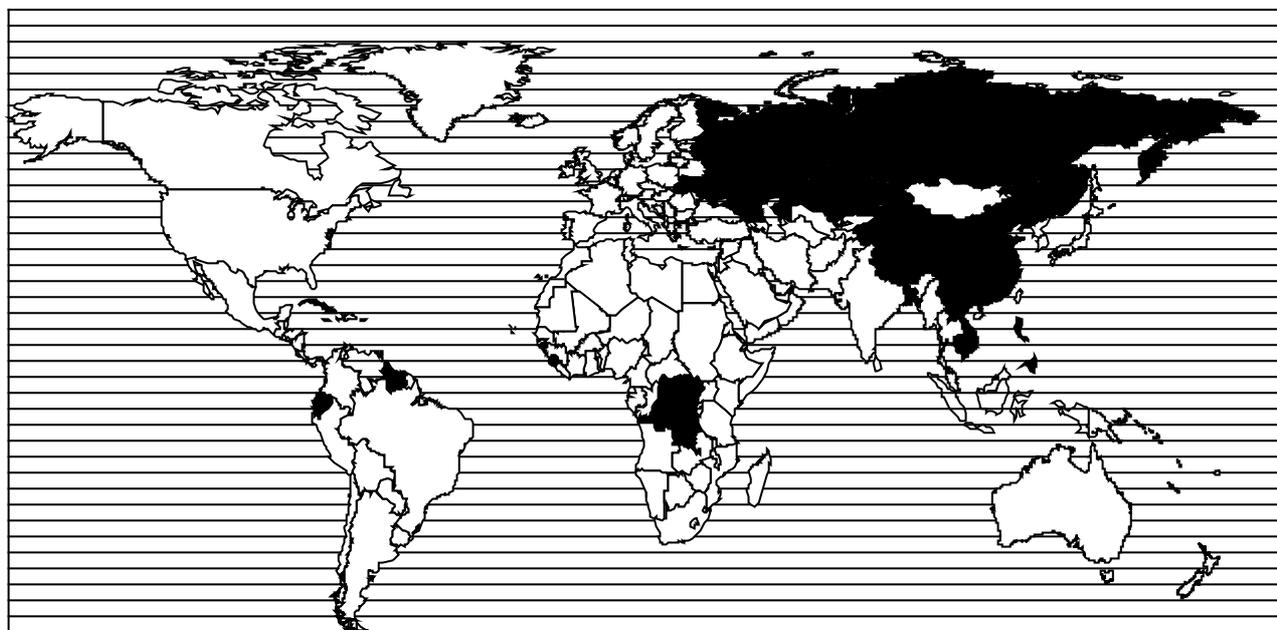


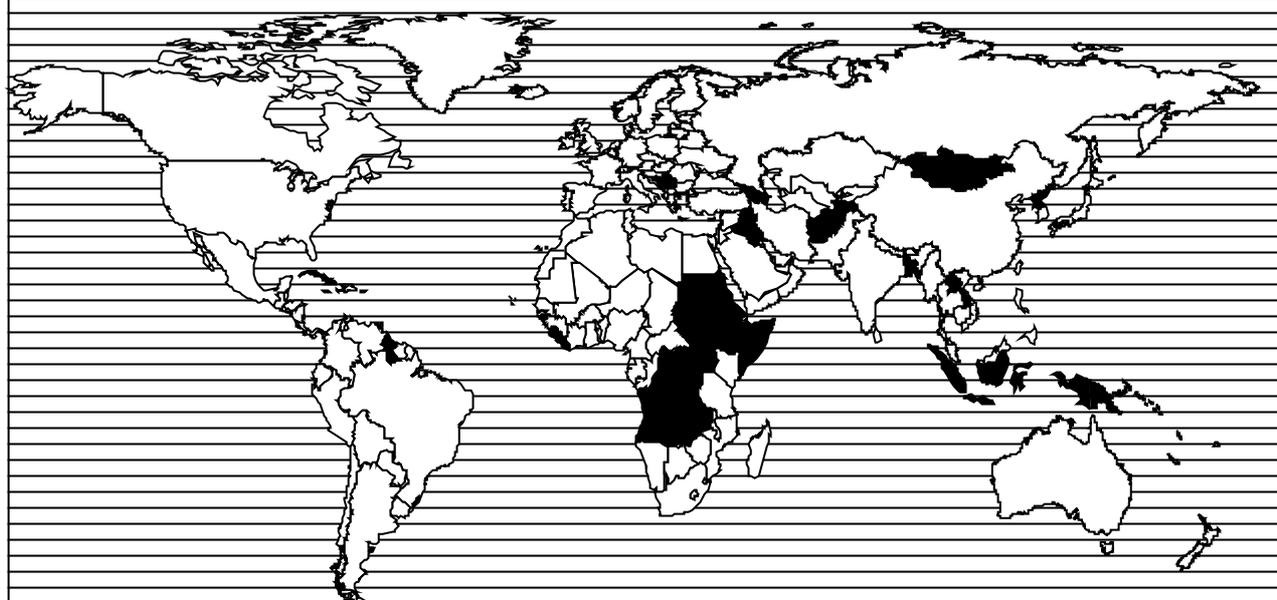
FOODCROPS AND SHORTAGES

No.4

September 1998



UNFAVOURABLE PROSPECTS FOR CURRENT CROPS



FOOD SUPPLY SHORTFALL IN CURRENT MARKETING YEAR REQUIRING EXCEPTIONAL ASSISTANCE

AFFECTED COUNTRIES^{1/}

UNFAVOURABLE PROSPECTS FOR CURRENT CROPS^{2/}

<u>Country</u>	<u>Harvest date</u>	<u>Main contributory factors</u>
<u>Bangladesh</u>	Nov./Jan.	Floods
<u>Cambodia</u>	December	Drought
<u>China</u>	Nov./Dec.	Floods
<u>Congo, Dem.Rep.of*</u>	Sept./Oct.	Civil strife
<u>Cuba</u>	Sept./Dec.	Reduced plantings, drought, shortages of inputs
<u>Ecuador</u>	May/Sept.	Adverse weather, reduced plantings
<u>Guinea Bissau</u>	Oct./Nov.	Civil strife
<u>Guyana</u>	Sept./Oct.	Drought, reduced plantings
<u>Kazakhstan</u>	July/Oct.	Drought
<u>Laos*</u>	Nov./Dec.	Drought
<u>Nepal</u>	Nov./Dec.	Floods, landslides
<u>Philippines</u>	Aug./Sept.	Drought
<u>Russian Federation</u>	July/Oct.	Drought
<u>Sierra Leone*</u>	Sept./Dec.	Civil strife
<u>Suriname</u>	Sept./Oct.	Drought
<u>Ukraine</u>	July/Oct.	Drought
<u>Viet Nam</u>	October	Drought

SHORTFALLS IN FOOD SUPPLIES IN CURRENT MARKETING YEAR REQUIRING EXCEPTIONAL AND/OR EMERGENCY ASSISTANCE (Total: 30 countries)

AFRICA (13 countries):

Angola*, **Burundi***, **Democratic Republic of Congo***, **Eritrea***, **Ethiopia***, **Guinea-Bissau**, **Liberia***, **Rwanda***, **Sierra Leone***, **Somalia***, **Sudan***, **Uganda**, **Zambia**

ASIA (7 countries):

Afghanistan*, **Bangladesh**, **Indonesia***, **Iraq***, **Korea, D.P.R.***, **Laos***, **Mongolia***

CENTRAL AMERICA (2 countries):

Cuba, **Haiti***

SOUTH AMERICA (1 country):

Guyana

COMMONWEALTH OF INDEPENDENT STATES (4 countries):

Armenia, **Azerbaijan**, **Georgia**, **Tajikistan***

EUROPE (2 countries):

Bosnia-Herzegovina, **Yugoslavia**, **Fed. Rep. of**

OCEANIA (1 country):

Papua New Guinea

DISTRIBUTION OF LOCAL AND/OR EXPORTABLE SURPLUSES REQUIRING EXTERNAL ASSISTANCE:

- Sudan

^{1/} New countries included in this report compared to the last report, are underlined on this page; both here and in the text, countries with unfavourable prospects for current crop and/or uncovered shortfalls are marked in **bold** and those affected or threatened by successive bad crops or food shortages are marked with an asterisk (*). Definitions can be found on the Contents page.

^{2/} Main crop unless otherwise indicated.

HIGHLIGHTS

The famine situation in Southern Sudan has eased with improved food aid distribution. However, the health and nutritional situation of a large section of the population, particularly displaced people, remains extremely poor. Assistance will be needed until next year. While overall prospects for this year's harvest have improved with abundant rains in recent months, production is anticipated to be sharply reduced in areas affected by insecurity, dry weather earlier in the season and recent floods. Elsewhere in the eastern Africa sub-region, the food supply situation gives cause for serious concern in Somalia, where this year's recently harvested "Gu" season crop was the fifth consecutive reduced harvest.

The food supply situation in southern Africa is generally stable despite reduced cereal production in several countries. As a result of abnormal weather conditions attributed to El Niño, cereal production was significantly reduced in Botswana, Lesotho, Namibia, Zambia and Zimbabwe. Consequently, the sub-regional cereal import requirements are forecast to rise significantly during the 1998/99 marketing year. However, a maize surplus will be available in South Africa due to large carryover stocks.

Harvest prospects are generally favourable so far in the Sahelian countries, except in Guinea Bissau where civil strife has disrupted agricultural activities and will lead to a significant decrease in cereal production in 1998.

Resurgence of civil strife in the Democratic Republic of Congo is likely to affect the A season crop, particularly in the Kivu region, where planting is about to start. New population movements and food supply difficulties will aggravate the already precarious food situation of large sections of the population.

In Asia, heavy rains and floods have inflicted severe damage on several countries, especially China, Bangladesh, Republic of Korea and Korea DPR. Thousands of people have been killed while crops and infrastructure have been extensively damaged. The floods in Korea DPR are likely to aggravate the acute food supply problems the country has been facing for the past three years. In Cambodia, Laos and Viet Nam drought has affected crop production.

In Central America and the Caribbean, the tail-end effects of El Niño have resulted in severe damage to foodcrops in Cuba and affected the development of the 1998 maize crop in Mexico. Prospects for the 1998/99 first season cereal crops are favourable for most of the other countries in the sub-region.

In South America, planting of the 1998 wheat crop has been completed in the southern areas with a reduced area planted relative to 1997, due to unattractive prices and the fear of possibly adverse weather. In Ecuador, substantial damage has been caused by El Niño to the 1998 first season crops.

A reduced grain crop is being harvested in the CIS, following dry spells and reductions in farm input utilisation. There are mounting fears that the grain trade will be disrupted by the rouble crisis.

In Europe another good crop is being harvested in the EC but reduced outputs are forecast in some eastern European countries, mostly due to adverse weather and farmers' financial difficulties.

In the United States another good wheat crop has been harvested in 1998 and prospects remain favourable for the coarse grains harvest. Prospects are also satisfactory for the harvest in Canada which is now well underway and one of the earliest on record.

In Australia, the prospects for the winter wheat crop have improved following continued rains over the past two months. Output of wheat for 1998 is now forecast at 23.5 million tonnes, close to the 1993 record, and sharply up on the previous year.

SUMMARY

WEATHER CONDITIONS AND CROP PROSPECTS

In **northern Africa**, 1998 wheat production is estimated to have increased significantly compared to last year's poor outturn, mainly due to generally favourable growing conditions. All countries in the sub-region harvested above-average crops. In Algeria, output is estimated to have more than doubled relative to last year's to 2 million tonnes, although it remained below the 1996 record. Production in Morocco is estimated to increase by some 91 percent on last year to 4.4 million tonnes, while in Tunisia output is estimated to be 37 percent higher. Output of the almost entirely irrigated crop in Egypt is estimated at 6.1 million tonnes, 5 percent higher than last year. Aggregate output of coarse grains in the sub-region in 1998 is estimated at 11 million tonnes, some 19 percent higher than last year.

In **western Africa**, despite a late start of the season in the coastal countries, growing conditions have been generally favourable, except in Ghana and Côte d'Ivoire where dry spells have stressed crops. Cereal output in Sierra Leone is expected to be below last year's level following new population displacements, while production should be close to last year in Liberia. In both countries the food supply situation is still very precarious and they will continue to rely heavily on food assistance in 1999. The large number of refugees in southern Guinea has affected food availability and agricultural activities in the area. In the Sahelian countries, reflecting generally abundant and widespread rains in August, harvest prospects are favourable so far in Burkina Faso, Chad, Mali and Niger. Following late and reduced rains in July, prospects have improved in Senegal and The Gambia with increasing and regular rains in August and early September, but the final outcome is heavily dependent on weather conditions in September and October. In Mauritania, recently planted rainfed crops are developing satisfactorily but they represent only about one third of total cereal production. In Guinea Bissau, the cease-fire agreed in late July and subsequent peace talks permitted the resumption of agricultural activities, but production is anticipated to remain well below normal.

In **central Africa**, abundant rains benefited coarse grain crops in Cameroon and Central African Republic. Resurgence of civil strife in the Democratic Republic of Congo is likely to impede normal agriculture and marketing activities, especially in Kivu region.

In **eastern Africa**, abundant rains in August improved prospects for the 1998 foodcrops about to be harvested. Good outputs, better than last year, are forecast in Kenya, Ethiopia and Eritrea. In Sudan, heavy rains in early September resulted in floods and crop damage but generally benefited developing cereals stressed by dry weather. In Tanzania, Uganda, Rwanda and Burundi, where harvests have been completed, foodcrop production recovered substantially from last year's levels. By contrast, sharply reduced cereal crops were gathered in Somalia due to dry weather and reduced plantings.

In **southern Africa**, the cereal harvest earlier in 1998 is estimated at about 19 million tons. This is below last year's level and below average, despite above-average cereal crops in Angola, Malawi, Mozambique and Swaziland. As a result of abnormal weather conditions attributed to El Niño, cereal production was significantly reduced in Botswana, Lesotho, Namibia, Zambia and Zimbabwe. Consequently, the sub-regional cereal import requirements are forecast to rise significantly during the 1998/99 marketing year. However, a maize surplus will be available in South Africa due to large carryover stocks, which is expected to be exported to the food-deficit countries. In Angola, renewed fighting and increased insecurity during the past few months have exacerbated an already precarious food supply situation, particularly in the southern provinces. In Madagascar, the 1998 rice crop is expected to be slightly below average as a result of reduced plantings.

In **Asia**, persistent rains attributed to the La Niña phenomenon and consequent flooding have taken a heavy toll on human life, infrastructure and crops. This year's south-west monsoon arrived early or on schedule in most countries of the region but its performance has been erratic resulting in excessive rains and flooding in several countries and drought conditions in others. Large areas of cropped land have been submerged in China, Bangladesh, The Republic of Korea, India and Nepal. Extensive damage also occurred in Japan, The Democratic People's Republic of Korea and Indonesia. Although it is too early to estimate the impact of the floods on crop production, there are fears of a decline in world paddy output, 90 percent of which comes from the region. In contrast, drought conditions are affecting some countries in the region, including Cambodia, Vietnam and Laos. Reflecting generally favourable weather conditions, production in Afghanistan has increased.

