225.2	234.5	227.1	208.2	209.8	210.8	559.7	574.5	566.4	-1.4
India	95.9	86.5	93.5	43.1	38.1	41.9	158.2	155.0	159.0	297.1	279.6	294.4	5.3
Indonesia	0.0	0.0	0.0	19.0	19.6	19.4	70.8	73.0	71.9	89.9	92.6	91.3	-1.4
Japan	0.9	1.0	1.0	0.2	0.2	0.2	10.8	10.5	10.6	11.8	11.7	11.8	1.0
Myanmar	0.2	0.2	0.2	1.6	1.8	1.8	28.2	27.5	28.0	30.1	29.4	30.0	1.9
Nepal	2.0	1.6	1.4	2.5	2.6	2.6	4.8	4.3	4.8	9.3	8.4	8.8	4.7
Pakistan	26.0	25.5	25.9	5.2	5.2	5.3	10.5	10.2	10.3	41.7	40.9	41.4	1.3
Philippines	0.0	0.0	0.0	7.7	7.0	7.4	18.9	17.5	18.7	26.6	24.4	26.1	6.8
Republic of Korea	0.0	0.0	0.0	0.2	0.2	0.2	5.6	5.8	5.6	5.9	6.0	5.9	-2.6
Thailand	0.0	0.0	0.0	4.9	4.8	4.9	33.2	28.7	30.3	38.1	33.5	35.2	5.0
Viet Nam	0.0	0.0	0.0	5.2	5.3	5.2	45.0	45.2	44.5	50.2	50.5	49.7	-1.6

Note: Totals and percentage change computed from unrounded data.

is expected to lead to a recovery in the **Philippines** and **Thailand**. In **Myanmar**, **Nepal**, the **Lao People's Democratic Republic** and **Japan**, 2016 rice production is seen to return to average levels after reduced outputs in 2015. In **Indonesia** and **Viet Nam**, dry conditions linked to the 2015/16 El Niño negatively affected the 2016 main season crops, which were planted in the last quarter of 2015 and early 2016, resulting in a 2 percent year-on-year decrease in output in both countries. This is also the case in **Timor-Leste**, where the paddy output is projected to decline for the second consecutive year. In **Sri Lanka**, a dry spell and floods during the planting period

of the 2016 secondary season crop will likely result in a 7 percent production decline for the aggregate 2016 output.

FAO's latest forecast for the 2016 maize output in the subregion stands at 293.2 million tonnes, marginally below last year's record level. Most of this decrease reflects a 7.5-million-tonne decline in **China**, due to a contraction in the sown area, as farmers shift away from maize cultivation to more profitable crops, including soybean and rice. This is mainly reflective of the Government's decision to end maize procurement at high minimum support prices this year in an attempt to lower domestic stock levels.

Based on latest official figures from most countries, the forecast for the 2016 subregional wheat production has increased by 4.2 million tonnes since June, to 252.4 million tonnes, with

**Table 12. Far East cereal production and anticipated trade in 2016/17<sup>1</sup>**  
(thousand tonnes)

	Avg 5-yrs (2011/12 to 2015/16)			2016/17 over 2015/16 (%)	2016/17 over 5-yr avg (%)
Cereals - Exports	44 925	40 726	40 167	-1.4	-10.6
Cereals - Imports	110 721	131 542	121 360	-7.7	9.6
Cereals - Production	999 982	1 013 166	1 020 879	0.8	2.1
Rice-milled - Exports	34 806	35 456	35 119	-0.9	0.9
Rice-milled - Imports	13 782	14 683	13 771	-6.2	-0.1
Rice-milled - Production	440 786	440 045	444 805	1.1	0.9
Wheat - Exports	5 416	2 580	3 190	23.7	-41.1
Wheat - Imports	39 731	45 288	45 953	1.5	15.7
Wheat - Production	244 235	246 658	252 476	2.4	3.4

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

much of the revision arising from a better-than-anticipated crop performance in **India**. In **China**, the wheat output is now expected to fall to 128.6 million tonnes despite an expansion in plantings due to a combination of unfavourable weather, including dry spells at the start of the season and excessive rains and consequent pest outbreaks at the end of the season which reduced yields.

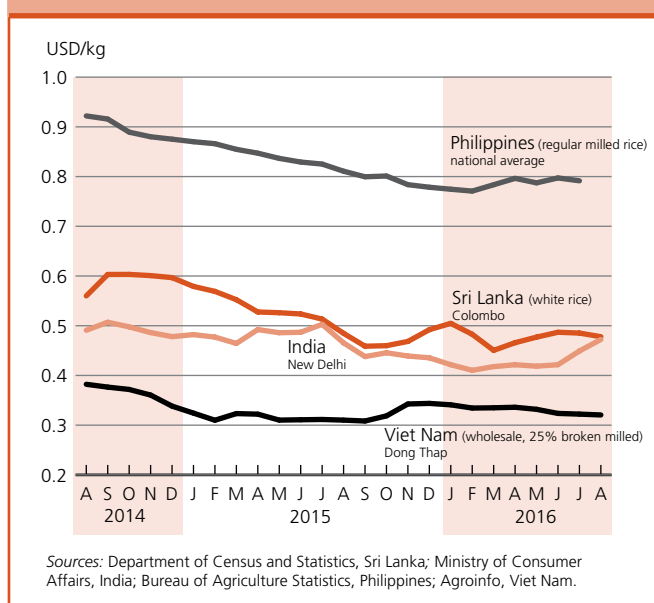
### Cereal imports forecast to contract in 2016/17 from last year's record

Given the expected increase in the subregional 2016 cereal output, FAO's forecast for aggregate cereal imports in the 2016/17 marketing year stands at 121.4 million tonnes, down 10.2 million tonnes from the 2015/16 estimate, although still 9.6 percent above the five-year average. The largest declines are expected in imports for feed cereals by **China**, reflecting the Government's efforts to lower the large national maize inventories. As a result, barley and sorghum imports in the 2016/17 marketing year are foreseen to fall by 41 percent and 36 percent, to 5.7 million tonnes and 6 million tonnes, respectively. Similarly, the maize import forecast for China has been cut by half to 2 million tonnes. Aggregate wheat imports in 2016/17 are set to increase slightly, mainly as a result of higher demand for low quality wheat for animal feeding from Indonesia. For rice, imports in 2016 are projected to decrease by 6 percent from the 2015 level. Aggregate cereal exports in 2016/17 are forecast to decrease for the second consecutive year to 40.2 million tonnes, marking the lowest level since 2011/12. Most of this decrease reflects lower rice exports in 2016 by **India**, **Thailand** and **Viet Nam**, as a result of lower national outputs and generally subdued import demand.

### Rice prices followed mixed trends, while those of wheat were more stable

Domestic prices of rice, in local currencies, have followed mixed trends across the subregion in recent months. In the

**Figure 6. Rice retail prices in selected Far East countries**



main exporting countries, prices weakened in August amid mostly favourable prospects for the 2016 crop and low import demand. This followed a period of higher prices, that were reflective of tighter supplies due to the reduced 2015 harvests. The largest recent price declines were recorded in **Thailand**, pressured by improved supplies from the 2015 secondary season crop and continuing Government stock releases. Similarly, prices fell in **Viet Nam** and **Myanmar**. In **India**, quotations edged up in recent months on account of supply pressure, following the reduced 2015 “rabi” secondary season crop and large State procurement activities. Among the importing countries, rice prices remained unchanged and close to their year-earlier levels in **Indonesia** and **the Philippines**, linked to adequate domestic availabilities, while prices fell in **Sri Lanka** with improved availabilities from the 2016 harvest. By contrast, Government procurement purchases, coupled with low imports and a reduced 2016 main “boro” season rice crop contributed to pushing up prices since July in **Bangladesh**. As for wheat and wheat flour, prices have remained generally more stable.

of coarse grains (11 percent down from the 2015 harvest). In **Iran (Islamic Republic of)**, the second biggest wheat producer in the subregion, the 2016 production of 12.5 million tonnes exceeds the 2015 harvest by 1 million tonnes and the five-year average by 28 percent. In **Afghanistan**, despite higher-than-usual winter temperatures that diminished water moisture, an about average 4.6 million tonnes of wheat were harvested. In **Iraq**, the wheat harvest is forecast at an average level of 3 million tonnes.

