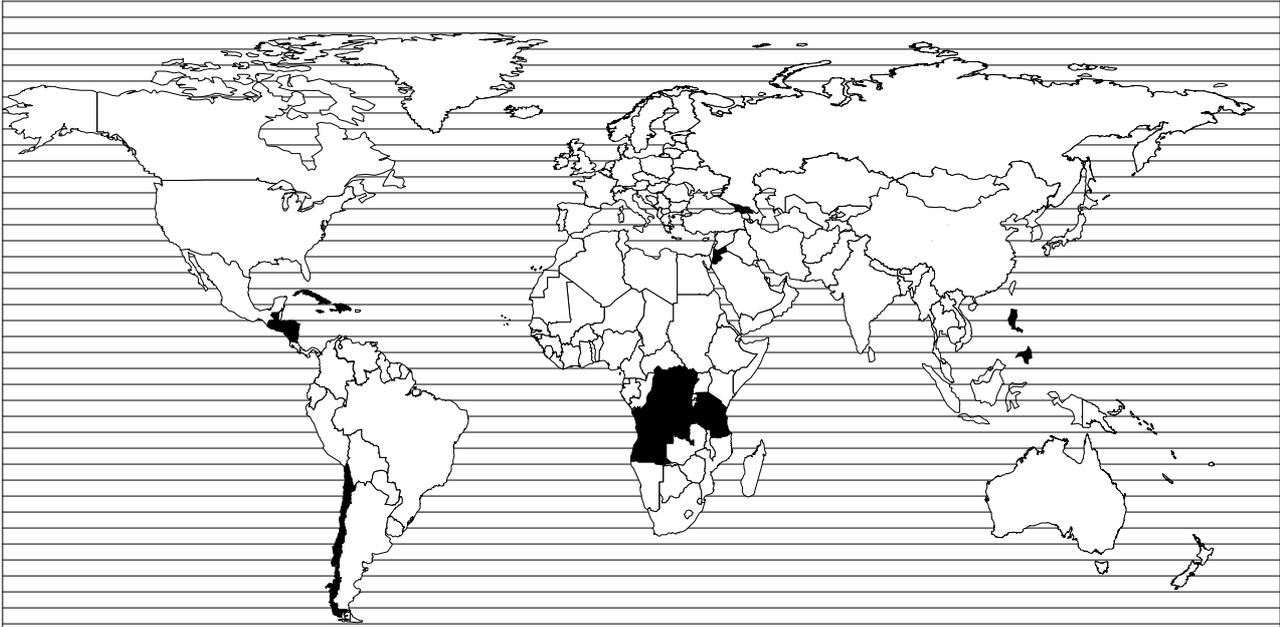


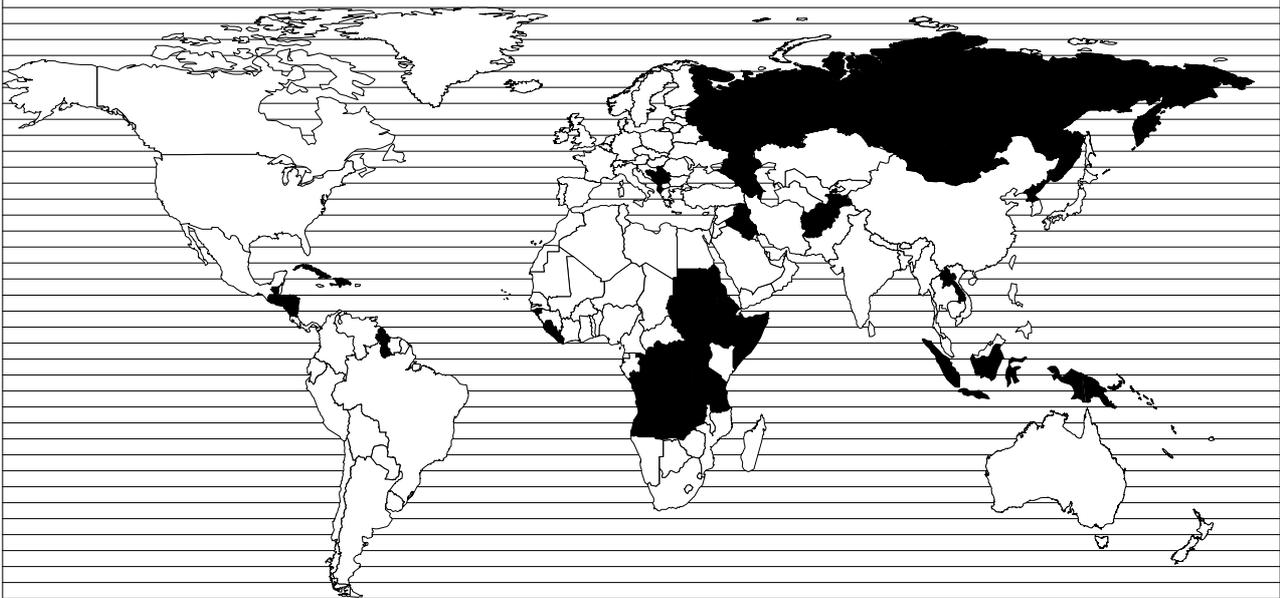
FOODCROPS AND SHORTAGES

No.1

February 1999



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>
Angola*	April/May	Civil strife
Antigua/Barbuda	Nov./Feb.	Hurricane rains and winds
Chile	Dec./Feb.	Drought
Congo, Dem.Rep.of*	Feb./Mar.	Civil strife
Cuba	Mar./July	Drought, shortages of inputs
Dominican Rep.	Dec./Feb.	Hurricane rains and floods
El Salvador	Feb./Mar.	Hurricane rains and floods
Guatemala	Feb./Mar.	Hurricane rains and floods
Haiti*	Nov./Feb.	Hurricane rains and floods
Honduras	Feb./Mar.	Hurricane rains and floods
Jordan	Mar./Apr.	Drought
Nicaragua	Dec./Feb.	Hurricane rains and floods
Philippines	Mar./Apr.	Weather anomalies
St.Kitts&Nevis	Nov./Feb.	Hurricane rains and floods
Tanzania	Jan./Feb.	Delayed and erratic rainfall

SHORTFALLS IN FOOD SUPPLIES IN CURRENT MARKETING YEAR REQUIRING EXCEPTIONAL AND/OR EMERGENCY ASSISTANCE (Total: 38 countries)

AFRICA (15 countries):

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

ASIA (6 countries):

Afghanistan*, **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 (5 countries):

Armenia*, **Azerbaijan**, **Georgia***, **Russian Federation**, **Tajikistan***

EUROPE (3 countries):

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

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

Serious concern mounts over deteriorating food situation in Somalia, where another poor "Deyr" crop is expected, the sixth in succession. The number of people in search of food and water is increasing, particularly from the worst affected regions of Bay and Bakol. In many areas, renewed fighting has aggravated an already precarious situation. Elsewhere in Eastern Africa, a severely reduced Vuli harvest in Tanzania has increased the number of vulnerable people, whilst in Kenya food shortages due to drought are reported in eastern parts despite a satisfactory situation nationally .

Good prospects for crops in southern Africa, following favourable rains in recent months. If conditions continue, a recovery in production is anticipated in South Africa, Zimbabwe and Zambia, and a good harvest is in prospect in Madagascar, Malawi, Mozambique, Swaziland. Food supplies are expected to remain tight in Angola due to renewed fighting and also in Zambia where drought reduced production last year.

Food production remains low in Liberia and Sierra Leone due to continuing insecurity, which has also affected agriculture in the Democratic Republic of Congo and Republic of Congo. While a record crop was gathered in the Sahel in 1998, output decreased in Guinea Bissau following civil disturbances.

In Asia, the outlook for winter grains is mixed. In China, drought last autumn affected winter grains, but favourable weather in India will result in a good wheat harvest. A recovery in rice production is expected in Indonesia, where a combination of El Niño drought and the financial crisis last year seriously compromised food security. Food security in Afghanistan and Korea DPR remains fragile as domestic production remains heavily constrained by lack of essential inputs. In Iraq, despite some improvement in the overall food position following the implementation of the oil-for-food deal, malnutrition still remains a serious problem.

Hurricane "Mitch" wrecks havoc in Central America, destroying around 400 000 tonnes of maize in Honduras, El Salvador, Nicaragua and Guatemala. No recovery is expected from the severely reduced production in 1997. In the Caribbean, 1998 paddy production was below average in Cuba and the Dominican Republic following hurricane "Georges". In South America, 1998 wheat production fell due to reduced planting and unfavourable weather.

In the CIS, the early outlook for 1999 wheat and rye is uncertain, as crops were planted in dry conditions. Crops are in reasonable condition in Ukraine, though in the Russian Federation conditions on some 2 million hectares of the 13 million planted are reported to be poor. The overall food situation remains stable due to a favourable harvest last year and large carry over stocks.

Early indications point to a reduced 1999 winter grains output in Europe, following reduced plantings in the EC and several eastern European countries.

The United States winter wheat area has fallen by 7 percent to the lowest level since 1972/73, because of poor price prospects. Crop conditions remain favourable so far.

Another above average cereal crop has been harvested in Australia in 1998. Prospects are good for the small summer coarse grains crop for harvest in 1999.

SUMMARY

WEATHER CONDITIONS AND CROP PROSPECTS

In **northern Africa**, prospects for 1999 wheat and barley are uncertain in Algeria and Morocco following a delay in rains which affected planting. Recent rains improved crop conditions but soil moisture levels remain low and rains are still needed. In Tunisia, prospects for winter grains are favourable following above-normal rains since the beginning of the season. In Egypt, the output of mostly irrigated wheat is anticipated to be satisfactory.

In **western Africa**, generally favourable conditions in Senegal, Mauritania, Mali, Niger and Chad in 1998 resulted in a record crop, estimated at 10.6 million tonnes, some 17 percent higher than average. Bumper harvests are estimated in Chad, Mali and Niger. Else where in the Sahel, output was above average in The Gambia, close to average in Burkina Faso and Senegal but below normal in Cape Verde and Mauritania. In contrast, cereal production is estimated to be well below average in Guinea-Bissau where civil strife has hampered farming. In the coastal countries, aggregate 1998 cereal production is estimated at an above-average 29.7 million tonnes. Improved security and favourable weather resulted in a good cereal harvest in Liberia, but in neighbouring Sierra Leone, 1998 crop production was well below average and the food supply situation remains critical in many areas.