In **Central America** and the **Caribbean**, prospects for the 1998 first season cereal crops are good in El Salvador, Nicaragua as well as in Honduras, where a reasonable recovery is expected from last year's drought-affected crops. In Guatemala, the maize crop is being affected by pests and considerable losses are expected, while in Mexico, the outlook is uncertain as the crops have been affected by abnormally dry weather. In Cuba, severe damage to foodcrops is reported, particularly in the eastern provinces, as a consequence of a long and severe drought. Generally normal weather has benefited crops in the Dominican Republic and Haiti and average outputs are anticipated.

In **South America**, planting of the 1998 wheat crop is almost completed in the southern areas of the sub-region. In Argentina, the area planted is provisionally estimated at about 15 percent below last year's average level, mostly due to low wheat prices relative to alternative crops. In Brazil, plantings have also declined by some 12 percent relative to 1997. In Uruguay, the area planted is about average. In Chile, a severe drought is affecting maize, which is presently being planted, and the development of the wheat crop to be harvested from December. In Bolivia, harvesting of the 1998 wheat (winter) crop is underway while planting of the 1998/99 first season coarse grain crops has started recently under generally dry weather conditions. In Peru, harvesting of the 1998 wheat and maize crops is well advanced and output is anticipated to decline from last year but still remain slightly above average. In Ecuador, the outlook is poor for foodcrops, currently being harvested, as they were severely affected by severe weather associated with El Niño at planting. In Colombia, harvesting of the 1998 maize crop is underway and a recovery is expected from the 1997 reduced crop. In Venezuela, harvesting of the 1998 maize crop has only started and an average output is anticipated.

In **Europe**, latest indications continue to point to another above-average cereal harvest in the EC in 1998, of some 210 million tonnes, 1 percent up on the previous year. An increase in wheat output is expected to be partially offset by smaller coarse grains crops. In eastern parts, production is forecast to decline in Bulgaria, Hungary and Romania, but remain mostly unchanged from 1997 in the other countries. In the Federal Republic of Yugoslavia, wheat production has increased this year, but hot, dry spells have resulted in a drop in maize production.

In the **Commonwealth of Independent States (CIS)**, harvesting is well underway. Scattered rains in August have caused some delays to fieldwork, but have provided useful moisture for the winter plantings. The total planted area is ten percent down from the recent average, mainly due to shortages of credit, fuel and working machinery. Dry spells in some of the key producing areas in July have resulted in below normal cereal yields for the CIS as a whole. Overall cereal production in 1998 is expected to be some 30 million tons below the good crop of 1997. Drought and late season rains have caused extensive damage to the important potato crop. In the Russian Federation, Ukraine and Kazakhstan, the major cereal producers, crops will be well down on the average. Harvests in Armenia, Azerbaijan, Georgia, Kyrgyz Republic, Tajikistan, Turkmenistan, and Uzbekistan are expected to be above the recent five year average.

In **North America**, latest information points to another good wheat crop in the United States. Production is now estimated at 69.4 million tonnes, marginally above the 1997 level. Prospects for the 1998 coarse grains crop remain generally satisfactory. Maize is reported to be developing well and output is forecast at about 244 million tonnes, some 2 percent up on last year. In Canada, the 1998 cereal harvest is now well underway and one of the earliest on record. Yields of most major crops are reported to be above last year's levels. Wheat output is forecast at 23 million tonnes, while that for coarse grains is put at about 25.7 million tons.

In **Oceania**, prospects for the 1998 winter wheat and coarse grains in Australia have improved significantly over the past two months due to better moisture conditions throughout most of the major producing areas. The 1998 wheat output is now forecast to reach 23.5 million tonnes, much higher than the previous year and close to the 1993 record, while that for coarse grains is put at 9.2 million tonnes, about the same as in 1997.

COUNTRY REPORTS ^{1/}

AFRICA

NORTHERN AFRICA

ALGERIA (3 September)

The output of the 1998 cereal crop, recently harvested, is estimated at 3 million tonnes, more than double last year's poor harvest, due mainly to favourable weather. Output of wheat is estimated to have increased by 1.2 million tonnes to 2 million tonnes, whilst production of barley more than tripled to 1 million tonnes. Isolated adult locusts could be present near the Hoggar Mountains and near Mali and Niger. Small scale breeding may occur in areas of recent rainfall. Cereal imports in 1998/99 (July/June) are forecast at about 5.6 million tonnes.

EGYPT (3 September)

The output from the recently harvested wheat crop, almost entirely irrigated, is estimated at 6.1 million tonnes, some 4 percent higher than last year. Maize output is expected to increase to 6.3 million tonnes, about 5 percent higher than last year. The development of the rice crop, to be harvested from mid-September, is reported to be satisfactory due to sufficient irrigation water and input availability. About 546 000 hectares have been sown to rice and 4.6 million tonnes of output is expected. Isolated mature desert locusts could be present and small scale breeding can take place near lake Nasser, the Western Desert and the Red Sea Coastal Plains. Imports of wheat and wheat flour in 1998/99 (July/June) are forecast at 7 million tonnes and coarse grains at 3 million tonnes.

MOROCCO (3 September)

Production of wheat in 1998 is estimated at 4.4 million tonnes, some 89 percent higher than last year, as a result of favourable weather. The output of barley is estimated at 2 million tonnes, about 49 percent higher than last year's poor harvest. Imports of wheat in 1998/99 (July/June) are forecast at 2 million tonnes, about 26 percent lower than the previous year.

TUNISIA (3 September)

The output of winter cereal crops in 1998, recently harvested, is estimated at 1.5 million tonnes, some 43 percent higher than last year. The output of wheat is estimated to have increased to 1.2 million tonnes and the barley output to have more than doubled to 330 000 tonnes. Although ploughing usually starts in September with the autumn rains, farmers have started ploughing for the next cereal crop due to early significant rains in the northern and central regions. Imports of wheat and barley in 1998/99 are forecast at 1 million tonnes and 300 000 tonnes, respectively.

^{1/} Bold print is used for countries with unfavourable crop prospects for current crops and/or uncovered shortfalls in food supplies in the current marketing year requiring exceptional and/or emergency assistance. Countries affected or threatened by successive bad crops and/or food shortages are marked with an asterisk (*).

WESTERN AFRICA

BENIN (3 September)

Rains remained widespread in July and August over the whole country. The first maize crop and rice are being harvested. Satellite vegetation images show above normal vegetation in the south and north, but slightly below average in the centre, around Parakou. Maize and millet production could be reduced in this area. Crop prospects are generally better than last year due to favourable growing conditions in most parts of the country.

The overall food supply situation is satisfactory. The cereal import requirement for 1998 (January/December) is estimated at 205 000 tonnes (including re-exports), mostly wheat and rice. According to the cereal balance sheet, about 70 000 tonnes of maize can be exported to neighbouring countries.

BURKINA FASO (15 September)

Above-normal rainfall was registered in early and mid-August. Rains decreased somewhat during the third dekad of August, notably in the north, but soil moisture reserves are generally abundant. Precipitation increased in the north in early September, compensating for the decreased rains in the previous dekad. Crops are developing satisfactorily. Short cycle and early planted varieties, notably of maize, are being harvested. Pastures are adequate countrywide. Grasshopper infestations are reported in the north and east. Cantharids are also present on maize and millet in the Sahel and Mouhoun zones. Worm infestations have been reported in several areas of the north and the east. Treatments have been undertaken.

Reflecting a below-average harvest in 1997, the overall food supply situation remained tight during the lean season in the areas which gathered reduced crops. About 75 percent of the emergency food aid requirement estimated by the Government at 76 400 tonnes to cover consumption requirements of 800 000 people for seven months has been covered. Substantial local purchases from surplus regions have been financed by various donors, including from local resources.

A joint FAO/CILSS Crop Assessment Mission is scheduled in mid-October to estimate 1998 crop production.

CAPE VERDE (15 September)

The arrival of the rains in late July was followed by dry weather during the first dekad of August, leading to crop failure in some areas. During the second dekad, widespread and abundant rains were registered on the islands of Santo Antao, Fogo and Brava, but were limited on Santiago island. During the third dekad, rains were registered on all the islands, including Santiago. The maize crop is emerging/tillering. Grasshopper infestations are reported on Brava, Fogo, Maio and Santiago islands and treatments have been undertaken in some locations.

Despite two successive poor harvests in 1995 and 1996, the overall food supply situation remains satisfactory as the country imports the bulk of its consumption requirement, except for some at-risk rural populations, particularly in the semi-arid or arid zones. For the 1997/98 marketing year (November/October), the cereal import requirement is estimated at 95 000 tonnes and the food aid requirement at 65 000 tonnes.

A joint FAO/CILSS Crop Assessment Mission is scheduled in early November to estimate 1998 crop production.

CHAD (15 September)

Widespread and above-normal rainfall since early July benefited crop development in most producing

areas. Precipitation decreased somewhat in late August in the south but improved in early September. By contrast, torrential rains were registered between 21 and 24 August in Moyen Chari and Logone regions, causing flooding in some areas. Crops are developing satisfactorily.

Pastures are regenerating well. Grasshoppers are reported on millet and sorghum in several regions. Isolated African Migratory Locusts are present in Massakory area. Low numbers of solitary Desert Locust adults may be present in a few places in Biltine and Ennedi. Small scale breeding is likely to occur in areas of recent rainfall.

The national early warning system (SAP) has recommended provision of 5 155 tonnes of food aid for about 237 000 people for up to four months during the lean season in areas classified as at-risk of food insecurity in the Sahelian zone. In addition, about 5 000 tonnes were needed to cover needs in the Sudanian and Saharan zones. Cereals have also been purchased to replenish the national security stock. The Government has launched an appeal for assistance for 40 tonnes of recession sorghum seeds for off-season production. Total imported food aid pledges reported so far amount to 35 000 tonnes, of which 15 000 tonnes have been delivered.

A joint FAO/CILSS Crop Assessment Mission is scheduled in mid-October to estimate 1998 crop production.

COTE D'IVOIRE (3 September)

Cumulative rainfall since the beginning of the season has been normal to below normal but rains remained widespread and harvest prospects for 1998 are about normal. Satellite vegetation images show above-average vegetation over the whole country. However, reduced rainfall in June and July could have reduced crop production in the south where the main maize and rice crops are currently being harvested.

The overall food supply situation is satisfactory and markets are adequately supplied. The cereal import requirement for 1998 (January/December), is estimated at 620 000 tonnes, mostly wheat and rice.

THE GAMBIA (15 September)

Following below-normal rains in July, precipitation was generally adequate in August. Due to a long dry spell in July/August last year, the 1997 aggregate cereal output was well below the 1996 output and substantially below average. In late April 1998, the Government launched an appeal for international assistance amounting to 9 325 tonnes of cereals.

A joint FAO/CILSS Crop Assessment Mission is scheduled in mid-October to estimate 1998 crop production.

GHANA (3 September)

Below-average rains were recorded in July and August in the centre, and could reduce the output of the main maize and rice crops which were then at the maturing stage and are now being harvested. Limited and erratic rainfall in June over the Upper regions could also have affected millet and sorghum production in these areas. By contrast, good growing conditions prevailed in the south where maize production is expected to be above average.

The overall food supply situation is satisfactory. Food distributions are underway for 30 000 vulnerable people in the extreme north following reduced crops output in 1997. The 1998 cereal import requirement is estimated at 440 000 tonnes, mostly wheat and rice.

GUINEA (3 September)

Following widespread and abundant rainfall, the main cereal crops are maturing and overall prospects for the 1998 harvest are favourable. However, satellite images show below-normal

vegetation in Fouta Djallon and Boké areas where reduced rains in July could have affected rice and maize production.

Latest estimates put the total number of Liberian and Sierra Leonean refugees in Guinea at 614 000, of whom about 414 000 are Sierra Leoneans and 200 000 Liberians. Heavy rains in late August severely disrupted the delivery of humanitarian assistance. The cereal import requirement for 1998 is estimated at 410 000 tonnes, mostly wheat and rice.

GUINEA-BISSAU (15 September)

Following the ceasefire agreement signed on July 26 and the start of peace talks in late August, most of the 350 000 people who fled Bissau and other towns should be able to return to their homes.

Satellite imagery indicates that abundant and widespread rains covered the entire country in August and early September. Hopefully, the ceasefire in late July permitted farmers to undertake replanting of rice, but availability of seeds and delays in the preparation of rice seedbeds are likely to have severely limited planted areas.

The overall food supply situation has deteriorated following the fighting which displaced a large number of people and disrupted marketing activities. The situation is expected to remain tight in 1998/99. In late August, an emergency assistance operation was approved by FAO and WFP for a total of 37 000 tonnes of relief food to address for six months the needs of 350 000 internally displaced persons who are located mainly around Bafeta.

LIBERIA* (3 September)

Abundant rainfall during the whole growing season resulted in good development of the rice crop, which is about to be harvested. But severe seed shortages were reported in many rural areas and will have limited production. The 1998 cereal output is expected to be close to last year's level.

Food supply in the urban market is stable but prices remain very high and only an extremely low proportion of the population has sufficient income to buy enough rice, the staple food. Food assistance is being provided throughout almost the entire country and an improvement in the nutritional status of the population is reported. Food assistance is also provided to about 1 717 000 IDPs and refugees from Sierra Leone.

The cereal import requirement for 1998 (January/December), is currently estimated at 240 000 tonnes, including 130 000 tonnes of food aid.

MALI (15 September)

Precipitation remained generally widespread and abundant in July and August, but decreased somewhat in the centre-east in late August; however, it improved in early September. Crops are developing satisfactorily. Pastures are generally adequate. There were unconfirmed reports from nomads of Desert Locust adults in mid-August in the Adrar des Lforas south of Kidal between Wadi Alkit and Wadi Edjerer.

Following an above-average 1997 aggregate cereal output with record rice production, the overall food supply situation remains satisfactory. Cereal surpluses were available and substantial quantities have been exported, notably to Burkina Faso and Mauritania. The national early warning system (SAP) had classified several arrondissements in the north and west of Tombouctou region and in several parts of Kayes, Mopti and Ségou regions as at risk of food supply difficulties and recommended the provision of 8 600 tonnes of cereals to assist 318 000 people for 3 months.

A joint FAO/CILSS Crop Assessment Mission is scheduled in late October to estimate 1998 crop production.

MAURITANIA (15 September)

Since the beginning of the rainy season in mid-July, precipitation remained widespread and regular during August and September. Crops are generally growing satisfactorily. Early short cycle millet and sorghum crops (60 - 70 days) are heading in several areas of the south, while long cycle varieties (120-150 days) are tillering in low lying areas. Pastures are in good condition. Some grasshoppers have been reported in some areas, notably in the pastures. Desert Locust activity remains calm.

Following the harvesting of recession and off-season crops, the final aggregate output of cereals for 1997/98 is estimated at 152 200 tonnes, which is better than in 1996/97 but below average. The overall food supply situation is anticipated to be tight in the remainder of 1998, notably in the south of Aftout area. However, following substantial recent commercial imports, wheat and rice prices remain stable. The Government has appealed for international food assistance amounting to about 50 000 tonnes. Pledges reported so far amount to 31 000 tonnes of which 15 000 tonnes have been delivered.

A joint FAO/CILSS Crop Assessment Mission is scheduled in late October to estimate 1998 crop production.