In **the Syrian Arab Republic**, the country’s agricultural productive capacity has been severely eroded by several years of conflict, which contributed to the lack of inputs and damage to agricultural machinery, irrigation systems and storage facilities. Unlike in 2015, precipitation during and following the planting season was inconsistent across the country and temperatures have been higher than average, reducing water moisture. While the main growing area of Hassakeh in the east of the country received above-average rainfall, weather conditions were less favourable in other cereal-producing areas in Aleppo, Idlib and Homs. Based on preliminary assessments, a below-average wheat harvest of about 1.7 million tonnes is estimated in the Syrian Arab Republic.

In **Yemen**, during the first half of April, several desert locust adult groups and swarms formed in at least one area along the southern coast. As vegetation dried out, the locusts moved into adjacent interior regions, including the agriculturally important area of the Central Highlands (Marib), the most rich and fertile zone in Yemen, typically farmed by subsistence farmers. As of early August 2016, the desert locust situation continues to be potentially dangerous, with heavy rains and flooding allowing further breeding. Prevailing insecurity and logistical difficulties prevented the implementation of surveys and control operations in July 2016. In addition to natural hazards, the persistent conflict has resulted in shortages of agricultural supplies as well as causing an increase in the price of inputs, with potential negative implications for the upcoming agriculture season.

## NEAR EAST

### Average aggregate wheat crop harvested in 2016

Harvesting of the 2016 winter cereal crops was completed in August. Total cereal production in 2016 is forecast at an average level of 68.2 million tonnes, but down from the high level of the previous year. This year’s reduction reflects a lower wheat crop, provisionally estimated at 42.7 million tonnes, 5 percent down from last year’s above-average output, but still close to the previous five-year average. In **Turkey**, the main producer in the subregion, official estimates indicate a 10 percent decrease in cereal production in 2016 compared to last year, to about 34.9 million tonnes, including 20.5 million tonnes of wheat (10 percent below the output in 2015) and 13.4 million tonnes

**Table 13. Near East cereal production**  
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	Change: 2016/2015 (%)
<b>Near East</b>	<b>41.3</b>	<b>45.0</b>	<b>42.7</b>	<b>20.3</b>	<b>22.7</b>	<b>20.8</b>	<b>4.4</b>	<b>4.3</b>	<b>4.7</b>	<b>65.9</b>	<b>72.0</b>	<b>68.2</b>	<b>-5.3</b>
Afghanistan	5.4	4.7	4.6	0.7	0.7	0.7	0.8	0.6	0.6	6.9	6.0	5.9	-2.1
Iran (Islamic Republic of)	10.6	11.5	12.5	3.7	3.9	3.9	2.3	2.7	2.9	16.7	18.1	19.3	6.6
Iraq	3.5	3.2	3.0	1.2	1.1	1.0	0.4	0.1	0.3	5.1	4.4	4.3	-1.8
Syrian Arab Republic	1.9	2.4	1.7	0.8	1.1	0.9	0.0	0.0	0.0	2.6	3.6	2.6	-27.2
Turkey	19.0	22.6	20.5	12.9	15.1	13.4	0.8	0.9	0.9	32.8	38.6	34.9	-9.7

Note: Totals and percentage change computed from unrounded data.

## No improvement in conflict-stricken Iraq, the Syrian Arab Republic and Yemen

In the **Syrian Arab Republic**, approximately 13.5 million people continue to be in need of urgent humanitarian assistance, including more than 6.5 million people who are internally displaced. As of early August 2016, over 4.8 million Syrian refugees were registered in Egypt, Iraq, Jordan, Lebanon and Turkey. In addition, a large share of the population lives abroad without seeking refugee registration. In **Iraq**, over 4 million people have been displaced from their homes, of whom nearly 2 million since January 2014, many of them repeatedly. An estimated 2.4 million people are currently food insecure, including 1.5 million facing severe food insecurity. A reduced budget resulted in disruptions to the Government's Public Distribution System (PDS), the main source of food for the poorest Iraqis, and consequently increased the vulnerability of the affected population, particularly those internally displaced. In **Yemen**, around 21.2 million people, 82 percent of the population, require some kind of humanitarian assistance to meet their basic needs or protect their fundamental rights. The Integrated Food Security Phase Classification (IPC) from June 2016 estimates that about 51 percent of the population (14.12 million) is under IPC "Emergency" and "Crisis" phases due to widespread conflict and insecurity, dwindling livelihood opportunities, a sharp downturn in the economy, and disrupted market network and access. Likewise, insecurity affected the purchasing power of poor households, limiting their economic access to food. Out of 22 governorates, nine are under IPC Phase 4: "Emergency" and ten in IPC Phase: 3: "Crisis", while approximately 2.75 million people are internally displaced.

## CIS IN ASIA<sup>5</sup>

### Increased plantings and favourable weather boost 2016 cereal production

The 2016 cereal harvest is nearing completion. The total subregional cereal output, which consists mostly of wheat, is forecast at 35.1 million tonnes, 3 percent up from 2015 and above the five-year average. The biggest year-on-year increase in wheat production is expected in **Kazakhstan**, the largest producer and exporter of the region, where the crop is expected to reach 14.5 million tonnes, 0.8 million tonnes higher than in the previous year. This year's increase results from a 3 percent expansion in plantings and improved yields. Similarly, production of barley, which is the second most important crop, is anticipated to increase to 2.7 million tonnes.

In **Azerbaijan**, harvesting of the 2016 cereal crops was completed by the end of August. According to the latest estimates, the aggregate cereal output in 2016 stands at 2.93 million tonnes, just 2 percent below the record of last year and well above the average. Wheat production is estimated at 1.7 million tonnes, marginally higher than 2015's harvest.

In **Georgia**, favourable weather conditions and an expansion in wheat plantings contributed to a larger cereal output, which is forecast at 704 000 tonnes in 2016. Wheat production is expected to almost double from the 2015 harvest to 300 000 tonnes. However, the share of milling quality wheat is reported to be quite low, therefore the country is expected to continue to import wheat from the Russian Federation, Kazakhstan and Ukraine in the 2016/17 marketing year.

Similarly, in **Tajikistan**, good weather conditions resulted in improved yields, which together with a moderate expansion in plantings, led to a 19 percent year-on-year increase in cereal production, now forecast at 1.46 million tonnes. Most of the growth is expected to be on account of larger wheat and maize crops. In **Turkmenistan**, latest estimates point to a cereal production of 1.8 million tonnes in 2016, the largest crop since 2013. The bulk of

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

(million tonnes)

	Wheat			Coarse grains			Total cereals <sup>1</sup>			
	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	Change: 2016/2015 (%)
<b>CIS in Asia</b>	<b>25.1</b>	<b>25.9</b>	<b>27.1</b>	<b>6.3</b>	<b>7.1</b>	<b>7.1</b>	<b>32.2</b>	<b>34.0</b>	<b>35.1</b>	<b>3.3</b>
Armenia	0.3	0.4	0.4	0.2	0.2	0.2	0.5	0.6	0.6	-1.9
Azerbaijan	1.4	1.7	1.7	0.9	1.3	1.2	2.4	3.0	2.9	-2.2
Georgia	0.1	0.2	0.3	0.4	0.3	0.4	0.4	0.6	0.7	26.4
Kazakhstan	13.0	13.7	14.5	3.4	3.8	3.9	16.8	17.9	18.8	4.8
Kyrgyzstan	0.6	0.7	0.6	0.8	1.0	0.8	1.4	1.8	1.5	-16.5
Tajikistan	0.9	0.9	1.0	0.2	0.2	0.3	1.2	1.1	1.4	18.6
Turkmenistan	1.2	1.4	1.6	0.1	0.1	0.1	1.4	1.6	1.8	11.9
Uzbekistan	7.6	7.0	7.0	0.3	0.2	0.3	8.1	7.4	7.5	0.9

Note: Totals and percentage change computed from unrounded data.

