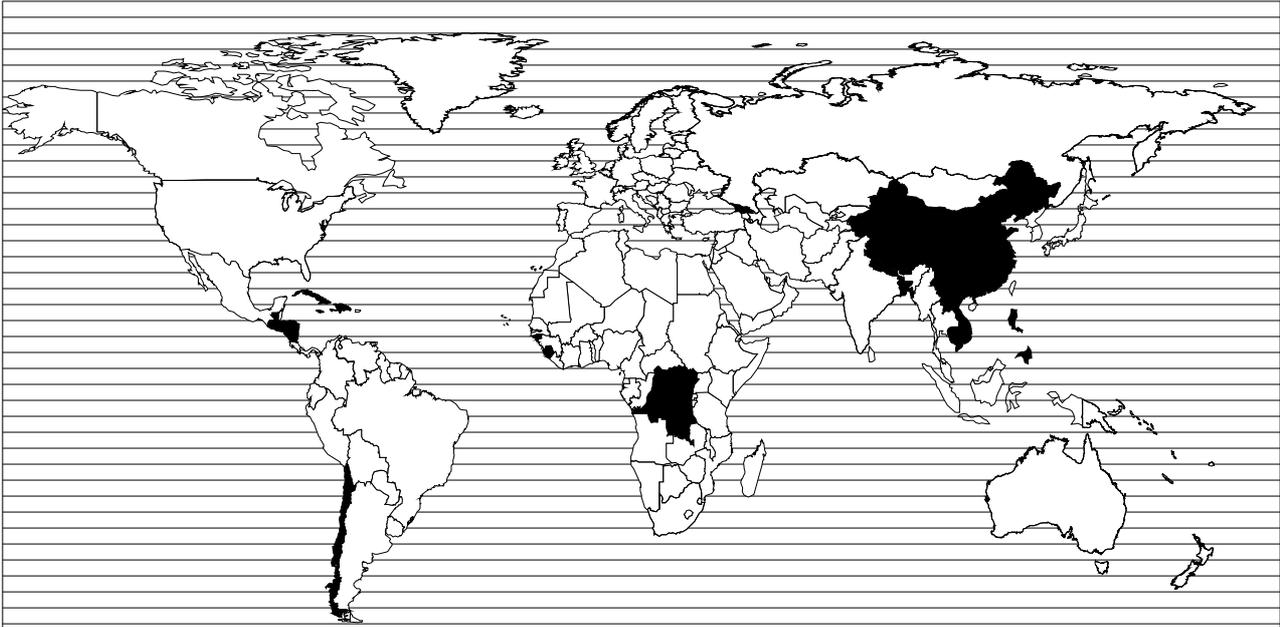


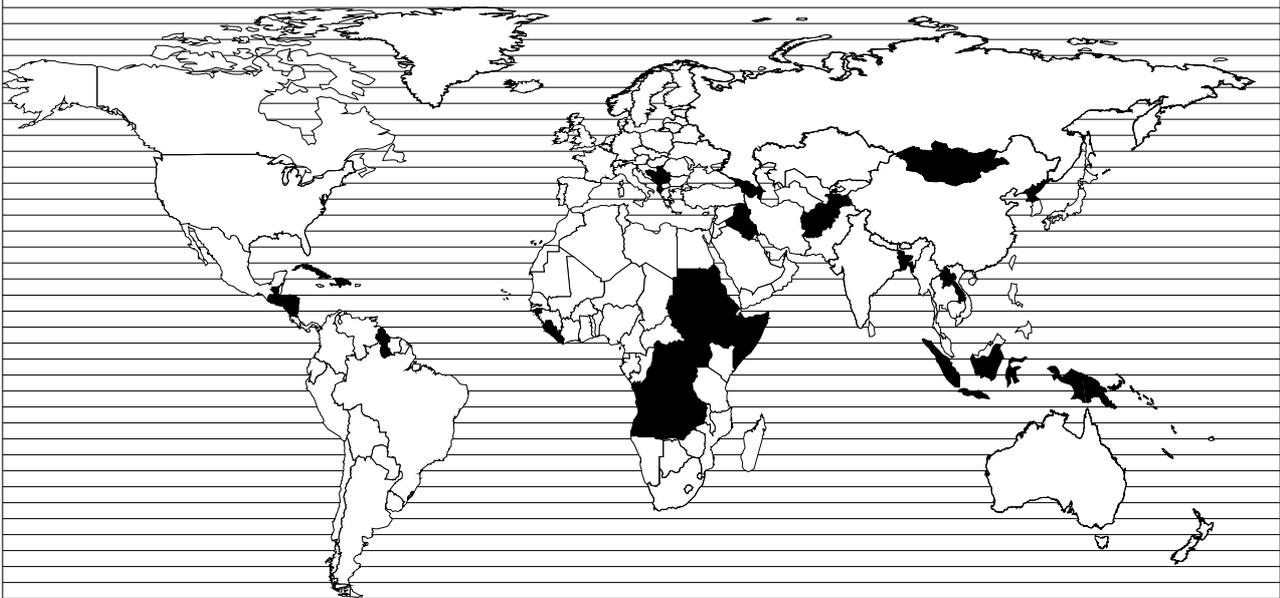
FOODCROPS AND SHORTAGES

No.5

November 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>Antigua/Barbuda</u> | Nov./Jan. | Hurricane rains and winds |
| Bangladesh | Nov./Jan. | Floods |
| Cambodia | December | Drought |
| <u>Cape Verde</u> | Nov./Dec. | Drought |
| <u>Chile</u> | Dec./Feb. | Drought |
| China | Nov./Dec. | Floods |
| Congo, Dem.Rep.of* | Sept./Nov. | Civil strife |
| Cuba | Sept./Dec. | Reduced plantings, drought, shortages of inputs, hurricane rains and flooding |
| <u>Dominican Rep.</u> | Dec./Feb. | Hurricane rains and flooding, winds and mudslides |
| <u>El Salvador</u> | Nov./Dec. | Hurricane rains and flooding, winds and mudslides |
| <u>Guatemala</u> | Nov./Feb. | Hurricane rains and flooding, winds and mudslides |
| Guinea Bissau | Oct./Nov. | Civil strife |
| <u>Haiti*</u> | Nov./Jan. | Hurricane rains and flooding, winds and mudslides |
| <u>Honduras</u> | Oct./Dec. | Hurricane rains and flooding, winds and mudslides |
| Laos* | Nov./Dec. | Drought |
| Nepal | Nov./Dec. | Floods, landslides |
| <u>Nicaragua</u> | Nov./Jan. | Hurricane rains and flooding, winds and mudslides |
| Philippines | Nov./Dec. | Weather anomalies |
| <u>St.Kitts&Nevis</u> | Nov./Jan. | Hurricane rains and flooding, winds |
| Sierra Leone* | Sept./Dec. | Civil strife |
| Viet Nam | Oct./Nov. | Drought |

SHORTFALLS IN FOOD SUPPLIES IN CURRENT MARKETING YEAR REQUIRING EXCEPTIONAL AND/OR EMERGENCY ASSISTANCE (Total: 37 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***, **DPR Korea***, **Laos***, **Mongolia***

CENTRAL AMERICA (8 countries):

Cuba, **Dominican Republic**, **El Salvador**, **Guatemala**, **Haiti***, **Honduras**, **Nicaragua**, **St.Kitts&Nevis**

SOUTH AMERICA (1 country):

Guyana

COMMONWEALTH OF INDEPENDENT STATES (4 countries):

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

EUROPE (3 countries):

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

OCEANIA (1 country):

Papua New Guinea

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

- **Burkina Faso**, **Chad**, **Mali**, **Niger**, **Senegal**, **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

Hurricane "Mitch" has inflicted extensive damage to crops in Central America. The heavy rains, high-force winds and widespread flooding at the end of October have left thousands of people dead and swept away houses and infrastructure. Honduras and Nicaragua were particularly hit hard, while Guatemala, El Salvador, Costa Rica, Panama and parts of Mexico have also been affected with varying degrees. Earlier in September the island states of Cuba, Dominican Republic, Haiti, Antigua and Barbuda, and St. Kitts/Nevis were similarly affected by hurricane rains and floods.

La Niña weather anomalies have caused extensive crop damage in several parts of Asia. In China and Bangladesh paddy production is forecast to decline due to heavy rains and floods last summer. In Indonesia, the combined effects of the economic crisis and adverse weather have resulted in a significant reduction of rice production, the country's staple food. Elsewhere, a large food deficit is forecast in DPR Korea, despite an improved harvest in 1998. Adverse weather conditions have also reduced cereal production in the Philippines, Cambodia and Laos.

In eastern Africa, the food supply situation is difficult in Somalia due to the sharply reduced main season cereal crops. In Sudan, despite serious floods in central and northern parts, overall prospects for coarse grains harvest are favourable. However, emergency food assistance is required in some southern areas where population displacement and insecurity prevail. An FAO/WFP mission is in the country assessing the food and rehabilitation requirements. Elsewhere in eastern Africa, harvest prospects are generally favourable reflecting adequate rains.

In southern Africa, this year's growing season has started under favourable conditions. Despite a reduced 1997/98 cereal output, the sub-region's food supply situation remains generally stable. However, in Angola the food supply position is expected to tighten in the coming months, reflecting the unstable security situation.

A record cereal harvest is forecast in 1998 in countries of western Africa and the overall food supply situation in the sub-region is expected to improve. However, civil strife has affected agricultural activities in Guinea Bissau and Sierra Leone where output is forecast to remain below average. In Liberia, food production is gradually improving, but, as in Guinea Bissau and Sierra Leone, food assistance will still be needed in 1999.

In the CIS, the 1998 grain and pulse harvest has fallen sharply due to adverse weather conditions exacerbated by the difficult economic situation in most states. The early outlook for 1999 crops is not promising.

In Europe, the 1998 cereal output is marginally reduced from last year, mainly reflecting smaller crops in several eastern European countries. A reduced winter grain area for the 1999 harvest is forecast reflecting adverse weather in some cases, an increased land set-aside requirement in the EC and continuing problems in the agricultural sectors of some eastern European countries.

In the United States, winter wheat planting for 1999 harvest is complete under generally favourable conditions and the bulk of the crop is reported to be in good condition. Early indications point to some reduction in area.

In Australia, prospects for the winter cereal crops have deteriorated somewhat following adverse weather in some parts over the past two months. Output nevertheless is expected to increase a little from the previous year.

SUMMARY

WEATHER CONDITIONS AND CROP PROSPECTS

In **northern Africa**, recent rains have prompted early planting of winter grains in central and eastern Algeria, and some areas of Tunisia. In contrast, major producing areas of Morocco have experienced a dry spell, which delayed planting of winter crops. Planting of the mainly irrigated wheat crop is underway. Production of wheat in 1998 in the sub-region has increased by 3.8 million tonnes from the reduced 1997 level to 13.8 million tonnes, reflecting generally favourable growing conditions. The subregion's coarse grain crop in 1998 also benefited from favourable weather and production of coarse grains increased in the sub-region by some 19 percent to 11 million tonnes.

In **western Africa**, a bumper crop is anticipated in the Sahel with record harvests in Chad, Mali and Niger, and well above average harvests in Gambia and Mauritania. However, production remains below average in Cape Verde and about average in Burkina Faso and Senegal. In Guinea-Bissau, civil strife has hampered agricultural production and cereal production is likely to decrease significantly. In the coastal countries along the Gulf of Guinea, harvest prospects are generally good in Benin, Nigeria and Togo but less favourable in Cote d'Ivoire and Ghana. Liberia and Sierra Leone remain heavily dependent on international food assistance despite some improvement in food production.

In **central Africa**, crop prospects are favourable in Central African Republic but poor in northern Cameroon. Civil strife in the Democratic Republic of Congo since early August is hampering agricultural and marketing activities in the Kivu region in the east, where increasing population displacement is reported.

In **eastern Africa**, harvesting of the 1998 cereal crops is underway in northern countries of the sub-region, while it has been completed in the southern countries. Generally normal to above-normal rains during the growing season are expected to result in a significant increase in this year's aggregate regional cereal production. While higher outputs are forecast for most countries, in Somalia, the harvest was sharply reduced by dry weather and pests.

In **southern Africa**, the irrigated wheat crop is being harvested while the coarse grain and paddy crops, due for harvest from April 1999, are being sown following adequate rains in several countries. Cereal output in 1998, estimated at some 19 million tonnes, was below average and 16 percent less than last year's above-average output. Only four countries - Angola, Malawi, Mozambique and Swaziland - gathered crops higher than last year. As a result of lower plantings and adverse weather, production was reduced in all other countries of the sub-region. Particularly reduced were the crops in Botswana, Lesotho, Namibia, Zambia and Zimbabwe. The sharply reduced maize crop in South Africa, at 1.4 million tonnes less than in 1997, is unlikely to seriously limit the exportable surpluses to the deficit countries in the sub-region, given the large carryover stocks.

In **Asia**, severe weather anomalies related to La Niña continue to affect several countries. In China, heavy rains and floods last summer caused extensive damage mainly to the rice crop. In Bangladesh, floods that covered most of the country for more than two months reduced the monsoon rice production (Aus and Aman) by about 14 percent compared to last year's already low output. Despite an improved harvest, DPR Korea faces a large food deficit in the 1998/99 marketing year. In Indonesia, the food security situation remains precarious as rice production is forecast to fall by about 8 percent in 1998 compared to the previous year and the economic crisis is still serious. In the Philippines, the effects of El Niño and La Niña are reported to have severely damaged the country's rice and maize crops. Drought conditions have affected crops in Cambodia, Vietnam and Laos. In Afghanistan, despite a recovery in cereal production, the food situation remains precarious in the areas affected by civil strife.

In **Central America** and the **Caribbean**, chances of a recovery in 1998/99 from the 1997/98 El Niño affected crops have been thwarted in several countries by the recent hurricane rains, widespread flooding and sustained high-force winds. The affected countries include Cuba, Haiti, Dominican Republic, Antigua and Barbuda, St. Kitts/Nevis, as well as Nicaragua, Honduras, Guatemala and parts of El Salvador. By contrast, Mexico is expected to have an average to above-average coarse grains output.

In **South America**, harvesting of the 1998 wheat crop has started in Argentina, Brazil, Uruguay and is about to start in Chile. Lower than average outputs are provisionally forecast as a consequence of reduced plantings relative to 1997 and the anticipated La Niña-related adverse weather. In Bolivia, generally dry

weather continues to prevail, affecting yields of the 1998 second season (winter) wheat crop. In Ecuador, the aggregate 1998 cereal output is expected to be below average as a consequence of El Niño related crop damage. In Colombia and Venezuela, a recovery in maize production is expected in 1998 compared to last year.