NIGER (15 September)

Rains were generally regular and widespread in late July and August. They decreased during the last dekad of August but remained widespread in early September. Soil moisture reserves are generally adequate and crop water needs are well covered. In early August and again in early September torrential rains in the southwest and in Niamey area caused several deaths, substantial damage to infrastructure and flooding in crop zones. Pastures are abundant reflecting good rains in the pastoralist zones. Grain-eating birds and grasshopper and other insect infestations are reported in several departments and treatments have been undertaken. Low numbers of Desert Locust adults are likely to be present and breeding in Tamesna where rains have recently fallen.

Food supply was tight during the lean season in several areas, especially in Tillabery and Diffa departments. Markets are generally well supplied but cereal prices are high. Substantial imports have been recorded from neighbouring countries. The Government has appealed for international assistance, including food and seeds, and for replenishment of cereal banks.

A joint FAO/CILSS Crop Assessment Mission is scheduled in mid-October to estimate 1998 crop production.

NIGERIA (3 September)

Satellite imagery show below-normal vegetation in the north in Sokoto, Katsina, Kano, Bauchi and Borno provinces, due to low rainfall during the start of the growing season. This could reduce the 1998 wheat and sorghum harvest in these areas. Overall, growing conditions have been favourable in the centre and south, and the output of the main maize and rice crops, which are currently being harvested, should be close to last year's level. Shortages of fertilisers, improved seeds and pesticides are expected to have again negatively affected maize and rice production.

Food supply is still constrained by high levels of post-harvest losses and high distribution costs but is satisfactory. The cereal import requirement for 1998 is estimated at 1 300 000 tonnes, including 1 million tonnes of wheat and 200 000 tonnes of rice.

SENEGAL (15 September)

The rainy season started in the extreme south-east in early June, with the rains progressing slowly to the centre and the north, which remained dry up to mid-July. Planting of coarse grains started with

the arrival of the rains in late July in the north, which was later than last year but normal. In August, regular rains were recorded in the centre and the north, except in the southern part of St Louis region. Heavy rains in Tambacounda region caused flooding in some areas. In the south, (Kolda region), precipitation remained irregular and poorly distributed. Crop water needs are covered everywhere and crops are generally developing satisfactorily. Maize is flowering and rice is tillering/elongating. Due to the late start of the rains in the centre and centre-north and seed supply difficulties, planted areas are likely to be reduced. The final outcome will depend heavily on the continuation of the rains up to mid-October in the centre and the north.

Pastures are regenerating following regular rains in August. Grasshopper infestations have been reported in Kaffrine department but treatments prevented their spread. Grain eating birds are also reported in the Senegal River region. No Desert Locust activity is reported.

Following the reduced 1997 cereal harvest due to a long dry spell in July/August 1997, the overall food supply situation was tight during the lean season in the affected areas. In the urban areas, food supply is adequate and prices of rice are stable, reflecting substantial commercial imports by traders. In rural areas, supplies and prices of rice are also generally stable, prices of coarse grains started to decrease following substantial increases during the lean season. In July, the Government allocated a total of about 7 billion CFA Francs to buy food locally and distribute it to vulnerable populations.

A joint FAO/CILSS Crop Assessment Mission is scheduled in late October to estimate 1998 crop production.

SIERRA LEONE* (3 September)

Cereal production in 1998 is expected to be lower than in 1997. The planted area is estimated to be substantially lower than last year, due to continuing insecurity in the rural areas and population displacements which occurred during the growing season. An acute shortage of rice seed in the country has further limited crop production. Flooding occurred in Kambia and Mambolo, destroying rice fields following heavy rainfall in mid-August.

There are currently an estimated 100 000 internally displaced persons (IDPs), plus some 160 000 refugees in neighbouring Guinea. The security situation has deteriorated significantly since the beginning of the year, especially in the rural areas not yet under the control of ECOMOG forces.

The price of rice has increased sharply over the last few months, partly because of the government's decision not to provide any foreign exchange to commercial rice importers. Pockets of acute food shortage are located in the northeastern and central parts of the country. Due to several years of civil strife and insecurity in the country, the overall food supply situation remains very precarious and large-scale assistance is needed. Sierra Leone's cereal import requirement for 1998 is estimated at about 260 000 tonnes, including 80 000 tonnes of food aid.

TOGO (3 September)

The harvest of the main maize and rice crops is underway. The late start of the growing season and limited rainfall during the two last dekads of May and the first dekad of June might have reduced crop output in the south. In the centre and the north, maize, millet and sorghum crops benefited from adequate growing conditions and the output is expected to be normal to above normal.

The food supply situation is satisfactory. Food prices are decreasing following the start of the harvesting period. The cereal import requirement for 1998 (January/December), is estimated at 90 000 tonnes of wheat and rice.

CENTRAL AFRICA

CAMEROON (3 September)

Abundant and widespread rains benefited crop development in July and August. Precipitation was particularly abundant during the second and third dekad of July and again during the second dekad of August when there was above-normal rainfall countrywide. Precipitation decreased during the third dekad of August and in early September but was sufficient to meet crop water needs. Therefore, coarse grains are developing satisfactorily and crop prospects are favourable.

Following a government appeal for international food assistance to meet the needs of populations affected by a poor crop and attacks by African Migratory Locusts in late 1997, an emergency food operation permitted the provision of 6 000 tonnes of relief food to 210 000 people in the extreme north for a period of 3 months. The cereal import requirement for 1998 (January/December) is estimated at 250 000 tonnes of wheat and rice, and 10 000 tonnes of coarse grains.

CENTRAL AFRICAN REPUBLIC (3 September)

Reflecting abundant and widespread rains in July and August, crops are generally developing satisfactorily. Following an above-average cereal harvest in 1997, the food supply situation is satisfactory. Refugees from Rwanda, Burundi and the Democratic Republic of Congo, Sudan and Chad reside in the Central African Republic.

For the 1998 marketing year (January/December), the cereal import requirement is estimated at about 40 000 tonnes, mainly wheat.

CONGO, DEMOCRATIC REPUBLIC* (16 September)

Since the beginning of August, the country has again been plunged into civil strife, barely a year after the insurgency that toppled the former government. The most affected parts of the country are the eastern provinces of North and South Kivu, and the south-western part stretching from the estuary of the Congo river to the capital, Kinshasa. This latter part is now back in government hands after brief occupation by the rebels. Emergency food aid has been airlifted to Kinshasa from Pointe Noire and shipped across the Congo river from Brazzaville in neighbouring Congo.

The eastern part faces a potential humanitarian crisis should the fighting escalate. Season A is about to start in the Great Lakes region; intensified conflict will hamper farming activities and result in severe food shortages in the coming months. Moreover, many farming households were unable to take full advantage of the favourable weather conditions during the just-ended season B largely due to lack of inputs. Large-scale population movements can also be expected in search of both food and safety, both within DRC and to neighbouring countries. Already, reports indicate that refugees from DRC are entering Burundi, Rwanda and Tanzania.

CONGO, REP OF (16 September)

Following the civil strife in 1997 which severely disrupted food marketing activities and caused large-scale displacement of the urban population, the situation appears to be moving towards recovery and reconstruction. Most of the estimated 50 000 refugees in the DRC have returned.

EQUATORIAL GUINEA (3 September)

The staple foodcrops are sweet potatoes, cassava and plantains. Some 10 000 tonnes of wheat and rice are imported annually. The food aid requirement in 1998 (January/December) is estimated at 2 000 tonnes of wheat and rice.

GABON (3 September)

The staple foodcrops are cassava and plantains, the production of which is estimated at about 330 000 tonnes. Production of cereals in 1997, mainly maize, is estimated at 25 000 tonnes. The country imports the bulk of its cereal consumption requirement. The wheat and rice requirement in 1998 is estimated at 82 000 tonnes. No food aid is necessary.

EASTERN AFRICA

BURUNDI* (3 September)

A recent FAO Crop and Food Supply Assessment Mission to Burundi estimated the 1998 B season food production at about 1.85 million tonnes, an increase of 4 percent on last year's season B. Cereals suffered a 1 percent decline, while pulses, roots and tubers, and bananas rose respectively by 7 percent, 5 percent and 4 percent. The season was characterized by an improvement in the security situation except in the western and southern provinces. This allowed some of the population in re-groupment camps to return to their homes. As a consequence, cultivated land has increased, particularly for tide-over crops. Rainfall in 1998 B season was adequate and well distributed except in localized areas in the northern and eastern parts of the country.

Total food output in 1998 is forecast at 3.68 million tonnes, or 15 percent above 1997 production and about the same level as in the pre-crisis period. Food import requirements in 1998 are estimated at 42 000 tonnes of cereals and 69 000 tonnes of pulses. While, the food supply situation has improved with the satisfactory harvest of this season, it remains precarious for people still living in the displaced camps, where access to land remains insufficient to cover the food needs.

ERITREA* (3 September)

Good rains in August, which followed unseasonable dry weather, improved conditions for the 1998 main season cereal and pulse crops. The Desert Locust situation remains calm. The outlook for harvest from November is generally favourable.

The tight food supply situation due to a succession of poor harvests has been aggravated in areas affected by the armed conflict with neighbouring Ethiopia. It is estimated that a total of 275 000 people, or about 10 percent of the population, have been affected by the conflict. The Government has appealed to the international community for assistance to meet the emergency food and non-food needs of the affected populations.

ETHIOPIA* (3 September)

Abundant rains in July and August benefited developing crops of the 1998 main "Meher" season, particularly in parts of Ahmara, Tigray and eastern Oromiya where precipitation had been insufficient. Overall prospects for the harvest from late October are favourable.

Latest official estimates of the secondary 1998 "Belg" foodcrops indicate an output 45 percent higher than last year's reduced production, but lower than the bumper crop of 1996. While a record harvest was obtained in the important growing Southern Nations Nationalities and Peoples Regional State, the outcome was sharply reduced in the Belg-dependent areas of the northern highlands, mainly South Tigray, parts of North Wello, North Shewa and Northwest Shewa. The food situation in these areas, previously affected by a reduced 1997 Meher production, gives cause for concern.

As a result of the Ethiopia-Eritrea conflict, the Government's Disaster Prevention and Preparedness Commission (DPPC) has appealed for food and non-food assistance for the

affected population. Emergency food assistance for 168 000 displaced people in Tigray region and 20 000 in Afar region, amounting to 5 000 tonnes of cereals, is being provided.

KENYA (3 September)

Above-average rains in July and August benefited developing cereal crops of the 1998 main "long rains" season. The maize crop in the main growing area of the Rift Valley is reported in good condition. The outlook for the harvest, starting from October, is promising. Preliminary official forecasts indicate a maize output of 2.3 million tonnes, an increase of 13 percent from the reduced level of last year. Assuming normal "short rains" production early next year, the 1998/99 aggregate maize output is projected at 2.8 million tonnes. Even at this above-average level, however, production will not cover consumption needs of the increased population. Imports will still be necessary, although at a lower level than in 1997/98. Production of wheat is forecast at 315 000 tonnes, around the level of last year which covered about one-third of the national requirements.

In anticipation of the expected good harvest, prices of maize, the staple food, have declined substantially since June and are currently some 40 percent below their level of a year ago.

In arid and semi-arid areas, the good rains of the past months have improved pastures and the recovery of livestock following the huge losses of animals to floods in late 1997. Food assistance continues to be distributed to the affected population in these areas.

RWANDA* (3 September)

Security conditions deteriorated during the month of August, when at least 160 people were reported killed in fighting in the prefectures of Byumba, Ruhengeri and Kigali. As a result, WFP suspended food distributions in Ruhengeri in early September.

The 1998 second season foodcrop output was estimated by an FAO/WFP/EU/FEWS/Government local assessment team as substantially higher than last year and around the pre-civil strife average level of 1990. The area planted increased 9 percent and good rains in May and June benefited crops. As a result, the food deficit until the next harvest is estimated at 63 000 tonnes of cereal equivalent, well below that of the first half of the year. The tight food situation, following the insufficient food production of the previous season, has eased with the new harvest. Food prices started to decline in June.

However, in the northwestern prefectures of Gitarama, Ruhengeri and Gisenyi, affected by persistent insecurity, the food situation remains tight for thousands of displaced people who were unable to plant crops this season. Cases of malnutrition are reported from some camps. Food aid is being distributed to these IDPs but increasing insecurity hampers access to several locations.

SOMALIA* (3 September)

Rains towards the end of June, during the short Hagai rainy season, were too late to improve conditions of the 1998 "Gu" season crops severely affected by prolonged dry weather. However, they allowed for new plantings in some parts. The outcome of the main "Gu" season is estimated to be sharply reduced. A recent Food Security Assessment Unit (FSAU) appraisal of the cereal crops in the main southern agricultural areas, including the Hagai-off-season expected harvest, revised downwards preliminary estimates to 22 000 tonnes of sorghum, 20 percent of last year's level, and 61 000 tonnes of maize, 50 percent of the 1997 "Gu" season. The poor outcome reflects reduced plantings and yields due to insufficient rains since the beginning of the season, but also due to negative agronomic factors and financial constraints associated with the severe floods in late 1997. Insecurity in parts of the country also contributed to reductions in plantings.

Taking into account the expected reduced harvest in the northern regions (Somaliland) and assuming normal "Deyr" output, the 1998/99 aggregate cereal production is forecast at 186 000 tonnes, one third-lower than the reduced level of 1997/98 and 62 percent below the pre-war average.

The ban on livestock imports from Somalia by Saudi Arabia, one of the main markets, continues to severely affect incomes of large numbers of pastoralists, as well as the import capacity of the country.

The reduced 1998 "Gu" production will be the fifth successive poor harvest. This, coupled with the disruption of all economic activities by prolonged civil conflict, will aggravate the already precarious food situation of the majority of the population. Substantial amounts of food assistance will be required until the next harvest in December to avoid a major food crisis.

SUDAN* (15 September)

The famine in Southern Sudan, which has caused an estimated 100 000 deaths by starvation in the state of Bahr-EI-Gazhal since April, has eased with improved food aid distributions since August. While in previous months continuing insecurity, restrictions to delivery and heavy rains resulted in food aid distributions well below target, the estimated requirements of 15 000 tons per month were fully covered in August. Food market prices decreased in Wau, the capital of the Western Bahr-EI-Ghazal State and the number of deaths by starvation declined sharply by mid-September. However, the situation remains critical. Deaths due to lack of sanitation and safe water continue to increase and severe malnutrition remains at very high rates particularly among displaced populations. Continuing relief assistance for the affected population is needed beyond the next harvest, which is expected to be poor in several areas.

Overall prospects for the 1998 crops, to be harvested from October, have improved with abundant rains from mid-July but the situation varies substantially according to areas. Rains, which normally start in late March in the southernmost parts, were delayed by about one month. This resulted in planting reductions of the first season maize and sorghum crops in the Bahr-EI-Jebel state. Subsequently, rains were erratic in most areas in May and June, with prolonged dry periods coupled with heavy rains and floods in parts. The dry weather led to crop losses of early planted crops in parts of Bahr-EI-Gazal, Upper Nile and EI-Buheiral states, including parts of Rumbek and Tonj areas on the west of the Nile, and Ayod, Magok, Paluer, Old Fangk and Pagil on the east bank of the Nile. By contrast, floods destroyed crops in Lafon areas of Eastern Equatoria State, as well as in north-eastern parts of the Upper Nile State, including Ganyiel, Nyal, Leer, Duar and Nhialdiu. Along the rivers Nile and Sobart, floods washed out maize and vegetable crops, particularly in Bor area of Jonglei state, but new plantings are expected in October when waters recede. Widespread and abundant rains from mid-July until early September allowed extensive plantings of cereal and non-cereal crops, particularly in northern areas where sowing takes place later. Seed availability following distributions by humanitarian agencies was better than last year although still below requirements. The late rains also allowed the recovery of long-cycle crops in parts. Nevertheless, localized floods resulted in further crop damage, mainly around Malual Akon and Weil in Northern Bahr-EI-Ghazal State.