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

<sup>5</sup> Georgia is no longer a member of CIS but its inclusion in this group is maintained for the time being.

this is accounted for by wheat, production of which is estimated to have risen by 200 000 tonnes from 2015 to reach 1.6 million tonnes, following good weather during the growing season that improved yields well above the reduced levels of the previous two years.

In **Armenia** and **Uzbekistan**, the aggregate cereal output in 2016 is anticipated to remain close to the previous year's high level. By contrast, production is expected to fall in **Kyrgyzstan** by almost 17 percent.

Planting of the 2017 winter crops, which constitutes only a small fraction of total annual cereal production, started in mid-August under favourable weather conditions. The bulk of the subregional cereal crop is sown in spring, normally beginning in April.

### Cereal imports to decrease reflecting higher domestic production

The aggregate cereal import requirement in 2016/17 is anticipated to decrease by 6 percent to 7.1 million tonnes, mostly reflecting

reduced import demand for wheat in **Tajikistan** and **Uzbekistan** following higher domestic outputs.

Total cereal exports in the 2016/17 marketing year are also forecast to decline by 1 percent from last year's level of 8.5 million tonnes. The small decrease in exports rests on reduced shipments of barley, which are anticipated to decline by 17 percent to 500 000 tonnes. Wheat exports are expected to remain unchanged, with 7 million tonnes coming from Kazakhstan, the main exporter of the subregion.

### Domestic prices of wheat flour decline with new supplies from the 2016 harvest

In most importing countries of the subregion, domestic prices of wheat flour decreased in August on account of augmented supplies following the 2016 harvest and lower exports prices from Kazakhstan, the main supplier of the subregion. In **Kazakhstan**, wheat export quotations declined marginally mainly on downward pressure from the new crop.

## CENTRAL AMERICA AND THE CARIBBEAN

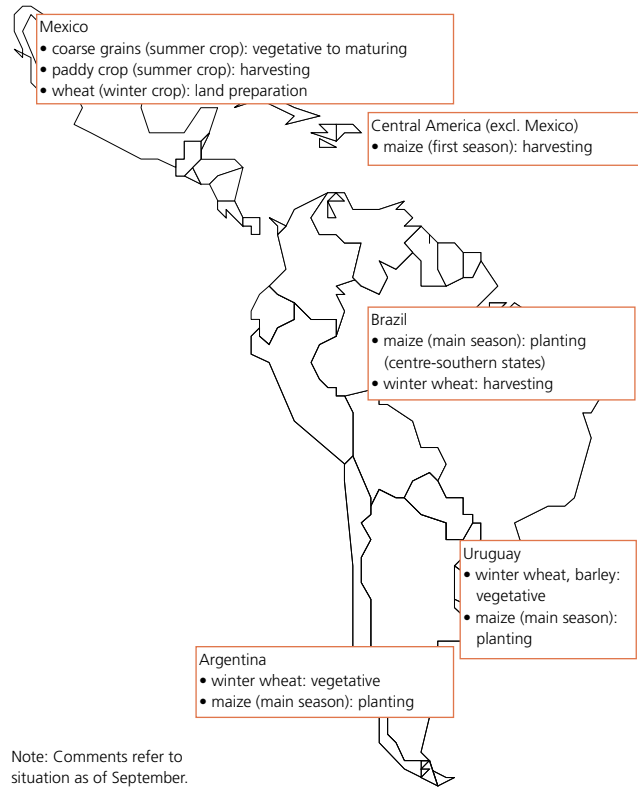
### Recovery in yields boosts wheat production in 2016

In **Mexico**, virtually the only wheat producer in the subregion, harvesting of the 2016 wheat crop concluded in June and preliminary estimates point to an output of about 3.8 million tonnes, 2 percent up from the previous year and above the five-year average. The increase largely reflects a partial recovery in yields from last year's drought-reduced levels, as sowings were relatively unchanged from the previous year.

### Maize production in 2016 forecast at a bumper level

FAO's latest forecast for the subregion's aggregate 2016 maize production has been revised upwards to 30.4 million tonnes, some 7 percent higher than the previous year's level and well above the average of the past five years. The upward revision is mainly on account of recently improved production prospects in **Mexico**, the subregion's main producer, where the autumn/winter crop yields reached bumper levels and the outlook for the spring/summer crop, just planted, is favourable. The aggregate 2016 maize output (autumn/winter and spring/summer crops) in the country is now forecast to reach a record 25.7 million tonnes.

Elsewhere in the subregion, prospects for the 2016 maize crops (first and second season) are more uncertain but a slight recovery from last year's drought-reduced level is expected. Although the recent El Niño event dissipated in June and precipitation levels improved significantly compared to the previous year's low levels, they remained mostly below average during the period from May to July, when planting of the main "de primera" cereal season, which represents between 40 and 60 percent of the total maize



output in **El Salvador, Guatemala, Honduras and Nicaragua**, occurs. However, despite the lingering dry conditions, according to remote sensing data up to the first dekad of August, crop growth has progressed mostly normally during the season so far, with the exception of the "dry corridor", which covers an area from **Guatemala to Nicaragua**. Harvesting of the first season crops will begin from September.

The bulk of the planting for the second cereal season will begin from September and prospects are favourable; an increase in precipitation from late July has improved soil moisture and is

**Table 15. Latin America and Caribbean cereal production**  
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	Change: 2016/2015 (%)
<b>Central America &amp; Caribbean</b>	<b>3.7</b>	<b>3.7</b>	<b>3.8</b>	<b>36.4</b>	<b>34.9</b>	<b>37.6</b>	<b>2.9</b>	<b>2.6</b>	<b>2.8</b>	<b>42.9</b>	<b>41.3</b>	<b>44.2</b>	<b>7.1</b>
El Salvador	0.0	0.0	0.0	0.9	0.8	0.9	0.0	0.0	0.0	1.0	0.8	1.0	19.3
Guatemala	0.0	0.0	0.0	1.9	1.9	1.9	0.0	0.0	0.0	1.9	1.9	2.0	2.2
Honduras	0.0	0.0	0.0	0.5	0.4	0.6	0.1	0.0	0.1	0.5	0.4	0.7	55.5
Mexico	3.7	3.7	3.8	31.8	30.8	32.5	0.3	0.2	0.3	35.8	34.7	36.6	5.4
Nicaragua	0.0	0.0	0.0	0.5	0.4	0.5	0.3	0.3	0.3	0.8	0.7	0.8	19.4
<b>South America</b>	<b>24.4</b>	<b>20.6</b>	<b>24.2</b>	<b>137.8</b>	<b>148.1</b>	<b>132.5</b>	<b>24.7</b>	<b>25.5</b>	<b>23.0</b>	<b>187.0</b>	<b>194.3</b>	<b>179.8</b>	<b>-7.5</b>
Argentina	13.9	11.3	14.0	39.9	42.4	47.3	1.6	1.6	1.4	55.4	55.2	62.7	13.6
Brazil	6.3	5.4	6.2	82.9	88.3	70.2	12.1	12.4	10.5	101.3	106.2	87.0	-18.0

Note: Totals and percentage change computed from unrounded data.



expected to benefit the early-planted crops. In general, maize plantings for 2016 crops are expected to be well up on the previous two years as farmers try to increase outputs and revenues after the two previous years when El Niño-related drought limited production possibilities. Thus, assuming favourable weather conditions continue for the rest of the season and that yields of the first season crop were not significantly impacted by dry weather at the beginning of the season, the preliminary forecast puts the 2016 maize crop in the subregion, excluding **Mexico**, at 4.6 million tonnes, up 23 percent from last year's poor crop and above the five-year average.

### White maize prices generally above year-earlier levels in the June-August period

In most countries of the subregion, white maize prices seasonally increased in the June to August period with the progress of the lean season which will continue until the onset of the 2016 main "de primera" season harvest from September. In **Nicaragua**, seasonal price pressure on top of a tight supply situation caused by last year's drought-reduced harvest, maintained strong upward pressure on prices, which by August rose to 17 percent above their level a year earlier. In **Guatemala** and **Honduras**, white maize prices stabilized in August, moderately above their year-earlier levels, after rising in the previous two months. By contrast, in **El Salvador** prices have remained generally stable in the past months and in August were well below their year-earlier level reflecting ample availabilities from imports. In **Mexico**, white maize prices increased in recent months and in August were above their level at the same time last year despite favourable prospects for this year's harvest, as a weak local currency and high demand continued to pressure prices.