In **Europe**, persisting showers in the past weeks throughout the northern countries hampered the last of the summer harvesting and winter planting. Aggregate cereal output in the region in 1998 is estimated at 308 million tonnes, just below the 1997 level. Increased production in the EC partially offset reduced crops in some eastern European countries. Early indications for the winter grains for harvest in 1999 point to a reduced area reflecting adverse weather in some parts but also due to an increase in the land set-aside requirement in the EC and continuing problems in the agricultural sectors of some eastern European countries. In the Baltic countries, the 1998 grain harvests, forecast at 0.7 million tons in Estonia, 1 million tons in Latvia and 3 million tons in Lithuania are marginally less than last year due to excessive rains in August, which lowered yields.

In the **Commonwealth of Independent States (CIS)**, the aggregate 1998 cereal and pulse harvest is estimated to have fallen to 102 million tonnes, 30 percent less than in 1997. In the major states, persistent dry conditions from mid-June to August were exacerbated by the deterioration of the economic situation and managerial problems on farm and in the service industry. In the Russian Federation, the 1998 grain and pulse harvest has fallen to about 50 million tonnes from 88 million tonnes in the preceding year. In the Ukraine output is estimated at about 28 million tonnes, some 20 percent less than last year's while in Kazakhstan grain production reached only 7.5 million tonnes compared to 12 million tonnes in 1997. Elsewhere, preliminary estimates indicate that harvests were less than last year also in Azerbaijan, Belarus, Georgia, Kyrgyzstan, Moldova, and Tajikistan but larger in Armenia, Turkmenistan and Uzbekistan. The early outlook for the 1998 winter wheat and rye crops to be harvested in 1999 is uncertain. The areas sown were similar to last year but some plantings occurred well beyond the optimum dates and poorly established plants have probably suffered from extremely cold weather conditions. In addition, with the financial crisis in the Russian Federation, the outlook for agricultural credit for 1999 is poor.

In **North America**, winter wheat planting in the United States for 1999 harvest is complete under generally favourable conditions and early indications point to some reduction in area. Latest official estimates put the 1998 aggregate wheat output at 69.6 million tonnes, some 1 percent up from 1997, and that of coarse grains at about 250 million tonnes, 3 percent up from 1997. In Canada, the bulk of the 1998 harvest is complete, reflecting favourable weather conditions. While wheat output fell due to reduced plantings, that of coarse grains is estimated to have increased.

In **Oceania**, prospects for the 1997 winter grain crops in Australia have deteriorated somewhat following adverse weather in some parts over the past two months. Output nevertheless is expected to increase somewhat from the previous year. Early indications for the summer coarse grains to be harvested in 1999 point to an increase in area as some flood damaged winter grain areas will probably be resown to summer crops.

COUNTRY REPORTS ^{1/}

AFRICA

NORTHERN AFRICA

ALGERIA (25 November)

Land preparation for winter crops has started in most parts of the country. In central and eastern Algeria some early planting has started with recent rains. Production of cereals in 1998 more than doubled compared to last year, to 3 million tonnes, due to generally favourable weather conditions. Wheat production is estimated at 2 million tonnes, whilst the output of barley more than tripled to 1 million tonnes. Cereal imports in 1998/99 (July/June) are forecast at some 5.7 million tonnes.

EGYPT (25 November)

Planting of the (mainly irrigated) wheat crop is underway. Production of wheat in 1998 increased by some 4 percent over last year to 6.1 million tonnes. Likewise, the output of maize is estimated at 6.3 million tonnes, 8 percent up on last year. Imports of wheat and wheat flour in 1998/99 (July/June) are forecast at 7 million tonnes and those of coarse grains at 3 million tonnes.

MOROCCO (25 November)

Land preparation for winter crops is underway. Wheat output in 1998 is estimated to have increased to 4.4 million tonnes, about 90 percent higher than the 1997 harvest, as a result of favourable weather. The output of barley, estimated at 2 million tonnes, is about 49 percent higher than last year. Imports of wheat in 1998/99 (July/June) are forecast at 2 million tonnes, some 20 percent lower than last year.

TUNISIA (25 November)

Recent rains have prompted early planting in some areas. However, more rains are needed for widespread planting. The output of cereals in 1998 is estimated at 1.7 million tonnes, 58 percent up on last year. Production of wheat is estimated to be 53 percent higher than last year and the barley output increased by 90 percent to 303 000 tonnes. Imports of wheat and barley in 1998/99 (July/June) are forecast at 900 000 tonnes and 300 000 tonnes, respectively.

WESTERN AFRICA

BENIN (25 November)

Following above-average and well distributed rainfall during the growing season, crop prospects for 1998 are favourable. Flooding occurred in mid-August and September in the centre and the north of the country and damaged infrastructure and reduced crop production in these areas.

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.

^{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 (*).

BURKINA FASO (25 November)

A joint FAO/CILSS Crop Assessment Mission reviewed with national services in mid-October the evolution of the 1998 growing season and harvest prospects. The aggregate 1998 cereal production is estimated at 2 387 800 tonnes which is well above last year's output but remains about average.

This increased harvest will improve the overall food supply situation which was tight in 1998 following a reduced crop in 1997. Prices of cereals have decreased significantly. The government is planning to buy about 20 000 tonnes to replenish the national security stock to the recommended level of 35 000 tonnes. However, some deficit areas remain vulnerable and the provision of cereals at subsidised prices may be necessary as was done by the government during the 1998 lean season.

CAPE VERDE (25 November)

In early November, a joint FAO/CILSS Crop Assessment Mission with national services estimated the 1998 maize production at 3 400 tonnes, which is below last year's reduced harvest and below average, mainly due to insufficient rain.

Following this poor crop, some sections of the rural population will be highly vulnerable and may need food assistance. However, despite several successive poor harvests, the overall food supply situation remains satisfactory as the country imports the bulk of its consumption requirement. Substantial food aid contributions are already pledged for 1998/99 and several deliveries are planned in November and December.

CHAD (25 November)

Cumulative rainfall is above average and above last year's level in many areas. In the Sudano-Sahelian zone, heavy rains flooded rice crops but provided abundant ground water supplies in low-lying areas which is favourable for recession sorghum crops. The pest situation remained relatively calm during the season. Pasture is abundant and no major livestock disease has been reported so far.

A joint CILSS/FAO Crop Assessment Mission which visited the country in mid-October estimated the total cereal production at 1 277 000 tonnes, which is 30 percent above the 1997/98 output. It is also 9 percent above the last record crop in 1994/95. Output of cereals has increased compared to last year, with the exception of rice which is lower this year (-11 percent) as a result of adverse weather conditions and shortage of inputs. The overall food supply situation is satisfactory.

COTE D'IVOIRE (25 November)

Reduced rainfall in September and early October is likely to have reduced the yield of the main upland rice crop, which is currently being harvested. However, in the north, the rainfall situation has been satisfactory and could partly compensate for the reduced output in the south.

The overall food supply situation is satisfactory with the marketing of the new crop. Repatriation of about 140 000 Liberian refugees who are still in the western departments is underway. The cereal import requirement for 1998 (January/December), is estimated at 620 000 tonnes, mostly wheat and rice.

THE GAMBIA (25 November)

A joint CILSS/FAO Crop Assessment Mission which visited the country from 12-16 October estimated the 1998 total cereal production at 120 980 tonnes. This is 16 percent higher than last year and 18 percent above the average of the last five years. Coarse grains increased by 6 percent to 92 727 tonnes, whilst the output of paddy (upland and swamp) increased by about 11 percent.

The overall food supply situation is anticipated to be satisfactory in light of relatively good harvest. Cereal prices started to decline at the onset of the harvest. However, the food supply situation may become tight during the lean season in the Lower River Division, particularly in the Nuimis districts, due to a decline in early millet production.

GHANA (25 November)

Below-average rains were recorded in August, September and early October, notably in the south and the centre where the output of the main maize and rice crops, which are now harvested, may have been reduced. The output of millet and sorghum crops should be about normal.

The overall food supply situation is satisfactory following the harvest of the early millet and maize. About 30 000 Liberian refugees remain in Ghana. The 1998 cereal import requirement is estimated at 440 000 tonnes, mostly wheat and rice.

GUINEA (25 November)

Following widespread and abundant rainfall during the whole growing season, the main cereal crops are being harvested and prospects for the 1998 output are favourable.

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 are Liberians. Organised repatriation is underway for the Liberian refugees and about 80 000 have been repatriated since the beginning of the year. However, new refugees have arrived from neighbouring Guinea Bissau, fleeing the on-going conflict.

The cereal import requirement for 1998 is estimated at 410 000 tonnes, mostly wheat and rice.

GUINEA-BISSAU (25 November)

An accord signed in November reaffirmed the ceasefire agreement signed in late July 1998. It provides for the opening of a humanitarian corridor, and the re-opening of the airport and port still under rebel control. The accord also called for the formation of a government of national unity and the holding of legislative and presidential elections before March 1999.

The food supply situation is reported to be stable as the ongoing harvest is providing an additional supply. However, following recent fighting which led to a suspension of food distributions, about 380 000 internally displaced people need assistance, notably in Prabis and Cumura, near Bissau, and in Bafata area. Food distribution has resumed.

LIBERIA* (25 November)

Rainfall was below normal in September and October but remained widespread. Improved security conditions prevailed in the rural areas during the growing season. Severe seed shortages were reported and may limit the 1998 cereal output.

Food supply on the urban market is stable but prices remain very high. Sporadic fighting is still occurring and water and electricity supply has not been restored in most areas of Monrovia. Food assistance is being delivered almost throughout the country and an improvement in the nutritional status of the population is reported. Organised repatriation is

underway for about 480 000 Liberian refugees in neighbouring countries, and 80 000 have been repatriated. The cereal import requirement for 1998 (January/December) is estimated at 240 000 tonnes, including 130 000 tonnes of food aid.

MALI (25 November)

Abundant rainfall provided sufficient soil moisture to allow good development of crops, even in traditionally dry zones. However, the early end of rains may have adversely affected yields in some northern areas of Kayes and Ségou regions. Water in the Niger and Senegal river valleys is normal and better than in 1997, favouring irrigated rice crops in Ségou and Mopti areas. But localized flooding in Tombouctou and Gao areas resulted in crop losses. The pest situation has been relatively calm. Pastures and water points are generally satisfactory.

A joint CILSS/FAO Crop Assessment Mission that visited the country in late October estimated the 1998 cereal production at 2 524 000 tonnes. This is 13 percent above average and 3 percent over the previous record output of 1994 (2 457 350 tonnes). Better yields and a substantial increase in the cultivated area (35 percent) were achieved compared to the 1993-97 average. Following this record crop, the food supply situation will be satisfactory in 1998/99.

MAURITANIA (25 November)

Cumulative rainfall for 1998 is generally higher than in 1997. As a result, a good output of recession crops is expected and growing conditions are favourable for fields in low-lying areas and for irrigated crops. Migratory locusts, grasshoppers, grain eating birds and Desert Locusts were reported in several areas (Gorgol, Guidimaka, and Assaba). Treatments have been undertaken since July.

In all the pastoral zones, abundant fodder production is expected this year. This should cover livestock needs until about mid-1999 when herds will have to migrate to other zones to find sufficient feed. In late October/early November, a joint CILSS/FAO Crop Assessment Mission estimated total 1998 cereal production at 202 600 tonnes. This represents a 34 percent increase over last year and is close to the record output of 1994/95.

NIGER (25 November)

A joint CILSS/FAO Crop Assessment Mission which visited the country from 19-23 October estimated the 1998 aggregate cereal production at 3 037 756 tonnes, comprising 2 973 904 tonnes of millet and sorghum, 53 255 tonnes of paddy, 6 497 tonnes of maize and 4 100 tonnes of wheat. This estimated record production is 77 percent higher than in 1997 and about 45 percent above the average of the last five years. Good weather conditions and relatively low pest infestations largely account for this good outturn.

The overall food supply situation is anticipated to be satisfactory in light of the expected good harvest. However, despite this increase in harvest, the food supply situation is likely to be tight in some areas which are chronically food deficit. In addition, about 42 000 flood victims need specific assistance, as requested by a UN General Assembly appeal on 10 November.

NIGERIA (25 November)

Despite a late start of the rains, conditions were generally favourable for a good crop development throughout the growing season. The millet and sorghum crops in the northern part of the country are expected to be normal to above normal. In the centre and the southwest, dry periods in July and August might have affected crop development and reduced the maize and rice output. Shortages of fertilizers, improved seeds and pesticides are also expected to have further limited maize and rice production.

Food supply continues to be 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 (25 November)

On the basis of the national production survey, a joint FAO/CILSS Crop Assessment in late October estimated 1998 rainfed crop production at 976 400 tonnes which is 24 percent above the 1997 reduced harvest but is still 3 percent below the average of the last five years. With recession and off-season crops whose prospects are better than last year, the total cereal production is slightly over 1 million tonnes.

Following the reduced 1997 cereal harvest, the Government distributed more than 40 000 tonnes of cereals in the affected areas. The overall food supply situation is expected to improve following this better harvest but vulnerable people, notably in the centre and the north, may require food assistance. Overall food supply is adequate and prices of rice are stable, while prices of coarse grains decreased significantly following the harvest.

SIERRA LEONE* (25 November)

The food supply situation is improving in Freetown and in the centre of the country, where relatively peaceful conditions now prevail. However, increased insecurity in the major part of the country has severely disrupted most agricultural activities and affected the population's food security. Food prices are increasing and prospects for food production in 1998 are unfavourable. The planted area is estimated to be substantially lower than last year due to security problems. Flooding occurred in the Kambia and Mambolo areas and destroyed rice fields, following heavy rainfall in mid-August.

There are currently about 50 000 registered internally displaced persons (IDPs), and estimates of another 40 000 to 50 000 IDPs displaced by the continuing violence. The situation has deteriorated significantly especially in the rural areas that are not controlled by ECOWAS forces.

The overall food supply situation remains very precarious. The cereal import requirement for 1998 has been estimated at about 260 000 tonnes, including 80 000 tonnes of food aid.

TOGO (25 November)

Harvesting of the main millet, sorghum and rice crops is drawing to an end. The late start of the growing season and irregular rainfall might have reduced crop output in the south, including rice. In the centre and the north, maize, millet and sorghum crops benefited from adequate growing conditions and the output is expected to be above last year's level.

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 176 000 tonnes of wheat and rice (including re-exports).

CENTRAL AFRICA

CAMEROON (25 November)

Following a late start of rains and irregular rainfall during the growing season, crop prospects are below average. Heavy rains in August and September caused flooding in the Lake Tchad, Mayo-Danay, Faro and Mayo-Rey regions, which damaged infrastructures and reduced crop output. No significant activity of African Migratory Locusts has been reported following the infestations of late 1997.

With the start of the harvesting period, food prices are decreasing and food availability is satisfactory. Some food supply difficulties were reported in the flooded areas. 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. Following a government appeal for international food assistance, a WFP Emergency Operation provided 6 000 tonnes of relief food for 210 000 people in the extreme north. A new operation is currently under preparation.

CENTRAL AFRICAN REPUBLIC (25 November)

Reflecting generally abundant and widespread rains, a good cereal crop is anticipated. The food supply situation is satisfactory.