Despite crop losses by dry weather and floods in some areas, the outlook for the 1998 foodcrops has substantially improved due to the rains in recent months. The overall production is now forecast to be above the sharply reduced level of 1997. Generally good crops are expected in Upper Nile, Bahr-EI-Jebel, Eastern and Western Equatoria states, as well as in Raga province of Bahr-EI-Ghazal, not affected by insecurity. The rains have also benefited pastures and water supplies for livestock, reported in good condition in secure areas of Jonglei, Unity and Upper Nile states.

Besides localized crop failures due to unfavourable weather, food production is anticipated to be reduced for the second consecutive year in large areas affected by continuous fighting, where population displacements hampered normal cultivation this year. In Northern Bahr-El-Ghazal State, the massive movement of population in search of safe places halted all economic activities, while thousands of cattle were lost to raiding, particularly in Malual Akon area. In the Western Bahr-El-Ghazal State, little cropping is reported in Wau and surrounding areas. Heavy displacements since January and the extremely poor nutritional situation of the population, following last year's poor harvest, prevented cultivation of crops. In Unity State, widespread fighting seriously disrupted farming activities, particularly in Bentui and Leer. Continued food aid will be necessary for the populations in these areas until the next harvest from July/October 1999.

An FAO Crop and Food Supply Assessment Mission will visit the southern states of Sudan in late September to fully assess the outcome of the 1998 food production.

Elsewhere in the country, heavy rains in northern and central parts in early September resulted in the worst floods in the past 10 years in Khartoum, Northern, White Nile and Kassala States causing loss of lives, population displacements and severe damage to infrastructure and housing, as well as loss of most sorghum and maize crops. Preliminary assessment indicates that about 300 000 people have been affected by the floods. The Government has declared a state of emergency in the affected areas and has appealed for international assistance. A UN Inter-agency Mission is currently assessing the effects of the floods, including the impact on this year's crop production.

TANZANIA (3 September)

A recent FAO/WFP Crop and Food Supply Assessment Mission to Tanzania estimated the total food crop production in 1998 some 32 percent above last year's reduced volume and 13 percent above the average for the past five years. Substantial increases were estimated for cereals, bananas and roots and tubers. Within the cereals group, however, millet and sorghum production was forecast to fall by 32 percent, while maize and paddy were estimated to increase by 54 and 89 percent respectively. Abundant rains this year encouraged farmers to expand the total area planted to food crops by 15 percent above last year.

Food supply in the 1998/99 marketing year is forecast to exceed requirements for most foodcrops, except sorghum/millet and wheat. The shortfall in sorghum/millet is expected to be partially covered by substitution with non-cereal crops. Exports of rice in the order of 100 000 tonnes and 70 000 tonnes of maize are anticipated, the latter mainly in the form of already authorized exports and informal cross-border trade. Notwithstanding an overall increase in food production much of central Tanzania and parts of northern and coastal areas are likely to experience considerable food deficits. Some 300 000 people will require food assistance.

UGANDA (3 September)

Harvest of the 1998 first season foodcrops is well advanced, while planting of the second season crops is underway. Rains in late July and August hampered harvest operations but provided soil moisture for land preparation for the second season planting. Overall, the 1998 first season production of maize and beans is estimated to be good. However, there are regional variations. In southern, south-western and western parts, despite a delay in the onset of the rains, yields and output are satisfactory. By contrast, a dry spell in the second decade of May in the north, northeastern and eastern parts resulted in reduced production. In the northern districts of Gulu and Kitgum, the intensification of rebel activity at planting time further reduced production levels.

The overall food supply situation has improved with the arrival of the new harvest. Prices of beans and maize have declined. **However, food difficulties are being experienced in the northern and western areas where civil conflict persists. Food aid is being provided to 400 000 displaced**

people but insecurity hampers access to the needy population. Food aid is also required for 126 000 people in northeastern areas of Kotido, Moroto and Kitgum affected by a succession of poor harvests.

SOUTHERN AFRICA

ANGOLA* (3 September)

As a result of generally favourable weather and some 10 percent increase in the area sown, aggregate cereal production in 1998 (mostly maize) rose by more than one-third to 594 000 tonnes. Output from other crops including cassava, pulses and sweet potatoes is also estimated to have increased reflecting larger areas sown and good yields.

The cereal import requirement in the 1998/99 marketing year (April/March) is estimated at 471 000 tonnes, including 121 000 tonnes of food aid. Despite the improvement in domestic production, the country's food supply situation remains difficult. Renewed fighting in several areas particularly in the northern province of Malange has exacerbated an already precarious food supply situation. The food supply position is particularly serious in the two drought-hit southern provinces of Cunene and Cuando Cubango where targeted food assistance is required. The number of displaced people in need of emergency food assistance is increasing, but it is difficult to reach many areas because of growing insecurity. Food aid pledges at the end of August amounted to 129 000 tonnes, of which 45 000 tonnes have been delivered.

BOTSWANA (3 September)

The 1998 cereal crop - mainly sorghum - is estimated at 9 000 tonnes, one-third of last year's below-average crop. Erratic and poorly distributed rainfall towards the end of the growing season seriously affected yields in several parts of the country, leading to a major crop loss.

However, even in normal years, the country imports most of its cereal needs. It is therefore anticipated that, available grain stocks and planned imports by major commercial millers will meet the domestic requirements of 256 000 tonnes, estimated for the 1998/99 marketing year.

LESOTHO (3 September)

Production of cereals in 1998 is put at 105 000 tonnes, including 67 000 tonnes of maize and 28 000 tonnes of sorghum. This is 34 percent lower than last year's crop, and markedly below average, reflecting erratic and poorly distributed rains during the growing season. As a result, cereal imports will have to remain at the same high level of last year when over 200 000 tonnes of cereals were imported, mostly on commercial terms. Food aid pledges at the end of August amounted to 6 200 tonnes, all delivered.

MADAGASCAR (3 September)

Growing conditions for the 1998 paddy and other cereal crops were generally favourable and locusts had no significant impact on production. However, reflecting lower plantings, paddy output is estimated to have decreased by some 300 000 tonnes from the average harvest of 2.5 million tonnes in 1997. Production of maize and other cereals is expected to be about average.

The overall food supply situation in the country for the 1998/99 marketing year is expected to remain relatively stable, including in the drought-prone south, where locust damage to crops and pastures is reported.

MALAWI (3 September)

The food supply situation in the current 1998/99 marketing year is expected to improve following the above average 1998 cereal harvest of 1.88 million tonnes. Maize production increased by 225 000 tonnes to 1.76 million tonnes. People living in localized food deficit areas in the north, where excessive rains resulted in flooding with loss of crops, are expected to be assisted under a Government programme supported by aid agencies.

MOZAMBIQUE (3 September)

The 1998 production of cereals is estimated at 1.69 million tonnes, an increase of some 10 percent on last year's above-average crop of 1.53 million tonnes. The increase is attributed to both increased area planted and harvested and increased yields for all cereals, particularly in the northern and central provinces. Production of cassava, groundnuts and beans is also estimated to have increased significantly.

Following several years of steady increase in food production and a good 1998 harvest, the overall food supply position is expected to improve further in the current marketing year. The country, which received an average of 600 000 tonnes of food aid in the 1991-94 period, will need virtually no food aid in 1998/99, except in localised areas where floods and drought caused some crop losses.

NAMIBIA (3 September)

The 1998 cereal output is officially estimated at 59 000 tonnes, one-third of last year's above-average crop. Production of millet decreased from 107 000 tonnes to 35 000 tonnes, the lowest level for the last six years. Below-normal and poorly distributed rain in most areas of the country resulted in widespread crop failures and poor regeneration of pastures.

As a result of the sharp decline in domestic output, the food supply situation in 1998/99 (May/April) is likely to be tight. Imports of cereals are estimated to double to some 155 000 tonnes (120 000 tonnes of maize and 35 000 tonnes of wheat). An international appeal has been launched for US\$6 million to finance food distribution, food-for-work and development of the water sector for an estimated 160 000 drought-affected people mainly in the northern areas bordering Angola.

SOUTH AFRICA (3 September)

Aggregate output of cereals in 1998 is currently estimated at 10 million tonnes, some 16 percent lower than last year's above-average crop. This includes 7.6 million tonnes of maize, which is 16 percent down from last year's output of 9 million tonnes, mainly due to reduced plantings and prolonged dry spells that reduced yields. However, this reduced harvest is unlikely to seriously limit the exportable maize surplus to the deficit countries in the sub-region, given the large carryover stock.

The early outlook for the wheat crop to be harvested towards the end of the year is unfavourable. Despite recent favourable weather conditions, production in 1998 will be negatively affected by a sharp reduction in plantings as confirmed by the September official forecast which points to a 46 percent reduction in area planted and a 35 percent drop in output compared to 1997.

SWAZILAND (3 September)

Above-normal rains for most of the growing season coupled with larger planted areas resulted in a 1998 cereal crop (mainly maize) of 107 000 tonnes. This is 26 percent higher than last year's drought reduced harvest and above average. Most of the increase was due to better yields in the Lowveld, almost one-third higher than last year, and in the Highveld.

Sufficient domestic cereal availability combined with normal commercial imports of wheat and rice (40 000 tonnes and 8 000 tonnes, respectively) should lead to a satisfactory food supply position for the marketing year 1998/99.

ZAMBIA (3 September)

As a result of El Niño-related weather anomalies which drastically reduced crop yields and total production, the 1998 cereal output is estimated at 707 000 tonnes, down 37 percent from the previous year's level and markedly below average. For maize, the staple of the country, production is estimated at some 548 000 tonnes, 43 percent lower than last year and 58.6 percent of the previous five-year average.

The food supply situation for the 1998/99 marketing year is expected to be tight. Maize prices are reported to be steadily increasing since May/June. Against a total cereal import requirement of 660 000 tonnes, commercial imports are forecast at 364 000 tonnes, leaving an uncovered deficit of 296 000 tonnes, which includes 45 000 tonnes of emergency food assistance. To cover this deficit, the country will need international assistance in the form of grants, concessional imports and targeted food aid. So far food aid pledges amount to 6 000 tonnes, of which 3 000 tonnes have been delivered.

ZIMBABWE (3 September)

Aggregate cereal production in 1998 is currently estimated at 1.83 million tonnes, one-third less than last year's good crop. The 1998 maize harvest is officially estimated at 1.47 million tonnes, over 700 000 tonnes down compared to the 1997 above average crop.

With a relatively small carryover stock, the food supply situation during the 1998/99 marketing year is expected to be quite tight and larger than normal imports of maize and wheat are anticipated. Targeted food assistance, especially for vulnerable groups in the drier areas of the south, will be required.

ASIA

AFGHANISTAN* (3 September)

An FAO/WFP Crop and Food Supply Assessment Mission which recently visited the country estimated the 1998 total cereal production at 3.8 million tonnes, 5 percent higher than last year and the highest since 1978, as a result of generally favourable precipitation during winter and spring, improved security in many areas and some progress in agricultural rehabilitation. However, the food situation is likely to remain tight in the areas affected by civil strife and recent earthquakes. Cereal imports in 1998/99 (July/June) are forecast at 740 000 tonnes.

BANGLADESH (16 September)

Heavy monsoon rains that started in the second dekad of July caused extensive flooding in two-thirds of the country. The floods resulted in loss of life and extensive damage to property and infrastructure. Recent reports put the death toll at more than 1 000 people. Some 25 million people are reported to have been affected by the floods, with many thousands left homeless. Over 2 million head of cattle were also affected.

Late planted 'Aus' crops have been destroyed and the anticipated rice output of 1.9 million tonnes is now revised down to 1.6 million tonnes. The planting of the main 'Aman' rice was also delayed in most areas and many farmers will not be able to plant this season which ends in August/September. Actual crop losses will only be known after the floods recede, but recent estimates put the loss at around 2 million tonnes. An FAO/WFP Mission is planned for early October to assess the flood damage to crops and review the overall food supply situation.

The Government has made an emergency appeal for 1.38 million tonnes of foodgrains. A total of 830 000 tonnes has so far been pledged. More external assistance with both relief and emergency rehabilitation of the agriculture sector is urgently needed.

On 15 September, FAO and WFP jointly approved an emergency operation for US\$84 million for assistance to 19 million persons for five months (December 1998-January 1999).

CAMBODIA (3 September)

A late start of the monsoon and well below-normal rainfall, so far, are reported to have delayed the planting of rice in many parts of the country. The incidence of insect attacks on rice seedlings is also reported to be higher this season. Widespread food shortages are reported in the country's north-east, which suffered drought conditions earlier this year, with many households receiving relief food aid. The Government has appealed to the international community for about 250 000 tonnes of rice to be distributed to the drought affected population.

The preliminary forecasts put the 1998/99 paddy output at 3.77 million tonnes, about 10 percent higher than last year.

CHINA (18 September)

Heavy rains since mid-June have caused extensive flooding in central, south-eastern and north-eastern parts of the country. The floods have killed at least 3 000 people, mostly in the heavily populated areas of central and southern China. About 240 million people have been directly affected. The extent of the damage so far is estimated in the region of US\$36 billion.

Damage to crops has been extensive with about 22 million hectares affected and 4.8 million hectares totally destroyed. The summer grain harvest, which accounts for 20 to 25 percent of annual total grain output, is expected to fall by more than the official estimates of 11 percent from last year. Whether this will have a significant impact on the year's production remains uncertain. Official sources expect increased area under the autumn crops to compensate for the fall in summer production. The yields of subsequent crops could also benefit from abundant residual soil moisture from the floods.

The Government has mobilised more than one million soldiers to support the implementation of an emergency relief programme and provided more than US\$ 229 million worth of relief funds to the flood-affected areas. Sufficient stocks of grains are available for immediate food relief, reflecting consecutive years of bumper harvests.

On 17 September, an emergency operation was jointly approved by FAO and WFP to raise 247 214 tonnes of rice, which together with a commitment of 100 000 tonnes from the Government, will provide emergency food assistance for a total of 5.8 million people over four months (October 1998-January 1999).

CYPRUS (3 September)

The 1998 aggregate output of wheat and barley is estimated at 38 000 tonnes, some 19 percent lower than last year. Imports of wheat in 1998/99 (May/April) are forecast at 95 000 tonnes. Aggregate imports of barley and maize are forecast at some 540 000 tonnes, similar to last year.

INDIA (3 September)

Torrential monsoon rains in August over north and north-eastern parts of the country caused severe flooding and landslides. Latest estimates indicate that nearly 60 million people were affected, with some 1 800 killed. Around 3 million hectares of crop area were damaged. Most of the damage was sustained in Uttar Pradesh, Bihar, Assam and West Bengal. Furthermore, in early June a cyclonic storm that hit western parts of India resulted in more than 900 deaths, displaced a large number of people, and caused considerable damage to infrastructure.

Generally, the 1998 monsoon began on time and progressed more or less on schedule, bringing beneficial rains for planting of the 1998/99 crops in most southern and eastern parts of the country.

Total food grain production (including milled rice and pulses) in 1997/98 is officially estimated at 195 million tonnes, about 2 percent below the previous year's record production. The target for 1998/99 production is set at 210 million tonnes.