## SOUTH AMERICA

### Cereal production in 2016 to remain high, although down from previous year's record

FAO's latest forecast for 2016 cereal production in the subregion has been revised further downward to 179.8 million tonnes, 7.5 percent below the record in 2015 but above the five-year average. The latest downward revision mainly reflects a much lower than anticipated 2016 maize crop in **Brazil**, which has now been estimated at 67.9 million tonnes, its lowest level since 2011. The impact of El Niño-related dry weather on the second season "de safrinha" maize crop has been far worse than earlier expected, causing yields to decline by 27 percent compared to the same season last year. By contrast, the latest estimate of the recently completed 2016 maize crop in **Argentina**, gathered earlier in the year, has been revised upward to 39.8 million tonnes, a record

level. The removal of export controls and the weak national currency encouraged producers to increase plantings in response to high demand for Argentine maize for export. Moreover, good weather during the season favoured crop development leading to high yields. Elsewhere in the subregion, maize production is anticipated to decline. In **Bolivia (Plurinational State of)**, lower plantings, drought conditions at the end of the main summer season and pest infestations reduced the 2016 maize output by 17 percent. In **Chile** and **Paraguay**, sharp reductions in plantings, reflecting low prices and higher costs, are anticipated to reduce this year's crops by 25 and 31 percent, respectively. In **Colombia**, 2016 maize output is anticipated to remain relatively unchanged. In **Venezuela (Bolivarian Republic of)**, maize production in 2016 is forecast to increase after two years of drought-reduced outputs related to El Niño, but remain at a below-average level of about 2 million tonnes. This is mainly on account of input shortages, despite significant Government efforts to facilitate access to seeds and fertilizers, and water deficits that continued to constrain the area sown to maize.

The forecast for the 2016 wheat crop in the subregion, to be harvested from late November, points to an increase of 17 percent from last year to 24.2 million tonnes, a bumper level. The increase mainly reflects higher sowings in **Argentina** and **Brazil**, which account for the bulk of the subregion's wheat production, in response to high prices and high domestic demand, particularly in the latter country. In **Chile**, where the 2016 wheat crop was already harvested in February, the latest estimate puts production at 1.7 million tonnes, 100 000 tonnes up from the previous estimate, reflecting higher than anticipated yields, and 17 percent above last year's level. By contrast, in **Paraguay**, wheat output in 2016 is anticipated to decline almost 25 percent to 800 000 tonnes, its lowest level since 2013, as low prices and high costs discouraged farmers.

### Cereal exports in 2016/17 forecast down from previous year's record level but will remain high

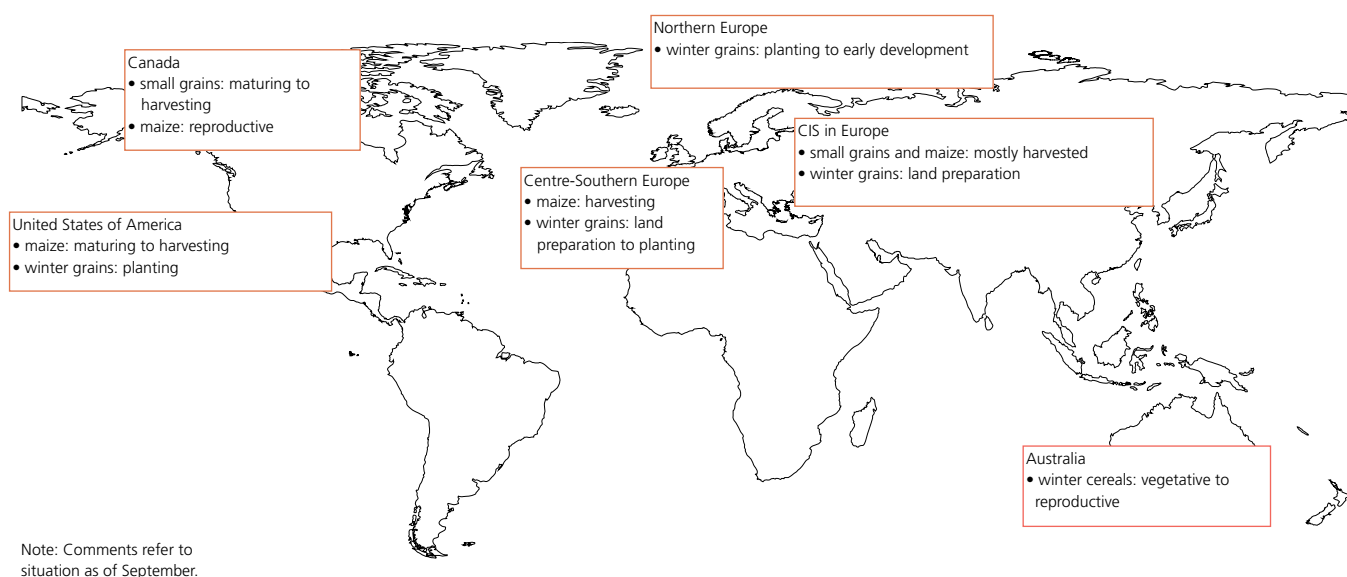
The latest forecast for the subregion's aggregate exports of cereals in the 2016/17 marketing year, the bulk of which is maize, has been revised downward to 65.4 million tonnes, 11.4 percent below last year's record but well above the five-year average. The downward revision reflects lower than anticipated maize availabilities in Brazil, due to the reduced 2016 maize crop. In **Brazil**, maize exports are forecast at 21 million tonnes in the 2016/17 marketing year (March/February), almost 40 percent lower than in the previous year. In **Argentina**, the forecast for maize exports in the 2016/17 marketing year (March/February) has been revised upward to 24 million tonnes, 3 million tonnes higher than earlier anticipated, and up 27 percent from the previous year's level. Higher export volumes are largely underpinned by the removal of export restrictions and ample availabilities from this year's record crop. Wheat exports

are anticipated to increase 7 percent from last year and reach 10.9 million tonnes, reflecting this year's bumper crop in Argentina, which accounts for about 80 percent of the subregion's exports.

### Prices for wheat and maize followed mixed trends but remained at high levels supported by tight supplies and high export demand

Yellow maize prices followed mixed trends in the subregion but were generally above year earlier levels during the June to August period, reflecting tight supplies as a result of reduced maize harvests or high export demand. In **Argentina**, with the arrival of new supplies from the record 2016 yellow maize crop, prices in August declined from the record levels in June and July, but were still 17 percent above their year-earlier levels, reflecting high export demand. By contrast, in **Brazil**, yellow maize prices increased further in August following the downward revision of production estimates for the second season crop in the face of a generally tight supply situation, and were 71 percent above year-earlier levels. In **Bolivia (Plurinational State of)** and **Chile**, prices also rose further in August continuing the upward trend of recent months, reflecting the reduced 2016 yellow maize crops, and were well above year earlier levels. In **Colombia**, yellow maize prices in August followed mixed trends in the main markets, but mostly remained well above their level at the same time last year as tight domestic availabilities and high local demand continued to pressure prices.

Wheat grain and flour prices in the main subregional markets followed mixed trends in the past few months but in August were generally above their year-earlier levels. In **Argentina**, wheat prices generally continued to be pressured by high export demand as a result of the removal of export controls and a weak national currency. Domestic prices of wheat flour, influenced also by high domestic demand, continued their upward trend reaching record high levels in August. Those for grain declined in July and August after peaking at record levels in June, weighed down by the selling of stocks ahead of the harvest due in November and forecast at a bumper level. In **Brazil**, prices of wheat grain and wheat flour in August were relatively unchanged halting the increasing trend of the previous three months. However, prices remained well above their levels during the same period last year, particularly wheat grain which was some 60 percent above its August 2015 level, supported by tight supplies, particularly of high quality wheat. In **Chile**, wheat prices were unchanged in August and down from a year earlier, reflecting adequate imports. In **Bolivia (Plurinational State of)**, prices of imported wheat flour generally increased in August, continuing their upward trend of previous months, and remained above their levels at the same time last year, pressured by lower import levels as a result of recent increases in wheat export quotations in Argentina, the country's main supplier and tight domestic supplies.