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

CONGO, DEMOCRATIC REPUBLIC* (25 November)

Civil strife continues since the beginning of August, mainly in the east. Planting for season A is now underway in Kivu but insecurity is hindering farming activities. Severe shortages of food and medicines are reported. Cholera remains a major concern, especially in the Shabunda area in South Kivu. Moreover, many farming households were unable to take full advantage of the favourable weather conditions during the last season B largely due to lack of inputs. Considerable population movements have been reported, both within DRC and to neighbouring countries. Local authorities in Goma have appealed for assistance for 31 750 people, most of whom have lost their homes in the conflict areas. More than 11 000 Burundian refugees hosted by the local population in South Kivu, mainly in the Uvira region, are also in poor health with high malnutrition rates. The situation is particularly worrisome in Kindu, in Maniema Province, as all ground links have been cut.

The food supply situation is also deteriorating in Lubumbashi, where flooding in the province last year destroyed up to 70 percent of crops and basic foodstuffs are costly and becoming increasingly scarce in the markets. In addition, Lubumbashi is host to displaced people who came from Kalemie, Nyunzu and Nyemba areas in mid-October. Between 20 000 and 40 000 displaced people are also reported around Kabalo, Nyunzu, Nyemba, Manono and Ankoro. In the Orientale Province, there are tens of thousands of vulnerable people in Kisangani where there is a scarcity of consumer goods on local markets, as the town has not been supplied since mid-August.

CONGO, REP OF (25 November)

Following the civil strife in 1997 which severely disrupted food marketing and caused large-scale displacement of the urban population, the situation was improving in Brazzaville but recent civil disturbances are reportedly causing renewed population displacement in the southern parts. The food supply situation in Brazzaville remains problematic due to the suspension of railway traffic from Pointe-Noire and river traffic from Kinshasa. Food prices are increasing. Local suppliers and WFP have started food airlifts from Pointe-Noire to the capital.

EQUATORIAL GUINEA (25 November)

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 (25 November)

The staple foodcrops are cassava and plantains, the production of which is estimated at about 330 000 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* (25 November)

Renewed violence in September and October has resulted in a deterioration of the security situation in the country. This is likely to disrupt agricultural activities in some areas.

Harvesting of the 1998C short season food crops is complete. The outturn is estimated to be satisfactory, reflecting normal weather conditions and improved agricultural input availability. Prospects for the 1999A season crop in the ground are uncertain. Erratic rains in the past two months, mainly in eastern parts, may have negatively affected crop yield.

The food supply situation has improved with the improved 1998 food production. However, it remains tight for the population still living in displaced camps.

ERITREA* (25 November)

Normal rains in October maintained favourable prospects for the 1998 main season cereal and pulses crops. Following abundant rains during the growing season, the 1998 cereal and pulse production is anticipated to recover from the reduced levels of the past years. The tight food supply is easing with the arrival of the new harvest on the market. However, in areas affected by the armed conflict with neighbouring Ethiopia, production is expected to be reduced due to population displacements. A UN Inter-Agency Appeal has been launched to provide food and non-food assistance to an estimated 109 000 affected people.

ETHIOPIA* (25 November)

Harvesting of the 1998 main "Meher" cereal crop is underway. Overall, prospects are favourable reflecting abundant rains during the growing season, particularly in northern parts. Production is anticipated to recover from last year's level which was affected by excessive rains at harvest. However, erratic precipitation in the south-western parts may result in localized reduced harvest.

An FAO/WFP Crop and Food Supply Assessment Mission is currently in the country to appraise the 1998 Meher production and estimate food aid requirements in 1999. Food aid pledges in 1998 amounted to 719 000 tonnes of cereals of which 503 000 tonnes have been distributed up to the end of November.

KENYA (25 November)

The 1998 main "long rains" cereal crops are being harvested in the main growing areas of the Rift Valley. Prospects remain favourable as a result of normal to above-normal rains, particularly in western parts. Production of the main staple, maize, is forecast to increase substantially over the reduced level of last year's same season to 2.3 million tonnes, while wheat output is anticipated at around or higher than the normal 1997 crop.

Prices of cereals and beans continued to decrease in October, reflecting the arrival of the new harvest onto the markets, as well as high levels of imports during the year.

Pasture and animal conditions in eastern and north-eastern areas have improved with the satisfactory rainy season. Food aid distributions by WFP in these areas, previously affected by severe floods, were terminated in October.

RWANDA* (25 November)

Planting of the 1999 first season foodcrops is complete. Growing conditions are satisfactory following generally normal to above-normal rains in September and October. However, persistent insecurity in north-western prefectures, continues to cause massive population displacements, disrupting agricultural activities. Reduced harvests are anticipated in these areas, hindering the recovery of agricultural production.

The output of the 1998 second season foodcrops, harvested in the middle of the year, was estimated to be substantially higher than the same season last year, and around the pre-civil strife level of 1990. As a result, prices of food staples have declined over recent months.

The number of displaced persons in north-western prefectures has continued to increase. The food and nutritional situation of the displaced is reported to be serious. Food assistance is being provided to some 360 000 in Ruhengeri, Gisenyi and Gikongoro prefectures.

SOMALIA* (25 November)

The food supply situation gives serious cause for concern following the sharply reduced 1998 main "Gu" season foodcrop production, which was the fifth consecutive reduced harvest. Production of maize is estimated at 61 000 tonnes, half last year's reduced level, and that of sorghum at 22 000 tonnes, only one-fifth of the 1997 Gu harvest.

Even assuming a normal secondary "Deyr" cereal crop to be harvested early in 1999, the deficit in 1998/99 marketing year (August/July) is large, estimated at 377 000 tonnes. After accounting for commercial imports, the food aid requirement is estimated at around 150 000 tonnes.

The precarious food situation has been aggravated by the ban of livestock imports from Somalia by Saudi Arabia, a traditionally important market, which has reduced incomes of a large proportion of the pastoral population. Food shortages are reported in several parts and cereal prices have increased. There is an urgent need for food assistance to avoid a major food crisis.

SUDAN* (25 November)

A recent FAO Crop and Food Supply Assessment Mission to southern Sudan forecasts the 1998 total cereal production for the region at 537 700 tonnes, of which 192 400 tonnes are expected from the mechanized farming sector in Upper Nile State. The remaining 345 300 tonnes, the bulk of which will be sorghum, are estimated to come from the traditional sector.

Production in the traditional sector is double last year's poor harvest due to better rains and a season relatively free from migratory pests and diseases.

Although the rains were delayed everywhere and were erratic in the first two months, they stabilized from mid-July and continued up to November throughout the three regions of southern Sudan. The resulting yields are far better than last year.

However, it is predicted that five states (Jonglei, Bahr el Jebel, Northern Bahr el Ghazal, Lakes and Warrab) will be in cereal deficit and food aid will be needed throughout the coming marketing year, particularly in Bahr el Ghazal region, as normal trade routes and infrastructure have broken down. It is unlikely that this year's production and any surplus on-farm stocks in the traditional sectors of Upper Nile and Western Equatoria will be accessible through market forces due to the segmentation of the population. Similarly, most of the 192 000 tonnes produced by mechanized farms in Upper Nile State is likely to be marketed in northern and central parts, with little traded southwards. Large scale local purchases of surpluses from Upper Nile State are recommended to cover the food deficit in the southern states.

In order to boost agricultural expansion, the Mission recommends the introduction of food-for-work schemes in secure areas in Bahr el Ghazal aimed at house rebuilding and farm rehabilitation, in conjunction with seed and tool supply schemes.

In central and northern Sudan, harvesting of the 1998 main season cereal crops has started. Despite severe floods and crop losses in parts, due to heavy rains in September, overall harvest prospects are favourable. An FAO/WFP Crop and Food Supply Assessment Mission is currently in the country to appraise the 1998 main season cereal production and estimate commercial imports/exports and food aid requirements in 1999.

In anticipation of the good harvest and reflecting high levels of carryover stocks, prices of sorghum remain at very low levels. The Government has recently lifted the three-year ban on sorghum exports.

TANZANIA (25 November)

The overall food supply situation is satisfactory following the good 1998 cereal and non-cereal crop production. An FAO/WFP Crop and Food Supply Assessment Mission earlier in the year estimated the 1998 total food crop production at one-third higher than the 1997 reduced level and above average. Pasture and animal conditions are also good in pastoral zones.

Despite available exportable surpluses in marketing year 1998/99 (June/May), food deficits are expected in parts of Singida and Dodoma regions, where production was reduced, as well as in the chronically food deficit areas of the Coast region. Recent assessments indicate that a total of 374 000 persons are in need of food assistance until the next harvest in February 1999.

Planting of the 1998/99 short "Vuli" season crop is underway under normal conditions so far.

UGANDA (25 November)

Widespread abundant rains in the third dekad of October benefited developing foodcrops of the 1998 second season, particularly in the eastern districts where the main maize crop was stressed by dry weather earlier. Prospects for the harvest early next year are favourable.

The rains of the past months have also improved pasture conditions and water availability for the livestock in pastoral districts of Kotido and Moroto.

The overall food supply situation is satisfactory. Prices of food staples, particularly maize, have declined over recent months. In the northern districts of Gulu and Kitgum, affected by civil strife, some improvement in security since July has resulted in a decrease in the number of displaced persons, now estimated at 474 000. However, the food situation remains difficult in these areas. Food assistance is being provided to 400 000 displaced persons, as well as to 126 000 persons in the north-eastern areas affected by a succession of poor harvests.

SOUTHERN AFRICA

ANGOLA* (25 November)

Recent widespread rainfall in the main grain producing areas of the Central Plateau benefited the maize and millet crops due for harvest from April 1999. However, agricultural activities continue to be hindered by shortage of seeds and fertilizers and the displacement of rural people from their farms as a result of continued insecurity in several parts of the country.

Aggregate cereal production in 1998 rose by 37 percent to 599 000 tonnes due to an increase in the area sown and favourable weather. However, the country's food supply situation is expected to tighten in the coming months with large areas in need of food aid. The unstable security situation in several parts of the country has resulted in an ever-increasing need for emergency food aid.

The total cereal import requirement for 1998/99 (April/March) is estimated at 471 000 tonnes, including 121 000 tonnes of food aid. Pledges at the end of October amounted to 120 000 tonnes, of which 58 000 tonnes have been delivered.

BOTSWANA (25 November)

Rainfall in October has favoured early planting of coarse grain crops to be harvested from April 1999. However, more rain is needed for good crop establishment. Production of cereals in 1998, mainly sorghum, is estimated at 9 000 tonnes, one-third of last year's poor crop and markedly below average, due to erratic and poorly distributed rainfall.

However, even in normal years, the country imports the bulk of its cereal consumption requirements. It is therefore anticipated that available grain stocks and planned commercial imports will meet total requirements for the 1998/99 marketing year.

LESOTHO (25 November)

Normal rains in early October that encouraged land preparation and early sowing of the 1998/99 coarse grain crop were followed by below-normal precipitation towards the end of the month. The 1998 production of coarse grains has been officially revised upwards to about 141 000 tonnes, only some 9 percent lower than the previous year and 16 percent below average. The output of wheat now stands at 27 000 tonnes, which is also much above the initial estimates and above average.

Reflecting the revised estimates of the 1998 crop, cereal imports in the year ending March 1999 are estimated at some 188 000 tonnes, which is close to the previous year's requirements. Food aid pledges at the end of October amounted to 6 000 tonnes, all delivered.

MADAGASCAR (25 November)

Moderate to heavy rains in August and September over the eastern coast were followed by light rainfall in October that favoured the transplanting of the main 1999 paddy crop.

Reflecting lower plantings, paddy production in 1998 is estimated to have decreased by 12 percent to 2.2 million tonnes, the lowest level in recent years. In contrast, production of maize and sorghum

increased by some five percent to the average level of 163 000 tonnes. The overall food supply situation in the country in the 1998/99 marketing year is expected to remain relatively stable, including the drought-prone south where some locust damage to crops and pastures has been reported.

MALAWI* (25 November)

Light rains in recent weeks have prompted early plantings of the cereal crop to be harvested from April 1999. Reflecting favourable weather cereal production in 1998, mainly maize, increased by some 13 percent to an above-average level of 1.88 million tonnes.

As a result, the food supply situation in the current 1998/99 marketing year has improved substantially. People living in areas of localized food deficit in the north, where excessive rains resulted in flooding with loss of crops, continue to be assisted under a Government programme sustained by aid agencies.

MOZAMBIQUE* (25 November)

Some rains received in late October favoured early planting of the 1998/99 cereal crop. In 1998, increased area planted and good yields resulted in cereal production of 1.69 million tonnes, higher than both last year and the average for the previous five years. Production of cassava, groundnuts and beans also increased significantly.

Following several years of steady increase in food production, the overall food supply position has improved further in the current marketing year. The import requirement in rice and wheat in 1998/99, estimated at 67 000 tonnes and 145 000 tonnes, respectively, will be met by private sector imports. Food assistance is anticipated only in localized areas where floods and drought caused some crop losses.

NAMIBIA (25 November)

Normal rainfall received in early October in the east and south-east of the country benefited pastures and encouraged land preparation for the 1998/99 coarse grain crop. The output from irrigated winter wheat, currently being harvested, is estimated at 6 000 tonnes, higher than last year and above average.

Following the sharply reduced 1998 cereal production, estimated at 59 000 tonnes, which is one-third of last year's above-average output, the food supply situation in the current marketing year is tight. Imports of cereals in 1998/99 (May/April) are estimated to increase to some 155 000 tonnes (120 000 tonnes of maize and 35 000 tonnes of wheat).

SOUTH AFRICA (25 November)

Normal to above-normal rains in September and October in most maize producing areas provided adequate topsoil moisture for the sowing of summer crop. The output of the 1998 wheat crop, now being harvested, is estimated at 1.47 million tonnes, 36 percent down compared to last year's above average crop and markedly below average. This decline is mostly due to a sharp decline in the area sown in response to low international and domestic wheat prices.

Aggregate cereal output in 1998 is currently estimated at 9.7 million tonnes, some 19 percent lower than last year's above-average crop. This total includes the latest estimate for the maize crop which declined, for the second consecutive year, to 7.59 million tonnes, 16 percent down on 1997. This was mainly due to reduced plantings and unfavourable weather. However, given the large carryover stocks, this decrease in production is unlikely to seriously limit the exportable surpluses to the deficit countries in the sub-region.

SWAZILAND (25 November)

Above-normal rains in early October and moderate precipitation at the end of the month allowed the sowing of the 1998/99 maize crop, which normally accounts for some 96 percent of the aggregate cereal production.

As a result of a larger sown area and favourable weather, the 1998 cereal production increased by 26 percent to 111 000 tonnes. The food supply situation is expected to remain satisfactory until the end of the 1998/99 marketing year due to adequate domestic availability of cereals and planned commercial imports of 48 000 tonnes of wheat and rice.