INDONESIA* (3 September)

Unseasonably heavy rains in main cereal producing areas following prolonged drought boosted irrigation supplies for second-season rice and maize crops. However, floods caused by excessive rains at the end of July affected East Kalimantan resulting in loss of life and property. Floods are also reported in parts of Sumatra.

Forecasts of more heavy rains and tidal waves associated with the La Niña weather phenomenon in most parts of the country are worrying, and may aggravate the already precarious food supply situation precipitated by last year's prolonged drought and the financial and economic crisis. An FAO/WFP Mission is in the country to assess the outcome of the secondary season crops and review the overall food supply situation in the country.

WFP launched a US\$ 90 million emergency food aid programme at the end of August for 5.3 million vulnerable people.

IRAN, ISLAMIC REPUBLIC OF (3 September)

The production of the recently harvested wheat is estimated at 10.5 million tonnes, some 3 percent above average for the preceding five years, and about 300 000 tonnes above 1997. This partly attributed to favourable rainfall in the growing season in many regions of the country.

Wheat imports for the current marketing year (April/March), estimated at 3.3 million tonnes, are reported to have been bought with some of the amount already entering the country. Last year an estimated 4 million tonnes of wheat were imported due to fall in production. Rice imports for the year 1997/98 are reported to be a reduced 900 000 tonnes, compared to the 1996/97 amount of 1.2 million tonnes, due to favourable production prospects.

IRAQ* (3 September)

Production of wheat in the three Northern Governorates is reported to have increased as a result of the increase in the use of fertilizer and pesticides which were distributed under the oil-for-food deal. However, overall prospects for the 1998 cereal output remain uncertain in the Central and Southern Regions, mainly due to below average and unevenly distributed rains as well as shortages of essential agricultural inputs and the widespread incidence of pests, weeds and animal diseases.

Despite some improvement in the overall food supply situation following the implementation of the "oil for food" deal, malnutrition still remains a serious problem throughout Iraq.

ISRAEL (3 September)

The output from the recently harvested 1998 wheat crop, is estimated at 168 000 tonnes, some 20 percent higher than last year, as a result of favourable weather conditions. Imports of cereals in 1998/99 (July/June) are forecast at some 2.7 million tonnes.

JAPAN (3 September)

In early August, the country experienced the heaviest rainfall in more than 80 years damaging infrastructure and housing. Worst hit were the rice producing northern regions of the country. Nearly 17 000 hectares of farmland were damaged and the overall cost of the damage so far is estimated at US\$ 180 million.

This year the country has already increased the area set-aside by 176 000 hectares to 963 000 hectares, under the Area Land Diversion Programme designed to cut rice production and reduce large stocks. Recent reports indicate that this year's paddy output is expected to be about 10 percent below last year's reduced output.

JORDAN (3 September)

Aggregate output of wheat and barley in 1998 is estimated at 75 000 tonnes. Aggregate Imports of wheat and barley in 1998/99 (July/June) are forecast at 1.4 million tonnes, about 8 percent higher than last year. coarse grains imports in 1998/99 are forecast at 1.2 million tonnes, similar to last year.

KOREA, REPUBLIC OF (3 September)

Heavy rains that started at the end of July have caused serious flooding killing at least 273 people. More than 150 000 people have vacated their homes and damage to property is estimated at about US\$689 million. Some 47 000 hectares, mostly rice fields in northern parts of the country, were flooded and about 4 440 hectares of vegetable-producing farmland in southern parts of the country were destroyed.

The target for paddy production this year, set at 6.7 million tonnes (10 percent lower than last year), is unlikely to be achieved. Cereal imports in 1997/98 are estimated at 12.1 million tonnes compared to 13.1 million tonnes in 1996/97.

KOREA, DEMOCRATIC PEOPLE'S REPUBLIC OF* (3 September)

Torrential rains, hailstorms and subsequent flooding in August, are reported to have damaged crops and infrastructure in several parts the country. The damage was severe but localised. More than 40 000 hectares of cropped area have so far been damaged denting earlier favourable prospects for 1998 crops. An FAO/WFP Mission is planned in October to assess the outcome of the main season crops and review the overall food supply situation in the country.

The country's food security remains precarious. In May this year the government appealed for US\$300 million from the international community to restore its agricultural sector and end its dependence on food aid. FAO, through its "double cropping programme", has prepared priority project proposals to address simultaneously the need for global increase of food production and the targeting of the most vulnerable farmers and co-operatives.

Total food aid pledges amount to about 880 000 tonnes of which 737 000 tonnes have been delivered.

LAOS* (3 September)

Drought conditions since late June are reported to be threatening the main rice crop, for harvest later in the year. In southern parts of the country, particularly in Savannakhet Province, thousands of hectares of the rice crop are reported to have been damaged. The affected provinces were also reported to have been hit by severe floods in the last three years, making it difficult for households to withstand the effects of the drought. Last May the Government made an appeal to donors for 35 000 tonnes of rice in food aid.

Aggregate paddy production in 1997/98 was estimated at 1.6 million tonnes, about 13 percent above average.

LEBANON (3 September)

The output of 1998 wheat and barley is estimated at 62 000 tonnes, about similar to last year. Imports of wheat in 1998/99 (July/June) are forecast at some 0.5 million tonnes, the same as the previous year.

MALAYSIA (3 September)

The country continued to receive average to above-average rainfall in most parts of the country since May. The rains brought relief to the drought-affected parts of the country earlier in the year benefiting crops. Harvesting the second rice crop, which accounts for some 38 percent of annual output, is nearing completion.

Aggregate production for paddy in 1998 is provisionally forecast at 2 million tonnes, about 5 percent below the average for the last five years, mainly due to reduced plantings. Recent Government reports have indicated that the drought conditions earlier in the year affected rice yields in only 15 percent of the country's eight growing areas covering 211 000 hectares.

MONGOLIA* (3 September)

Average to above average rainfall in July and early-August in central and northern parts of the country have boosted moisture for this year's grain crop for harvest later in the year.

The United States has recently pledged to donate 24 000 tonnes of wheat to the country to help bridge the supply gap in addition to the 11 000 tonnes provided last year. Japan has also donated 20 000 tonnes of wheat in 1998. The wheat is expected to be sold in the domestic market, and the proceeds to be used for development projects.

MYANMAR (3 September)

Below-normal rainfall since June was reported in most parts of the country, stressing the newly planted rice.

The aggregate output of paddy for 1997/98 is officially estimated at 17.3 million tonnes, about 1 percent above the last five-year average. The forecast for this year's paddy output is put at 17.8 million tonnes. Rice exports in 1998 are forecast at around 40 000 tonnes, more than 3 times higher than the 1997 export of 15 000 tonnes.

NEPAL (3 September)

Heavy monsoon rains since mid-June are reported to have caused serious flooding in most parts of the country killing at least 250 people and displacing more than 7 000 households in 62 districts. Some 1 160 hectares of crops are reported to have been destroyed and more hundreds of cattle killed.

Output of paddy in 1998/99 is officially projected to be similar to last year's harvest of 3.64 million tonnes.

PAKISTAN (3 September)

Pre-monsoon rains in May benefited the planting of paddy and coarse grains. The 1998 south-west monsoon started late in the country and was reported to be less frequent. Rainfall in July was below normal in 7 out of 12 provincial stations that report their data, indicating that the monsoon has been somewhat weak. Some regions are also reported to be experiencing drought conditions and need close monitoring.

Output of the 1997/98 paddy crop is estimated to be record 6.9 million tonnes, some 9 percent higher than in the previous year. A record wheat harvest of about 19 million tonnes is also estimated, against an average harvest of about 16 million tonnes in the previous five years

PHILIPPINES (3 September)

Planting of main season paddy, which was hampered by El Niño related drought at the beginning of the season, is nearing completion. Several provinces in Mindanao were affected by prolonged drought severely damaging crops and resulting in serious food shortages. Maize output in 1998 is expected to be about 3.79 million tonnes, about 12 and 14 percent below last year's harvest and the average for the previous five years respectively. Output of paddy in 1998 is also expected to decline to 10.5 million tonnes, about 2 percent below average.

The Government has estimated that about half a million households were affected with about half of those in dire need. The National Food Agency is reported to have contracted a record import of 1.35 million tonnes of rice for delivery this year.

SAUDI ARABIA (3 September)

Aggregate output of wheat and barley in 1998 is estimated at 2.2 million tonnes, some 16 percent higher than last year, as a result of favourable growing conditions. Low numbers of locusts are likely to breed on the southern Tihama near Jizan and in some areas with recent rainfall. Imports of barley in 1998/99 (July/June) are currently forecast at 5.1 million tonnes.

SRI LANKA (3 September)

Favourable monsoon rainfall and the availability of adequate water in reservoirs have benefited the Yala season Paddy crop. Rainfall in 1998 from the South West monsoon has been generally favourable with cumulative rainfall, in the period 1 May to 3 September, being normal to above normal in all eight provinces monitored. In comparison, in the same period the previous year, cumulative rainfall was normal or above normal in six out of the 8 provinces.

The overall food supply situation is satisfactory. Following the good harvests of last year Government-held rice stocks are adequate and rice imports are expected to be much smaller.

SYRIA (3 September)

The output of the 1998 recently harvest wheat crop is estimated at 4.1 million tonnes, 35 percent higher than last year. The output of barley is estimated at 983 000 tonnes, some 8 percent higher than the previous year. Imports of wheat flour in 1998/99 are forecast at some 150 000 tonnes and rice imports are also forecast at 150 000 tonnes.

THAILAND (3 September)

Although there are concerns over La Nina related floods, planting of the main-season paddy is underway under favourable conditions. From 18 May to 30 August, cumulative rainfall was below normal in 7 (out of 26) stations, accounting for about 17 percent of the main season grain production. This compares with 12 stations accounting for 58 percent of main season production with below normal rainfall at the same time last year.

The preliminary forecast for paddy output in 1998/99 is about 23 million tonnes, up by 2 percent from the previous year. Current high rice prices are expected to encourage farmers to increase area under paddy.

TURKEY (3 September)

The output of the 1998 wheat crop, estimated at 20 million tonnes, is about 7 percent higher than last year, mainly as a result of the increase in yield, which are reported to have increased by about 15 percent from last year. The output of barley and maize is estimated at 8 million tonnes and 2.3 million tonnes, respectively. To meet corn demand through imports, the Government has reduced the import

tax on non-seed corn to 20 percent from 35 percent. Wheat imports in 1998/99 are forecast at some 1.0 million tonnes and maize imports are forecast at 600 000 tonnes.

VIET NAM (3 September)

Prolonged drought in central Vietnam has dried up major reservoirs damaging more than 8 000 hectares of paddy. The situation is expected to worsen as more dry weather is forecast. However, torrential rains in northern provinces have swollen major rivers including the Red River, Thai Binh and Lo to danger levels, threatening severe flooding. Flash floods have also resulted in loss of life and damage to crops and property in the Mekong Delta. More than 3 000 hectares of maize were also reported to have been damaged in the south east of the country.

In response to rising domestic rice prices and to ensure domestic availability, the Government has imposed a limited ban on new export contracts from August 15. Subsequently, export targets for 1998 were revised down to 3.6 million tonnes from the original 4 million tonnes.

Aggregate paddy output in 1998 is expected to be slightly lower than last year's figure of 27.5 million tonnes.

YEMEN (3 September)

Output of the sorghum crop in 1998 is estimated to increase to 439 000 tonnes, 23 percent higher than last year. Likewise wheat production, estimated at 165 000 tonnes, is 28 percent higher than the previous year. Small scale breeding of desert locust could extend into areas of recent rainfall in the eastern desert. Hoppers are likely to appear from early October and may form small groups or bands. Scattered adults may appear on the Red Sea Coastal plains and start to breed in areas of recent rains.

Imports of cereals in 1998 - mainly wheat - are estimated at some 2.9 million tonnes.

CENTRAL AMERICA (including the Caribbean)

COSTA RICA (3 September)

Planting of the 1998/99 first (main) season cereal crops has been completed with some delay due to the late arrival of the rainy season, the result of the tail-end effects of El Niño. Maize plantings are provisionally estimated to be about average. The area planted to paddy, the main cereal, is close to 1997/98 average level. Production is not enough to meet domestic demand of this important food staple. Domestic prices are low and efforts to promote increased plantings are hindered by farmers' fear of strong import competition. Rice imports in marketing year 1998 (January/December) are expected to be about 100 000 tonnes, some 10 percent above the 1997 level of imports and high above the volume of imports in the early nineties. The 1997/98 bean production, another important staple in the population's diet, is estimated at about 13 000 tonnes, far from meeting a domestic demand of some 36 000 tonnes. The crop greatly suffered the effects of El Niño particularly in the northern large producing province of Huerta.

CUBA (3 September)

The country has been affected by a severe prolonged El Niño induced drought, particularly in the eastern parts of the country. Serious damage to foodcrops and livestock pastures in the provinces of Las Tunas, Holguín, Santiago de Cuba, Guantánamo and Granma is reported. Water supply has been rationed to the population. The drought has aggravated the problems in the agricultural sector, affected by the continuing shortage of agricultural inputs. The Government has made a request for emergency food aid for some 615 000 people and technical assistance for the rehabilitation of agricultural activities in the affected areas.

DOMINICAN REPUBLIC (3 September)

Normal weather conditions are benefiting planting of the 1998/99 second season cereal and other foodcrops. Dry conditions, however, are reported in localized zones of the south, east and north-east of the country with slight damage to rainfed crops. Aggregate maize output for the year is forecast to be about average, a recovery from last year's drought affected crop. Paddy production should increase significantly from 485 000 tonnes to about 520 000 tonnes. Rice imports in 1998 marketing year (January/December) have been estimated at about 50 000 tonnes. No need for imports of this important staple in 1999 marketing year (January/December) is anticipated.

EL SALVADOR (3 September)

Normal weather conditions have resumed, benefiting planting of the 1998/99 first season cereal and bean crops. Harvesting has just started and a significant recovery in maize production, the main cereal, is expected from last year's El Niño affected crop. Maize imports in 1998/99 marketing year are forecast to decline considerably from the relatively high volume of 330 000 tonnes imported in 1997/98 (August/July).

GUATEMALA (3 September)

Harvesting of the 1998/99 first season cereal crops is about to start, following some delay in plantings because of the late arrival of the rainy season, the result of the tail-end effects of El Niño. The area planted to maize, the main cereal, in some parts is being affected by pests and some losses are anticipated. Improved yields relative to last year's drought-affected crops are expected elsewhere. Imports in marketing year 1998/99 (July/June) are forecast to decline from the previous year, but should still be relative highly reflecting the consistent domestic demand for this item particularly from the poultry feeding industry.

HAITI* (3 September)

Normal weather conditions have benefited the recently harvested 1998/99 first season maize and irrigated paddy crops, as well as that of the rainfed paddy and other food crops currently being harvested. Maize production and other rainfed foodcrops are expected to recover from last year's drought affected crops and average outputs are anticipated. The output of the irrigated paddy crop is provisionally estimated at an average 80 000 tonnes. Food assistance is still being provided by the international community. About 27 000 tonnes of food aid have been pledged in 1998/99 which compares to 128 000 tonnes in 1997/98 when crops were severely affected by drought.