## NORTH AMERICA

### Sharply increased cereal production in 2016

Following better than expected yields during the latter stages of the wheat harvest, the official estimate of **the United States of America's** 2016 wheat output has been revised upward to 63.2 million tonnes. This puts it well above the previous two years' reduced crops and the highest level in eight years despite a reduction in plantings, as favourable weather conditions led to bumper yields. With regard to coarse grains, latest information continues to point to a record maize crop this year resulting from a large area expected to be harvested and near-record to record yields in major growing states. As of late August, 75 percent of the crop was rated in good or excellent condition, up from 69 percent last year, and the latest official forecast puts output this year at almost 385 million tonnes, 40 million tonnes up from last year's

level. In **Canada**, the latest official forecast as of end-August puts this year's wheat production at 30.5 million tonnes, 10.5 percent up from last year. Overall, wheat plantings were reduced because of a shift to other crops but generally favourable conditions have led to increased yield prospects this year. By contrast, production of coarse grains is expected to decline this year. Although maize plantings were relatively unchanged, yields are forecast to be lower this year and production may be down by as much as 9 percent.

## EUROPE

### European Union

#### European Union's wheat output to decrease in 2016

The forecast for the **European Union's** aggregate cereal output in 2016 now stands at 302.6 million tonnes, below expectations

**Table 16. North America, Europe and Oceania cereal production**  
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	2014	2015 estim.	2016 f'cast.	Change: 2016/2015 (%)
<b>North America</b>	<b>84.6</b>	<b>83.4</b>	<b>93.6</b>	<b>399.6</b>	<b>393.0</b>	<b>427.6</b>	<b>10.1</b>	<b>8.7</b>	<b>11.1</b>	<b>494.3</b>	<b>485.1</b>	<b>532.3</b>	<b>9.7</b>
Canada	29.4	27.6	30.5	22.1	25.7	24.8	0.0	0.0	0.0	51.5	53.3	55.2	3.6
United States of America	55.1	55.8	63.2	377.6	367.2	402.8	10.1	8.7	11.1	442.8	431.8	477.1	10.5
<b>Europe</b>	<b>249.0</b>	<b>256.3</b>	<b>247.1</b>	<b>272.2</b>	<b>238.2</b>	<b>248.6</b>	<b>4.0</b>	<b>4.2</b>	<b>4.2</b>	<b>525.2</b>	<b>498.7</b>	<b>499.9</b>	<b>0.3</b>
Belarus	2.9	2.5	2.5	6.1	5.5	5.7	0.0	0.0	0.0	9.0	8.0	8.2	1.4
European Union	157.1	160.5	144.0	171.7	150.0	155.7	2.9	3.0	3.0	331.7	313.4	302.6	-3.4
Russian Federation	59.7	61.8	69.5	42.4	39.5	40.1	1.0	1.1	1.1	103.1	102.4	110.8	8.1
Serbia	2.3	2.4	2.4	7.7	5.9	5.9	0.0	0.0	0.0	10.0	8.3	8.3	0.5
Ukraine	24.1	26.5	25.6	39.7	33.4	36.9	0.1	0.1	0.1	63.8	60.0	62.6	4.4
<b>Oceania</b>	<b>24.1</b>	<b>24.5</b>	<b>27.3</b>	<b>12.3</b>	<b>13.4</b>	<b>13.9</b>	<b>0.8</b>	<b>0.7</b>	<b>0.3</b>	<b>37.2</b>	<b>38.6</b>	<b>41.4</b>	<b>7.3</b>
Australia	23.7	24.2	27.0	11.7	12.9	13.3	0.8	0.7	0.3	36.3	37.7	40.6	7.4

Note: Totals and percentage change computed from unrounded data.

earlier in the season and 3.4 percent down from 2015. Although estimates indicate very little change in the overall cereal area this year, average yields are expected to be down, turning out somewhat below the five-year average, after relatively high levels in the past two years. By far, the bulk of the decrease is on account of a smaller wheat harvest, now forecast at 144 million tonnes, almost 10 percent down from the 2015 level. The reduction mostly reflects the negative impact of wet weather in France. By contrast, hot, dry conditions in some major maize producing areas have adversely affected the outlook for this year's crop. Nevertheless, output in 2016 is still expected to recover significantly from last year when crops were affected by widespread drought, to reach 63 million tonnes. Barley production is estimated to be similar to the previous year's level at about 60 million tonnes, with some increase in area offsetting reduced yields.

### CIS in Europe

#### Cereal production in 2016 forecast at record level

With harvesting of the 2016 cereal crops ongoing, the aggregate cereal output of the European CIS countries is forecast at 184 million tonnes, 7 percent up from last year's already high level. Most of the increase rests on a larger subregional wheat production, forecast at 99 million tonnes, almost 8 million tonnes higher than 2015's output. Maize production is also expected to rise, but by a lesser extent, to 42 million tonnes.

In **the Russian Federation**, total cereal production is estimated at 110 million tonnes, 8 percent higher than the bumper level of 2015, mainly on account of favourable weather during the winter and spring that boosted yields. Wheat production is now forecast at a record level of 69.5 million tonnes, up from earlier expectations and 13 percent up from last year, following better-than-expected yields, although the crop quality is reported to be poorer. A lesser increase is expected for the maize crop, which is set at 13.5 million tonnes, as a result of larger plantings. By contrast, a contraction in the area planted to barley resulted in an estimated 2 percent production decrease.

In **Ukraine**, the 2016 cereal production is forecast at 63 million tonnes, which would be a moderate increase from 2015's harvest. Despite dryness during the planting period, favourable weather thereafter resulted in increased spring cereal yields and led to a year-on-year production gain of 4 percent. Most of the increase is accounted by an expected 12 percent increase in the maize crop, forecast at 26.2 million tonnes, reflecting both larger plantings and improved yields. Similarly, barley output is expected at 8.9 million tonnes, up 7 percent compared to last year. By contrast, output of wheat is forecast to decline by 3 percent to 25.6 million tonnes, following a reduction in area due to dry conditions at planting. However, the quality of grain is expected to be higher this year.

The 2016 cereal output in **Republic of Moldova** is expected to rebound from last year's low level to 2.8 million tonnes, an

increase of about 30 percent from the previous year. Wheat production, which is the country's main crop, is estimated at 1.2 million tonnes, an increase of 40 percent from the drought-affected output of the previous year.

In **Belarus**, unfavourable weather conditions during the winter negatively affected yields. Therefore, despite increased plantings, the 2016 cereal harvest is forecast at 8.1 million tonnes, close to the previous year's level.

#### Exports in 2016/17 forecast at record level

The subregion's aggregate cereal exports in the 2016/17 marketing year (July/June) are forecast at a new record subregion's level of 76.2 million tonnes. Most of the anticipated increase stems from **the Russian Federation**, where the Government has removed the wheat export tax to stimulate exports as the record crop this year will further boost the already high domestic supplies. Wheat shipments are forecast to reach 29.5 million tonnes, which would make the Russian Federation the biggest wheat exporter in the world in 2016/17. On the contrary, exports of wheat from **Ukraine** are set at 14 million tonnes in 2016/17, down 20 percent from the previous year. Total subregional maize exports are expected to rise slightly to 23.4 million tonnes, mainly on the expectations of higher shipments from Ukraine.

#### Wheat export quotations rise, but domestic prices decline

In the Black Sea Region, limited supplies of high quality wheat, coupled with strong export demand, led to a 2 percent increase in export prices in August.

On the contrary, in the domestic markets of **the Russian Federation** and **Ukraine** wheat prices decreased over the last month. Large sales of feed quality wheat and the strengthening of the national currencies were the main factors that weighed negatively on prices.

## OCEANIA

#### Prospects for 2016 winter grain crop remain favourable

The prospects for the 2016 winter grain crops in **Australia** remain favourable. The season got off to a good start with favourable soil moisture conditions for planting, while subsequent rains during July and August across most grain-producing areas provided ample moisture for development of crops. Although the overall area planted to winter grains is estimated to be virtually unchanged from the previous year given the better yield prospects, output is expected to increase. As of late August, FAO forecasts wheat production at 27 million tonnes, almost 12 percent up from 2015.