In **central Africa**, crop prospects are generally favourable in Central African Republic and the Cameroon. In contrast there has been significant deterioration in the food supply situation in the Republic of Congo, following recent eruption of civil strife. The food situation also remains precarious in many parts of the Democratic Republic of Congo

In **eastern Africa**, harvesting of 1998/99 second season crops has been completed in most countries, except in Ethiopia, where planting is about to commence. Late and erratic rains reduced plantings, yields and output in several countries, particularly in Kenya, Tanzania and Somalia. Overall 1998/99 cereal production for the sub-region as a whole is projected to be above average, following a good main season.

In **southern Africa**, rainfall has been generally favourable for 1998/99 crops in most countries. Abundant rains continued through January in many areas, raising concerns that yields may be reduced by water-logging in parts of Malawi, Mozambique, South Africa, Zambia and Zimbabwe. Preliminary indications point to an overall increase in area sown to maize and other crops compared to last year. Prospects are also generally good for rice in Madagascar. However, prospects are unfavourable in Angola as a result of continued fighting in major cereal producing provinces.

In **Asia**, the outlook for winter grains is mixed. In China, drought in major producing areas is estimated to have damaged crops on several million hectares. In contrast, the wheat crop in India is expected to be good following favourable weather and an increase in cultivated area. In Pakistan, conditions in January favoured winter wheat, following dry conditions earlier. Similarly, unexpected rains in Thailand improved prospects for the second rice crop. In Bangladesh, a campaign to boost Boro rice has been launched and the outlook for the winter wheat remains favourable. In Indonesia, a recovery in main season rice production is expected this year, following generally favourable conditions. In DPR Korea, food supply difficulties are likely to persist despite some recovery in domestic production in 1998. In Afghanistan, prospects for the 1999 harvest in May/June remain uncertain, due mainly to the ongoing fighting in the northern provinces and continued shortages of essential inputs. Crop prospects remain poor in Iraq and Jordan following unfavourable weather. In Syria and Turkey conditions have been satisfactory for cereal production.

In **Central America** and the **Caribbean**, 1998/99 cereal output is expected to be even lower than output last year, which was severely affected by El Niño related weather disturbances. Widespread losses in maize and bean production occurred in Honduras, El Salvador, Nicaragua, Guatemala and Mexico following devastation caused by hurricane "Mitch". In Cuba, Haiti and the Dominican Republic heavy rain and flooding following hurricane "Georges" seriously damaged the main paddy crop.

In **South America**, harvesting of the 1998/99 wheat crop has been completed in Argentina, Brazil, Paraguay, Uruguay and Chile. Production was below average and almost 5 million tonnes lower than in 1997/98, due to reduced planting and adverse weather. In Bolivia and Ecuador, harvesting of the 1999 first season wheat crop will begin in March, while in Peru harvesting is due to start from April. In Brazil, maize is being harvested in some areas and production is expected to recover from last year's El Niño affected season. In the Andean countries, harvesting of first season coarse grain crops is about to begin, while in Colombia and Venezuela, planting of the 1999/2000 first season crop will commence in April.

In **Europe**, weather conditions for winter grain crops have been generally satisfactory so far. The output of winter wheat is expected to fall in 1999, due to a combination of reduced plantings and adverse autumn weather in several countries. Although the area under winter coarse grains is also estimated to have fallen, overall production will depend largely on the level of spring planting. In the Baltics, conditions over winter for grains have been mostly favourable so far, though some crop damage is likely in Latvia. 1998 cereal and pulse production was reduced by persistent rains in the summer, with lower harvests in all three countries. In Lithuania, production fell by 8 percent to 2.8 million tons.

In the **Commonwealth of Independent States (CIS)**, the early outlook for 1999 winter wheat and rye is mixed. In the Ukraine and Russian Federation, aggregate area sown has declined marginally with most crops planted late or under dry conditions. Reports indicate that crops are in satisfactory condition on 85 percent of the area planted in the Ukraine, but are poor on over 2 million hectares of the 13 million planted in the Russian Federation. The aggregate 1998 cereal and pulse harvest is estimated by FAO at 111 million tons, nearly 30 percent less than output in the previous year (157 million tons). FAO's estimates for the major states are 15 percent higher than those reported officially.

In **North America**, prospects for the 1999 wheat crop in the United States are satisfactory. Although the area planted to winter wheat is estimated to have fallen by 7 percent from 1998, weather conditions have been generally favourable so far. In Canada, the bulk of the 1999 wheat crop will be sown in May-June. Early indications point to a further reduction in wheat area due to poor price prospects.

In **Oceania**, 1998 winter wheat production in Australia is estimated at 21.2 million tonnes, about 9 percent higher than the previous year. Output of coarse grains, however, has fallen by about 16 percent to 8.4 million tonnes. Prospects for the small summer coarse grain crop for harvest in 1999 are good due to favourable planting conditions in late 1998.

COUNTRY REPORTS ^{1/}

AFRICA

NORTHERN AFRICA

ALGERIA (3 February)

Recent rainfall maintained adequate moisture condition for the 1999 wheat and barley crops but below-normal temperatures delayed somewhat the development of the crops now in the vegetative stage. However, additional timely rains will be required during the remainder of the growing season to avert declines in crop yield.

Production of cereals in 1998 increased markedly to more than 3 million tonnes from a drought-reduced harvest of 1.1 million tonnes in 1997 as a result of favourable weather conditions and larger area sown. Cereal imports excluding semolina in 1998/99 (July/June) are forecast at 5.5 million tonnes, about 400 000 tonnes less than in the previous year.

EGYPT (11 February)

Early prospects for the wheat (mainly irrigated) and barley crops to be harvested from mid-April are favourable. Wheat and maize production in 1998 is estimated to have slightly increased to 6.1 million tonnes and 6 million tonnes, respectively. In contrast, reflecting a sharp reduction in the area sown, the output from the paddy crop in 1998 declined by more than 1 million tonnes to 4.45 million tonnes.

Imports of wheat and wheat flour in 1998/99 (July/June) are forecast at 7.2 million tonnes, virtually unchanged from previous year. Coarse grain imports (mostly maize) are forecast also unchanged from previous year at 3.2 million tonnes.

MOROCCO (11 February)

Widespread moderate rains in mid-January improved moisture conditions for the 1999 winter grain crops previously stressed by unfavourable weather. Dry weather conditions returned recently over winter grain areas but lower than normal temperatures limited crop stress. Widespread timely rains will be needed in the coming months to facilitate a normal crop development. The area sown to wheat and barley is reported to be lower than the average for the previous five years.

Production of cereals in 1998, estimated at 6.6 million tonnes, was 63 percent higher than the drought-affected crop of 4.1 million tonnes in 1997. Imports of wheat and wheat flour in 1998/99 (July/June) are forecast at 1.8 million tonnes, some 28 percent lower than last year.

TUNISIA (11 February)

Prospects for the 1999 winter grain crop to be harvested from May are currently favourable. Cumulative rainfall since the beginning of the growing season is reported to be above normal particularly in the major producing northern areas. The area sown to cereals, mainly wheat, in 1998/99 season is currently estimated at 1.3 million hectares, slightly lower than the target due to inadequate rainfall in the central cereal growing areas at sowing time. However, use of high quality seeds and adequate availability of fertilizers should result in higher cereal yields. Pasture conditions are satisfactory particularly in northern area.

^{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 (*).

Production of cereals in 1998 increased by about 58 percent to 1.7 million tonnes, reflecting overall favourable growing conditions. Imports of wheat in 1998/99 (July/June) are forecast at 900 000 tonnes, down 400 000 tonnes compared to previous year. By contrast, coarse grains imports are forecast to increase by some 80 000 tonnes to 600 000 tonnes.

WESTERN AFRICA

BENIN (8 February)

Planted areas in 1998 were above normal, except for groundnuts. 1998 aggregate cereal output should be close to average but below 1997's level, and current estimates point to a production of about 800 000 tonnes.

The overall food supply situation is satisfactory following the harvest of the main crops. Reduced demand from the sahelian countries that also had good harvests, is causing prices to remain low. The cereal import requirement for 1999 (January/December) is estimated at 200 000 tonnes (including re-exports) of wheat and rice.

BURKINA FASO (15 February)

Seasonably dry conditions prevail. Off-season crops are developing satisfactorily. A joint FAO/CILSS Crop Assessment Mission estimated the aggregate 1998 cereal production at 2 387 800 tonnes which is well above the previous year's output but remains about average.

The overall food supply situation has improved following this better harvest. Prices of cereals have decreased significantly following the harvest but increased slightly in late January/early February. In January, the Government launched bids to buy about 15 000 tonnes of local cereals in order to replenish the national security stock to its recommended level of 35 000 tonnes. Some deficit areas remain vulnerable and may need some assistance during the lean season.

CAPE VERDE (15 February)

The 1998 maize production has been estimated at 3 400 tonnes, which is below the previous year's reduced harvest and well below average. Following successive poor harvests, some sections of the rural population may need assistance in food and/or seeds for the next season. However, the overall food supply situation remains satisfactory as the country imports the bulk of its consumption requirement. The cereal food aid requirements for 1998/99 amount to 95 000 tonnes. 48 400 tonnes have been pledged, of which 14 000 tonnes have been delivered so far

CHAD (15 January)

Seasonably dry conditions prevail. Recession crops are developing satisfactorily. A joint CILSS/FAO Crop Assessment Mission estimated 1998 cereal production at a record 1 277 000 tonnes, which is 30 percent above the previous year's output.

The overall food supply situation is satisfactory, notably in the Sahelian zone which gathered well above average harvests. Prices of cereals declined following the harvest. This should facilitate local purchases for the reconstitution of the national security stock (which was almost exhausted) for which external assistance is required. Some food supply difficulties are likely in areas of the Sudanian zone affected by flooding in 1998.

COTE D'IVOIRE (8 February)

Below-normal and erratic rainfall was recorded over Côte d'Ivoire, notably in the south. However, in the north, the rainfall situation has been satisfactory and could partly compensate for the reduced

output in the south. Estimates for the 1998/99 cereal production point to about 1.6 million tonnes, compared with 1.55 million tonnes in 1997/98

The overall food supply situation is satisfactory with the arrival of the new crop on the market. Repatriation of about 140 000 Liberian refugees who remain in the country is underway. The cereal import requirement for 1999 (January/December), is estimated at 645 000 tonnes, mostly wheat and rice.

THE GAMBIA (15 February)

Seasonably dry conditions prevail. A joint CILSS/FAO Crop Assessment Mission estimated the 1998 total cereal production at 120 980 tonnes, which is 16 percent higher than in 1997 and 18 percent above the average of the previous five years.