ZAMBIA (25 November)

The output of the 1998 irrigated wheat crop, now being harvested, is estimated at 71 000 tonnes, 11 000 tonnes more than last year and above average. Sowings of the coarse grain crop, to be harvested from April 1999, will start with the onset of the rainy season that is about to start.

Reflecting El Niño-related weather anomalies, cereal output in 1998 dropped by 37 percent to 709 000 tonnes. For maize, the main staple of the country, production was estimated at some 548 000 tonnes, 43 percent lower than last year and 58.6 percent below the five-year average.

The food supply situation for the 1998/99 marketing year is expected to be tight. Maize prices have increased steadily since May. 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. So far food aid pledges amount to 15 000 tonnes, of which 12 000 tonnes have been delivered.

ZIMBABWE* (25 November)

The output of the irrigated wheat crop, now being harvested, is estimated at an above-average level of some 250 000 tonnes. By contrast, production of maize, the main staple, harvested earlier in the year, fell by one-third to 1.47 million tonnes due to erratic rainfall associated with El Niño.

The national food supply situation for the current marketing year is expected to be tight until the next harvest in April 1999. Recently, the price of bread and maize meal went up by 30 percent and 40 percent, respectively, and fuel prices rose by over 60 percent in early November. The food supply position is particularly critical in Matabeleland South Province and sections of Midlands, Masvingo and Manicaland provinces.

Cereal import requirements for 1998/99 are estimated at 825 000 tonnes. While 4.5 million people have registered for the Grain Loan Scheme, the Government is providing direct relief assistance to the most vulnerable groups. However, most needy areas are difficult to reach because of transport difficulties.

ASIA

AFGHANISTAN* (25 November)

Land preparation for the 1998/99 winter grain crops has started. The 1998 cereal production is estimated at 3.9 million tonnes, 5 percent higher than last year and the highest since 1978, as a result of generally favourable weather conditions during the growing season. Cereal imports in 1998/99 (July/June) are forecast at 740 000 tonnes.

BANGLADESH (25 November)

An FAO/WFP Crop and Food Supply Assessment Mission which visited the country in October, found that the unprecedented monsoon floods from July to September caused a loss of around 2.2 million tonnes of rice production. The monsoon rice production (Aus and

Aman) is projected at some 9.2 million tonnes (milled basis), about 14 percent lower than last year's reduced output. An increase in the winter-sown Boro rice crop is expected to partly offset the flood losses.

The Mission forecast the 1998/99 total paddy production at 26.3 million tonnes (17.6 million tonnes on milled basis), some 6 percent less than 1997/98. In contrast, compared to last year, wheat production is forecast to increase by about 10 percent to 1.98 million tonnes

Cereal import requirement in 1998/99 is estimated at about 4 million tonnes, with rice and wheat accounting for 1.6 and 2.4 million tonnes respectively. International assistance is required to import about 1.5 million tonnes of which 1.13 million tonnes have already been pledged.

CAMBODIA (25 November)

Below-average and late arrival of this year's wet season (June-October) rains have adversely affected crops and delayed harvest, particularly in the southern parts of the country. As a result, domestic rice prices are reported to have risen to a five-year high, exacerbating the food security situation of vulnerable groups. Severe food shortages have also been reported in the north-east, which suffered drought conditions earlier this year, with many households receiving relief food aid. Recent official reports indicate that wet season paddy output is expected to amount to 2.7 million tonnes compared with 2.8 million tonnes in 1997. At this level, the target for 1998/99 total paddy production of 3.77 million is unlikely to be met.

CHINA (25 November)

Official reports indicate that drought conditions have affected winter wheat growth in the north and the maturation of late rice in the south. Earlier during summer, floods in Central and Southern China destroyed several million hectares of cropland, damaged agricultural infrastructure and, in some cases, delayed planting of the late-double crop. Most of the provinces affected are major rice producing areas.

It is estimated that the area under wheat and other winter grains will increase by about 2.1 percent compared with last year. The 1998 paddy output is provisionally forecast to decline by about 9 million tonnes from last year's record to 191 million tonnes.

An Emergency Operation, jointly approved by FAO and WFP to raise 247 214 tonnes of rice, has begun in October targeting 5.8 million vulnerable people affected by the floods. As of 5 November, confirmed contributions amount to about 32 percent of the Emergency Operation requirement.

CYPRUS (25 November)

Planting of winter crops has started. Aggregate output of wheat and barley crops is estimated at 38 000 tonnes, 19 percent down from last year. Imports of barley and maize are forecast at 400 000 tonnes and 140 000 tonnes, respectively.

INDIA (25 November)

Unseasonable rains in October were reported to have damaged mainly rice crops in some northern and southern parts of the country. Elsewhere, seasonably dry conditions favoured summer grain crops and harvesting of kharif paddy. Cumulative rainfall at the beginning of the Rabi season this year was higher than last year. During the period from 1 October to 4 November, cumulative rainfall was normal in 33 out of 35 sub-divisions monitored, accounting for 86 percent of Rabi production, compared with 22 sub-divisions accounting for 81 percent of Rabi production in the same period last year.

Despite generally favourable monsoon rains this year, excessive rainfall and floods in some parts of the country have resulted in considerable damage to crops.

INDONESIA* (25 November)

A recent FAO/WFP mission found that the country's food security situation remains precarious as rice production fell further and the economic crisis is still serious, while unemployment was expected to rise sharply to over 20 million people by the end of 1998. The Mission estimated the 1998 paddy output at 45.4 million tonnes, about 1 million tonnes less than the previous estimate and down from 49.4 million tonnes produced in 1997. The decline is attributed to a combination of the El Niño-related drought, lower planted area, and a shortage of inputs, including fertilizers and pesticides.

IRAN, ISLAMIC REPUBLIC OF (25 November)

Production of wheat in 1998 is reported to have increased by more than 3 percent compared to last year's level of 10.2 million tonnes due to favourable rainfall during the growing season. Consequently, wheat imports for the current marketing year (April/March) is estimated at about 3.3 million tonnes compared to about 4 million tonnes last year. Rice imports are also expected to be reduced to 900 000 tonnes, compared to 1.2 million tonnes last year.

IRAQ* (25 November)

Rainfall has been much below normal due to an unusual dry spell, which has seriously affected the country. As a result, the sowing of the winter crop has been delayed. Very early prospects for 1998/99 crop are unfavourable so far, especially in the northern part of the country. In addition, production is likely to be constrained again this season by serious shortages of quality seeds, fertilizer and agricultural machinery. In spite of the easing of the food supply situation following the implementation of the "oil for food" deal, malnutrition still remains a serious problem throughout Iraq. The UN Security Council has just approved a fifth phase of oil-for-food deal of US\$5.256 billion worth of oil sales over a period of six months, to buy food, medicine and health supplies, and for emergency infrastructure repairs.

ISRAEL (25 November)

Planting of the winter crops has started and will continue until December. Following favourable weather, the output of wheat crop in 1998 has increased by some 20 percent to 168 000 tonnes. Imports of cereals in 1998/99 (July/June) are forecast at 2.7 million tonnes.

JAPAN (25 November)

Harvesting of the 1998 crop is underway and, given a combination of lower area and floods that inflicted some damage to paddy, output is now projected to decline by about 11 percent to 11.2 million tonnes.

JORDAN (25 November)

Sowing of the winter crops is underway for valley and highland crops. Aggregate production of wheat and barley in 1998 is estimated at 75 000 tonnes. Aggregate imports of wheat and barley (July/June) are forecast at 1.4 million tonnes, about 8 percent up from last year. Coarse grains' imports are estimated at 1.2 million tonnes, similar to last year.

KOREA, REPUBLIC OF (25 November)

Heavy rains in July and August have caused serious flooding which resulted in loss of life and damage to crops and property. Paddy output in 1998 is forecast to decline by 6 percent from the previous year to 7 million tonnes despite a slight increase in area. This is due to reduced yields attributed to weather-related problems.

KOREA, DEMOCRATIC PEOPLE'S REPUBLIC OF* (25 November)

An FAO/WFP Crop and Food Supply Assessment Mission which visited the country from 10 to 27 October found that despite an improved harvest, DPR Korea will enter 1999 with a large food deficit. Cereal Production is estimated at 3.48 million tonnes compared to last year's severely reduced crop of 2.66 million tonnes. Against this, some 3.93 million tonnes would be required for food alone and 4.83 million tonnes for total cereal utilisation, leaving an overall import requirement of about 1.35 million tonnes. Assuming that the country could import about 300 000 tonnes commercially, the overall deficit amounts to 1.05 million tonnes, with which the country needs assistance. The mission stressed the need for adequate targeting of food aid to vulnerable groups most at risk and in support of food-for-work activities.

The Mission also noted the need for adequate support for agricultural recovery, rehabilitation and development to enable the country to produce enough food to meet its minimum needs. On a more immediate basis, assistance is urged on improving input supplies, mainly fertilizers, spare parts and fuel.

LAOS* (25 November)

Drought conditions since late June have affected the main rice crop, for harvest in November/December. In southern parts of the country, particularly in Savannakhet Province, thousands of hectares of the rice crop are reported to have been damaged with a loss of up to 50 percent of the crop. The affected provinces had also suffered severe flooding in the last three years, making it difficult for households to withstand the effects of the drought. The Government has already made an appeal to donors for 35 000 tonnes of rice in food aid.

LEBANON (25 November)

Aggregate output of wheat and barley in 1998 is estimated at 62 000 tonnes. The country heavily depends on imports (around 90 percent) to meet demand for rice and sugar. Imports of wheat in 1998/99 (July/June) are forecast at some 0.5 million tonnes, similar to last year.

MALAYSIA (25 November)

Aggregate paddy production 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.

MONGOLIA* (25 November)

Harvesting of this year's wheat crop is almost complete. Despite average to above average rainfall in the summer, planted area in 1998 is estimated to have declined by nearly 2 percent to 323 000 hectares compared with 1997.

In 1997/98, the United States and Japan have donated 10 000 tonnes and 20 000 tonnes of grain respectively.

MYANMAR (25 November)

Harvesting of the main rice crop is underway and a slight decline in output is anticipated due to smaller area sown. Below-normal rainfall in the growing season is also reported to have affected yields. Earlier forecast put this year's paddy output at 17.8 million tonnes.

NEPAL (25 November)

More than 70 000 hectares of cropped area in the monsoon season were reported to have been damaged due to floods and landslides. Paddy output this year is forecast to be below the 3.6 million tonnes harvested in 1997.

PAKISTAN (25 November)

Harvesting of the paddy crop is underway and preliminary indications point towards a good 1998 season, with an increase in planted area to an estimated 2.4 million hectares, about 5 percent higher than last year. The Government has also provided additional incentives in the form of credit facilities, higher procurement prices and increased availability of inputs. Output is provisionally forecast to increase by 6 percent from 1997 to a record 6.9 million tonnes.

PHILIPPINES (25 November)

The combined effects of El Niño and La Niña are reported to have severely damaged the country's rice and maize production. Typhoon Zeb and Babs, which came within days of each other, damaged about 650 000 tonnes of paddy in Luzon, the country's rice bowl. The overall paddy output in 1998 is now forecast to reach only 8.99 million tonnes, down from the previous forecast of 10.8 million tonnes. Maize output is similarly expected to fall by as much as 9 percent to about 3.9 million tonnes compared to last year.

Government reports indicate that this year's rice imports are expected to reach up to 2.2 million tonnes. The country's rice stocks, including imports, are expected to be about 2 million tonnes by the end of 1998.

SAUDI ARABIA (25 November)

Planting of the wheat crop is underway. As result of favourable weather, the aggregate output of wheat and barley in 1998 has increased by 16 percent to 2.2 million tonnes. Low number of locusts is likely to breed on the southern Tihama near Jizan. Imports of barley in 1998/99 (July/June) are forecast at 5.1 tonnes.

SRI LANKA (25 November)

Favourable monsoon rainfall and the availability of adequate water in reservoirs have benefited the Yala paddy crop. As a result, total paddy output in 1998 is expected to increase by 16 percent from last year to about 2.6 million tonnes.

Rainfall from the north-east monsoon, the country's main rainy season, has been below average. In the period 1 October to 11 November, cumulative rainfall was below normal in four out of eight

provinces monitored, accounting for 54 percent of Maha paddy production. In comparison, in the same period last year, cumulative rainfall was below normal in none of the 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 in 1998/99.

SYRIA (25 November)

Sowing of the winter grains has started and will continue until the end of the year. Production of wheat in 1998 is estimated at 4.1 million tonnes, 35 percent up from last year and that of barley at 983 000 tonnes, 8 percent higher than last year. Imports of wheat flour and rice in 1998/99 are forecast at 150 000 tonnes and 150 000 tonnes, respectively.

THAILAND (25 November)

Scattered showers at the beginning of November boosted reservoir levels in western Thailand, while dry weather helped rice harvesting in the northeast. Harvesting of the 1998/99 main-season crop is underway and the Government forecasts an increase in output as strong price incentives helped motivate producers to expand rice area.

TURKEY (25 November)

Sowing to the winter crops is underway. Production of wheat in 1998 is estimated at 21 million tonnes, 12 percent higher than last year. The output of barley and maize is estimated at 8.2 million tonnes and 2.2 million tonnes, respectively. Wheat imports in 1998/99 are forecast at 1 million tonnes and those of maize at 650 000 tonnes.

VIET NAM (25 November)

A tropical storm that hit the south-central coast of the country on 20 November killed more than 200 people, damaged infrastructure and delayed rice harvesting in the south. Heavy showers in early November across central and southern Viet Nam were also reported to have slowed rice harvesting. Earlier in the year, prolonged drought and flash floods in different parts of the country damaged crops and property and may have affected yields. However, recent reports indicated that the Mekong Delta, which supplies around half of the country's rice output, has produced 15.45 million tonnes of paddy this year, about 10 percent higher than last year.

The export target for 1998 was revised down to 3.6 million tonnes from the original 4 million tonnes due to limited ban on exports. As of mid-October rice exports stood at 3.11 million tonnes.

YEMEN (25 November)

The output of the main sorghum crop, now being harvested, is estimated at 439 000 tonnes, some 23 percent higher than last year, due mainly to favourable weather conditions. If rains do not fall in Shabwah, current desert locust infestations are likely to concentrate as a result of drying conditions, and small bands and swarmlets may form. Laying could occur on the coastal plains.

**CENTRAL
AMERICA**
**(including the
Caribbean)**

ANTIGUA AND BARBUDA (2 November)

The country was affected by hurricane rains and flooding and high force winds in late September, causing extensive damage to housing, to the agricultural and livestock sectors, as well as to forestry and fishery. A request for the emergency rehabilitation of agricultural activities has been made by the Government.