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Table A1. Global cereal supply and demand indicators

	Average 2009/10 - 2013/14	2012/13	2013/14	2014/15	2015/16	2016/17
<b>1. Ratio of world stocks to utilization (%)</b>						
Wheat	27.6	24.7	25.8	29.3	30.9	31.6
Coarse grains	17.7	15.7	18.2	20.8	20.0	19.4
Rice	31.4	33.4	35.1	35.1	33.7	32.4
Total cereals	23.4	21.7	23.7	26.0	25.8	25.3
<b>2. Ratio of major grain exporters' supplies to normal market requirements (%)</b>						
	118.0	108.1	121.5	122.7	122.1	119.2
<b>3. Ratio of major exporters' stocks to their total disappearance (%)</b>						
Wheat	18.0	14.1	13.8	16.7	16.9	17.4
Coarse grains	11.4	8.2	10.5	12.9	11.4	13.2
Rice	25.0	27.8	28.9	23.9	18.2	15.6
Total cereals	18.2	16.7	17.7	17.8	15.5	15.4
	Annual trend growth rate 2006-2015	2012	Change from previous year			2016
		2012	2013	2014	2015	2016
<b>4. Changes in world cereal production (%)</b>						
	2.6	-2.2	9.9	1.7	-1.5	1.6
<b>5. Changes in cereal production in the LIFDCs (%)</b>						
	2.0	3.7	1.1	3.1	-6.4	5.0
<b>6. Changes in cereal production in the LIFDCs less India (%)</b>						
	2.4	5.4	0.6	6.7	-6.0	3.8
	Average 2009-2013	2012	Change from previous year (%)			2016*
		2012	2013	2014	2015	2016*
<b>7. Selected cereal price indices:</b>						
Wheat	184.3	-4.8	-4.9	-6.6	-20.5	-15.2
Maize	227.6	2.2	-12.9	-25.8	-11.8	-5.0
Rice	237.4	-4.6	0.8	0.8	-10.5	-8.9

Notes:

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

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

Major wheat exporters are Argentina, Australia, Canada, the European Union, Kazakhstan, the Russian Federation, Ukraine and the United States of America; major coarse grain 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.

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

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

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

\*January-August average.

**Table A2. World cereal stocks<sup>1</sup>**  
(million tonnes)

	2012	2013	2014	2015	2016 estimate	2017 forecast
<b>TOTAL CEREALS</b>	<b>549.0</b>	<b>528.1</b>	<b>590.7</b>	<b>655.2</b>	<b>659.3</b>	<b>663.7</b>
<b>Wheat</b>	<b>195.2</b>	<b>170.9</b>	<b>181.9</b>	<b>209.5</b>	<b>225.4</b>	<b>233.3</b>
held by:						
- main exporters <sup>2</sup>	68.8	48.7	50.9	62.5	65.7	68.6
- others	126.4	122.2	131.0	147.0	159.7	164.7
<b>Coarse grains</b>	<b>207.5</b>	<b>196.1</b>	<b>236.4</b>	<b>271.5</b>	<b>264.3</b>	<b>264.7</b>
held by:						
- main exporters <sup>2</sup>	74.5	54.9	80.7	101.2	90.5	105.1
- others	133.0	141.2	155.7	170.3	173.8	159.6
<b>Rice (milled basis)</b>	<b>146.3</b>	<b>161.1</b>	<b>172.4</b>	<b>174.2</b>	<b>169.6</b>	<b>165.8</b>
held by:						
- main exporters <sup>2</sup>	41.3	46.6	49.5	42.8	32.2	27.5
- others	105.0	114.5	122.9	131.4	137.4	138.3
<b>Developed countries</b>	<b>153.9</b>	<b>118.2</b>	<b>137.3</b>	<b>164.6</b>	<b>163.7</b>	<b>187.3</b>
Australia	9.0	6.6	5.9	6.4	6.9	8.0
Canada	9.4	8.2	15.1	10.4	8.4	8.3
European Union	32.6	24.4	29.5	36.1	34.7	31.3
Japan	5.5	6.2	5.6	5.2	5.0	5.0
Russian Federation	16.1	7.0	7.1	9.3	9.3	11.9
South Africa	2.6	2.5	1.7	3.3	3.3	2.4
Ukraine	9.7	4.9	7.6	9.6	5.3	6.0
United States of America	49.3	44.2	51.4	69.0	75.2	97.1
<b>Developing countries</b>	<b>395.0</b>	<b>409.9</b>	<b>453.4</b>	<b>490.6</b>	<b>495.6</b>	<b>476.4</b>
<b>Asia</b>	<b>329.0</b>	<b>353.3</b>	<b>380.7</b>	<b>403.3</b>	<b>413.1</b>	<b>405.0</b>
China	197.9	216.6	238.4	257.3	281.6	282.4
India	50.3	53.1	53.8	54.6	46.5	47.3
Indonesia	10.5	11.2	10.9	9.9	9.5	9.1
Iran (Islamic Republic of)	1.5	3.6	3.5	6.6	6.4	5.1
Korea, Republic of	3.7	3.3	3.7	4.1	4.5	4.8
Pakistan	5.2	3.5	3.9	4.6	3.8	2.8
Philippines	2.9	3.1	3.1	3.9	3.7	3.6
Syrian Arab Republic	3.5	2.6	2.2	1.4	1.6	1.0
Turkey	4.5	4.6	5.8	5.2	5.6	3.9
<b>Africa</b>	<b>37.8</b>	<b>35.2</b>	<b>38.3</b>	<b>43.8</b>	<b>43.7</b>	<b>39.7</b>
Algeria	3.2	3.6	5.2	5.8	6.4	6.0
Egypt	7.9	5.5	6.2	6.2	6.4	6.3
Ethiopia	2.0	1.9	1.7	2.7	1.7	2.2
Morocco	4.8	3.4	5.5	5.2	8.7	6.1
Nigeria	2.1	1.4	1.5	1.9	1.3	1.2
Tunisia	0.8	1.3	1.1	1.3	1.1	1.0
<b>Central America</b>	<b>5.6</b>	<b>5.6</b>	<b>6.6</b>	<b>7.2</b>	<b>7.7</b>	<b>7.0</b>
Mexico	2.3	2.6	3.3	3.6	3.9	3.1
<b>South America</b>	<b>22.2</b>	<b>15.4</b>	<b>27.4</b>	<b>35.9</b>	<b>30.5</b>	<b>24.2</b>
Argentina	4.8	2.1	5.8	10.3	8.9	8.5
Brazil	9.2	5.8	11.6	14.7	9.9	4.6

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

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

<sup>2</sup> Major wheat exporters are Argentina, Australia, Canada, the European Union, Kazakhstan, the Russian Federation, Ukraine and the United States of America; major coarse grain 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.

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

	Wheat			Maize		Sorghum
	US No.2 Hard Red Winter Ord. Prot. <sup>1</sup>	US Soft Red Winter No.2 <sup>2</sup>	Argentina Trigo Pan <sup>3</sup>	US No.2 Yellow <sup>2</sup>	Argentina <sup>3</sup>	US No.2 Yellow <sup>2</sup>
<b>Annual (July/June)</b>						
2003/04	161	149	154	115	109	118
2004/05	154	138	123	97	90	99
2005/06	175	138	138	104	101	108
2006/07	212	176	188	150	145	155
2007/08	361	311	318	200	192	206
2008/09	270	201	234	188	180	170
2009/10	209	185	224	160	168	165
2010/11	316	289	311	254	260	248
2011/12	300	256	264	281	269	264
2012/13	348	310	336	311	278	281
2013/14	318	265	335	217	219	218
2014/15	266	221	246	173	177	210
2015/16	211	194	208	166	170	174
<b>Monthly</b>						
2014 - August	284	219	270	175	181	183
2014 - September	279	204	248	164	166	174
2014 - October	289	223	242	165	171	189
2014 - November	280	236	252	178	179	197
2014 - December	289	261	251	178	197	217
2015 - January	262	233	254	176	184	231
2015 - February	252	221	241	174	178	230
2015 - March	250	219	228	173	169	226
2015 - April	239	209	225	172	168	223
2015 - May	231	199	228	166	168	217
2015 - June	242	211	226	170	173	224
2015 - July	238	208	229	179	176	223
2015 - August	216	190	227	163	160	180
2015 - September	218	195	223	166	161	177
2015 - October	221	208	223	172	164	182
2015 - November	211	201	210	166	167	173
2015 - December	212	191	193	164	166	170
2016 - January	213	192	194	161	161	165
2016 - February	205	189	194	160	167	165
2016 - March	207	189	192	159	163	161
2016 - April	201	193	199	164	170	162
2016 - May	193	189	202	169	187	153
2016 - June	198	186	210	181	197	170
2016 - July	188	168	210	161	179	147
2016 - August	188	157	215	150	177	140

Sources: International Grains Council and USDA.