The overall food supply situation is anticipated to be satisfactory in light of the relatively good harvest. Cereal prices declined following 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 reduced millet output.

GHANA (1 February)

Seasonably dry conditions prevail. Aggregate 1998 cereal production is estimated at 1.78 million tonnes, which is slightly above 1997. Production has recovered in the extreme north, where crop output had been reduced in 1997. Roots and tubers production is estimated at about 13.44 million tonnes, which is well above average.

The overall food supply situation is satisfactory following the harvest of the main crops. About 30 000 Liberian refugees who remain in the country are receiving food assistance. The 1999 cereal import requirement is estimated at 500 000 tonnes, mostly wheat and rice.

GUINEA (3 February)

Following widespread and abundant rainfall during the whole growing season, production estimates for 1999 point to about 900 000 tonnes, which is about average. The overall food supply situation is satisfactory.

The total number of refugees in Guinea is estimated at 614 000, made up of about 414 000 Sierra Leoneans and 200 000 Liberians. They are mainly in the south of the country, putting high pressure on natural and food resources in these areas. The 1999 cereal import requirement is estimated at 410 000 tonnes, mostly wheat and rice.

GUINEA-BISSAU* (22 February)

Resurgence of fighting in the capital on 31 January caused damage to infrastructure and renewed population displacements. Although the food supply situation had improved somewhat following the rice harvest in late 1998, production was lower than the previous year due to insecurity, fighting and adverse weather in some areas. Food distribution has resumed and an estimated 250 000 people are currently in urgent need of assistance, notably in or around the capital, Bissau, and near Cumura, Prabis and Safim.

LIBERIA* (8 February)

An FAO Crop and Food Supply Assessment Mission visited Liberia late last year and found that the overall food situation had improved significantly. The Mission estimated paddy production in 1998 at 210 100 tonnes, up 25 percent on the estimate for 1997 and about 70 percent of the pre-civil strife 1986-90 average. Cassava production is estimated at 313 300 tonnes (fresh weight), which is 96 percent of the pre-crisis average. The increase in production was mainly due to an expansion of area planted and higher yields. In addition, improved varieties of cassava have become more readily available from a number of NGO-supported projects.

In spite of some improvement in the nutritional status of the population, the country continues to rely heavily on humanitarian assistance. Food assistance is being provided to about 1.7 million IDPs and refugees from Sierra Leone. Organized repatriation is underway for about 480 000 Liberian refugees in neighbouring countries. In 1999, Liberia's cereal import requirement is estimated at 155 000 tonnes, of which 105 000 tonnes are expected to be imported commercially.

MALI (15 February)

Seasonably dry conditions prevail. Off-season crops are developing satisfactorily. A joint CILSS/FAO Crop Assessment Mission in October estimated the 1998 cereal production at a record 2.5 million tonnes, 13 percent above average and 3 percent over the 1994 record. Low numbers of Desert Locusts may be present in a few areas of the Adrar des Iforas.

Following this record crop, the food supply situation is satisfactory. Prices of cereals have declined. There is a substantial surplus for local purchase, export or triangular transaction.

MAURITANIA (22 February)

Seasonably dry conditions prevail. Off-season and recession crops are developing satisfactorily. The October/November joint FAO/CILSS Crop Assessment Mission cereal production estimate of 202 600 tonnes has been revised downwards to 164 000 tonnes. This represents a 7.4 percent increase on the previous year but remains below-average. In early January, scattered Desert Locust adults were observed in the south-west in Brakna, east of Aleg. Similarly, adults are expected to be present and persist in a few areas of the north.

The overall food supply situation is satisfactory but localised shortages are likely following reduced crops in some areas. The cereal import requirement (including re-exports) for 1998/99 (November/October) is estimated at 305 000 tonnes and the food aid requirement at 35 000 tonnes.

NIGER (15 February)

Seasonably dry conditions prevail. A joint CILSS/FAO Crop Assessment Mission in October estimated the 1998 aggregate cereal production at a record 3 million tonnes, about 77 percent higher than in 1997 and about 45 percent above the average of the last five years. Some Desert Locusts may be present in a few areas of Tamesna.

The overall food supply situation is satisfactory. Low cereal prices should facilitate local purchases for the reconstitution of the national security stock for which external assistance is required. However, the food supply situation is likely to be tight in some areas which are chronically food deficit, notably in Agadez, Diffa or Tillabery departments.

NIGERIA (8 February)

The official estimate of cereal output in 1998 is put at 22.8 million tonnes, about 4 percent above the 1997 level, due to the favourable growing conditions. Production of roots and tubers, mainly cassava and yams, is estimated at 62 million tonnes, which is well above average.

Food supply is constrained by high levels of post-harvest losses and high distribution costs but is satisfactory. The cereal import requirement for 1999 is estimated at 1 250 000 tonnes, including 1.05 million tonnes of wheat and 150 000 tonnes of rice.

SENEGAL (15 February)

Seasonably dry conditions prevail. A joint FAO/CILSS Crop Assessment Mission in late October estimated the 1998 rainfed cereal production at 976 400 tonnes, about 24 percent above the 1997 reduced harvest but 3 percent below the average of the last five years. With favourable prospects for recession and off-season crops, total cereal production is forecast at slightly over 1 million tonnes.

The overall food supply situation is expected to improve. Markets are well supplied. Prices of rice are generally stable. Prices of millet and sorghum were declining in early February and are much lower than in 1998. However, some localized food supply difficulties are likely for vulnerable populations affected by successive poor harvests, notably in the centre and the north. The cereal import requirement for the 1998/99 marketing year (November/October) is estimated at about 800 000 tonnes, mainly rice and wheat.

SIERRA LEONE* (9 February)

The food supply situation remains critical in Freetown, following recent escalation of violence. Some 117 000 internally displaced persons (IDPs) have been registered at six locations in western Freetown and limited food distributions are underway. Severe food and fuel shortages are reported and most traders and importers have left Freetown. Aid agencies' warehouses in Freetown have been looted and humanitarian aid distributions remain very limited. If insecurity continues, most scheduled rehabilitation activities, including seed and tool distribution and technical assistance, will be delayed or remain limited. As a result, agricultural production in the coming season, starting in May, is likely to be reduced.

Fighting in the east, notably in Bo, Kenema, Koidu and Makeni in late 1998 and early 1999 has severely disrupted food distribution in these areas and caused large population displacements. UNHCR estimates that there are currently around 350 000 internally displaced people in the country, most of them in Kenema, Bo (the second city of Sierra Leone) and in the western border area of Kambia. Pockets of acute food shortage are located in these areas where insecurity prevents humanitarian activities.

Despite favourable conditions, the area planted in 1998 is estimated to have been substantially lower than in 1997 due to insecurity, and estimates point to a cereal output of about 400 000 tonnes, which is 20 percent lower. Sierra Leone's cereal import requirement for 1999 is estimated at about 290 000 tonnes, including 140 000 tonnes of food aid.

TOGO (8 February)

Following late and inadequate rainfall, cereal output in 1998 point to about 590 000 tonnes, about 15 percent below last year's record. Roots and tubers production, which is less sensitive to dry periods, recorded a 5 percent increase over last year's level, reaching 1.29 million tonnes.

The food supply situation is satisfactory. Food prices are decreasing following the start of the harvesting period. The cereal import requirement (including re-exports) for 1999 (January/December) is estimated at 115 000 tonnes.

CENTRAL AFRICA

CAMEROON (15 February)

The 1998 cereal output is estimated to be about average. Food prices decreased following the harvest and the food supply situation is satisfactory. Food supply difficulties are likely in northern areas. A WFP Emergency Operation provided 6 000 tonnes of relief food for 210 000 people in the extreme north in 1998. A new WFP operation is under preparation for the distribution of 9 500 tonnes of food to 660 000 persons for six months.

CENTRAL AFRICAN REPUBLIC (15 February)

Reflecting generally abundant and widespread rains, a good cereal crop has been gathered in late 1998. The food supply situation is satisfactory. For the 1999 marketing year (January/December), the cereal import requirement will remain close to 1998 level of 40 000 tonnes, mainly wheat. About 4 400 Congolese refugees are relocated to a new camp in Boubou area.

CONGO, DEMOCRATIC REPUBLIC OF* (22 February)

Increased population displacement by armed conflict is reported in Goma region in eastern DRC. A UN mission visited areas under RCD control to explore possibilities of emergency assistance to the displaced populations in the rebel-held areas. The assistance will consist of the distribution of seeds, agricultural implements and foodstuffs. In Kinshasa, the nutritional situation continues to deteriorate. Prices of basic food commodities increased sharply. Many of the agriculture areas that supply Kinshasa remain cut off, restricting many households' access to food. In addition, the transport of some food supplies from Kinshasa to Brazzaville reduced food availability. A recent survey of families on the outskirts of Kinshasa indicated that 90 percent of daily household expenditure goes on food.

The food supply situation remains tight in Lubumbashi, where flooding last year destroyed up to 70 percent of crops and where a large number of displaced people from the Kalemie, Nyunzu and Nyemba areas are reported. In the provinces of Bas Congo, Bandundu and Katanga, tens of thousands of refugees are reported coming from the Pool region in the Republic of Congo or from northern Angola, which has been affected by renewed fighting.

CONGO, REP OF (15 February)

The food supply situation in Brazzaville has deteriorated significantly following an upsurge of fighting which caused new population displacement in the capital, notably from the two southern districts of Bacongo and Makelekele. In 1997, civil strife severely disrupted food marketing and caused large-scale displacement of the urban population. Food prices have increased sharply. Some 31 000 displaced people are totally dependent on humanitarian aid, living in several camps in the northern part of the city. Food and medical supplies are only sufficient until the end of February. Fighting also erupted in the Pool region in the south of the country, where there is a serious need for humanitarian assistance for displaced people. About 21 000 people fled the region to seek refuge in the province of Bas-Congo in DRC, while about 20 000 refugees are also reported in Pointe Noire

EQUATORIAL GUINEA (29 January)

In addition to the staple foodcrops of sweet potatoes, cassava and plantains, the annual cereal import requirement is some 10 000 tonnes. Food aid requirement in 1999 (January/December) is estimated at 2 000 tonnes of wheat and rice.

GABON (29 January)

The main 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, estimated at around 85 000 tonnes in 1999, all of which is brought in commercially.