COSTA RICA (23 November)

The country has been affected by storm rains and winds, caused by Hurricane "Mitch", from 25 – 30 October. Preliminary assessments indicate that damage has been inflicted to crops such as coffee, paddy, sugar cane, and leafy vegetables particularly in the northern, central and southern parts of the country. Damage to the livestock sector is also reported. Maize output in 1998/99 is provisionally forecast at 32 000 tonnes compared to the 1997/98 crops of 24 000 tonnes. Production of paddy in 1998 is expected to be between 255 000 and 265 000 tonnes, subject to losses incurred by the hurricane. This compares to some 250 000 tonnes in 1997. Rice imports should decline in 1999 (January/December) from the estimated 100 000 tonnes imported in 1998. Imports of beans reached a record 20 000 tonnes this year, reflecting the low output obtained due to El Niño related adverse weather conditions principally in the first half of the year.

CUBA (2 November)

Hurricane rains and flooding, combined with high force winds in late September, affected particularly the provinces of Guantánamo, Holguín, Las Tunas, Granma, and Santiago de Cuba in the extreme eastern parts of the Island, which had suffered extreme El Niño-induced drought conditions earlier in the year. Extensive damage has been caused to housing and infrastructure, as well as to some important staple crops such as plantains. The vital foreign exchange earner sugar cane crop for 1998/99 was badly affected. Various sugar mills are reported damaged. Other cash crops like coffee and cocoa were also severely affected. The country had suffered a severe disruption to harvesting of the important sugar cane crop in April and subsequently experienced substantial foodcrop losses because of the prolonged drought. The current losses inflicted by the hurricane represent a further blow to the vulnerable agricultural sector and have aggravated the difficult food supply situation in the country.

An emergency appeal for 34 000 tonnes of relief food to assist some 615 000 persons, mostly nursing mothers, school children and drought victims in the eastern provinces was launched in early September. A request for the emergency rehabilitation of agricultural activities has also been made by the Government.

DOMINICAN REPUBLIC (23 November)

Torrential rains and flooding and high force sustained winds caused by Hurricane "Georges" in late September inflicted heavy loss of life and left more than 100 000 people homeless. Some of the affected areas are among the main crop growing areas of the country. An assessment of damages to the agricultural sector indicates that 90 percent of food and export crops were damaged to a varying extent in the affected areas. About 190 000 hectares under foodcrops have been severely affected, including some 20 000 hectares of paddy and extended cropped fields of roots and tubers, a main staple in the population's diet. The important foreign exchange earners tobacco and sugar cane crops also sustained extensive damage. Severe damage was also incurred to banana crops, particularly in the south-western

parts of the country. Consumer prices of this important staple have considerably increased. Significant losses were incurred by poultry and small animal farms. Emergency food aid to about 25 000 persons and other types of relief assistance are presently being provided by the international community. Plans for the rehabilitation of agricultural activities in the affected zones are being formulated.

EL SALVADOR (23 November)

Hurricane "Mitch" left about 240 casualties and by 15 November, more than 235 persons were still missing. The affected population is estimated about 84 000 persons, of which 10 370 have totally lost their homes or suffered severe damage in their properties. Enormous damage to the country infrastructure is reported. The agricultural sector was also severely affected, particularly the departments of Usulután, Morazán and the southern parts of the department of San Miguel. Some villages on the Pacific coast were also seriously affected by the floods. Harvesting of the 1998 first season cereal crops was well advanced when the hurricane struck and some planting of the second crop had been initiated. No detailed assessment of damage has yet been made, but extensive damage is reported to fields of standing crops in the aforementioned areas, which are some of the most economically depressed zones in the country. Early estimates indicate that possibly as much as 80 percent of the maize grown in these areas have been lost. Other important crops for the affected population, such as sorghum and beans, are reported to have been seriously damaged. Important coffee plantations, a main agricultural export, have been seriously affected. Preliminary estimates indicate that about 10 percent of the 1998/99 coffee crop has been severely affected. The important sugar cane crop is also reported to be considerably affected. Damage has also been incurred to the foreign exchange earner cotton crop. Food assistance will be immediately provided for 60 000 people for six months from the large scale assistance is being provided by the international community. A detailed assessment of damage is in the process of being initiated for the rehabilitation of the agricultural activities in the affected areas.

GUATEMALA (23 November)

The country was severely hit by end-October by Hurricane "Mitch" torrential rains and flooding, particularly affecting the north- and south-eastern parts of the country. By 15 November, about 263 persons had been confirmed dead while 121 were missing. The affected population is estimated at some 105 700 people, of which 21 111 have totally lost their homes or have been inflicted severe damage in their properties. Various zones remained isolated and some of the main connecting roads closed. Preliminary official assessments confirm extensive damage to coffee, tobacco and banana plantations, melons and other fruit and garden vegetables. About 80 percent of the area planted to bananas, a vital foreign exchange earner, has been severely affected, while some 15 percent of the coffee crop has been reportedly lost. Further losses could be incurred as a result of blocked access to coffee farms. Thousands have lost their jobs because of the damage incurred to plantations. Serious damage has also been inflicted to maize, sorghum, paddy, bean, vegetable and various food crops in the important producing areas of Izabal, Zacapa and Jutiapa. Significant damage to irrigation systems in the latter area is reported. Increases in consumer prices for most of the important staples have been reported. The livestock sector also suffered from the effects of the hurricane. Significant losses are reported in the main cattle raising areas of the country. An FAO emergency project for the rehabilitation of agricultural activities in some of the most affected areas is about to be implemented. Large scale emergency assistance is being provided by the international community. Some 65 000 persons will be receiving food aid for six months.

HAITI* (23 November)

Virtually the whole country has been affected by Hurricane "Georges" rains and flooding, and mudslides, combined with high force winds in late September. Extensive damage has been caused to the 1998 second season sorghum crop, as well as the millet crop, mostly grown in the central plateau, the large producing Artibonite valley, the south-west and northern parts of the country. In the flooded zones, beans, in particular, as well as vegetables, roots and tubers and other minor food crops are ruined. About 80 percent of the important banana plantations in the south-west have been destroyed. Great losses have been also inflicted to small animal farms. Food assistance from the international community is expected to continue. A project for the immediate rehabilitation of agricultural activities in the most affected areas is in the process of being approved.

HONDURAS (23 November)

Torrential rains, flooding, landslides and winds of different intensities caused by Hurricane "Mitch" affected the country for the full week extending between 26 and 31 October. "Mitch" started as a hurricane off the Caribbean coast and swept through the country as a tropical storm before moving north-west into the neighbouring country of Guatemala by 30 October. By 15 November, about 6 600 persons had been confirmed dead while 8 000 had been declared missing. The affected population is estimated at about 2 100 000 persons, of which 70 000 have totally lost their homes or have suffered severe damage to their properties. Disastrous flooding has swept away over 25 small villages in the northern parts of the country and it is reported that as much as 60 percent of the country's infrastructure has been destroyed or seriously damaged. Immense damage has been inflicted to the agricultural sector. Every important coffee producing area, a vital foreign exchange earner, has been affected, and large warehouses and coffee store rooms of main exporters inundated. Preliminary estimates put the coffee losses at about 20 percent of expected production this year and further losses are anticipated because of blocked access to coffee farms. Planting of the country's 1998 main season cereal crops, which includes about 80 percent of annual maize production, was underway when the hurricane struck. Beans, oil palms, citrus and other fruit crops, some of which for export, including the important banana crop, have also suffered immense damage. Severe losses have been inflicted to the livestock sector with large scale animal deaths reported. Tourist resorts have been severely affected. The losses incurred represent a significant blow to the economy of Honduras, which is one of the poorest countries in Latin America. A large scale relief assistance is being provided by the international community. About 600 000 people will be receiving food aid for the next six months. Plans are being prepared for the immediate rehabilitation of agricultural production.

MEXICO (23 November)

The south-western parts of the country were affected by storm rains and winds caused by Hurricane "Mitch" at the end of October. The area had been formerly affected in September by tropical storm "Javier" with considerable damage to crops in certain zones. In the north-west, planting of the 1998/99 wheat crop in the large irrigated areas continues under generally dry weather. Above-normal rains in September contributed fill water reservoirs in the main growing states of Sonora and Sinaloa, as well as in Baja California, which had been previously affected by a long dry spell. The outlook is good and the area planted should be close to 1997/98 average level but improved yields are anticipated. Harvesting of the important spring/summer maize crop in the southern parts has benefited from recent dry weather, a recovery from the heavy rains due to Hurricane "Mitch" which had affected the areas. For the country as a whole, an average maize output is anticipated despite damage incurred by the adverse weather. Harvesting of the recently planted (spring/summer) sorghum crop has started. The fall/winter crop was better than earlier estimated and aggregate sorghum production for the year is forecast at an above-average 6.4 million tonnes, but production is still short by some 3 million tonnes to meet domestic demand.

NICARAGUA (23 November)

Disaster caused by Hurricane "Mitch" was of enormous proportion. By 15 November, about 2 447 casualties had been confirmed and some 885 persons missing. The affected population is estimated at some 868 000 persons which accounts for some 20 percent of the country's population. Of these, about 36 368 have totally lost their homes or have had severe damage to their properties. The impact of the hurricane was particularly felt in the north-central and north-western parts of the country. A huge landslide caused by the torrential rains in the north-west, near the country's border with Honduras, swept away a group of small villages. Many populated and cropped areas on the Atlantic coast were water-logged as a consequence of the high tides and flooded rivers. Damage to infrastructure is immense. It is reported that about 2 500 km of highways and roads and 174 bridges have been damaged or destroyed, cutting off towns and villages from the capital and the rest of the country. Significant losses have been incurred to the agricultural, livestock and fishery sectors. Planting of the 1998 second season cereal and bean crops was underway when the hurricane struck. The rainfed paddy crop was seriously affected, as well as maize and the important bean crop, which constitutes the main sources of protein for the rural population. Losses inflicted to the bean crop represent about 6 months of domestic consumption. Significant damage has been also incurred to other food and cash crops. Preliminary indications are that about 20 percent of the important foreign exchange earner coffee crop has been lost, but losses could be much larger because of blocked access to coffee farms. About 400 000 people will be receiving food aid for six months. An FAO project for the immediate rehabilitation of agricultural activities in the Department of Matagalpa, one of the most affected areas by the hurricane, benefiting some 5 120 small farmers, is about to be implemented. Massive assistance is being provided by the international community.

PANAMA (23 November)

Heavy rains and flooding caused by Hurricane "Mitch" struck the country by late October, affecting about 7 000 persons in the southern province of Darién alone, near the border with Colombia. It is reported by the country's civil protection agency that thousands have remained homeless. Some casualties are also reported. Serious damage to the coffee crop is reported. Official estimates indicate that 20 percent of the 1998/99 coffee crop has been lost. A detailed assessment of damages has not been made yet.

ST. KITTS AND NEVIS (28 October)

The country was affected by hurricane rains and flooding, and high force winds in late September. About 85 per cent of houses have seen some damage and about 3 000 to 3 500 persons have been left homeless (in a total population of 39 000). The agricultural sector was also damaged, particularly the most important foreign exchange earner sugar cane crop. Early estimates indicate that about 50 percent of the sugar cane crop has been destroyed. Banana plantations were seriously damaged and other fruit and minor foodcrops equally affected. A request for food relief assistance and the emergency rehabilitation of agricultural activities has been made by the Government.

SOUTH AMERICA

ARGENTINA (23 November)

Decreased plantings with respect to 1997 are reported in the large producing central and western parts of Buenos Aires province and south-east of Cordoba, mainly reflecting farmers' decision to switch to alternative crops attracted by better prices relative to wheat. A combination of excessive rains and generally dry conditions during the growing season, has also adversely affected the crop. Harvesting has started and early forecasts point to a reduced output of some 10.1 million tonnes, compared to 14.8 million tonnes produced in 1997. Planting of the 1998/99 maize crop, currently underway, has also been affected by the lack of adequate precipitation. The area planted is expected to decline considerably with respect to last year's record level.

Sowing of the 1998/99 paddy crop continues and official forecasts indicate that enlarged plantings are anticipated relative to last year when the crops were severely affected by El Niño induced heavy rains and flooding.

BOLIVIA (2 November)

Dry weather conditions continue to prevail, particularly in the south-west and central parts of the country. In the eastern parts, where harvesting of the 1998 second season (winter) wheat crop is about to be completed, normal rains have resumed but lower than average yields have been obtained as the crop was severely affected at planting by a severe dry spell. Planting of the 1998/99 first (main) coarse grain crops, principally maize, as well as planting of the important potato crop, have started. The area planted is forecast to be close to last year; however, a recovery in production is provisionally forecast due to anticipated improved yields. The crops were severely affected last year by El Niño induced drought.

BRAZIL (23 November)

Harvesting of the 1998 wheat crop is about to be completed and production is expected to fall from last year's 2.4 million tonnes to a slightly lower than average 2.2 million tonnes. This is the result of damaging rains in September in the largest wheat growing states of Parana and Rio Grande do Sul. Planting of the 1998/99 maize crop continues and plantings are expected to increase by over 10 percent with respect to last year when the crop, particularly in the north-east, was affected by El Niño-related weather. Considerably enlarged plantings are anticipated for the paddy crop, currently being sown.

CHILE (23 November)

A severe dry spell in the central parts of Chile is affecting the developing 1998/99 wheat crop, to be harvested from December. About 30 000 hectares of a total 380 000 hectares of cropped fields have been declared lost. A below-average output is expected. The 1998/99 maize crop, currently being planted, is also affected by the dry spell and plantings are forecast to be significantly below average. Latest weather forecasts indicate that current weather conditions should prevail in the months ahead.

COLOMBIA (23 November)

Harvesting of the 1998/99 first season maize crop has been completed while planting of the second season crop has only started under favourable weather conditions. Aggregate maize output (both seasons) is expected to be an above-average 1.2 million tonnes, which compares to last year's El Niño affected crop of some 800 000 tonnes. Paddy production is also expected to increase from a low 900 000 tonnes in 1997 to something more than 1 million tonnes.

ECUADOR (23 November)

Planting of the 1998 second season coarse grain and paddy crops has been virtually completed. In the coastal areas, the irregular precipitation in September should not affect the developing maize and paddy crops. In the highlands, below-normal rains have been reported. Planting of the 1998 second season wheat crop and harvesting of the second season yellow maize crop have started. In the eastern areas, below-normal rains are also reported but with no adverse effect on the development of the second season yellow maize and paddy crops. Despite average results anticipated from the second season crops, aggregate 1998 cereal outputs should be considerably below-average levels due to the severe damage incurred by El Niño related effects to the first season crops.

GUYANA (23 November)

Normal to abundant rains have prevailed in November, which marks the beginning of the rainy season, benefiting planting of the important paddy crop, as well as fruits, cassava and other minor crops that had been severely affected earlier in the year because of El Niño induced drought. Prospects are also good for the foreign exchange earner sugar cane crop. Livestock pasture conditions have also considerably improved.