<sup>1</sup> Delivered United States f.o.b. Gulf.

<sup>2</sup> Delivered United States Gulf.

<sup>3</sup> Up River f.o.b.



**Table A4a. Cereal import requirements of Low-Income Food-Deficit Countries<sup>1</sup>, 2015/16 or 2016 estimates**  
(thousand tonnes)

	2014/15 or 2015				2015/16 or 2016			
	Marketing year	Actual imports		Total commercial and aid	Total import requirements (excl. re-exports)	Import position <sup>2</sup>		
		Commercial purchases	Food aid			Total commercial and aid	Food aid deliveries <sup>3</sup>	Commercial purchases
<b>AFRICA</b>		<b>31 291.3</b>	<b>1 034.9</b>	<b>32 326.2</b>	<b>31 129.0</b>	<b>9 096.6</b>	<b>87.1</b>	<b>9 009.5</b>
<b>East Africa</b>		<b>9 898.1</b>	<b>560.9</b>	<b>10 459.0</b>	<b>10 432.9</b>	<b>3 191.5</b>	<b>3.1</b>	<b>3 188.4</b>
Burundi	Jan/Dec	147.4	3.0	150.4	168.0	17.1	3.1	14.0
Comoros	Jan/Dec	70.0	0.0	70.0	41.0	8.3	0.0	8.3
Djibouti	Jan/Dec	217.0	3.5	220.5	121.0	286.5	0.0	286.5
Eritrea	Jan/Dec	427.0	0.0	427.0	437.3	10.0	0.0	10.0
Ethiopia	Jan/Dec	1 700.0	111.5	1 811.5	1 620.0	595.0	0.0	595.0
Kenya	Oct/Sep	2 640.5	94.6	2 735.1	2 512.6	948.7	0.0	948.7
Rwanda	Jan/Dec	126.2	2.6	128.8	130.0	13.0	0.0	13.0
Somalia	Aug/Jul	590.0	58.0	648.0	620.0	55.7	0.0	55.7
South Sudan	Nov/Oct	n.a.	n.a.	545.0	555.0	n.a.	n.a.	n.a.
Sudan	Nov/Oct	1 955.9	257.3	2 213.2	2 820.0	548.1	0.0	548.1
Uganda	Jan/Dec	317.4	20.8	338.2	498.0	25.5	0.0	25.5
United Republic of Tanzania	Jun/May	1 161.7	9.6	1 171.3	910.0	683.6	0.0	683.6
<b>Southern Africa</b>		<b>2 662.1</b>	<b>55.5</b>	<b>2 717.6</b>	<b>2 801.3</b>	<b>1 979.5</b>	<b>19.2</b>	<b>1 960.3</b>
Lesotho	Apr/Mar	226.5	5.0	231.5	192.0	67.8	0.0	67.8
Madagascar	Apr/Mar	543.7	7.4	551.1	487.8	57.1	7.7	49.4
Malawi	Apr/Mar	117.0	13.2	130.2	258.8	339.7	3.1	336.6
Mozambique	Apr/Mar	1 266.8	22.2	1 289.0	918.0	792.2	1.3	790.9
Zimbabwe	Apr/Mar	508.1	7.7	515.8	944.7	722.7	7.1	715.6
<b>West Africa</b>		<b>16 977.4</b>	<b>269.2</b>	<b>17 246.6</b>	<b>16 124.7</b>	<b>3 466.3</b>	<b>63.9</b>	<b>3 402.4</b>
<b>Coastal Countries</b>		<b>12 872.5</b>	<b>146.3</b>	<b>13 018.8</b>	<b>11 984.0</b>	<b>2 379.2</b>	<b>4.8</b>	<b>2 374.4</b>
Benin	Jan/Dec	361.0	6.0	367.0	367.0	384.5	0.0	384.5
Côte d'Ivoire	Jan/Dec	1 889.7	3.5	1 893.2	1 740.0	614.5	4.3	610.2
Ghana	Jan/Dec	1 090.3	7.8	1 098.1	1 176.0	331.8	0.5	331.3
Guinea	Jan/Dec	610.5	16.5	627.0	687.5	97.4	0.0	97.4
Liberia	Jan/Dec	275.0	77.0	352.0	402.0	68.8	0.0	68.8
Nigeria	Jan/Dec	8 020.0	0.0	8 020.0	7 020.0	795.5	0.0	795.5
Sierra Leone	Jan/Dec	351.0	35.0	386.0	356.0	14.4	0.0	14.4
Togo	Jan/Dec	275.0	0.5	275.5	235.5	72.3	0.0	72.3
<b>Sahelian Countries</b>		<b>4 104.9</b>	<b>122.9</b>	<b>4 227.8</b>	<b>4 140.7</b>	<b>1 087.1</b>	<b>59.1</b>	<b>1 028.0</b>
Burkina Faso	Nov/Oct	479.0	6.0	485.0	573.0	75.3	0.0	75.3
Chad	Nov/Oct	104.0	40.6	144.6	151.7	43.7	15.8	27.9
Gambia	Nov/Oct	141.0	11.5	152.5	203.5	68.7	0.0	68.7
Guinea-Bissau	Nov/Oct	88.0	6.3	94.3	104.3	1.6	0.0	1.6
Mali	Nov/Oct	366.2	9.7	375.9	399.2	96.1	0.0	96.1
Mauritania	Nov/Oct	514.5	10.0	524.5	461.0	211.9	1.5	210.4
Niger	Nov/Oct	468.2	36.8	505.0	518.0	117.9	41.8	76.1
Senegal	Nov/Oct	1 944.0	2.0	1 946.0	1 730.0	471.9	0.0	471.9
<b>Central Africa</b>		<b>1 753.7</b>	<b>149.3</b>	<b>1 903.0</b>	<b>1 770.1</b>	<b>459.3</b>	<b>0.9</b>	<b>458.4</b>
Cameroon	Jan/Dec	1 016.6	2.0	1 018.6	887.0	375.8	0.0	375.8
Central African Republic	Jan/Dec	52.0	23.0	75.0	75.0	3.9	0.9	3.0
Democratic Republic of the Congo	Jan/Dec	669.7	120.3	790.0	790.0	77.4	0.0	77.4
Sao Tome and Principe	Jan/Dec	15.4	4.0	19.4	18.1	2.2	0.0	2.2

Source: FAO

<sup>1</sup> 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 IDA assistance (i.e. USD 1 945 in 2011); for full details see <http://www.fao.org/countryprofiles/lifdc>

<sup>2</sup> Estimates based on information as of August 2016.

<sup>3</sup> Refers to food aid deliveries to WFP country offices, bilateral transfers and deliveries by other UN agencies and NGOs.