**EASTERN
AFRICA**

BURUNDI* (5 February)

Harvesting of the 1999 A season crops has been completed and a reduced output is estimated, reflecting late and insufficient rains during the growing season. An FAO/WFP/Government of Burundi crop assessment in the second half of December estimated food production from the season at 1.1 million tonnes, 3 percent below the 1998 A season output and 23 percent below the pre-crisis average. Output of beans, estimated at 75 000 tonnes, is 14 percent below last year, while cereals declined 5 percent to 85 000 tonnes. Production of roots and tubers and bananas and plantains decreased by 2 percent and 3 percent respectively.

Violent incidents and insecurity persist in several regions of the country. Approximately 550 000 people are still living in displacement camps. Food assistance for some 300 000 most vulnerable people for 1999 is estimated at 50 000 tonnes of food.

The suspension of the 1996 trade embargo in December 1998 is expected to increase economic and trade activities in the country.

ERITREA* (5 February)

A satisfactory 1998 main season cereal crop is estimated, as a result of abundant and well distributed rains during the growing season. However, due to dry weather in November and December in the coastal areas, where the sorghum crop is about to be harvested, the outlook is uncertain.

While the overall food supply situation has improved with the arrival of the new harvest on the market, the situation continues to be difficult for the families displaced by the conflict with neighbouring Ethiopia. A recent Government assessment indicates that during 1999, some 450 000 people will need food assistance, including 100 000 internally displaced persons and 60 000 expelled from Ethiopia, hosting families of returnees/displaced as well as those affected by the economic disruption caused by the war. The Government has appealed for international food aid to assist this population.

ETHIOPIA* (5 February)

An FAO/WFP Crop and Food Supply Assessment Mission which visited the country in late 1998 estimated cereal and pulse production from the 1998 Meher season at 11.69 million tonnes, 36 percent up on last year but slightly less than the record crop of 1996. The increase is due to favourable rains, increased use of fertilizer and improved seeds, and a low incidence of pests and diseases.

The improved availability of cereals has resulted in falling grain prices in most markets. Only minimal imports, mainly rice, will be necessary in 1999. Given this favourable outturn, there should be scope for a significant build-up of stocks at all levels. Export possibilities to neighbouring countries will be restricted because of weak import demand and the closed border with Eritrea.

Despite the excellent harvest, some 2 million people will require an estimated 180 000 tonnes of food aid, excluding those from pastoral areas and some 395 000 internally displaced persons affected by the on-going conflict with neighbouring Eritrea. Due to ample domestic supplies, imported food aid is not needed this year. However, donors are strongly urged to support local purchases to provide some strength to the market.

In pastoral southern and eastern parts, dry weather has resulted in a deterioration of pastures and the condition of animals. Distribution of emergency water is underway in some areas. The Government is currently undertaking an assessment of the situation.

KENYA (3 February)

Prospects for the "short rains" maize and beans crops, being harvested, are unfavourable. Late and insufficient rains resulted in reductions in plantings and negatively affected yields. Production forecasts have been revised downwards from 400 000 tonnes to 100 000 tonnes. Although the short rains maize accounts for only 15 percent of the national production, it is the main crop in Eastern and parts of Central Province. Despite an overall satisfactory food supply, severe food shortages are already being reported, particularly from the marginal lower parts of Kiambu, Kirinyaga, Maragua Thika, and Nyeri districts. The dry weather has also resulted in the deterioration of pastures and shortage of water supplies for livestock. Food aid is needed for the affected population.

The output of the 1998 main "long rains" cereal crop was significantly higher than in 1997, mainly reflecting abundant and well distributed rains in the main producing area of the Rift Valley. Maize, the main staple, has been estimated at an above average level of 2.34 million tonnes. Assuming a reduced "short rains" crop of 100 000 tonnes, the aggregate 1998/99 maize production is projected at 2.44 million tonnes. At this level, import requirements for marketing year 1998/99 (October/September) are estimated at 430 000 tonnes, substantially below the previous year when imports reached very high levels.

Reflecting the good "long rains" maize crop and large carryover stocks from last year, prices have declined sharply in recent months to a level of around US\$80 per tonne. In order to support prices the Government has announced the buying of 270 000 tonnes of maize for food aid distribution to the population affected by a poor "short rains" harvest and building up its Strategic Reserves.

RWANDA* (5 February)

Harvest of the 1999 A season crop is complete and preliminary estimates indicate a 15 percent decline compared to last year. Late and poorly distributed rains resulted in a reduction in planting and yields. Most affected crops are beans and cereals, while roots and tubers were less affected by the dry weather.

In the northwestern prefectures, affected by persistent civil strife, an improvement in the security conditions in recent months has led to a decline in the number of displaced persons. By early January, official estimates indicated 505 000 displaced persons in Gisenyi and Ruhengeri Prefectures. International food assistance is currently being provided to the most affected people.

SOMALIA* (3 February)

By all indications, the 1998/99 harvest of the secondary "Deyr" cereal crops, now underway, is poor. Late and below-average rains from October to December resulted in reduced plantings and yields. Insufficient rainfall has also caused the deterioration of pastures and water supplies for livestock and humans. Although "Deyr" crops normally account for only 20 percent of annual cereal production, this "Deyr" crop follows on from the failure of the 1998 main "Gu" cereal crop, which was only one-quarter of the level pre-war.

The already difficult food supply situation is anticipated to deteriorate in the coming months, with an estimated 1 million people at risk of food shortages and 400 000 most at risk. Prices of cereals have increased sharply in recent months and are well beyond the reach of the majority of the population. Coping mechanisms are becoming exhausted after five consecutive reduced harvests and the ban of livestock imports from Somalia by Saudi Arabia. Population movements, particularly from the worst affected Bay and Bakol regions, in search of food and water, are on the increase. The situation has been aggravated by renewed fighting in many areas. Current estimates indicate that some 30 000 people have been displaced by hunger and insecurity.

Following the sharply reduced 1998 "Gu" crop, FAO projected the aggregate cereal deficit at 340 000 tonnes. This estimate was based on an optimistic assumption of normal rains during the "Deyr" season. However, with the final production estimates for the Northwest region and a forecast "Deyr" crop of only 75 000 tonnes, the cereal deficit has been revised up to 400 000 tonnes. Of this, some 245 000 tonnes are projected to be met by commercial imports, leaving an overall food aid requirement of 155 000 tonnes. However, insecurity in many areas of the country prevents access to needy people. Emergency food aid requirements for the 400 000 most vulnerable people in rural areas of southern Somalia (or some 7 percent of the population) are estimated at 11 000 tonnes for the period January-March.

With six consecutive reduced harvests, there is also urgent need for seeds for planting in the next season from April. It is estimated that approximately 1 500 tonnes of sorghum seed would be required for some 75 000 most vulnerable households.

SUDAN* (5 February)

An FAO/WFP Crop and Food Supply Assessment Mission which visited the country in November/December 1998, estimated record coarse grain production following adequate and well-distributed rains, timely availability of agricultural inputs and minimal damage by pests and diseases. Millet production is estimated at 1 million tonnes, almost twice the previous year's level, and sorghum at 4.5 million tonnes, 60 percent above the below average crop of 1997. By contrast, prospects for the 1999 wheat crop, to be harvested in March, are unfavourable reflecting a decline in the area planted.

Sorghum market prices have fallen below production costs in main producing areas, due to large cereal supplies. This may depress area planted next year. Sorghum exports are no longer banned and export availabilities are estimated at 640 000 tonnes.

Despite the satisfactory food supply situation in the north, some 2.36 million people in the south will need emergency food assistance due to on-going civil conflict. In the north, vulnerable groups including internally displaced people and needy communities in specific localities will need food aid especially during the lean period (April-October) in 1999. Emergency food aid needs of war-affected and food-deficit regions are in the order of 173 000 tonnes, including 130 000 tonnes of cereals. In view of the ample domestic availability, local purchases for food aid are highly recommended in order to support markets.

The serious nutritional situation in southern Sudan, particularly in Bahr El-Ghazal, where famine conditions were experienced last year, has improved in the past months with increased food aid distributions.

TANZANIA (15 February)

An FAO/WFP Crop and Food Supply Assessment Mission in early January 1999 found that as a result of reduced rainfall, planted area and yields fell sharply and overall Vuli maize production will be significantly below normal. The worst affected regions were the Coast and the lowlands of Arusha, Morogoro and Kilimanjaro where rainfall was less than 25 percent of normal.

In addition, domestic maize supplies for the 1998/99 marketing year (June/May) were reduced by higher than anticipated storage losses, due to a combination of ineffective pesticide use, generally poor storage facilities and high levels of grain borer infestation. Supplies may also have been reduced by increased unofficial cross border trade in maize to Zambia, in response to higher prices. In addition to supply constraints, there was increased demand for maize this year in regions like Dodoma and Singida, where the principal sorghum and millet crops failed almost totally last year. The sudden rise in maize prices in late October/early November over a relatively short period, suggests that in addition to developing shortages, which would have had a more gradual impact on price, there was a considerable degree of hoarding.

Although the availability and price of maize have given cause for concern, there is satisfactory supply of food, other than sorghum and millet, in the main producing areas at reasonable prices. This is due to the favourable production of rice, banana and tuber crops last main season. Rice, however, still remains beyond the reach of poorer sectors of the population who have limited purchasing power, whilst crops like cassava and banana are only available in main producing areas as they are not easily transported to food deficit areas over long distances.

The Mission estimated the 1999 Vuli maize production at 228 000 tonnes, some 60 percent lower than last year and 40 percent below the long term average. For the remaining four months of the current marketing year, the Mission estimated that the country has an import requirement of 561 000 tonnes of maize, of which already contracted commercial imports amount to 75 000 tonnes and food aid in the pipeline to 3 000 tonnes. This leaves the country with an uncovered import requirement of 483 000 tonnes, of which 20 000 will be requested as further food assistance through WFP. In the meantime the Government has released 10 000 tonnes through the SGR for relief assistance. Although the aggregate deficit in maize remains sizeable, it is recognized that considerable substitution by other food crops will reduce overall requirements for maize. The commercial sector may also increase the volume of imports, in view of the lifting of the import duty on maize and providing domestic prices in relation to international prices remain high.

The shortfall in current Vuli production and successive poor harvests in parts of the country have significantly increased the number of people that are vulnerable to food shortages, now estimated at 1 million.

UGANDA (8 February)

Harvesting of the 1998 second season crop is complete. Maize production is estimated to be about 57 percent of normal levels due to insufficient rains. By contrast, production of other important foodcrops such as bananas and roots and tubers, more resistant to dry conditions, is estimated to be normal.

The areas most affected by a reduced harvest are the eastern and central regions, and the Lake Victoria Basin. Severe food shortages are reported in Kifamba sub-county of Rakai

District following a succession of poor crops. In the northern districts of Gulu and Kitgum, affected by civil strife, renewed fighting has resulted in a deterioration of the security conditions. International food assistance continues to be provided to some 400 000 displaced persons in these areas.