HONDURAS (3 September)

Normal rains have resumed, benefiting the development of the 1998/99 first season cereal crops, currently being harvested, and planting of the 1998/99 second (main)season cereal crops, recently started. Intended plantings of maize, the main cereal, should be similar to last year's average level. The crops were affected last year by El Niño associated drought but only localized losses of a serious nature were reported and compensated by production increases elsewhere. Maize imports in

marketing year 1998/99 (July/June) are expected to increase nevertheless from last year's relatively high level, mostly reflecting the expanding demand from the poultry feeding industry.

MEXICO (3 September)

Normal weather conditions have resumed in some parts, favouring planting of the important 1998 spring/summer maize crop, to be harvested from October. Planting had been delayed because of the late arrival of the rainy season in some of the main central growing areas, such as the states of Puebla and Mexico. The long-awaited arrival of the rains helped accelerate sowing in other important producing states such as Jalisco, Hidalgo, Chiapas, Michoacan and Oaxaca, in the south and south-west of Mexico, and compensate for possibly reduced plantings in the central plateau. Prospects are nevertheless uncertain with respect to the final outcome. Earlier estimates pointed out to a summer/spring maize crop of 16.5 million tonnes, but sources have recently indicated that output could be lower. Much will depend upon the intensity and regularity of the rains in the weeks ahead. Aggregate maize output for the 1998 spring/summer crop and the 1998/99 fall/winter crop is provisionally forecast at an average 18.6 million tonnes (1997/98: 18.5 million tonnes). Sorghum output from the 1998 spring/summer crop has been provisionally estimated at 2.2 million tonnes, better than expected, despite the dry weather that has affected for months the main producing state of Tamaulipas. Planting of the 1998 second season sorghum crop, the main crop, has started.

Land is being prepared for planting of the 1998/99 irrigated wheat crop, to be started from October in the main producing north-western states of Sonora, Sinaloa, Guanajato and Baja California. Recent storm rains, following precipitation in August, have helped replenish water reservoirs, which are reported at considerably low levels.

NICARAGUA (3 September)

Harvesting of the 1998/99 first season cereal and bean crops is due to start from September. Planting was delayed because of the late arrival of the rainy season, but normal rains since July have been favouring planting and the development of the crops. Production of maize should improve significantly from last year's El Niño affected crop. An above-average 320 000 tonnes output for the whole 1998/99 season is tentatively forecast. Production of sorghum is also expected to increase to an average 95 000 tonnes. Maize imports in marketing year 1998/99 (June/July) should decline from the previous year's high 175 000 tonnes to some 110 000 tonnes. Technical assistance for the rehabilitation of agricultural activities is still being provided to last year's drought affected population.

SOUTH AMERICA

ARGENTINA (3 September)

Despite interruptions due to excessive rains, weather conditions have in general favoured harvesting of the 1998 coarse grain crops. Harvesting of the maize crop is virtually completed and a historical high 19.3 million tonnes have been collected. This mostly reflects the excellent yields obtained as a result of the adequate humidity at planting and during the crop development period brought about by El Niño. Harvesting of the sorghum crop has been also practically completed and output is provisionally estimated at a record 3.17 million tonnes.

Planting of the 1998 wheat crop has been virtually completed. The area planted is expected to some 15 percent below last year's average level, as farmers in the large growing areas, particularly in the important Buenos Aires Province, have been attracted into alternative crops because low wheat prices.

BOLIVIA (3 September)

Dry weather conditions have affected the development of the 1998 wheat (winter) crop in the important producing eastern department of Santa Cruz. Harvesting is about to start and lower than average yields are anticipated. Fieldwork in preparation for planting of the 1998/99 first season cereal crops is underway in the high plains and Andean valleys which have also been affected by the lack of rains. Planting of the important potato crop has just initiated. Assistance for the rehabilitation of the affected areas has been requested by the Government.

BRAZIL (3) September

The area planted to the 1998 wheat crop in the main producing southern states of Rio Grande do Sul, Santa Catarina and Parana is estimated 10 to 12 percent below 1997 average level. The decline reflects a combination of unattractive wheat prices, the possibility to shift to more profitable crops relative to wheat, and expectations of unfavourable weather. Harvest is due to start from September and output is tentatively forecast at an average level. Yields are expected to improve which would help compensate the smaller area planted.

Planting of the 1998/99 maize crop is about to start. Farmers are expected to increase plantings because of the attractive prices following last year's relatively low output when El Niño associated drought affected the maize crop particularly in the north and north-east of the country.

CHILE (22 September)

The recently planted 1998/99 wheat crop is being affected in central areas by a severe dry spell. The crop, to be harvested from December, was expected to recover from the 1997/98 below-average level; however the outlook is poor as latest forecasts indicate that precipitation is likely to be below normal in the months ahead.

The dry spell is also affecting planting of the 1998/99 coarse grain crops, principally maize, which has just started. Reduced plantings relative to the 1997/98 average level are anticipated.

COLOMBIA (3 September)

Harvesting of the 1998 coarse grain crops is underway. A recovery is expected in maize production, the main cereal. The 1997 crop was seriously affected by El Niño induced drought. Rains have resumed since April, benefiting planting and development of the crop. Output is tentatively forecast at an average 1.2 million tonnes which compares to last year's 800 000 tonnes. Production of sorghum, by contrast, is expected to decline for the third consecutive year. Harvesting of the important paddy crop is about to start. A recovery is also anticipated from the 1997 affected crop. Some 330 000 tonnes of milled rice should be imported in 1998 (January/December) to help meet last year's production deficit.

ECUADOR (3 September)

Harvesting of the 1998 coarse grain crops, principally maize, is well advanced. The outlook is poor as the crops have been affected by prolonged adverse weather due to El Niño. Some 170 000 hectares of maize plantings, mainly distributed along the coastal provinces, have been seriously damaged. Immense losses have been also incurred to the paddy crop, as well as to important cash crops such as coffee, cocoa, soybeans and bananas. A request for assistance in the rehabilitation of agricultural activities in the affected areas has been made by the Government.

GUYANA (3 September)

Normal weather conditions have recently resumed following a prolonged drought which severely affected the country's most important paddy and sugar cane crops. Livestock was also affected. A state of emergency was declared by Government and 28 000 tonnes of food aid have been pledged by the international community.

PERU (3 September)

Harvesting of the 1998 wheat crop is well advanced. Prospects are good and a slightly above-average output is tentatively forecast. Harvesting of the maize (yellow) crop is also underway. Production is expected to recover and an above-average output, similar to 1997, is forecast. Paddy production, by contrast, should decline from 1997 record level and a near average output is anticipated. The outlook is good for the important potato crop and about 1.9 million tonnes have been collected in the first six months of 1998, some 10 percent above last year's output for the same period.

SURINAME (3 September)

Weather conditions have improved in recent weeks helping thus alleviate the situation for the agricultural sector which had been affected by a severe prolonged drought caused by El Niño. Harvesting of paddy, the main crop, is underway. The outlook is poor despite improved weather conditions and for the first time in its history, the country would have to import rice to help meet the deficit in production. The Government has made an appeal for the rehabilitation of agricultural activities and thus help prevent food shortages in the next agricultural season.

URUGUAY (3 September)

Planting of the 1998 wheat crop has resumed following several disruptions caused by excessive rains, the result of the tail-end effects of El Niño. The area planted is expected to decline from the 1997 slightly above-average level.

Fieldwork is underway for planting of the 1998/99 coarse grain crops, to start from September, as well as the important foreign exchange earner paddy crop. This year's crop was seriously affected by heavy rains and flooding at harvesting, and although an average 870 000 tonnes of paddy were collected, output was 16 percent lower than in 1997. Farmers' planting intentions will largely depend upon weather conditions. Latest weather forecasts indicate that normal conditions should prevail.

VENEZUELA (3 September)

Harvesting of the 1998 maize (white) crop has recently started. Early forecasts indicate a decline in production from last year's above-average level, but output would still be about average. This reflects reduced plantings largely caused by the combination of increasing production costs and newly imposed constraints in financial terms and conditions. The important paddy crop, currently being harvested, is expected to be slightly below average, a decline from 1997 near-record level. Harvesting of other basic food crops, such as roots, pulses and vegetables is underway.

EUROPE

EC (3 September)

FAO now forecasts total cereal output in the Community at 210 million tonnes, slightly up from the previous forecast and 1 percent above the 1997 crop. Wheat crops have performed particularly well as a result of favourable weather conditions and above-average to record crops are expected in most countries. Aggregate wheat production is now forecast at 102 million tonnes, 7 percent up from 1997. With regard to the coarse grains, barley and rye production are also forecast to increase from the

previous year but output of oats will be reduced. The summer maize crop is forecast to decline sharply from last year's record level. Plantings were reduced in France, Italy and Spain, the largest producers, and this seasons weather conditions have not been ideal for this crop. Nevertheless, maize output in the Community is forecast to reach almost 36 million tonnes, remaining above the average of the past 5 years.

ALBANIA (3 September)

Latest official reports indicate that about 400 000 tonnes of wheat were produced in the country this year. FAO estimates that food consumption of wheat has been in the range of 650 000 to 700 000 tonnes over the past few years, which is concurrent with recent official indications for 650 000 tonnes to meet food requirements in 1997/98. Assuming that some of the domestic crop will be retained for seed use, some of the poorer quality grain will be used for feeding livestock, and some wastage will occur, as is normal, is estimated that at least some 300 000 tonnes of wheat will be needed in 1998/99 to maintain food consumption levels equivalent to recent years. The USDA Commodity Credit Corp has recently announced that it bought a total of 25 000 tonnes of United States red winter wheat for donation to Albania in two parcels under the Food for Progress Programme. One parcel was due for shipment in July and the other for September.

Albania continues to be inundated with refugees from the recent conflict in Kosovo Province of the Federal Republic of Yugoslavia (Serbia and Montenegro). As of late August some 7 000 refugees were officially registered in Tropoje district in northern Albania, while several thousand more are estimated to have travelled to other areas of the country. The security situation in the Tropoje district remains very tense. Food distribution is coordinated by all major humanitarian agencies and covers refugees in all major towns in northern Albania, including Tropoje, Bajrain, Curri, Shkodra, Dunnes and Tiranos.

BOSNIA-HERZEGOVINA (3 September)

Widespread rainfall in late August provided useful soil moisture for the upcoming planting of winter cereals. Food production, notably output of milk, eggs, maize, potatoes and vegetables, has been increasing steadily in the aftermath of the war. In 1997/98 the area sown to winter grains (wheat) declined. In BiH, only 43 000 hectares, or 74 percent of the target area was sown to winter crops. In the Republika Srpska the area sown also fell. Information on crop production is lacking and/or unreliable. Cereal production for 1998 is probably in the region of 1 million tonnes.

The cereal import requirement for 1998/99 is provisionally estimated at around 275 000 tonnes.

BULGARIA (3 September)

Weather conditions over the past few weeks have been warm and generally favourable for the final development of winter crops and harvesting. Some rainfall in the middle of July was beneficial for the developing maize crop. Wheat output in 1998 is forecast at some 3.3 million tonnes, about 5 percent down from last year's crop but about the average of the past five years. Coarse grains production is forecast at 2.3 million tonnes, also down somewhat from the previous year but about average.

CZECH REPUBLIC (3 September)

As of early September the bulk of the 1998 cereal crops had been gathered under generally favourable conditions. Latest reports indicate that total cereal production will remain close to the 1997 level between 6.5-7.0 million tonnes, despite marginally lower plantings. Of the total, wheat is expected to account for about 4 million tonnes.

ESTONIA (3 September)

Harvesting of spring crops (barley and rye) is well underway. The area sown to cereals – 295 000 hectares - is similar to last year's level, but per hectare yields are below average, especially for wheat. The important potato crop was damaged by stormy weather and heavy summer rains. The total 1998 cereal harvest is estimated at 588 000 tonnes, 11 percent down on the 1997 outturn.

HUNGARY (3 September)

Widespread intermittent rainfall in late August was beneficial for immature summer crops. The bulk of the winter crops had already been gathered, favoured by hot and dry conditions in July and August. In aggregate, another above average cereal crop is forecast in 1998, although down from the bumper harvest last year. Wheat output is estimated at 5 million tonnes. However, latest information indicates that the quality of many crops is poorer than normal due to a high ratio of fungal infection. The outcome of the maize crop remains somewhat uncertain; preliminary forecasts point to an output of about 6 million tonnes but the full affect of earlier drought conditions on yields is not yet known.

LATVIA (3 September)

Spring crops are being harvested. The area planted to cereals in 1998 rose slightly to 490 000 tonnes, but yields were down, especially for barley. Total cereal production is provisionally estimated at 1.03 million tonnes.

LITHUANIA (3 September)

Cereal production in 1998 is estimated at 2.74 million tonnes, an above average crop, although down on the bumper 1997 harvest of 2.98 million tonnes. Despite problems of marketing the 1997 crop on a depressed world market, an exportable surplus of around 75 000 tonnes (wheat and barley) is anticipated for the 1998/99 marketing year (July/June).

POLAND (3 September)

In Poland, latest official reports indicate that the 1998 wheat harvest is turning out better than earlier expected. Wheat output is now forecast at 9.3 million tonnes, over 1 million tonnes up from last year and well above the average of the past five years. However, the barley crop is still expected to fall somewhat to about 3.6 million tonnes.

ROMANIA (3 September)

The arrival of some rainfall in western parts of the country in late August brought some relief to immature summer crops. However a heat wave through most of July and August has already seriously affected the majority of the country's maize and sunflower crops. The final outcome of the 1998 maize crop is still uncertain but production is expected to be well below the previous year's good level. The winter wheat crop was less affected by the summer drought, but plantings were already reduced by adverse weather last autumn. Output of wheat is now forecast to fall significantly in 1998, to 5 million tonnes, well below the average of the past five years

SLOVAK REPUBLIC (3 September)

In the Slovak Republic, latest official reports indicate a marginal increase in cereal output in 1998, mainly due to increased plantings and higher yields. Rye, barley and triticale account for most of the increase.

YUGOSLAVIA, FED. REP. OF (SERBIA AND MONTENEGRO) (3 September)

The 1998 wheat crop, now harvested, is estimated at 3.27 million tonnes, from just over 800 000 hectares, which is above average and 12 percent higher than the 1997 outturn. The maize area remained unchanged from the 1997 level. However, yields are expected to fall by as much as 20 percent as a result of high temperatures and low rainfall from mid July to mid August. Hailstorms caused extensive crop damage on an estimated 9 000 hectares. Maize harvesting is underway. Preliminary indications are of a maize crop in the region of 6 million tonnes. Scattered showers in late August and early September provided useful moisture for the planting of winter wheat.

Maize exports for the 1998/99 marketing year (July/June) are forecast at around 300 000 tonnes. The Government plans to purchase 600,000 tonnes of wheat, but the official prices are viewed as insufficient to meet production costs. Short supplies have been reported for basic foodstuffs in state shops, where consumer subsidies are maintained, but the private trade has adequate stocks.

Intense fighting continues in Kosovo, where some 270 000 people have been displaced from their homes inside Kosovo. A further 130 000 people have taken refuge in neighbouring regions and states. With the onset of winter approaching, agencies are appealing for immediate funds of US\$43 million.

COMMONWEALTH OF INDEPENDENT STATES

ARMENIA (3 September)

For 1998 crops, the area planted to cereals increased marginally, to 203 000 hectares. With above normal yields, the cereal harvest is estimated at 345 000 metric tonnes, some 20 percent above the average of the previous 5 years.