**Table A4b. Cereal import requirements of Low-Income Food-Deficit Countries<sup>1</sup>, 2015/16 or 2016 estimates**  
(thousand tonnes)

	2014/15 or 2015				2015/16 or 2016			
	Marketing year	Actual imports		Total commercial and aid	Total import requirements (excl. re-exports)	Import position <sup>2</sup>		
		Commercial purchases	Food aid			Total commercial and aid	Food aid deliveries <sup>3</sup>	Commercial purchases
<b>ASIA</b>		<b>19 106.8</b>	<b>493.9</b>	<b>19 600.7</b>	<b>22 764.8</b>	<b>14 500.8</b>	<b>354.9</b>	<b>14 145.9</b>
<b>Cis in Asia</b>		<b>4 137.8</b>	<b>0.5</b>	<b>4 138.3</b>	<b>4 337.2</b>	<b>2 960.5</b>	<b>0.0</b>	<b>2 960.5</b>
Kyrgyzstan	Jul/Jun	570.8	0.3	571.1	521.2	35.9	0.0	35.9
Tajikistan	Jul/Jun	1 082.0	0.2	1 082.2	1 089.0	810.4	0.0	810.4
Uzbekistan	Jul/Jun	2 485.0	0.0	2 485.0	2 727.0	2 114.2	0.0	2 114.2
<b>Far East</b>		<b>6 309.2</b>	<b>146.2</b>	<b>6 455.4</b>	<b>8 405.6</b>	<b>8 416.4</b>	<b>14.6</b>	<b>8 401.8</b>
Bangladesh	Jul/Jun	5 271.0	15.0	5 286.0	5 631.0	3 349.3	0.3	3 349.0
Bhutan	Jul/Jun	90.4	1.0	91.4	74.0	1.6	0.0	1.6
Democratic People's Republic of Korea	Nov/Oct	309.5	100.2	409.7	694.0	29.0	10.0	19.0
India	Apr/Mar	38.7	0.0	38.7	886.0	4 805.8	0.0	4 805.8
Mongolia	Oct/Sep	67.8	0.0	67.8	199.8	123.7	0.0	123.7
Nepal	Jul/Jun	531.8	30.0	561.8	920.8	107.0	4.3	102.7
<b>Near East</b>		<b>8 659.8</b>	<b>347.2</b>	<b>9 007.0</b>	<b>10 022.0</b>	<b>3 123.9</b>	<b>340.3</b>	<b>2 783.6</b>
Afghanistan	Jul/Jun	2 161.0	16.0	2 177.0	2 632.0	1 310.0	0.0	1 310.0
Syrian Arab Republic	Jul/Jun	2 278.8	281.2	2 560.0	2 940.0	794.8	126.9	667.9
Yemen	Jan/Dec	4 220.0	50.0	4 270.0	4 450.0	1 019.1	213.4	805.7
<b>CENTRAL AMERICA AND THE CARIBBEAN</b>		<b>1 896.5</b>	<b>76.4</b>	<b>1 972.9</b>	<b>2 159.1</b>	<b>1 124.2</b>	<b>9.1</b>	<b>1 115.1</b>
Haiti	Jul/Jun	580.0	68.1	648.1	669.1	281.6	7.0	274.6
Honduras	Jul/Jun	869.4	5.5	874.9	915.0	607.9	1.6	606.3
Nicaragua	Jul/Jun	447.1	2.8	449.9	575.0	234.7	0.5	234.2
<b>OCEANIA</b>		<b>472.6</b>	<b>0.0</b>	<b>472.6</b>	<b>480.6</b>	<b>81.6</b>	<b>0.0</b>	<b>81.6</b>
Papua New Guinea	Jan/Dec	415.2	0.0	415.2	420.2	78.2	0.0	78.2
Solomon Islands	Jan/Dec	57.4	0.0	57.4	60.4	3.4	0.0	3.4
<b>TOTAL</b>		<b>52 767.2</b>	<b>1 605.2</b>	<b>54 372.4</b>	<b>56 533.5</b>	<b>24 803.2</b>	<b>451.1</b>	<b>24 352.1</b>

Source: FAO

<sup>1</sup> 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 IDA assistance (i.e. USD 1 945 in 2011); for full details see <http://www.fao.org/countryprofiles/lifdc>

<sup>2</sup> Estimates based on information as of August 2016.

<sup>3</sup> Refers to food aid deliveries to WFP country offices, bilateral transfers and deliveries by other UN agencies and NGOs.

**Table A5. Cereal import requirements of Low-Income Food-Deficit Countries<sup>1</sup>, 2016/17 estimates\***  
(thousand tonnes)

	2015/16 Actual imports			2016/17 Import position <sup>2</sup>				
	Marketing year	Commercial purchases	Food aid	Total commercial and aid	Total import requirements (excl. re-exports)	Total commercial and aid	Food aid deliveries <sup>3</sup>	Commercial purchases
<b>AFRICA</b>		<b>2 643.9</b>	<b>19.2</b>	<b>2 663.1</b>	<b>4 924.0</b>	<b>129.8</b>	<b>0.0</b>	<b>129.8</b>
<b>Eastern Africa</b>		<b>683.6</b>	<b>0.0</b>	<b>683.6</b>	<b>815.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>
United Republic of Tanzania	Jun/May	683.6	0.0	683.6	815.0	0.0	0.0	0.0
<b>Southern Africa</b>		<b>1 960.3</b>	<b>19.2</b>	<b>1 979.5</b>	<b>4 109.0</b>	<b>129.8</b>	<b>0.0</b>	<b>129.8</b>
Lesotho	Apr/Mar	67.8	0.0	67.8	283.0	34.8	0.0	34.8
Madagascar	Apr/Mar	49.4	7.7	57.1	533.0	0.0	0.0	0.0
Malawi	Apr/Mar	336.6	3.1	339.7	817.0	0.0	0.0	0.0
Mozambique	Apr/Mar	790.9	1.3	792.2	1 161.0	26.6	0.0	26.6
Zimbabwe	Apr/Mar	715.6	7.1	722.7	1 315.0	68.4	0.0	68.4
<b>ASIA</b>		<b>8 391.7</b>	<b>131.5</b>	<b>8 523.2</b>	<b>15 638.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>
<b>CIS in Asia</b>		<b>2 960.5</b>	<b>0.0</b>	<b>2 960.5</b>	<b>3 530.2</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>
Kyrgyzstan	Jul/Jun	35.9	0.0	35.9	521.0	0.0	0.0	0.0
Tajikistan	Jul/Jun	810.4	0.0	810.4	572.2	0.0	0.0	0.0
Uzbekistan	Jul/Jun	2 114.2	0.0	2 114.2	2 437.0	0.0	0.0	0.0
<b>Far East</b>		<b>3 453.3</b>	<b>4.6</b>	<b>3 457.9</b>	<b>6 490.8</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>
Bangladesh	Jul/Jun	3 349.0	0.3	3 349.3	5 450.0	0.0	0.0	0.0
Bhutan	Jul/Jun	1.6	0.0	1.6	79.0	0.0	0.0	0.0
Nepal	Jul/Jun	102.7	4.3	107.0	961.8	0.0	0.0	0.0
<b>Near East</b>		<b>1 977.9</b>	<b>126.9</b>	<b>2 104.8</b>	<b>5 617.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>
Afghanistan	Jul/Jun	1 310.0	0.0	1 310.0	2 732.0	0.0	0.0	0.0
Syrian Arab Republic	Jul/Jun	667.9	126.9	794.8	2 885.0	0.0	0.0	0.0
<b>CENTRAL AMERICA</b>		<b>1 115.1</b>	<b>9.1</b>	<b>1 124.2</b>	<b>2 055.1</b>	<b>0.5</b>	<b>0.5</b>	<b>0.0</b>
Haiti	Jul/Jun	274.6	7.0	281.6	645.1	0.3	0.3	0.0
Honduras	Jul/Jun	606.3	1.6	607.9	865.0	0.0	0.0	0.0
Nicaragua	Jul/Jun	234.2	0.5	234.7	545.0	0.2	0.2	0.0
<b>TOTAL</b>		<b>12 150.7</b>	<b>159.8</b>	<b>12 310.5</b>	<b>22 617.1</b>	<b>130.3</b>	<b>0.5</b>	<b>129.8</b>

Source: FAO

\* Countries included in this table are only those that have entered the new marketing year.

<sup>1</sup> 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 IDA assistance (i.e. USD 1 945 in 2011); for full details see <http://www.fao.org/countryprofiles/lifdc>

<sup>2</sup> Estimates based on information as of August 2016.

<sup>3</sup> Refers to food aid deliveries to WFP country offices, bilateral transfers and deliveries by other UN agencies and NGOs.

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