SOUTHERN AFRICA

ANGOLA* (19 February)

The 1998/99 rainy season has been favourable for crops so far, with widespread rain over most regions since October. However, planted area is expected to be considerably reduced this year as a result of insecurity in many areas following renewed civil strife since December. Intense fighting is reported in major cereal growing areas of the centre (Bie and Huambo) extending to the north and east. As a consequence, many farmers have abandoned land to join the rapidly increasing number of displaced people or refugees to neighbouring countries.

The food supply outlook in the country has become increasingly bleak. The number of internally displaced in need of urgent assistance is now estimated at over 500 000 people, largely concentrated in the provinces of Huambo, Bie, Malanje, Huila and Uige. Given the serious deterioration in security conditions necessitating delivery of food and other supplies by air, the cost of transport, logistic and insurance are expected to be drastically higher. There is therefore, an urgent need to ensure that adequate humanitarian assistance is provided to the affected population, including the strengthening of the resource capacity of humanitarian institutions. Food aid pledges at the end of January amounted to about 125 000 tonnes, of which 115 000 tonnes have been delivered so far.

BOTSWANA (5 February)

The rainy season has so far been favourable to crops. However, more rains are needed. Pastures have recovered substantially, which should improve the quality of livestock.

The national food supply situation is generally satisfactory as domestic cereal availability and planned imports should adequately cover current needs.

LESOTHO (5 February)

Rainfall has been abundant and widespread since October and cumulative levels at the end of January range from normal to above normal. Crops are reported in good condition. Maize in the mountains and foothills is at flowering stage while it is at vegetative stages in the lowlands.

The national food supply situation is generally stable. Cereal import requirements of some 188 000 tonnes are expected to be met largely through commercial channels. The Government, through its Drought Relief Programme of the Disaster Management Authority, plans to provide assistance to 400 000 beneficiaries, with donor assistance.

MADAGASCAR (8 February)

Rainfall has been favourable so far for the 1998/99 crops. Abundant rains have been received since October, starting along the eastern coast and expanding north-eastward in November, gradually covering most crop growing areas. Thunderstorms in the Mozambique Channel, which developed into Tropical Storm Alda in mid-January, missed southern Madagascar but brought abundant rains to many areas, particularly the Southwest. This also provided welcome relief to many southern areas where planting had been delayed for lack of rains. Overall, crops are reported in good vegetative condition in most growing areas.

The overall food supply situation in the country in the 1998/99 marketing year remains relatively stable. In the drought-prone south, markets are supplied with rice from other parts of the country. Relief assistance continues to be provided to vulnerable population groups.

MALAWI (8 February)

Widespread rainfall has continued over the southern and central parts of the country since November, providing favourable conditions for crop development. In the north, planting rains were received only in January in some areas. As a result, the outcome of harvest will depend largely on the continuation of good rains during the next two to three months.

Following a good harvest in 1998/99, the food supply situation has improved significantly. Markets are supplied by local maize but also by imports primarily from Zimbabwe and South Africa. Government assistance continues to be provided to vulnerable populations groups, victims of drought or floods.

MOZAMBIQUE (8 February)

Conditions have so far been generally favourable for crop development in the south and the centre where rainfall has been abundant since October. The wet conditions resulted in flooding in several areas, especially in Gaza and Sofala provinces, causing localized damage to crops in low lying areas. However, dry conditions prevailed until December in northern and north-eastern provinces (Cabo Delgado, Nampula and Niassa Provinces), where the season normally starts later than the rest of the country. In late January, several areas in the north were still recording less than 50 percent of their normal rainfall. In these cereal surplus producing areas, prospects for a good 1999 harvest are still favourable, provided sustained and widespread rains are received in the next few weeks.

The national food security situation for the 1998/99 marketing year is generally satisfactory. As a result of a steady increase in food production during the past several years, the country is now self-sufficient in maize, with exportable surpluses available for deficit countries in the sub-region. The import requirement in rice and wheat, estimated at 67 000 tonnes and 145 000 tonnes, respectively, will be met through private channels.

NAMIBIA (8 February)

The 1998/99 growing season started in late November and early December with widespread rains over the north-eastern part of the country, gradually moving south and other parts of the country. Planting continues in some areas. Additional rainfall is needed for the remainder of the season for crops to achieve normal development.

The national food supply situation in the current marketing year continues to be tight as a result of the drought-reduced 1998 cereal harvest of 59 000 tonnes. As this was only one-third of the previous year's output, the cereal import requirement was estimated at 155 000 tonnes for 1998/99 (May/April), mostly through commercial channels.

SOUTH AFRICA (5 February)

Heavy rains through January raised concerns that yields in some areas might be reduced due to water-logging. Preliminary official estimates of plantings indicate a reduction of area sown to maize to 2.8 million hectares from 3.0 million hectares last year, the lowest level in decades. Part of the explanation appears to be that farmers are switching to more lucrative crops such as sunflowers that showed a 48 percent increase in plantings to 0.8 million hectares. Some producers also shifted to planting groundnuts or left fields fallow.

The official estimate of the 1998/99 winter wheat crop currently stands at 1.47 million tonnes, 36 percent below the 1997/98 level and below average, a response to low international and domestic prices. Aggregate cereal output in 1998 stands at 9.6 million tonnes, some 20 percent lower than the

previous year's above-average crop. Despite the decrease in production, the total cereal availability has enabled the country to have an exportable surplus due to large carryover stocks.

SWAZILAND (8 February)

Conditions for crops, now at the vegetative stage, have been favourable so far. The 1998/99 growing season started early with light to moderate rains falling over most of the country in October. Rainfall in November and December was abundant and cumulative levels by January ranged from normal to above normal in most areas.

The food supply situation is expected to remain satisfactory until the end of the 1998/99 marketing year in April, due to adequate domestic availability of cereals and planned commercial imports, mainly wheat and rice.

ZAMBIA (8 February)

Abundant rains in December and January, particularly in the central part of the country, enabled farmers to put more land into cultivation. Planting is now completed in most part of the country. Initial indications are that the area under coarse grains will be much higher than last year's level. After the drought and flood reduced harvest of 1997/98, early prospects for the 1998/99 cereal crops are favourable.

The food supply situation for the current marketing year continues to be tight. To meet its domestic food shortfall, the country has been importing maize, largely from countries in the sub-region, including Mozambique, South Africa and Zimbabwe. Relief food assistance continues to be needed for vulnerable groups and those affected by drought. Food aid pledges by donors amount to 25 500 tonnes, of which 12 000 tonnes have been delivered.

ZIMBABWE* (8 February)

Rainfall has been abundant and widespread since October, becoming heavy in many areas in December and part of January, raising cumulative rainfall to over 100 percent of normal levels in most areas. This has raised concerns that crops in low-lying areas could suffer yield losses from water-logging and leaching of fertilizers. Crop conditions are reported to be generally good in most areas and harvest prospects are favourable so far.

The national food supply situation is generally stable. Available supply of cereals and planned imports are expected to cover needs until the beginning of the new harvest in April. Government relief assistance continues to be provided to vulnerable groups in food deficit regions.

ASIA

AFGHANISTAN* (1 February)

Production of wheat and barley, for harvest from June, is expected to be constrained by shortage of agricultural inputs and persistent insecurity in the provinces of the north, which include some 40 percent of the country's irrigated cereal area. Despite increased output in recent years, domestic availability of cereals still lag well behind demand. Due to favourable weather, production of cereals in 1998 is estimated at 3.9 million tonnes, 5 percent higher than the previous year and the highest since 1978.

Imports of cereals in 1998/99 are forecast at 740 000 tonnes, some 6 percent higher than the previous year.

BANGLADESH (10 February)

The 1998/99 paddy production is estimated at 26.3 million tonnes, about 2 million tonnes below last year, reflecting the severe damage caused by the floods that affected most of the country during July to September. The production forecast for the 'boro' rice crop, to be harvested in May/June has been set at 8.4 million tonnes, against the previous year's harvest of 8.1 million tonnes.

The outlook for the wheat crop, to be harvested in March-April is favourable; the production forecast is set at 1.98 million tonnes, against the previous year's crop of 1.8 million tonnes. As of end-December 1998, the government-held cereal stocks were estimated at 361 000 tonnes. Current projections indicate that the country will import some 1.1 million tonnes of rice and 2.4 million tonnes of wheat.

CAMBODIA (10 February)

An FAO/WFP Crop and Food Supply Assessment Mission, which visited the country in January, estimated the 1998/99 main, wet season paddy, at 2.88 million tonnes. The output for the second, dry season irrigated crop, to be harvested in March, is put at 0.64 million tonnes, giving a total paddy production of 3.52 million tonnes. At this level, despite the drought during May to September, scattered pest infestation and some flooding, aggregate output would be about 3 percent above 1997/98 production and 19 percent higher than the average for the previous five years. Maize output is also expected to increase due to increase in planted area.

CHINA (8 February)

1998/99 grain output is officially expected to reach 490 million tonnes, despite devastating floods last summer. Paddy output is estimated at 191 million tonnes, 9 million tonnes below last year's record largely due to the floods in key producing areas.

Production of the 1998 winter wheat crop, to be harvested from April, is reported to have been affected by drought, plant disease and insects, but the final outcome is uncertain.

CYPRUS (1 February)

Sowing of the 1998/99 wheat and barley crops for harvest from May has been completed under generally favourable weather. The aggregate area sown is reported unchanged from previous year, at about 60 000 hectares. Production of barley in 1998 has been revised to 53 000 tonnes, an increase of 47 percent compared to the markedly below-average harvest in previous year.

Imports of cereals in 1998/99 (May/April), mainly wheat and barley are forecast at the previous years' level of some 600 000 tonnes.

INDIA (10 February)

The overall outlook for the "rabi" grains (mainly wheat), to be harvested in April/May 1999, remains favourable. For the 1998/99 "rabi" season starting 1 October 1998, cumulative rainfall as of 27 January 1999 was below normal in one (out of 35) sub-divisions, accounting for less than one

percent of the "rabi" grain production. This compares with 10 sub-divisions accounting for 10 percent of "rabi" grain production with below-normal rainfall at the same time in 1997/98.

Heavy rains and floods late last year damaged the "kharif" rice crop in a number of major southern parts of the country. Accordingly, paddy production in 1998/99 is estimated at about 121.6 million tonnes, nearly 2 percent below the 1997/98 record output.