The country imported some 367 000 tonnes of cereals in 1997/98, of which 156 000 tonnes were food aid. In view of the good crop it is likely that total cereal imports in the 1998/99 marketing year will be in the region of 350 000 tonnes. The country is reported to have become almost self sufficient in potato and vegetable production. Although the national food supply situation is relatively stable, much of the population is dependent on welfare support.

AZERBAIJAN (3 September)

The spring grains harvest, though behind schedule, is nearing completion. The preliminary estimates of 1998 cereal production point to a crop of 1.14 million tonnes, six percent above the 1993-1997 average, but slightly lower than last year's output. The area planted to winter barley fell to 38 percent of the average, and although wheat area increased, there was a decline in total area of 5 percent. However, the fall in area was more than compensated for by higher than average yields.

A total of 435 000 tonnes of cereal import were recorded in the 1997/98 marketing year (July/June), of which 56 000 tonnes were food aid. A moderate rise, to 445 000 tonnes is expected in 1998/99.

BELARUS (3 September)

Showers in August hampered the harvesting of spring grains and sowing of the winter cereals crop. By late August two thirds of the crop had been gathered. Heavy rainfall has reduced cereals yields and also damaged the important potato crop. Despite a substantial increase in state subsidies for farm inputs, total cereal production, estimated at 5.98 million tonnes, is marginally below the average of the 1993-1997 period. The national currency, which plunged earlier in the year, is likely to continue to slide in reaction to the Russian crisis. Inflation could reach 60 percent in 1998. Cereal imports for 1998/99 are likely to be around 650 000 tonnes, compared to some 700 000 tonnes in 1997/98.

GEORGIA (3 September)

Harvesting of the spring crops is nearing completion, after delays caused by a lack of working farm machinery. Growing conditions for maize, mainly produced in the west, have been satisfactory. The 1998 maize crop is estimated at 500 000 tonnes, 34 percent higher than the average of the previous 5 years. Wheat production, estimated at 225 000 tonnes is also above average, but well below the bumper 1997 outturn of 300 000 tonnes. Strong winds and dry conditions damaged winter wheat in the east of the country. Lack of farm credit and the high costs of inputs remain major constraints to growth in the sector.

Wheat imports for the 1997/98 marketing year (July/June) reached 0.5 million tonnes, of which 162 000 tonnes were food aid. It is probable that imports in 1998/99 will remain at around this level. The country is self sufficient in maize.

WFP is providing emergency food assistance to some 200 000 internally displaced persons, victims of hostilities in the Abkhazia area.

KAZAKHSTAN (3 September)

Harvesting of spring grains, particularly wheat, is underway. The area planted to cereals in 1998 is estimated at 13.3 million hectares, some 30 percent below the average for the previous five years. The fall is attributed to short supplies of fuel, seed and credit. Shortages of fertiliser, exacerbated by unusually hot, dry weather conditions in July have resulted in yield reductions. Crop failures were reported on almost 18 percent of the area planted to cereals. The 1998 cereal harvest is provisionally estimated at some 8.6 million tonnes against 12.3 million tons in 1997, and a sharp reduction in export availabilities can be expected for the next marketing year.

KYRGYZ REPUBLIC (3 September)

Harvesting of spring grains is nearing completion. Progress was slow, hampered by cold weather and showers. Planted area was 5 percent down on the 1997 level, but well above the average for the previous six years. Excessive rains affected yields earlier in the season and fertiliser and pesticide imports fell short of requirements. The 1998 cereal harvest is currently put at 1.64 million tonnes, some 24 percent up on the average for the previous five years, but below the bumper crop of 1.72 million tonnes in 1997. For the 1998/99 marketing year (July/June) some 17 600 tonnes of cereal food aid imports are expected and cereal exports are forecast to reach 150 000 tonnes.

MOLDOVA (3 September)

Harvesting of spring grains is complete. The latest estimates put total 1998 cereal production at 2.6 million tonnes against 3.2 million tonnes last year. The maize crop of 1.4 million tonnes is eighteen percent lower than the 1997 outturn, although it remains well above the average for 1992-1997. Wheat production, at 1.01 million tonnes, was down on last year's and somewhat below average. While cereal area increased, there was a marked decline in yields. This reflects the low profitability of crops (there are significant carryovers from the 1997 crop), and some irregularities in weather conditions. With

ample supplies, it is unlikely that there will be substantial imports of cereals in the 1998/99 marketing year.

RUSSIAN FEDERATION (3 September)

Harvesting and threshing of spring grains was well behind schedule, interrupted by showers in August, although early September was unusually warm and dry. Planting of winter grains is underway, with much-needed soil moisture provided by recent rains in the south. The total area planted to cereals in 1998 is estimated at 49.9 million tonnes, which is some 8 percent down on the average of the last five years.

Yields of the major grains have declined this year as a result of prolonged dry spells, especially in the Urals, lower Volga valley and North Caucasus. The latest estimates put total 1998 cereal production at 65.46 million tonnes, 18 percent lower than the 1993-1997 average and well below the 86.77 million tonnes harvested last year. Wheat production is set to fall to around 35 million tonnes from 44.2 million tonnes in 1997. Preliminary estimates indicate that drought in the main barley areas has resulted in a barley harvest that is only two thirds of the 1993-1997 average, reputedly the lowest outturn since 1962, so a major fall in exports is certain. the potato crop is also well below average.

The cereal import requirement for 1998/99 is preliminarily estimated at about 3 million tonnes. The dramatic decline in the rouble from mid-August, and related political crisis, give rise for concern over Russia's capacity to meet its food import requirement. There may be a move from higher valued and processed commodities towards staples.

The recent events have led to speculative hoarding and a rush on the part of consumers to purchase the available stock. There are fears that dramatic falls in real income, rising unemployment and increased food prices will prompt food crisis in the coming months. The security situation in the Republic of Dagestan in the north Caucasus, continues to deteriorate.

TAJIKISTAN* (3 September)

The current prospects are for a decline in cereal production in 1998. The preliminary estimate of 510 000 tonnes is some 13 percent lower than the 1997 crop. The total area planted to cereals in 1998 is estimated at 371 000 hectares, somewhat below the 392 000 hectares planted last year: the main reason for the decline appears to be a shift into cotton. Some 15 000 hectares were damaged or washed away by flooding in April. The flooding also posed logistics problems for the timely delivery of agricultural inputs for the spring crops. The cold spring and rusts and smuts have caused some reductions in grain yields and quality. Yields of wheat, the main cereal crop, are estimated at 1.46 tonnes per hectare, compared to last year's level of 1.6 tonnes.

Despite the decline in domestic output, the total cereal import requirement for 1998/99 (July/June) is tentatively estimated at 360 000 tonnes. This is close to actual cereal imports during the previous marketing year (365 000 tonnes of which 124 000 tonnes were food aid), as there is likely to be some scope for drawing down stock in 1998/99.

In April 1998, heavy rains resulted in floods and landslides and consequent losses of life and property. An appeal was launched in late July for a total of US\$6.61 million, to support relief and rehabilitation activities. The security situation is reported to be relatively calm, although there have been sporadic clashes between the Government forces and opposition groups.

TURKMENISTAN (3 September)

Harvesting of the spring grains is nearing completion. The total 1998 cereal area is estimated at 625 000 hectares, well above the 534 000 hectares planted last year, and almost 16 percent above average. Land reforms, improvements in the credit system and increased incentives prompted the area expansion. The 1998 cereals crop is estimated at around 864 000 tonnes, well up on the 1997 level. Total cereal imports for the 1997/98 marketing year (July/June) reached some 310 000 tonnes, mainly high grade milling wheat. The import requirement for 1998/99 is forecast to be in the region of 400 000 tonnes. In the first half of 1998 the country ran a sizeable trade deficit and continues to face difficulties in exploiting its large natural gas reserves, raising concerns that the import capacity may be constrained.

THE UKRAINE (3 September)

The 1998 spring crops have now, for the most part, been gathered. Showers in late August came too late to induce a recovery in maize and sunflower crops, stressed by below normal precipitation in July. Delays in maize harvesting were attributed to the reallocation of labour and machinery into more profitable crops and scattered showers. The area planted to cereals – 12.8 million hectares - was marginally above average. Although fertiliser supplies reportedly increased, moisture stress of spring crops and high winter-kill for the 1997/98 winter crop, have led to reduced cereal yields. Total 1998 cereal production is estimated at 29.94 million tonnes, 12 percent down on the 1993-1997 average and well down on last year's crop of 35.85 million tonnes. Improved wheat quality (and hence value) may partly compensate for the reduced production. The rains provided useful soil moisture for the planting of winter grains, which is underway. Early indications are of a reduction in winter wheat and barley area.

Prospects for exports in 1998/99 are unclear in the light of the poor harvest and the possible effects of the rouble crisis and consequent reductions in Russian import demand. Trading volumes have dropped on the main exchanges.

UZBEKISTAN (3 September)

Cereal production is expected to reach some 3.9 million tonnes in 1998, some 31 percent higher than the 1993-1997 average and better than the 1997 output of 3.7 million tonnes. This is despite a reduction in planted area from the 1997 level, caused by diversion of land into other crops. Reported cereal imports in the 1997/98 marketing year (July/June) amount to 980 000 tonnes. In view of the improved harvest, imports in 1998/99 are expected to drop to 930 000 tonnes. Positive economic growth is expected in 1998 although at a lower rate than in 1997. There has been some progress in reduction of the current account deficit. Floods and landslides in areas neighbouring Krygistan, caused loss of life and extensive damage to property in mid July.

NORTH **AMERICA**

CANADA (3 September)

The 1998 cereal harvest is now well underway and one of the earliest on record. It is reported that yields of most major crops are above last year's levels due to an early planting season, and satisfactory growing conditions. Intermittent rain during the latter part July arrived in time to relieve crops following previously very hot and dry conditions. Wheat output is now forecast at 23 million tonnes, about 5 percent down from 1997 and below the average of the past 5 years. Prospects for the main coarse grains crop (mostly barley), are similar to those for wheat. Aggregate coarse grains output is now forecast at about 25.7 million tonnes, virtually unchanged from last year's crop; a reduction in barley output is expected to be offset by larger maize and oats crops.

UNITED STATES (11 September)

The bulk of the United States wheat crop has been gathered and the spring wheat harvest is well underway. Following generally good weather conditions for harvesting and the development of the spring wheat crop, official estimates for wheat production have been raised further since the last report. Winter wheat production is now estimated at some 52 million tonnes, 2 percent up from the good 1997 crop despite a significant reduction in area. The forecast for spring wheat production is now put at some 17 million tonnes, virtually unchanged from last year's crop.

Prospects for the 1998 coarse grains crop remain generally satisfactory, despite some serious drought and heat problems in the southern and southeast states and some localized problems in the Midwest, mainly due to excessive moisture. The latest (11 September) USDA crop report maize production at about 247 million tonnes, some 4 percent up from last year's crop. This year's crop is well ahead of the normal rate of development with the bulk of it through the critical reproductive phase by early August. There is now less potential for major yield loss from prolonged heat and also the rapid pace of development suggests there will be limited likelihood of damage from early frosts.

The forecast for the 1998 paddy crop is 8.2 million, slightly above last year's level despite delayed planting in California and a heat wave in many of the southern rice producing states.

OCEANIA

AUSTRALIA (3 September)

Prospects for the 1998 winter wheat and coarse grains crops in Australia have improved significantly over the past two months due to excellent moisture conditions throughout most of the major producing areas. Although serious localized flooding in New South Wales in late July damaged some winter grain crops, the affect on the country's aggregate output will be limited. The latest official forecast in September put the 1998 wheat crop at 23.5 million tonnes, 26 percent up from the previous year's crop. By contrast, coarse grains output in 1998 is forecast at 9.2 million tonnes about the same as last year. Despite the reduced plantings, winter barley and oats crops are forecast to be as large as in the previous year, reflecting generally favourable growing conditions. The small summer coarse grain crop (mostly sorghum) which was harvested earlier this year, was some about 10 percent down from the previous year.

PAPUA NEW GUINEA (3 September)

A tidal wave about 10 metres high has recently struck a remote part of the Northwest coast of the country, destroying the whole area near Scission lagoon. Most of the fish and crabs in the lagoon were also reported to have died.

Notwithstanding the tidal wave, the country has received normal to above-normal rains during the growing season, which benefited crops. Prospects for crops, mainly roots and tubers, are expected to be good. However, the food situation is likely to be tight for vulnerable groups and those who lacked basic agricultural inputs at the planting time.

ESTIMATED 1997/98 OR 1998 CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/(thousand tons)