PERU (2 November)

Light to moderate rains have prevailed in the early half of October, following a dry spell in September which particularly affected the central and southern parts of the country, some of which continue to suffer from the lack of rain. The bulk of the 1998 wheat harvesting has been completed and an above-average output for the year is anticipated. The bulk of maize harvesting has been also completed and output is expected to be slightly above last year's satisfactory output. By contrast, production of paddy is expected to decline from 1997 record level but should nevertheless remain about average. Good results are anticipated from the important potato crop.

SURINAME (23 November)

Normal to abundant rains have prevailed in November, which marks the beginning of the rainy season, benefiting planting of the vital foreign exchange earner paddy crop. A recovery in production is expected assuming normal weather conditions remain. The crop had been severely affected last year because of El Niño induced drought, forcing the country to import rice for the first time in history to meet domestic requirements.

URUGUAY (2 November)

Harvesting of the 1998/99 wheat crop has started. Heavy rains in September affected the crop and a slightly lower than average output is expected. Harvesting of the barley crop has also started and a significant recovery is expected from last year's El Niño affected crop.

Planting of the 1998/99 maize crop is underway for harvesting from March. Enlarged plantings are forecast, reflecting producers' intentions to recover from the 1997/98 affected crop. Sowing of the important paddy crop is also underway for harvesting from March. The area planted is expected to increase considerably from the previous year weather affected crop as farmers are motivated by attractive prices and anticipated expanding exports

VENEZUELA (2 November)

Harvesting of the 1998 second season maize crop is underway while that of sorghum has been completed. An average maize output is provisionally forecast while sorghum production continued to decline for the third consecutive year, largely reflecting strong competing imports. Aggregate paddy output in 1998 (three crops) is provisionally forecast at an above-average level.

COMMONWEALTH OF INDEPENDENT STATES

ARMENIA* (24 November)

For 1998 crops, the area planted to cereals is estimated to have increased marginally, to 192 000 hectares, from an average of 195 000 hectares during the 1993-1997 period. With above normal yields, the cereal harvest is officially estimated at about 330 000 metric tonnes, some 10 percent above the average of the previous 5 years. The 1998 potato crop is expected to be in the region of 400 000 tonnes.

The country imported some 361 000 tonnes of cereals in the 1997/98 marketing year (July/June), of which 153 000 tonnes were food aid. In view of the good crop it is estimated that total cereal import requirements in the 1998/99 marketing year could decline to around 350 000 tonnes. Nevertheless, the actual volume of imports will hinge on the availability of credits and food aid.

AZERBAIJAN (24 November)

With harvesting almost completed, the 1998 grain and pulse harvest is officially estimated at 910 000 tonnes, collected from an area of 569 000 hectares. However, official statistics focus predominantly on developments in the large farms and tend to underestimate developments in food production in less traditional areas. At this stage, FAO tentatively estimates the 1998 grain harvest to be at least 1 million tonnes, including some 900 000 tonnes of wheat, against 1.14 million tonnes harvested last year. The decline reflects reduced area sown, notably to barley, and somewhat lower yields.

In the 1998/99 marketing year, commercial cereal imports of nearly 520 000 tonnes are expected. GDP is recovering steadily, but unemployment and the minimum salaries and pensions remain low with about 80 percent of the household income being spent on food. WFP is targeting 215 000 of the IDPs. Net food requirements up to mid 1999 are 6 500 tons of wheat flour, 1 700 tons pulses, 1 400 tons oil and 770 tons of sugar.

BELARUS (24 November)

The total 1998 wheat area (winter and spring) is estimated at 382 000 hectares, which is almost double the average for 1993-1997, reflecting a drive towards food self-sufficiency. The wheat and pulse area has been expanding, mainly at the expense of feed crops such as barley and rye. At 2.9 million hectares, the total cereal and pulse area was marginally down on last year's level and close to the average of the last five years.

Official estimates suggest a total 1998 cereal production of 5.1 million tonnes, down from last year's crop of 6.4 million tonnes mainly due to adverse weather. The wheat crop, estimated at 800 000 tonnes, is well above last year's, reflecting the increased area. However, excessive moisture has reduced the proportion of the milling quality wheat. Commercial cereal imports for the 1998/99 marketing year (July/June) are expected at around 1 million tonnes, up from the 1997/98 level of about 650 000 tonnes.

The winter wheat area (for harvest in 1999) is reported to have increased this year by a further 10 percent.

GEORGIA* (24 November)

The total area sown to grain for the 1998 harvest is officially estimated at 380 000 hectares, somewhat more than last year despite dry weather which hampered spring plantings, but 30 percent higher than the average for 1993-1997. Wheat production in 1998, estimated at 240 000 tonnes is also above average, but well below the bumper 1997 outturn of 292 000 tonnes. Growing conditions for maize, mainly produced in the west, have been satisfactory.

Wheat imports for the 1997/98 marketing year (July/June) reached 0.6 million tonnes, of which 164 000 tonnes were food aid. It is expected that imports in 1998/99 will remain at around this level. The country is self sufficient in maize.

The most vulnerable populations are the internally displaced, fleeing from fighting in the Abkhazia area. Repatriation efforts were hampered by renewed fighting in May 1998, which caused 30 000 people to flee their homes. WFP is providing emergency food assistance to some 200 000 internally displaced people.

KAZAKHSTAN (24 November)

The total area sown to cereals and pulses in 1998 is estimated at 29 percent below the average for 1993-1997.

The drop in planted area was accompanied by a 34 percent fall in cereal crop yields in 1998, according to official harvest projections. The main reason for low yields is unusually dry, hot weather from mid-June to August, which stressed spring crops at the reproductive stages. Some 80 percent of the total crop was affected, with particularly unfavourable conditions in the north of the country. Low utilization of fertilizer and crop protection chemicals was also a contributory factor. Total 1998 cereal production is officially estimated at 7.4 million tonnes, 40 percent below 1997 and about 50 percent below the average of the previous five years.

Officially reported grain carryover stocks amount to some 1.9 million tonnes. Substantial stock draw down is expected during the 1998/99 marketing year (July/June). Stocks were accumulated in 1997/98 as a result of a weak export market. With the prospects of increased demand from neighbouring countries coupled with a significant reduction in domestic feed demand, some 1.3 million tonnes of cereal exports are expected in 1998/99.

KYRGYZ REPUBLIC (24 November)

The total area planted to cereals for 1998 winter and spring crops, is estimated at some 650 000 hectares, which is slightly higher than the average area for the previous 5 years but some 5 percent lower than last year's plantings as a result of lower profitability. Farmers shifted part of the grain area into fruit and vegetable production. Potato area has risen for the fifth year in succession.

Cereal crop yields were moderately better than last year's (the 1997 crop was damaged by drought in the north) but will not compensate for the drop in area. Some emerging crops were affected by unseasonal frosts and localised heavy showers. Fertilizer and pesticide imports reportedly fell short of requirements. Total cereal output is forecast at some 1.6 million tonnes of which 1.25 million tonnes are wheat, down on last year's output of 1.73 million tonnes. Harvesting was delayed by acute shortages of machinery and fuel and by cold weather and heavy rainfall in southern areas.

Commercial imports for 1998/99 are tentatively forecast at around 70 000 tonnes, over half of which has already been delivered or contracted.

MOLDOVA (24 November)

Total 1998 cereal production is estimated at 2.65 million tonnes against 3.3 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 was estimated at around 1 million tonnes, down on last year's and somewhat below average.

The main reasons for the drop in production this year relate to the low profitability of the crop and dry conditions in April 1998 which affected the planting of spring crops.

With ample domestic supplies, significant commercial imports of cereals are unlikely in the 1998/99 marketing year (July/June). Cereal exports for 1998/99 are tentatively forecast at 0.3 million tonnes.

The winter grains area for harvest in 1999 is forecast to increase to about 0.5 million hectares from an average of some 0.4 million hectares.

RUSSIAN FEDERATION (30 November)

A recent FAO fact-finding mission to the Russian Federation found that drought and high temperatures from mid-June to August are the main causes of a sharp drop in domestic cereal production this year. The total cereal crop (including 1997/98 winter and spring crops) is provisionally forecast at around 50 million tonnes compared to 86.7 million tonnes in 1997 and a 1993-1997 average of 73 million tonnes. The decline also reflects underlying downward trends in planted area and yields. Large carryover stocks have helped to protect aggregate feed supplies from the production shock, and domestic feed demand is expected to continue its downward course.

The outlook for the cereal trade for the remainder of 1998/99 is uncertain. On current projections, despite the fall in output and assuming a sharp drawdown in carryover stocks, imports are expected to rise only marginally. The relatively high quality grading of this year's crop points to only moderate increases in import demand for food-quality cereals. The recently announced food aid package from the United States is expected to ease the situation and limit the risk of increased costs and/or logistics bottlenecks which the sharp stock drawdown would have implied. A substantial decline in imported processed foods is anticipated.

Remote areas in the north and far-east face the risk of erratic food supplies and high prices. Local trade restrictions could aggravate a tight market. The most vulnerable socio-economic groups, pensioners, orphans, the unemployed and households dependent on public salaries, can expect a tough winter, especially in the large, depressed industrial cities.

TAJIKISTAN* (24 November)

Cereal production in 1998 is preliminarily estimated at 510 000 tonnes, some 13 percent below the 1997 crop, mainly reflecting a reduction in the total area planted to cereals in favour of cotton. Some 15 000 hectares were damaged or washed away by flooding in April. 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 due to adverse weather.

Despite the decline in domestic output, the total cereal import requirement for 1998/99 (July/June) is tentatively estimated at 360 000 tonnes, slightly lower than last year.

An appeal was launched in late July for a total of US\$6.61 million, to support relief and rehabilitation activities. The security situation has deteriorated in October as a result of armed clashes between Government forces and opposition groups.

TURKMENISTAN (24 November)

Official data suggest a major increase in cereal and pulse production in 1998, to 1.24 million tonnes, significantly higher than the 1997 crop, and 12 percent above the 1993-1997 average. The increase is due to an expansion in area and better yields.

In view of the good 1998 crop cereal imports are expected to fall to around 270 000 tonnes in 1998/99. The imports will be mainly composed of wheat and some 20 000 tonnes of rice.

Winter grains for harvest in 1999 are officially reported to have been sown on a total of 570 000 hectares, one third higher than the average area for 1993-1997. Recent imports of farm machinery allowed the timely completion of land preparation.

THE UKRAINE (23 November)

The 1998 grain and pulse harvest is officially estimated to have fallen to 28 million tonnes, some 20 percent less than the official estimate for the 1997 harvest mainly due to adverse weather conditions. The maize crop was particularly affected and output is currently forecast to have halved to less than 2 million tonnes. The 1998 output of wheat is preliminarily estimated at 15.3 million tonnes, nearly 4 million tonnes less than FAO's estimate for last year's harvest while the coarse grain harvest is forecast to decline by almost 5 million tonnes to 11 million tonnes. By contrast, the pulse crop, planted early in the spring remained stable at around 1.1 million tonnes.

Despite the reduced harvest, the country is expected to export some 2.3 million tonnes of cereals from its large stocks. This compares with recorded exports of nearly 2 million tonnes in the 1997/98 marketing year, of which 1.3 million tonnes were wheat, mostly to destinations outside the CIS.

The outlook for the 1998/99 winter crops is uncertain. Indications are that the area sown to winter crops has remained fairly stable at 7.5 million hectares of which about 6.8 million are under grain.

Floods in the Western Trans Carpathian region in November have caused loss of life and damage to infrastructure, affecting some 300 000 people. The Government has requested assistance from the international community.

UZBEKISTAN (30 November)

The 1998 grain and pulse harvest was sharply better than last year mainly in response to good weather and the reduction in the marginal areas sown to wheat. The total output in 1998 is estimated at 4.4 million tonnes compared to 3.8 million tonnes last year and includes 3.6 million tonnes of wheat, (1997: 3.1 million tonnes) 0.3 million tonnes of coarse grains, virtually unchanged from last year, and 0.5 million tonnes (1997: 0.4 million tonnes) of rice. Nevertheless, aggregate output remained well below the target of 5.1 million tonnes, of which 4.2 million tonnes of wheat. The shortfall will be covered by commercial imports.

The early outlook for the main winter grain harvest in 1999 is satisfactory. By 1 November, farmers had planted nearly half of the winter grain area target of 1.31 million hectares, virtually the same as that sown in the preceding year.

EUROPE

EC (23 November)

Persisting showers in late October and early November in the United Kingdom, France, the Benelux countries, and Germany, continued to slow the last of the 1998 summer crop harvesting and hampered winter grain planting. However, the abundant moisture is generally beneficial for the establishment of the winter crops. Further south, except for some showers in mid-November, dry weather prevails over Portugal and southern Spain, helping summer crop harvesting and fieldwork for winter grain planting. Although no firm area estimates are yet available, the Community's aggregate winter cereal area is expected to decline, partly reflecting adverse planting conditions in several countries, but also due to the 5 percent increase in the land set-aside requirement for the 1999 harvest.

FAO's estimate of aggregate 1998 cereal production in the EC has been raised further since the last report to a record 214 million tonnes, 2.6 percent up from the 1997 crop. Wheat crops have performed particularly well in 1998 as a result of favourable weather conditions and above-average to record crops were recorded in most countries. Aggregate wheat production is now forecast at 103.8 million tonnes, 9 percent up from 1997. With regard to the coarse grains, barley, rye and triticale production are also forecast to increase from the previous year but output of oats will be reduced. Although the summer maize harvest has yet to be completed in several parts, latest indications confirm a significant reduction after last years bumper crop. Maize output is now forecast at some 35 million tonnes, compared to well over 39 million tonnes estimated for 1997.

ALBANIA (3 November)

The estimate of the 1998 wheat output remains at 400 000 tonnes, indicating some 300 000 tonnes of imported wheat will be needed in 1998/99 to maintain food consumption levels of this staple equivalent to recent years. Pledges/deliveries of wheat as food aid in the current year already amount to some 27 000 tonnes, mostly from the USDA Commodity Credit Corp.

As of mid-October, Albania is reported to be hosting some 21 000 refugees from the civil unrest in the Kosovo Province of the Federal Republic of Yugoslavia. WFP and other food supply agencies plan to continue food distribution to refugees in November. WFP will continue to support a bakery project which provides bread on a daily basis to 5 700 refugees in the Durres area.

BOSNIA-HERZEGOVINA* (3 November)

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. The Commodity Credit Corp (CCC) has reportedly purchased 4 420 tonnes of U.S. hard red winter wheat for donation to Bosnia-Herzegovina with shipment due in November.

BULGARIA (23 November)

The 1998 wheat output is estimated at 3.3 million tonnes, about 7 percent down from last year's crop but about the average of the past five years. The latest estimate of coarse grains production is 2.2 million tonnes, also down somewhat from the previous year but about average.