According to latest official reports, the Government wheat and rice stocks as of beginning-October 1998, were estimated at 15.2 million and 8.9 million tonnes, compared to a buffer requirement of 11.6 million and 6.5 million tonnes respectively.

INDONESIA* (10 February)

The prospect for the 1999 main rice crop, for harvest in March/April, is favourable reflecting increased area and adequate moisture. The Government's target for paddy production in 1999 is set at 52 million tonnes, about 7 percent above the average for the last five years.

The 1998 total paddy output is officially estimated at 46.4 million tonnes, about 3 million tonnes below the 1997 estimate. The decline is due to a combination of El Niño-related drought, lower planted area, and a shortage of inputs, including fertilizers and pesticides. However, a record maize harvest of 9.8 million tonnes, about 24 percent above average, is reported.

In the aftermath of the financial crisis in Asia, Indonesia has experienced a succession of economic shocks, which have resulted in a sharp depreciation in the currency, rapid inflation and a dramatic increase in the number of people unemployed. This, together with drought in 1997/98 had serious impact on domestic food production and food security. The dramatic pace at which events evolved, also meant that there were limited opportunities for adequate coping mechanisms to develop, at both the national and household levels. Although the anticipated recovery in rice production in 1998/99 will help improve the overall food situation considerably, large numbers of people continue to need assistance to help cushion the effects of economic slowdown. This includes continued food to families hardest hit by unemployment and assistance with the provision of essential agricultural inputs (seeds, fertilizers and pesticides) to farmers to maintain production. Following reduced food production last year and the economic problems, some 1.27 million tonnes of food assistance were pledged to the country mostly through bilateral channels. So far an estimated 460 000 tonnes has been delivered.

IRAN, ISLAMIC REPUBLIC OF (10 February)

Despite recent beneficial rainfall, record low autumn rainfall have affected crops in most of the country including primary winter wheat growing regions in the north-west and north-east of the country. The 1998 paddy output is estimated at 2.9 million tonnes, slightly above the 1997 output. Maize production in 1998 is forecast at 807 000 tonnes, some 93 000 tonnes below the previous year's record, but about 41 percent above average.

IRAQ* (17 January)

Reflecting below-average rainfall and higher than normal temperature, the prospects for the 1999 winter grain crops are unfavourable, particularly in the northern areas where most of the crops are not irrigated. Moreover, cereal production may be affected by serious shortages of fertilizers, spare parts for agricultural machinery and other agricultural inputs. Production of cereals (mainly wheat and barley) in 1998 is estimated at 2.5 million tonnes, some 12 percent higher than the drought-affected harvest of previous year but 10 percent below average. Shortage of essential inputs in the last several years is also reflected in the poor output of milk and milk products and in the virtual collapse of the poultry industry.

Despite some improvement in the overall food supply position, following the implementation of the "oil for food" deal, malnutrition still remains a serious problem throughout the country and will persist unless the requirements for the economic rehabilitation and development of the whole country are met.

ISRAEL (8 February)

The early prospects for the 1999 wheat and barley crops, to be harvested from April are favourable so far, reflecting overall normal weather conditions. Domestic production of wheat in normal years covers less than one-fifth of total requirement, the rest being imported by private mill owners under import licenses. Aggregate production of wheat and barley in 1998 is estimated at 175 000 tonnes, an increase of some 19 percent compared with the below-average crop harvested in the previous year and above average. Imports of cereals in 1998/99 (July/June) are forecast to increase by about 10 percent to 2.7 million tonnes.

JAPAN (10 February)

Paddy output in 1998, estimated at 11.2 million tonnes, is about 10 percent and 12 percent below 1997 and the average for the preceding five years. Main reasons for the decline are a combination of lower area and floods last summer.

JORDAN (8 February)

The prospects for the 1999 wheat and barley crops are poor due to drought. Pasture conditions were also affected.

Aggregate production of wheat and barley in 1998 is estimated at 75 000 tonnes, slightly higher than the previous year. Domestic cereal production normally meets only a small proportion of consumption requirements the rest being covered by imports. Imports of wheat in 1998/99 (July/June) are forecast at 800 000 tonnes, about 100 000 tonnes higher than last year. Rice imports are forecast at 90 000 tonnes, unchanged from the previous year. Coarse grain imports are forecast at 1.2 million tonnes, same as in 1997/98.

In view of the unfavourable outlook for the 1999 crop production, the food supply situation needs to be closely monitored.

KOREA, REPUBLIC OF (10 February)

The aggregate production of cereals in 1998 is estimated at 7.4 million tonnes compared with some 7.9 million tonnes harvested in 1997. This decline is mainly attributed to the decline paddy output to 7 million tonnes from last year's 7.5 million tonnes, mainly due heavy rains and floods in the summer.

KOREA, DEMOCRATIC PEOPLE'S REPUBLIC OF* (8 February)

Total paddy output in 1998 is estimated at about 2.1 million tonnes, up 23 percent on 1.7 million tonnes in 1997 but about 18 percent below the average for the previous five years. Maize output in 1998 is estimated at 1.8 million tonnes, a recovery from the 1997 record low output, but still about 11 percent below average. Despite the improved harvest, import of some 1.35 million tonnes of food grain will be needed in the current marketing year, including 1.05 million tonnes as food assistance.

In spite of some recovery in domestic food production last year, the overall food situation in the country continues to remain fragile. Much will depend on the run-up to the next agricultural season beginning in May. In the short term, food assistance to the most vulnerable sectors of the population will continue to be important. In this regard, since November 1998, some 80 000 tonnes of food aid has been pledged to the country of which

around 73 000 tonnes have been delivered. In the longer term the country has to find ways of increasing agricultural production sustainably. For the current year, further donor pledges are requested for the Double Cropping and Crop Diversification Programme, outlined in the UN Consolidated Appeal for 1999. As part of this appeal FAO has so far received US \$2.1 million, which will be used to purchase 3 000 tonnes of barley seed and fertilizer. In the longer term, donor assistance is encouraged for the UNDP sponsored Agricultural Recovery and Environmental Protection Programme, which aims to increase domestic food production to 6 million tonnes by the year 2003.

LAOS* (23 February)

Following reports of unfavourable food prospects, an FAO/WFP Mission visited the country in January/February to review the crop and food supply situation. Despite localized dry spells and a sharp reduction in rice planting in the upland, the mission estimated 1998/99 rice production at 1.77 million tonnes, some 21 percent above average for the previous five years and moderately higher than last year. Increased production is mainly attributed to unusually low levels of flood damage and major expansion in the irrigated area under off-season paddy.

In view of favourable domestic production, commercial imports are expected to be negligible. Notwithstanding late season damage to the off-season crop, average food prices are unlikely to stable. Amongst vulnerable sectors of the population, however, the mission noted that project food aid is needed to support well targeted project interventions in areas affected by reduced rice production in 1998/99. Such interventions would help to avert asset depletion. Based on available data, the number of people affected are tentatively estimated at 251 000 who will need assistance for an average duration of 4 months. This implies food aid requirement of 12 000 tonnes, part of which may be procured locally.

LEBANON (4 February)

The sowing of the wheat and barley crops, due for harvest from June, was completed under generally favourable weather. Production of cereals in 1998 is estimated at 67 000 tonnes which is about average.

Imports of cereals, mainly wheat, in 1998/99 (July/June) are forecast at some 0.7 million tonnes, similar to previous year.

MALAYSIA (10 February)

Paddy production in 1998 is estimated at 2 million tonnes, about 100 000 tonnes below the previous year and about 5 percent below average. Drought is reported to have affected rice yields in 15 percent of the country's eight provinces in 1998.

MONGOLIA* (10 February)

Wheat production in 1998 is estimated at 192 000 tonnes, about 19 percent below 1997 and 34 percent below the average for the preceding five years due to reduced planting and snow damage.

In the aftermath of the break-up of state farms and the transition of the economy from one which was centrally planned to one which has been liberalized, domestic food production has declined (as input use has fallen), whilst the number of people (especially children) with nutritional problems has increased. In view of this, the country needs assistance in agricultural rehabilitation and in feeding vulnerable sectors of society. In response, donors this year have provided 48 000 tonnes of wheat seed, whilst a further 60 000 tonnes of food aid have been pledged, of which an estimated 21 400 tonnes have been delivered.

MYANMAR (10 February)

The output of paddy in 1998 is estimated at 17 million tonnes, similar to the previous year and around average.

NEPAL (10 February)

The aggregate cereal output in 1998 is estimated at a reduced 5.9 million tonnes, some 300 000 tonnes below the previous year's harvest and about average, mainly due to heavy monsoon rains and floods.

PAKISTAN (10 February)

Early prospects for the wheat crop, for harvest in April/May, have improved with the arrival of rains in January after earlier dry conditions. Official reports indicate that the 1999 wheat output target of 19 million tonnes, which is just above the previous year's crop of 18.7 million tonnes could still be achieved.

Current estimates for paddy production indicate a record 7 million tonnes, 500 000 tonnes above 1997, and 16 percent above average. The increase is attributed to favourable growing conditions and a slight increase in planted area.

PHILIPPINES (10 February)

Since early February floods and landslides due to torrential rains damaged rice and maize in southern Mindanao. Many people have been killed and more than 110 000 households were displaced. The forecast for paddy production in 1998/99 is put at 10.2 million tonnes, slightly above the previous year's drought-reduced harvest, but about 3 percent below the average for the previous five years. Overall maize production is also expected to drop by about 500 000 tonnes compared with 1997/98.

SAUDI ARABIA (8 February)

Growing conditions for the wheat and barley crops due for harvest from April are favourable. Imports of coarse grains (mainly barley and maize) in 1998/99 (July/June) are forecast to increase by some 300 000 tonnes to 6.2 million tonnes.

In 1998, for the first time in twenty years private importers were allowed to import barley. Previously barley imports could be made exclusively by the state Grain and Flour Mills Organization (GSFMO).

SRI LANKA (10 February)

Planting of the 1999 "Maha", main season, paddy crop is complete, but planted area is reported to be lower than the Government target due to inadequate rainfall in planting period. Rainfall from the north-east monsoon in the period 1 October to 28 January, has been normal to above normal in all eight monitored provinces, similar to last year.

Overall output of paddy in 1998 is estimated at 2.6 million tonnes, about 18 percent higher than the previous year due to area expansion.

SYRIA (8 February)

Reflecting normal weather conditions and adequate availability of agricultural inputs, the prospects for the wheat and barley crops to be harvested from May are favourable. Production of wheat in 1998 is estimated to have increased by about 1 million tonnes to the above-average level of 4.1 million tonnes. Barley output rose by some 8 percent to 0.98 million tonnes but remained sharply below average for the second consecutive year.