a) Estimates for 1997/98 or 1998

COUNTRY	Marketing year	1996/97 or 1997			1997/98 or 1998			
		Actual imports			Total import requirements (excluding re-exports)	Import position		
		Commercial purchases	Food aid	Total commercial and aid		Total commercial and aid	Food aid allocated committed or shipped	Commercial purchases
AFRICA		21 852.9	1 831.2	23 684.1	25 897.0	22 102.6	1 877.2	20 225.4
Northern Africa		12 202.7	169.1	12 371.8	13 540.0	13 733.1	64.9	13 668.2
Egypt	July/June	9 886.0	167.3	10 053.3	10 020.0	10 213.1	52.4	10 160.7
Morocco	July/June	2 316.7	1.8	2 318.5	3 520.0	3 520.0	12.5	3 507.5
Eastern Africa		2 957.5	632.7	3 590.2	4 003.0	3 722.9	1 057.0	2 665.9
Burundi	Jan./Dec.	37.0	0.0	37.0	42.0	8.7	8.4	0.3
Comoros	Jan./Dec.	40.9	3.1	44.0	46.0	8.6	5.5	3.1
Djibouti	Jan./Dec.	66.7	11.7	78.4	66.0	14.2	5.4	8.8
Eritrea	Jan./Dec.	235.0	53.5	288.5	280.0	88.4	85.3	3.1
Ethiopia 2/	Jan./Dec.	37.8	201.5	239.3	640.0	692.7	658.8	33.9
Kenya	Oct./Sept.	1 771.0	75.0	1 846.0	1 346.0	1 547.1	50.9	1 496.2
Rwanda	Jan./Dec.	2.1	231.5	233.6	170.0	136.7	134.9	1.8
Somalia	Aug./July	211.0	5.1	216.1	280.0	280.0	12.1	267.9
Sudan	Nov./Oct.	493.7	46.3	540.0	532.0	289.8	44.9	244.9
Tanzania	June/May	62.3	5.0	67.3	601.0	656.7	50.8	605.9
Southern Africa		1 166.9	423.5	1 590.4	1 981.0	1 868.5	343.4	1 525.1
Angola	April/March	294.6	154.4	449.0	531.0	498.8	148.0	350.8
Lesotho	April/March	96.1	32.4	128.5	263.0	137.1	10.1	127.0
Madagascar	April/March	69.0	17.5	86.5	168.0	190.5	36.7	153.8
Malawi	April/March	75.6	98.8	174.4	347.0	118.6	7.6	111.0
Mozambique	April/March	154.7	109.4	264.1	212.0	284.1	132.2	151.9
Swaziland	May/April	70.6	6.0	76.6	47.0	61.5	0.0	61.5
Zambia	May/April	118.0	3.6	121.6	388.0	370.8	1.8	369.0
Zimbabwe	April/March	288.3	1.4	289.7	25.0	207.1	7.0	200.1
Western africa		4 867.5	572.4	5 439.9	5 704.0	2 274.7	402.8	1 871.9
Coastal countries		3 034.9	387.1	3 422.0	3 478.0	1 571.4	202.8	1 368.6
Benin	Jan./Dec.	112.1	32.0	144.1	120.0	15.9	8.4	7.5
Cote d'Ivoire	Jan./Dec.	463.4	51.6	515.0	620.0	125.6	48.6	77.0
Ghana	Jan./Dec.	382.6	83.8	466.4	440.0	167.7	47.7	120.0
Guinea	Jan./Dec.	371.7	3.4	375.1	410.0	7.0	4.0	3.0
Liberia	Jan./Dec.	85.9	129.9	215.8	240.0	42.1	37.7	4.4
Nigeria	Jan./Dec.	1 373.2	1.1	1 374.3	1 300.0	1 019.0	0.3	1 018.7
Sierra Leone	Jan./Dec.	159.6	78.7	238.3	260.0	54.3	52.7	1.6
Togo	Jan./Dec.	86.4	6.6	93.0	88.0	139.8	3.4	136.4
Sahelian countries		1 832.6	185.3	2 017.9	2 226.0	703.3	200.0	503.3
Burkina faso	Nov./Oct.	117.7	15.7	133.4	242.0	47.3	19.5	27.8
Cape Verde	Nov./Oct.	50.7	60.9	111.6	95.0	56.4	51.8	4.6
Chad	Nov./Oct.	63.0	26.0	89.0	73.0	41.6	34.8	6.8
Gambia	Nov./Oct.	97.2	7.3	104.5	110.0	32.4	3.2	29.2
Guinea Bissau	Nov./Oct.	80.2	5.4	85.6	66.0	25.6	0.9	24.7
Mali	Nov./Oct.	96.6	25.1	121.7	70.0	29.1	13.9	15.2
Mauritania	Nov./Oct.	344.0	24.2	368.2	340.0	132.8	31.0	101.8
Niger	Nov./Oct.	247.7	12.5	260.2	450.0	42.9	38.0	4.9
Senegal	Nov./Oct.	735.5	8.2	743.7	780.0	295.2	6.9	288.3
Central Africa		658.3	33.5	691.8	669.0	503.4	9.1	494.3
Cameroon	Jan./Dec.	248.6	1.5	250.1	260.0	260.0	0.0	260.0
Cent.Afr.Rep.	Jan./Dec.	38.9	0.1	39.0	39.0	3.9	0.4	3.5
Congo	Jan./Dec.	109.6	21.6	131.2	95.0	95.0	0.0	95.0
Congo, Dem R	Jan./Dec.	244.4	7.1	251.5	255.0	138.8	4.0	134.8
Eq. Guinea	Jan./Dec.	8.9	0.1	9.0	9.0	1.7	0.7	1.0
Sao Tome	Jan./Dec.	7.9	3.1	11.0	11.0	4.0	4.0	0.0

ESTIMATED 1997/98 OR 1998 CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/ (thousand tons)

a) Estimates for 1997/98 or 1998

COUNTRY	Marketing year	1996/97 or 1997			1997/98 or 1998			
		Actual imports			Total import requirements (excluding re-exports)	Import position		
		Commercial purchases	Food aid	Total commercial and aid		Total commercial and aid	Food aid allocated committed or shipped	Commercial purchases
ASIA		35 438.2	1 818.7	37 256.9	36 435.0	34 457.6	2 257.9	32 199.7
Afghanistan	July/June	639.8	150.2	790.0	750.0	750.0	118.5	631.5
Bangladesh	July/June	491.7	618.2	1 109.9	1 860.0	1 932.9	549.4	1 383.5
Bhutan	July/June	16.0	0.0	16.0	15.0	15.0	0.0	15.0
Cambodia	Jan./Dec.	49.9	23.0	72.9	40.0	60.1	0.0	60.1
China 3/	July/June	13 393.9	106.1	13 500.0	10 300.0	10 238.0	80.2	10 157.8
India	April/March	1 829.8	208.0	2 037.8	2 400.0	2 396.2	211.8	2 184.4
Indonesia	April/March	7 278.0	0.0	7 278.0	6 040.0	6 767.4	0.0	6 767.4
Korea, D.P.R.	Nov./Oct.	540.8	462.1	1 002.9	1 951.0	1 037.4	880.0	157.4
Laos	Jan./Dec.	27.0	43.0	70.0	58.0	19.4	19.4	0.0
Maldives	Jan./Dec.	32.3	2.7	35.0	37.0	1.7	0.0	1.7
Mongolia	Oct./Sept.	242.8	7.2	250.0	200.0	90.8	90.8	0.0
Nepal	July/June	8.2	6.2	14.4	23.0	28.9	4.9	24.0
Pakistan 4/	May/April	3 025.7	7.6	3 033.3	4 321.0	4 321.0	163.1	4 157.9
Philippines	July/June	3 441.0	39.9	3 480.9	3 650.0	3 696.5	0.0	3 696.5
Sri Lanka	Jan./Dec.	1 113.8	82.7	1 196.5	1 250.0	873.1	87.5	785.6
Syria	July/June	751.8	7.5	759.3	670.0	757.8	21.0	736.8
Yemen	Jan./Dec.	2 555.7	54.3	2 610.0	2 870.0	1 471.4	31.3	1 440.1
CENTRAL AMERICA		4 092.5	218.0	4 310.5	4 765.0	4 540.8	221.9	4 318.9
Cuba 5/	July/June	1 443.5	6.5	1 450.0	1 555.0	1 555.0	31.8	1 523.2
Dominican Rep.	Jan./Dec.	1 039.4	2.2	1 041.6	1 045.0	694.9	0.1	694.8
Guatemala	July/June	740.0	39.1	779.1	920.0	951.7	10.9	940.8
Haiti	July/June	325.8	103.9	429.7	535.0	534.9	127.9	407.0
Honduras	July/June	369.2	31.6	400.8	365.0	450.8	29.5	421.3
Nicaragua	July/June	174.6	34.7	209.3	345.0	353.5	21.7	331.8
SOUTH AMERICA		876.4	146.6	1 023.0	1 108.0	991.6	93.6	898.0
Bolivia	July/June	204.1	130.1	334.2	378.0	389.8	73.1	316.7
Ecuador	Jan./Dec.	622.3	16.5	638.8	680.0	555.8	3.6	552.2
Suriname	Jan./Dec.	50.0	0.0	50.0	50.0	46.0	16.9	29.1
OCEANIA		365.1	0.0	365.1	339.0	77.5	8.0	69.5
Kiribati	Jan./Dec.	8.0	0.0	8.0	8.0	0.0	0.0	0.0
Papua New Guinea	Jan./Dec.	303.3	0.0	303.3	275.0	77.5	8.0	69.5
Samoa	Jan./Dec.	15.8	0.0	15.8	17.0	0.0	0.0	0.0
Solomon Isl.	Jan./Dec.	26.0	0.0	26.0	26.0	0.0	0.0	0.0
Tokelau 5/	Jan./Dec.	0.0	0.0	0.0	1.0	0.0	0.0	0.0
Tuvalu	Jan./Dec.	1.0	0.0	1.0	1.0	0.0	0.0	0.0
Vanuatu	Jan./Dec.	11.0	0.0	11.0	11.0	0.0	0.0	0.0
EUROPE / CIS 6/		3 929.4	552.8	4 482.2	4 092.0	3 712.0	605.7	3 106.3
Armenia	July/June	255.0	101.0	356.0	360.0	367.0	156.4	210.6
Albania	July/June	352.2	11.8	364.0	368.0	368.0	2.4	365.6
Azerbaijan	July/June	452.0	33.0	485.0	435.0	435.0	56.0	379.0
Bosnia&Herzegovina 5	July/June	57.2	215.0	272.2	275.0	275.0	35.9	239.1
Georgia	July/June	539.0	91.0	630.0	505.0	506.0	162.0	344.0
Macedonia, FYR	July/June	240.0	0.0	240.0	240.0	0.0	0.0	0.0
Kyrgyz Republic	July/June	109.0	19.0	128.0	104.0	105.0	69.0	36.0
Tajikistan	July/June	174.0	82.0	256.0	299.0	365.0	124.0	241.0
Turkmenistan	July/June	531.0	0.0	531.0	559.0	311.0	0.0	311.0
Uzbekistan	July/June	1 220.0	0.0	1 220.0	947.0	980.0	0.0	980.0
TOTAL		66 554.5	4 567.3	71 121.8	72 636.0	65 882.1	5 064.3	60 817.8

SOURCE: FAO

1/ Includes food deficit countries with per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. U.S.\$ 1465 in 1995),

which is in accordance with the guidelines and criteria agreed to by the CFA should be given priority in the allocation of food aid. The status of Iran still to be determine

2/ Includes refugee needs. 3/ Includes import requirements of Taiwan Province. 4/ Excludes Afghan refugee requirements. 5/ Classified as LIFD countries as of January

1996. 6/ Data for CIS members includes intratrade between the Republics. 7/ Provisional estimate.

ESTIMATED 1998/99 CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/ (thousand tons)

b) 1998/99 estimates for LIFD countries which have entered the 1998/99 marketing year

COUNTRY	Marketing year	1997/98			1998/99			
		Actual imports			Total import requirements (excluding re-exports)	Import position		
		Commercial purchases	Food aid	Total commercial and aid		Total commercial and aid	Food aid allocated committed or shipped	Commercial purchases
AFRICA		16 064.3	460.8	16 525.1	15 833.0	2 565.5	421.6	2 143.9
Northern Africa		13 668.2	64.9	13 733.1	12 740.0	2 060.5	7.4	2 053.1
Egypt	July/June	10 160.7	52.4	10 213.1	10 020.0	1 562.0	7.4	1 554.6
Morocco	July/June	3 507.5	12.5	3 520.0	2 720.0	498.5	0.0	498.5
Eastern Africa		875.8	60.7	936.5	352.0	52.7	52.7	0.0
Somalia	Aug./July	270.1	9.9	280.0	340.0	6.7	6.7	0.0
Tanzania	June/May	605.7	50.8	656.5	12.0	46.0	46.0	0.0
Southern Africa		1 520.3	335.2	1 855.5	2 741.0	452.3	361.5	90.8
Angola	April/March	350.8	148.0	498.8	471.0	148.0	129.1	18.9
Lesotho	April/March	127.0	10.1	137.1	263.0	18.6	6.2	12.4
Madagascar	April/March	153.8	36.5	190.3	145.0	15.9	15.9	0.0
Malawi	April/March	111.0	3.6	114.6	102.0	19.4	19.4	0.0
Mozambique	April/March	151.9	135.2	287.1	212.0	168.3	108.9	59.4
Swaziland	May/April	61.5	0.0	61.5	63.0	0.0	0.0	0.0
Zambia	May/April	364.2	1.8	366.0	660.0	6.0	6.0	0.0
Zimbabwe	April/March	200.1	0.0	200.1	825.0	76.1	76.0	0.1
ASIA		29 754.8	1 148.9	30 903.7	29 799.0	10 977.2	1 348.1	9 629.1
Afghanistan	July/June	631.5	118.5	750.0	740.0	0.8	0.8	0.0
Bangladesh	July/June	1 383.5	549.4	1 932.9	1 950.0	1 328.5	830.0	498.5
Bhutan	July/June	15.0	0.0	15.0	20.0	0.0	0.0	0.0
China 3/	July/June	10 157.8	80.2	10 238.0	10 480.0	1 225.2	45.0	1 180.2
India	April/March	2 184.4	211.8	2 396.2	1 650.0	1 148.2	187.8	960.4
Indonesia	April/March	6 767.4	0.0	6 767.4	9 040.0	5 204.5	207.3	4 997.2
Nepal	July/June	24.0	4.9	28.9	59.0	0.0	0.0	0.0
Pakistan 4/	May/April	4 157.9	163.1	4 321.0	1 520.0	804.9	54.9	750.0
Philippines	July/June	3 696.5	0.0	3 696.5	3 700.0	1 236.7	17.9	1 218.8
Syria	July/June	736.8	21.0	757.8	640.0	28.4	4.4	24.0
CENTRAL AMERICA		3 624.1	221.8	3 845.9	3 640.0	272.6	156.2	116.4
Cuba 5/	July/June	1 523.2	31.8	1 555.0	1 575.0	0.0	0.0	0.0
Guatemala	July/June	940.8	10.9	951.7	915.0	128.5	60.0	68.5
Haiti	July/June	407.0	127.9	534.9	480.0	38.1	27.1	11.0
Honduras	July/June	421.3	29.5	450.8	410.0	46.3	9.4	36.9
Nicaragua	July/June	331.8	21.7	353.5	260.0	59.7	59.7	0.0
SOUTH AMERICA		316.7	73.1	389.8	501.0	104.8	104.8	0.0
Bolivia	July/June	316.7	73.1	389.8	501.0	104.8	104.8	0.0
EUROPE / CIS 6/		3 106.3	605.7	3 712.0	4 036.0	329.4	290.0	39.4
Armenia	July/June	210.6	156.4	367.0	352.0	8.7	8.7	0.0
Albania	July/June	365.6	2.4	368.0	368.0	27.4	27.4	0.0
Azerbaijan	July/June	379.0	56.0	435.0	445.0	36.0	36.0	0.0
Bosnia&Herzegovina 5/	July/June	239.1	35.9	275.0	275.0	75.5	75.5	0.0
Georgia	July/June	344.0	162.0	506.0	606.0	113.8	74.4	39.4
Macedonia, FYR	July/June	0.0	0.0	0.0	240.0	0.0	0.0	0.0
Kyrgyz Republic	July/June	36.0	69.0	105.0	40.0	17.6	17.6	0.0
Tajikistan	July/June	241.0	124.0	365.0	360.0	50.4	50.4	0.0
Turkmenistan	July/June	311.0	0.0	311.0	420.0	0.0	0.0	0.0
Uzbekistan	July/June	980.0	0.0	980.0	930.0	0.0	0.0	0.0
TOTAL		50 470.1	2 114.4	52 584.5	50 716.0	13 744.5	1 906.5	11 838.0

SOURCE: FAO

for footnotes, please see page 39.

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DEFINITIONS:

"Unfavourable Prospects for Current Crops": Refer to prospects of a shortfall in production of current crops as a result of a reduction of the area planted and/or adverse weather conditions, plant pests, diseases and other calamities which indicate a need for close monitoring of the crops for the remainder of the growing season.

"Shortfalls in Food Supplies in Current Marketing Year Requiring Exceptional External Assistance": Refer to an exceptional shortfall in aggregate supplies or a localized deficit as a result of crop failures, natural disasters, interruption of imports, disruption of distribution, excessive post-harvest losses, other supply bottlenecks and/or an increased demand for food arising from population movements within the country or an influx of refugees. In the case of an exceptional shortfall in aggregate food supplies, exceptional and/or emergency food aid may be required to cover all or part of the deficit.

"Distribution of Local and/or Exportable Surpluses Requiring External Assistance": Refers to a situation of an exceptional surplus existing in a particular area of a country which needs to be transported to deficit areas in the same country or the neighbouring countries for which purpose external assistance is required.

NOTE: This report is prepared on the responsibility of the FAO Secretariat with information from official and unofficial sources. Since conditions can change rapidly and information may not always represent the current crop or food supply situation as of present date, further enquiries should be made before any action is taken. None of the reports should be regarded in any way as statements of governmental views.

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