Regarding the 1999 season, the autumn wheat sowing was severely hampered by heavy rains throughout most of October. It is estimated that just some 800 000 hectares have been sown to winter wheat, well down from the previous year's 1.2 million hectares. Furthermore, some 40 percent of the area has been sown after the optimum date (end-October) which is likely to greatly affect the yield potential. The potential of the 1999 grain crops is also threatened by farmers' lack of funds for

fertilizers and other vital inputs. Oversupply of grain and poor prices on the domestic market after this year's harvest led to difficulties for farmers (and reluctance) to sell their crops immediately, and they still have funds tied up in stored produce. However, the Agriculture Ministry has reportedly earmarked 500 000 tonnes of wheat from this year's surplus for export which could ease the pressure on the local market.

CROATIA (3 November)

The 1998 cereal harvest is estimated at about 3.3 million tonnes, some 2 percent up from 1997 and above average. Wheat production is estimated to have risen to just over 1 million tonnes, and the quality is reported to be generally good. A small surplus is available which will likely be exported to neighbouring countries.

With regard to the 1999 harvest, the area sown to winter grains is expected to increase slightly. A planned reduction in wheat area will be more than offset by similarly planned increases for other grains, in particular barley and rye, and rapeseed. Weather conditions have been generally satisfactory to date but torrential rains along the Adriatic coast in late October caused some localized damage to infrastructure and losses of crops and livestock.

CZECH REPUBLIC (3 November)

Final official estimates put the 1998 cereal harvest at about 6.7 million tonnes, just slightly below the previous year's output. Of the total, wheat is expected to account for almost 4 million tonnes. Conditions are reported to be generally favourable for the 1999 winter grain crop.

ESTONIA (25 November)

The 1998 grain harvest is forecast at nearly 700 000 tonnes, close to last year's level. Although the area sown to grains increased by 5 percent excessive rains in August reduced average yields. The cereal import requirement in 1998/99 is likely to be limited to small quantities of wheat and rye flour for human consumption and some feedgrains. Production in the livestock industry has been adversely affected by market disruption in the Russian Federation.

FORMER YUGOSLAV REPUBLIC OF MACEDONIA (3 November)

Output of the 1998 cereal harvest is estimated at some 600 000 tonnes, virtually unchanged from the previous year's level.

HUNGARY (23 November)

High precipitation in October affected the end of the 1998 coarse grain harvest and led to delays in winter cereal planting. Latest official estimates put the 1998 cereal harvest at some 13 million tonnes, about 9 percent down from last year's bumper crop but still above the average of the past five years. Of the total, wheat is estimated to account for 5 million tonnes (1997: 5.3 million tonnes), while coarse grain output is put at 8 million tonnes (1997: 8.9 million tonnes).

Early prospects for the winter grain crops for harvest in 1999 are somewhat uncertain, partly due to the adverse weather for planting in October, and partly due to the extent of influence that this year's continuing domestic market surpluses may have on farmers planting intentions. However, it is likely that the winter grain area will be considerably reduced from the previous year's 1.2 million hectares.

LATVIA (25 November)

The aggregate area sown to grains (cereals and pulses) remained stable at nearly 0.5 million hectares. Excessive rains this summer adversely affected yield and the aggregate output is forecast at 1 million tonnes, about 4 percent less than last year. Nevertheless, cereal imports in 1998/99 are expected to remain low as the export market for livestock products in the Russian Federation contracts.

LITHUANIA (25 November)

The 1998 grain harvest is officially forecast to reach 3 million tonnes, only marginally less than last year's 3.05 million tonnes. Following this good harvest, the country has an exportable surplus of food quality wheat and rye amounting to about 100 000 tonnes.

POLAND (3 November)

Latest official estimates put 1998 cereal production at about 27 million tonnes, nearly 6 percent up from 1997. Wheat output is estimated at 9.5 million tonnes (1997: 8.2 million tonnes), while the coarse grain crop is expected to reach 17.5 million tonnes (1997: 17.2 million tonnes).

Prospects for the winter grain crops for harvest in 1999 are reported to be generally satisfactory. Light to moderate rain and near to above-normal temperatures throughout late October has ensured favourable conditions for winter grain establishment and early growth.

ROMANIA (3 November)

The 1998 wheat crop is estimated at 5.7 million tonnes, nearly 1.4 million tonnes less than the output in 1997. Plantings were reduced by adverse weather last autumn and yields were affected by drought during the summer. The potential of the summer maize crop was also severely limited by the dry summer weather, and production is estimated at about 8 million tonnes compared to over 12.7 million tonnes in the previous year.

Prospects for the winter cereal crop being planted for harvest in 1999 are somewhat unfavourable. Although mostly dry weather in late October greatly improved conditions for the winter wheat planting, after earlier wetness, the pace of fieldwork remains well behind normal and the optimum planting period has already passed. In addition, the agricultural sector continues to be affected by lack of funds and substandard equipment, and the winter grain area is expected to fall again.

SLOVAK REPUBLIC (3 November)

Latest official reports put the aggregate 1998 cereal output at some 3.5 million tonnes, about 300 000 tonnes below the estimate for 1997 but still about average. Conditions are reported to be generally favourable for the winter grain crop.

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

The 1998 wheat crop is now estimated at 2.9 million tonnes, somewhat less than earlier expectations and virtually unchanged from the 1997 production. The maize harvest has yet to be completed, after delays caused by wet weather in October. Although the maize area remained unchanged from the 1997, yields are expected to fall significantly as a result of high temperatures and low rainfall from mid-July to mid-August. Latest forecasts point to an output of 5.3 million tonnes compared to 6.9 million tonnes in 1997.

Prospects for the winter grain crops for the 1999 harvest are somewhat unfavourable. Wet weather in October hampered fieldwork, and by the end of the month, which is the end of the normal and optimum period for sowing, the area planted was still reported to be well down on the planned 850 000 hectares. The final outcome will depend critically on the weather in early

November, which if favourable, could allow further planting. However, with a much reduced area sown in the optimal period, and uncertainty over the amount of late planting still possible, it is likely that the 1999 winter wheat crop will be reduced.

In Kosovo Province, since the military withdrawal on 27 October, thousands of displaced have gone back to their villages. After much of the 1998 harvest was left in the field, and stored crops have been destroyed, the need for relief aid remains high. In some areas returned villagers are reported to be preparing to plant the winter crop of wheat. However, as the optimal planting period has been missed, and a large amount of farming equipment (from hand tools to tractors) has been looted or destroyed, the wheat crop in 1999 is likely to be well down from the normal output. Thus, the Province is expected to continue also into the next season to have an abnormally high wheat deficit.

NORTH AMERICA

CANADA (26 November)

The main wheat harvest was virtually completed by the end of September and was one of the earliest on record due largely to early seeding and the hot, dry weather during the summer and early autumn. The latest official estimate puts 1998 spring wheat output at 23.3 million tonnes, some 4 percent down from the previous year, primarily due to a reduction in seeded area. By contrast, the minor durum crop increased by about one-third to nearly 6 million tonnes. Aggregate coarse grain production is expected to increase marginally from the previous year, to 25.4 million tonnes. Larger maize and oats crops are expected to more than offset reduced barley production.

UNITED STATES (26 November)

The 1998 aggregate wheat output is estimated at 69.6 million tonnes, some 1 percent up from 1997. As of late November, planting of winter wheat for the 1999 harvest was virtually complete and the bulk of the crop was reported to be in mostly good to excellent condition. The final area sown to winter wheat remains somewhat uncertain, but tentative estimates point to reduction reflecting the less attractive price outlook than a year ago. The bulk of the 1998 coarse grains harvest is complete and latest estimates confirm another good crop about 3 percent up from the previous year. The USDA's November crop report put 1998 maize output at 249.8 million tonnes, about 12 million tonnes up from 1997. The 1998 paddy crop is estimated at 8.2 million tonnes, slightly up from the previous year's level.

OCEANIA

AUSTRALIA (26 November)

The outlook for the 1998 winter wheat and coarse grain crops has deteriorated somewhat in Australia due to adverse weather conditions in several parts, particularly in Queensland and New South Wales. However, as of late November, growing conditions remained ideal in many other parts and the total winter crop is still expected to increase from the previous year's crop of 19.4 million tonnes to somewhat over 20 million tonnes. Aggregate coarse grain output in 1998 (including the minor crop of mostly sorghum and maize harvested earlier this year) is now forecast at 8.6 million tonnes, compared to 10 million tonnes in 1997. It is expected that summer crops for harvest in 1999 will be planted to replace some flood damaged winter crops and thus the summer crop area is likely to increase in the upcoming season. With regard to paddy, preliminary indications suggest that planted area will be reduced by about 14 percent from 1998 to 120 000 hectares, a consequence of lower irrigation water supplies. Based on average yields, output would be about 1 million tonnes or about 30 percent less than the 1998 estimate.

FIJI (25 November)

Output of the sugar crop in 1998 is estimated to fall significantly, due to El Niño-related drought, which has seriously affected the country. Sugar is Fiji's most important industry, ranking just after tourism as an income earner, but viewed as the real backbone of the nation's economy. Some 80 000 people in the drought-stricken western cane belt are reported to need assistance. Cereal consumption requirements are generally met by imports - mostly on commercial terms.

PAPUA NEW GUINEA (3 November)

Prospects for crops, mainly roots and tubers, are good as a result of sufficient rains during the growing season. However, the food situation is likely to be tight for vulnerable groups and those who lacked basic agricultural inputs at 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 | | 22 228.7 | 1 852.6 | 24 081.3 | 26 040.0 | 24 700.6 | 2 044.8 | 22 643.3 |
| Northern Africa | | 12 202.7 | 169.1 | 12 371.8 | 13 720.0 | 13 733.1 | 64.9 | 13 668.2 |
| Egypt | July/June | 9 886.0 | 167.3 | 10 053.3 | 10 200.0 | 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 | | 2 959.0 | 633.5 | 3 592.5 | 4 003.0 | 4 211.8 | 1 174.0 | 3 025.3 |
| Burundi | Jan./Dec. | 37.0 | 0.0 | 37.0 | 42.0 | 10.2 | 8.4 | 1.8 |
| Comoros | Jan./Dec. | 38.5 | 3.1 | 41.6 | 46.0 | 9.9 | 5.5 | 4.4 |
| Djibouti | Jan./Dec. | 66.7 | 11.7 | 78.4 | 66.0 | 23.9 | 9.7 | 14.2 |
| Eritrea | Jan./Dec. | 235.5 | 53.5 | 289.0 | 280.0 | 98.1 | 82.5 | 3.1 |
| Ethiopia 2/ | Jan./Dec. | 37.8 | 201.5 | 239.3 | 640.0 | 765.6 | 719.2 | 46.4 |
| Kenya | Oct./Sept. | 1 771.2 | 75.3 | 1 846.5 | 1 346.0 | 1 625.1 | 92.5 | 1 532.6 |
| Rwanda | Jan./Dec. | 4.4 | 231.5 | 235.9 | 170.0 | 174.2 | 147.1 | 27.1 |
| Somalia | Aug./July | 211.9 | 5.1 | 217.0 | 280.0 | 280.0 | 10.3 | 269.7 |
| Sudan | Nov./Oct. | 493.7 | 46.3 | 540.0 | 532.0 | 566.5 | 57.5 | 509.0 |
| Tanzania | June/May | 62.3 | 5.5 | 67.8 | 601.0 | 658.3 | 41.3 | 617.0 |
| Southern Africa | | 1 166.9 | 423.5 | 1 590.4 | 1 981.0 | 2 001.2 | 372.7 | 1 628.5 |
| Angola | April/March | 294.6 | 154.4 | 449.0 | 531.0 | 510.5 | 159.7 | 350.8 |
| Lesotho | April/March | 96.1 | 32.4 | 128.5 | 263.0 | 134.6 | 7.6 | 127.0 |
| Madagascar | April/March | 69.0 | 17.5 | 86.5 | 168.0 | 194.9 | 38.1 | 156.8 |
| Malawi | April/March | 75.6 | 98.8 | 174.4 | 347.0 | 113.6 | 2.6 | 111.0 |
| Mozambique | April/March | 154.7 | 109.4 | 264.1 | 212.0 | 314.8 | 162.9 | 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 | 388.0 | 1.8 | 386.2 |
| Zimbabwe | April/March | 288.3 | 1.4 | 289.7 | 25.0 | 283.3 | 0.0 | 283.3 |
| Western africa | | 5 241.8 | 593.0 | 5 834.8 | 5 667.0 | 4 192.3 | 420.7 | 3 771.6 |
| Coastal countries | | 3 365.8 | 413.4 | 3 779.2 | 3 441.0 | 1 787.4 | 277.0 | 1 510.4 |
| Benin | Jan./Dec. | 112.1 | 32.0 | 144.1 | 120.0 | 28.6 | 11.6 | 17.0 |
| Cote d'Ivoire | Jan./Dec. | 463.4 | 51.6 | 515.0 | 620.0 | 205.3 | 49.4 | 155.9 |
| Ghana | Jan./Dec. | 361.3 | 110.1 | 471.4 | 440.0 | 211.3 | 52.4 | 158.9 |
| Guinea | Jan./Dec. | 371.4 | 3.4 | 374.8 | 410.0 | 50.2 | 6.9 | 43.3 |
| Liberia | Jan./Dec. | 85.9 | 129.9 | 215.8 | 240.0 | 93.0 | 85.0 | 8.0 |
| Nigeria | Jan./Dec. | 1 709.6 | 1.1 | 1 710.7 | 1 300.0 | 1 077.6 | 0.3 | 1 077.3 |
| Sierra Leone | Jan./Dec. | 159.6 | 78.7 | 238.3 | 260.0 | 71.3 | 68.0 | 3.3 |
| Togo | Jan./Dec. | 102.5 | 6.6 | 109.1 | 51.0 | 50.1 | 3.4 | 46.7 |
| Sahelian countries | | 1 876.0 | 179.6 | 2 055.6 | 2 226.0 | 2 404.9 | 143.7 | 2 261.2 |
| Burkina faso | Nov./Oct. | 117.7 | 15.7 | 133.4 | 242.0 | 205.7 | 19.8 | 185.9 |
| Cape Verde | Nov./Oct. | 50.7 | 60.9 | 111.6 | 95.0 | 81.0 | 45.5 | 35.5 |
| Chad | Nov./Oct. | 63.0 | 26.0 | 89.0 | 73.0 | 85.5 | 21.5 | 64.0 |
| Gambia | Nov./Oct. | 97.2 | 7.3 | 104.5 | 110.0 | 78.1 | 3.2 | 74.9 |
| Guinea Bissau | Nov./Oct. | 80.2 | 5.4 | 85.6 | 66.0 | 72.1 | 0.9 | 71.2 |
| Mali | Nov./Oct. | 96.6 | 25.1 | 121.7 | 70.0 | 94.2 | 9.9 | 84.3 |
| Mauritania | Nov./Oct. | 381.7 | 24.2 | 405.9 | 340.0 | 316.8 | 14.9 | 301.9 |
| Niger | Nov./Oct. | 247.7 | 12.5 | 260.2 | 450.0 | 607.6 | 26.1 | 581.5 |
| Senegal | Nov./Oct. | 741.2 | 2.5 | 743.7 | 780.0 | 863.9 | 1.9 | 862.0 |
| Central Africa | | 658.3 | 33.5 | 691.8 | 669.0 | 562.2 | 12.5 | 549.7 |
| 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 | 11.8 | 1.9 | 9.9 |
| Congo, Dem R | Jan./Dec. | 244.4 | 7.1 | 251.5 | 255.0 | 154.1 | 4.0 | 150.1 |
| Congo | Jan./Dec. | 109.6 | 21.6 | 131.2 | 95.0 | 126.7 | 1.7 | 125.0 |
| Eq. Guinea | Jan./Dec. | 8.9 | 0.1 | 9.0 | 9.0 | 3.6 | 0.7 | 2.9 |
| Sao Tome | Jan./Dec. | 7.9 | 3.1 | 11.0 | 11.0 | 6.0 | 4.2 | 1.8 |