Imports of wheat flour and rice in 1998/99 (July/June) are forecast both at 150 000 tonnes, those of maize at 340 000 tonnes, virtually unchanged from previous year.

THAILAND (10 February)

Harvesting of the 1998/99 main paddy crop, which normally accounts for 85-90 percent of the country's annual output, is completed. The output for this crop is expected to increase as strong price incentives motivated producers to expand the rice area. The 1998 maize production is estimated at 4.5 million tonnes, some 700 000 tonnes above the previous year's crop.

Planting of the 1998 irrigation-dependent secondary rice crop has started and early prospects are unfavourable due to expected water shortages. Recent unusual rains were welcomed by farmers in northern provinces. Officials have advised farmers to reduce the second-season rice area.

TURKEY (2 February)

Following normal weather conditions, the early prospects for the 1999 wheat and barley crops are favourable. Production of wheat in 1998, estimated at 21 million tonnes, the best in five years, was 12 percent higher than in 1997 and allowed the country to become again a net wheat exporter. Output of coarse grains (mostly barley and maize) increased by about 170 000 tonnes to 10.9 million tonnes. Paddy production rose by 27 percent to 330 000 tonnes. Wheat imports in 1998/99 (July/June) are forecast at 0.8 million tonnes compared with 1.4 million tonnes estimated for the previous year. Maize imports are forecast to decline by 200 000 tonnes to 650 000 tonnes. Exports of wheat and barley in the year ending June 1999, expected to reach 2.5 million tonnes and 1.2 million tonnes respectively, would be the highest in the last several years.

VIET NAM (10 February)

Aggregate paddy production in 1998 is estimated at 28.4 million tonnes, slightly lower than the previous year but about 8 percent above the average for the preceding five years. Planting of the winter-spring crop is in progress and the Government has targeted a paddy output of 14 million tonnes.

Rice export, which is one of the country's main export earners, reached 3.8 million tonnes in 1998. The export target for 1998 is 3.9 million tonnes.

YEMEN (2 February)

Land preparation for the sowing of the main sorghum and millet crops to be harvested towards the end of the year is about to start. The output from the 1998 sorghum crop is estimated at some 474 000 tonnes, about 32 percent higher than last year as a result of favourable weather and adequate availability of agricultural inputs. Output from the wheat crop increased by about one-third to 167 000 tonnes. Maize production estimated at 62 000 tonnes was 9 000 tonnes more than in 1977. Imports of cereals in 1998 - mainly wheat - are forecast at 2.87 million tonnes, about 6 percent higher than previous year.

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

ANTIGUA AND BARBUDA (22 February)

The country was severely affected by hurricane "Georges" in late September, resulting in extensive damage to housing and to the agricultural and livestock sectors. As a result of the extensive damage, in particular to fruits, roots and vegetable crops, a programme for the

immediate rehabilitation of agricultural activities with the assistance from the international community has been initiated.

COSTA RICA (22 February)

Harvesting of the 1998/99 second season cereal and bean crops is about to be completed. Despite damage caused by hurricane "Mitch" heavy rains and flooding, aggregate 1998/99 maize and paddy outputs are expected to be at average and above-average levels respectively. The bean crop is also expected to be an above-average 25 000 tonnes, a recovery from the 1997/98 El Niño affected crop. By contrast, the important foreign exchange earners sugar and coffee crops suffered the effects of the hurricane. About one-third of the sugar planted areas were affected, while some 5 percent of the anticipated production of coffee in 1999 was lost. Damage to banana, the main foreign exchange earner, was minimal.

Land is being prepared for planting of the 1999 first season maize and paddy crops to be started from April.

CUBA (22 February)

Planting of the winter paddy crop continues while harvesting of the potato crop is about to start under dry conditions. The aggregate 1998/99 paddy output is expected to be below average. Prospects are likely to worsen as the dry season has only started and moisture deficits have accumulated since November in the province of La Habana, parts of the province of Matanzas, the province of Camaguey and most of the eastern provinces which were affected by a prolonged drought in 1998. Harvesting of the 1998/99 sugar cane crop is underway. Despite damage incurred to plantations by hurricane "Georges" in late September, output is officially forecast to increase from last year's 3.2 million tonnes, one of the lowest harvests in 50 years, to 3.6 million tonnes. This level of production is still less than half the output in the 1980s as the sugar cane industry, continues to be affected by shortages of farm inputs, fuel and spare parts.

DOMINICAN REPUBLIC (22 February)

Harvesting of the 1998/99 second season maize and sorghum crops has been recently completed and aggregate coarse grain output for the whole year is provisionally estimated at a below average 56 000 tonnes, reflecting damage caused to the second season crops by hurricane "Georges" in late September. The paddy crop was also affected by the hurricane and subsequently by pests. Output in 1998 (January/December) declined from the previous year's 487 000 tonnes to a slightly below-average 440 000 tonnes. Food assistance is still being provided to hurricane affected farmers.

EL SALVADOR (22 February)

Harvesting of the 1998/99 second season coarse grain and bean crops and planting of the small third season maize and bean crops have been recently completed. Aggregate 1998/99 maize output, the main cereal, is expected to be about 554 000 tonnes, an improvement over last year's El Niño affected crop of only 508 000 tonnes, but significantly lower than an anticipated 682 000 tonnes. This is the result of the damage by hurricane "Mitch" in late October 1998. Below-average sorghum and paddy outputs of 169 000 tonnes and 54 000 tonnes respectively, for the whole year, are expected. Production of beans was also seriously affected. Output is estimated at about 46 500 tonnes from an earlier anticipated output of 68 000 tonnes. Last year's bean output was 67 000 tonnes. Severe damage was inflicted to important foreign exchange earning crops, such as coffee, sugar cane and cotton. Food assistance is still being provided by the international community to the affected population. About 60 000 persons are benefiting from this emergency operation. Programmes for the rehabilitation of agricultural activities and major infrastructure have been initiated.

GUATEMALA (22 February)

Harvesting of the 1998/99 second season cereal and bean crops is about to be completed. Latest official forecasts put aggregate coarse grain production, mostly maize, at a below-average 1.1 million tonnes, mainly due to reduced plantings coupled with the effects of hurricane "Mitch" in late October. This is nevertheless a recovery from last year's El Niño affected crops, when only 920 000 tonnes of coarse grains were harvested. (About 85 percent of the 1998/99 first season maize crop had been collected when the hurricane struck thus losses were minimized). Damage was also inflicted to the paddy and beans crops, particularly to the latter. Noticeable increases in consumer prices for beans were registered in the aftermath of the hurricane, but prices were shortly stabilized mainly as a result of imports from northern neighbouring countries. Major damage to roads and bridges have been repaired thus allowing foreign exchange earning coffee exports to resume. Overall exports for current 1998/99 crop are expected to decline by more than 20 percent compared to 1997/98. Food aid to around 65 000 people continues to be distributed. Programmes for agricultural rehabilitation and reconstruction of major infrastructure have been initiated.

HAITI* (22 February)

Harvesting of the 1998/99 second season cereal crops has been recently completed. Despite damage incurred by hurricane "Georges" in mid-September, particularly to sorghum, aggregate cereal output for the whole year is provisionally estimated at a near average 349 000 tonnes, a recovery from last year's 310 000 tonnes, when the crops were affected by El Niño adverse weather. Food assistance continues from the international community and programmes for the emergency rehabilitation of agricultural activities have been initiated.

Food pledges for 106 000 tonnes in 1998 have been mostly delivered.

Land is being prepared for planting of the 1999/2000 maize crop while sowing of the irrigated paddy crop has only started.

HONDURAS (22 February)

Harvesting of the 1998/99 second season ("postrera") crops are about to be completed following the severe disruption caused by hurricane "Mitch" at the end of October. Aggregate maize output, the main cereal, for the whole year is forecast to be about 411 000 tonnes, which compares to an earlier estimate of 611 000 tonnes and to the 1997/98 crop of 609 000 tonnes. Important losses were also inflicted to basic food staples such as beans and plantains. As a result of the damage, about 336 000 tonnes of maize, 40 000 tonnes of rice, 46 000 tonnes of sorghum and 10 000 tonnes of beans will be required as imports in 1998/99

marketing year (September/August). Wheat imports for some 138 000 tonnes will be also required. Losses for over US\$100 million were sustained by the livestock sector, while the cost to rehabilitate the sector is estimated at some US\$86 million. Damage to major export agricultural products, the main foreign exchange earners, was of enormous proportion. Production losses in 1998 and anticipated losses in production in 1999 are estimated at US\$480 million, while damage to major export products infrastructure has been estimated at US\$210 million. Food assistance from the international community continues to be provided to some 810 000 people, mostly from rural areas. Large scale programmes for the rehabilitation of agricultural activities, as well as major infrastructure, have been initiated.

MEXICO (22 February)

Harvesting of the recently planted 1999 irrigated wheat crop is due to start from April. Despite prevailing dry weather conditions, water reservoir levels are reported to be adequate. Production, nevertheless, is anticipated to increase only slightly from last year's below-average level, the result of a small increase from last year's plantings. Harvesting of the 1998/99 second season coarse grain crops, which were planted during the 1998 spring/summer months, has been completed and aggregate maize output in 1998/99 is provisionally estimated at an average 18.4 million tonnes, despite damage incurred to crops by hurricane "Mitch" in the southwestern parts of the country at the end of October. A well above-average 6.4 million tonnes of sorghum have been gathered.

NICARAGUA (22 February)

Harvesting of the 1998/99 third season "apante" crop has started. Measures have been taken by the Government, in collaboration with the international community, to boost production and thus help recover from the serious losses inflicted by hurricane "Mitch" to the 1998/99 second season maize and bean crops. Assuming success of the "apante" crop, aggregate maize output for the whole year (three crops) is expected to be an average 296 000 tonnes, a recovery from the 1997/98 output of 267 000 tonnes, when the crops were affected by El Niño adverse weather. Production of beans, a basic staple in the population's diet, is anticipated to be about 85 000 tonnes, which compares to 98 000 tonnes estimated before the hurricane. The import requirement due to the damage is estimated at about 50 000 tonnes of maize, 26 000 tonnes of rice and 15 000 tonnes of beans. Wheat imports are estimated at about 102 000 tonnes. The losses of export crops such as bananas, coffee and sugar is estimated at 13 percent of expected gross domestic value. Damage to the livestock sector is estimated at US\$14 million. Food aid continues to be distributed to some 400 000 beneficiaries, while programmes for agricultural rehabilitation have been initiated.