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 | | 35 426.6 | 1 830.6 | 37 257.2 | 37 922.0 | 37 440.6 | 2 096.0 | 35 344.6 |
| Afghanistan | July/June | 639.8 | 150.2 | 790.0 | 700.0 | 700.0 | 129.2 | 570.8 |
| Bangladesh | July/June | 491.7 | 618.2 | 1 109.9 | 2 600.0 | 2 600.0 | 549.4 | 2 050.6 |
| Bhutan | July/June | 16.0 | 0.0 | 16.0 | 15.0 | 15.0 | 0.0 | 15.0 |
| Cambodia | Jan./Dec. | 38.0 | 34.9 | 72.9 | 40.0 | 77.6 | 17.5 | 60.1 |
| China 3/ | July/June | 13 393.9 | 106.1 | 13 500.0 | 10 300.0 | 10 347.2 | 90.1 | 10 257.1 |
| India | April/March | 1 829.8 | 208.0 | 2 037.8 | 2 471.0 | 2 473.3 | 209.4 | 2 263.9 |
| Indonesia | April/March | 7 278.3 | 0.0 | 7 278.3 | 6 860.0 | 6 857.9 | 0.0 | 6 857.9 |
| Korea, D.P.R. 5/ | Nov./Oct. | 540.8 | 462.1 | 1 002.9 | 1 951.0 | 1 527.2 | 724.7 | 802.5 |
| 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 | 214.9 | 30.0 | 184.9 |
| 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 | 173.1 | 4 147.9 |
| Philippines | July/June | 3 441.0 | 39.9 | 3 480.9 | 3 650.0 | 4 367.8 | 8.5 | 4 359.3 |
| Sri Lanka | Jan./Dec. | 1 113.8 | 82.7 | 1 196.5 | 1 306.0 | 1 556.6 | 87.5 | 1 469.1 |
| 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 | 2 720.0 | 1 574.3 | 31.3 | 1 543.0 |
| CENTRAL AMERICA | | 4 096.9 | 218.0 | 4 314.9 | 4 785.0 | 4 630.8 | 203.9 | 4 426.9 |
| Cuba 5/ | July/June | 1 443.5 | 6.5 | 1 450.0 | 1 555.0 | 1 555.0 | 31.2 | 1 523.8 |
| Dominican Rep. | Jan./Dec. | 1 039.4 | 2.2 | 1 041.6 | 1 065.0 | 784.8 | 0.9 | 783.9 |
| Guatemala | July/June | 744.4 | 39.1 | 783.5 | 920.0 | 984.7 | 12.5 | 972.2 |
| Haiti | July/June | 325.8 | 103.9 | 429.7 | 535.0 | 507.1 | 112.4 | 394.7 |
| Honduras | July/June | 369.2 | 31.6 | 400.8 | 365.0 | 443.8 | 23.0 | 420.8 |
| Nicaragua | July/June | 174.6 | 34.7 | 209.3 | 345.0 | 355.4 | 23.9 | 331.5 |
| SOUTH AMERICA | | 853.9 | 155.4 | 1 009.3 | 1 108.0 | 1 104.5 | 91.4 | 1 013.1 |
| Bolivia | July/June | 204.1 | 138.9 | 343.0 | 378.0 | 389.8 | 68.0 | 321.8 |
| Ecuador | Jan./Dec. | 599.8 | 16.5 | 616.3 | 680.0 | 664.7 | 6.5 | 658.2 |
| Suriname 5/ | Jan./Dec. | 50.0 | 0.0 | 50.0 | 50.0 | 50.0 | 16.9 | 33.1 |
| OCEANIA | | 365.1 | 0.0 | 365.1 | 339.0 | 91.7 | 8.0 | 83.7 |
| 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 | 91.7 | 8.0 | 83.7 |
| 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 7/ | 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 | 4 034.8 | 607.7 | 3 427.1 |
| Armenia | July/June | 255.0 | 101.0 | 356.0 | 360.0 | 361.0 | 153.0 | 208.0 |
| Albania | July/June | 352.2 | 11.8 | 364.0 | 368.0 | 368.0 | 2.3 | 365.7 |
| Azerbaijan | July/June | 452.0 | 33.0 | 485.0 | 435.0 | 400.0 | 59.6 | 340.4 |
| Bosnia&Herzegovina 5 | July/June | 57.2 | 215.0 | 272.2 | 275.0 | 275.4 | 36.1 | 239.3 |
| Georgia | July/June | 539.0 | 91.0 | 630.0 | 505.0 | 577.0 | 163.8 | 413.2 |
| Macedonia, FYR | July/June | 240.0 | 0.0 | 240.0 | 240.0 | 240.0 | 0.0 | 240.0 |
| Kyrgyz Republic | July/June | 109.0 | 19.0 | 128.0 | 104.0 | 127.4 | 67.8 | 59.6 |
| Tajikistan | July/June | 174.0 | 82.0 | 256.0 | 299.0 | 395.0 | 125.1 | 269.9 |
| 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 | | 66 900.6 | 4 609.4 | 71 510.0 | 74 286.0 | 72 003.0 | 5 051.8 | 66 938.7 |

SOURCE: FAO

1/ Includes food deficit countries with per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. 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 determined.

2/ Includes refugee needs. 3/ Includes import requirements of Taiwan Province. 4/ Excludes Afghan refugee requirements. 5/ Classified as LIFD countries as of Jan 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 | | 18 953.6 | 690.4 | 19 644.0 | 18 493.0 | 4 239.5 | 681.9 | 3 557.6 |
| Northern Africa | | 13 668.2 | 64.9 | 13 733.1 | 12 735.0 | 3 364.1 | 12.9 | 3 351.2 |
| Egypt | July/June | 10 160.7 | 52.4 | 10 213.1 | 10 020.0 | 2 262.4 | 12.9 | 2 249.5 |
| Morocco | July/June | 3 507.5 | 12.5 | 3 520.0 | 2 715.0 | 1 101.7 | 0.0 | 1 101.7 |
| Eastern Africa | | 1 395.7 | 109.1 | 1 504.8 | 897.0 | 76.1 | 76.1 | 0.0 |
| Kenya | Oct./Sept. | 1 532.6 | 92.5 | 1 625.1 | 1 040.0 | 37.4 | 37.4 | 0.0 |
| Somalia | Aug./July | 269.7 | 10.3 | 280.0 | 340.0 | 6.7 | 6.7 | 0.0 |
| Sudan | Nov./Oct. | 509.0 | 57.5 | 566.5 | 545.0 | 12.4 | 12.4 | 0.0 |
| Tanzania | June/May | 617.0 | 41.3 | 658.3 | 12.0 | 57.0 | 57.0 | 0.0 |
| Southern Africa | | 1 628.5 | 372.7 | 2 001.2 | 2 741.0 | 660.2 | 453.8 | 206.4 |
| Angola | April/March | 350.8 | 159.7 | 510.5 | 471.0 | 217.6 | 120.6 | 97.0 |
| Lesotho | April/March | 127.0 | 7.6 | 134.6 | 263.0 | 18.5 | 6.1 | 12.4 |
| Madagascar | April/March | 156.8 | 38.1 | 194.9 | 145.0 | 18.7 | 18.7 | 0.0 |
| Malawi | April/March | 111.0 | 2.6 | 113.6 | 102.0 | 49.9 | 49.9 | 0.0 |
| Mozambique | April/March | 151.9 | 162.9 | 314.8 | 212.0 | 218.2 | 158.8 | 59.4 |
| Swaziland | May/April | 61.5 | 0.0 | 61.5 | 63.0 | 0.0 | 0.0 | 0.0 |
| Zambia | May/April | 386.2 | 1.8 | 388.0 | 660.0 | 14.9 | 14.9 | 0.0 |
| Zimbabwe | April/March | 283.3 | 0.0 | 283.3 | 825.0 | 122.4 | 84.8 | 37.6 |
| Western Africa | | 2 261.2 | 143.7 | 2 404.9 | 2 120.0 | 139.1 | 139.1 | 0.0 |
| Sahelian countries | | 2 261.2 | 143.7 | 2 404.9 | 2 120.0 | 139.1 | 139.1 | 0.0 |
| Burkina faso | Nov./Oct. | 185.9 | 19.8 | 205.7 | 200.0 | 26.2 | 26.2 | 0.0 |
| Cape Verde | Nov./Oct. | 35.5 | 45.5 | 81.0 | 100.0 | 45.5 | 45.5 | 0.0 |
| Chad | Nov./Oct. | 64.0 | 21.5 | 85.5 | 80.0 | 13.3 | 13.3 | 0.0 |
| Gambia | Nov./Oct. | 74.9 | 3.2 | 78.1 | 120.0 | 11.8 | 11.8 | 0.0 |
| Guinea Bissau | Nov./Oct. | 71.2 | 0.9 | 72.1 | 100.0 | 0.0 | 0.0 | 0.0 |
| Mali | Nov./Oct. | 84.3 | 9.9 | 94.2 | 50.0 | 4.0 | 4.0 | 0.0 |
| Mauritania | Nov./Oct. | 301.9 | 14.9 | 316.8 | 320.0 | 25.0 | 25.0 | 0.0 |
| Niger | Nov./Oct. | 581.5 | 26.1 | 607.6 | 300.0 | 7.8 | 7.8 | 0.0 |
| Senegal | Nov./Oct. | 862.0 | 1.9 | 863.9 | 850.0 | 5.5 | 5.5 | 0.0 |
| ASIA | | 32 270.7 | 1 925.4 | 34 196.1 | 33 285.0 | 15 216.0 | 2 864.8 | 12 351.2 |
| Afghanistan | July/June | 570.8 | 129.2 | 700.0 | 740.0 | 10.3 | 10.3 | 0.0 |
| Bangladesh | July/June | 2 050.6 | 549.4 | 2 600.0 | 4 025.0 | 3 203.9 | 1 130.0 | 2 073.9 |
| Bhutan | July/June | 15.0 | 0.0 | 15.0 | 20.0 | 0.0 | 0.0 | 0.0 |
| China 3/ | July/June | 10 257.1 | 90.1 | 10 347.2 | 11 000.0 | 2 487.9 | 55.1 | 2 432.8 |
| India | April/March | 2 263.9 | 209.4 | 2 473.3 | 1 351.0 | 1 432.5 | 142.1 | 1 290.4 |
| Indonesia | April/March | 6 857.9 | 0.0 | 6 857.9 | 8 385.0 | 5 250.2 | 1 218.6 | 4 031.6 |
| Korea, D.P.R. 5/ | Nov./Oct. | 802.5 | 724.7 | 1 527.2 | 1 354.0 | 142.5 | 142.5 | 0.0 |
| Mongolia | Oct./Sept. | 184.9 | 15.1 | 200.0 | 200.0 | 72.0 | 72.0 | 0.0 |
| Nepal | July/June | 24.0 | 4.9 | 28.9 | 99.0 | 0.0 | 0.0 | 0.0 |
| Pakistan 4/ | May/April | 4 147.9 | 173.1 | 4 321.0 | 1 821.0 | 808.3 | 65.2 | 743.1 |
| Philippines | July/June | 4 359.3 | 8.5 | 4 367.8 | 3 650.0 | 1 733.6 | 17.9 | 1 715.7 |
| Syria | July/June | 736.8 | 21.0 | 757.8 | 640.0 | 74.8 | 11.1 | 63.7 |
| CENTRAL AMERICA | | 3 643.0 | 203.0 | 3 846.0 | 3 595.0 | 432.8 | 160.7 | 272.1 |
| Cuba 5/ | July/June | 1 523.8 | 31.2 | 1 555.0 | 1 625.0 | 10.5 | 0.0 | 10.5 |
| Guatemala | July/June | 972.2 | 12.5 | 984.7 | 860.0 | 128.4 | 59.9 | 68.5 |
| Haiti | July/June | 394.7 | 112.4 | 507.1 | 475.0 | 62.3 | 27.5 | 34.8 |
| Honduras | July/June | 420.8 | 23.0 | 443.8 | 410.0 | 118.0 | 10.3 | 107.7 |
| Nicaragua | July/June | 331.5 | 23.9 | 355.4 | 225.0 | 113.6 | 63.0 | 50.6 |
| SOUTH AMERICA | | 321.8 | 68.0 | 389.8 | 501.0 | 110.3 | 110.3 | 0.0 |
| Bolivia | July/June | 321.8 | 68.0 | 389.8 | 501.0 | 110.3 | 110.3 | 0.0 |
| EUROPE / CIS 6/ | | 3 427.1 | 607.7 | 4 034.8 | 3 962.0 | 818.9 | 417.3 | 401.6 |
| Armenia | July/June | 208.0 | 153.0 | 361.0 | 338.0 | 51.3 | 51.3 | 0.0 |
| Albania | July/June | 365.7 | 2.3 | 368.0 | 368.0 | 27.4 | 27.4 | 0.0 |
| Azerbaijan | July/June | 340.4 | 59.6 | 400.0 | 520.0 | 125.5 | 44.6 | 80.9 |
| Bosnia&Herzegovina 5 | July/June | 239.3 | 36.1 | 275.4 | 290.0 | 85.3 | 85.3 | 0.0 |
| Georgia | July/June | 413.2 | 163.8 | 577.0 | 606.0 | 137.3 | 82.1 | 55.2 |
| Macedonia, FYR | July/June | 240.0 | 0.0 | 240.0 | 240.0 | 0.0 | 0.0 | 0.0 |
| Kyrgyz Republic | July/June | 59.6 | 67.8 | 127.4 | 40.0 | 107.6 | 74.9 | 32.7 |
| Tajikistan | July/June | 269.9 | 125.1 | 395.0 | 360.0 | 150.0 | 51.7 | 98.3 |
| Turkmenistan | July/June | 311.0 | 0.0 | 311.0 | 270.0 | 38.4 | 0.0 | 38.4 |
| Uzbekistan | July/June | 980.0 | 0.0 | 980.0 | 930.0 | 96.1 | 0.0 | 96.1 |
| TOTAL | | 58 616.2 | 3 494.5 | 62 110.7 | 59 836.0 | 20 817.5 | 4 235.0 | 16 582.5 |

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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