PANAMA (22 February)

Latest available information on damage caused by hurricane "Mitch" to the important coffee crop, particularly in the western parts of the country, indicates that losses incurred represent about 20 percent of the 1998/99 anticipated production. Losses include direct damage to plantations plus reduced yields currently being obtained. It is reported that the heavy rainfall has also resulted in the outburst of fungus in some locations which could extend and threaten the crop in the next few years.

ST. KITTS AND NEVIS (2 February)

The country suffered the impact of hurricane "Georges" in late September. Severe damage was inflicted to housing and infrastructure, as well as to the agricultural, fishery and livestock sectors. As a result of the extensive damage to crops, particularly bananas, sugar (the main source of employment in the country) and minor food crops such as fruits and vegetables, a programme for the rehabilitation of agricultural activities with the assistance of the international community has been initiated.

SOUTH AMERICA

ARGENTINA (2 February)

Harvesting of the 1998/99 wheat crop has been completed and output collected is officially estimated at a below-average 10.6 million tonnes, about 28 percent down from last year's 14.8 million tonnes. This mainly reflects the extremely dry weather in the key growing areas that has prevailed throughout the growing season with adverse consequence on yields. By contrast, normal rains since mid-January have improved growing conditions for the recently planted maize and sorghum crops, despite the frequent interruptions in sowing due to the lack of rain which contributed to a reduction of 13.3 percent in maize plantings from last year's record 3.7 million hectares. The area planted to sorghum declined only slightly from last year's near record level. Planting of the paddy crop, mostly in the north-eastern parts of the country, has also been completed and the area planted is officially estimated at an above-average 268 500 hectares.

BOLIVIA (22 February)

Normal weather conditions resumed from mid-January in the highlands and mountain valleys, as well as in the main producing eastern department of Santa Cruz and south-eastern parts of the country, benefiting the development of the 1999 first season cereal crops to be harvested from March. Harvesting of the important potato crop has already started. A recovery is expected for all cereals from the 1997/98 poor outputs, when the crops were severely affected by El Niño adverse weather.

BRAZIL (22 February)

Harvesting of the 1998 wheat crop has been recently completed and output is provisionally estimated at 2.2 million tonnes, 9 percent below last year's average crop. This is largely the result of dry weather conditions at planting in the main growing states of Parana and Rio Grande do Sul and untimely rains at harvesting which contributed to lower than expected yields. The recent rains in these states, where the bulk of the maize crop is grown, have benefited, by contrast, the development of the 1999 crop which had been affected by dry weather at planting in November. Harvesting has only started and production is expected to increase from last year when the crops were severely affected, particularly in the north-east, by El Niño-related extremely dry weather. Early forecasts indicate a maize output of about 33.3 million tonnes compared to last year's low 30 million tonnes. Harvesting of the paddy crop has also only started and output is provisionally forecast to increase from last year's El Niño affected crop of 8.5 million tonnes to 10.6 million tonnes. Farmers were prompted to increase plantings due to attractive prices caused by last year's scarce supplies.

CHILE (22 February)

Harvesting of the 1998/99 wheat crop is underway and output is anticipated to decrease to a below-average 1.2 million tonnes from the 1.7 million tonnes harvested in 1997/98. This is the result of the severe drought, one of the most serious in years, which affected the country in 1998. Harvesting of the 1999 maize crop is due to start from March and production is officially forecast to decline by 30 percent from last year's average 940 000 tonnes. Paddy production is also anticipated to be lower than average.

COLOMBIA (22 February)

Harvesting of the 1998/99 second season coarse grain crops is advanced, particularly maize, and coarse grain output for the whole year is expected to recover significantly from 1997/98 El Niño affected crops. Production of maize, the main cereal, is forecast to be about an average 1.15 million tonnes, which compares to 1997/98 low 800 000 tonnes. Paddy output is estimated at an average 1.6 million tonnes compared to the previous year's affected crop of 1.5 million tonnes. In late January, an earthquake in the southwestern parts of the country inflicted damage to the important coffee industry

infrastructure. No damage has been so far reported to the crops. Damage to infrastructure is presently being repaired by the Government to prevent eventual delays in exports.

Land is being prepared for planting of the 1999/00 first season cereal crops to be started from April.

ECUADOR (22 February)

Planting of the 1999 first season cereal crops is underway. Dry weather conditions have prevailed since December in the coastal areas, but with no effect so far on maize and paddy plantings. In the highlands, light to moderate rains are reported particularly in the southern parts favouring cereal and potato crops currently being planted. In the east, where yellow maize is grown virtually throughout the year and planting of paddy has only started, normal weather conditions are reported. Cereal outputs, as well as other food and export crops, are expected to recover from 1998 El Niño severely affected crops.

GUYANA (22 February)

Normal rains continue benefiting the development of the important paddy crop, as well as that of roots and fruits and other minor food crops. An important recovery is expected from last year when the crops were severely affected by El Niño induced drought.

PARAGUAY (22 February)

Heavy rains at the end of the harvesting season seriously affected the 1998 wheat crop. Low yields were obtained and output collected was a poor 250 000 tonnes which compares to an earlier estimate of some 400 000 tonnes and the previous year's average production of a similar 400 000 tonnes. Harvesting of the 1999 maize crop has only started and an average output is expected.

PERU (22 February)

Normal weather conditions have resumed since mid-January over most of the country, following weeks of dry weather particularly in the southern parts of the country. The rains have thus contributed increase water reservoir levels that were considered low. Harvesting of the 1998 wheat crop has been completed and output is provisionally estimated at an above-average 150 000 tonnes, a recovery from the previous year's 124 000 tonnes. Maize, both white and yellow, is grown all year around. Output collected in 1998, only for the period January/November, is officially estimated at 890 000 tonnes, which compares to the last 5-year average of 780 000 tonnes. Paddy output was an above-average one million tonnes.

Planting of the 1999 wheat crop has been completed for harvesting from May, while harvesting of the bulk of the 1999 yellow maize is underway and that of white is due to start from April.

SURINAME (22 February)

Normal rains continue benefiting the 1999 paddy crop which is due for harvesting principally from April. A significant recovery is expected from 1998 when the crop was severely affected by El Niño induced drought. Output is officially forecast at 124 000 tonnes, compared to the low 81 000 tonnes harvested the year before, a significant increase for this important crop which constitutes the main foreign exchange earner in the country. A recovery in output is also anticipated for other cash crops such as bananas, and minor food crops in general.

URUGUAY (22 February)

Harvesting of the 1998/99 wheat crop has been completed and an average output of some 450 000 tonnes have been gathered while that of the recently planted coarse grain crop is about to start. Recent rains have improved growing conditions and average to above-average outputs are provisionally forecast. Harvesting of the important paddy crop is due to start from March and a near-record output is expected provided normal conditions persist. Prompted by attractive export prices, farmers increased their plantings from last year's 163 000 hectares to some 190 000 hectares.

VENEZUELA (22 February)

Harvesting of the 1998 second season cereal crops was completed in December and an average 1 million tonnes output of maize has been collected. Sorghum production declined for the third consecutive year, largely the result of strong import competition. Paddy production also declined from 792 000 tonnes in the previous year to some 673 000 tonnes, most likely reflecting decreasing exports to neighbouring countries.

**COMMONWEALTH OF
INDEPENDENT STATES**

ARMENIA* (5 February)

The 1998 cereal and pulse harvest is provisionally estimated at around 300 000 tonnes. It is likely that lack of snowcover has caused some crop damage to winter wheat and barley to be harvested later this year. The country is seeking to mobilize high-grade seed for spring planting.

The cereal import requirement in 1998/99 is estimated at about 340 000 tonnes. Against this requirement, food aid pledges of nearly 50 000 tonnes have been reported to date and the balance would have to be imported commercially. The actual volume of imports will hinge crucially on the availability of credits and food aid. The financial crisis in the Russian Federation has impacted heavily, disrupting trade. Remittances from family members working abroad were an important element in household budgets. Remittances from the Russian Federation have virtually ceased and many workers are returning, increasing the number of unemployed. In view of the deteriorating economic situation, there is little scope for phasing out humanitarian assistance for the most vulnerable.

AZERBAIJAN (5 February)

FAO tentatively estimates the 1998 grain harvest to be about 1 million tonnes, including some 900 000 tonnes of wheat. This compares to 1.2 million tonnes last year. The reduction is due to a 10 percent fall in the area sown, notably barley, and lower yields.

In the 1998/99 marketing year, the cereal import requirement is estimated at 520 000 tonnes. Food aid pledges, for distribution to the vulnerable populations, amount to nearly 55 000 tonnes of grain and the balance is likely to be imported commercially. Some 177 000 tonnes of cereals were imported in the first 5 months of the marketing year. GDP continued to grow in 1998, but growth will be slower in 1999 as the fallout of the Russian financial crisis affects the economy, reducing exports. Food requirements up to mid-1999 are estimated at 6 500 tonnes of wheat flour, 1 700 tonnes of pulses, 1 400 tonnes of oil and 770 tonnes of sugar.

BELARUS (5 February)

The outlook for the 1999 grain harvest remains uncertain in view of the economic deterioration and financial crisis in the country. The winter wheat area (for harvest in 1999) is reported to have increased this year by a further 10 percent. However, the area ploughed in the autumn, in advance of

spring sowings is down. The 1999 grain production target has been set at 7 million tonnes. Following the poor 1998 grain harvest and shortages of foreign currency to import foodgrains, all regions have been ordered to increase the minimum area sown to grain by 20 percent. The extent to which farmers can comply will depend heavily on the availability of central government subsidies and adequate and timely availability of inputs

The 1998 grain harvest is officially reported to be only 4.9 million tonnes, down from last year's crop of 6.4 million tonnes, in response to adverse weather. In view of the tight controls on pricing, inflation and the impact of the Russian crisis, it would not be surprising if farms had held back grain to barter. The wheat crop, estimated at 800 000 tonnes, is above last year's (744 000 tonnes) but excessive moisture has reportedly reduced the proportion of the milling quality wheat. The country has a deficit of food quality wheat, officially estimated at 300 000 tonnes. In response to the mounting economic and financial difficulties, cereal imports in 1998/99 are expected to fall to about 560 000 tonnes, from an estimated 640 000 tonnes last year, despite the poor harvest. As bread is highly subsidized, food consumption of grains is expected to remain stable, but feed use is likely to fall sharply. In urban areas, chronic shortages of most other foodstuffs and panic buying are reported following the imposition of price controls last year.

GEORGIA* (5 February)

The outlook for the 1999 winter crops, mainly wheat and barley is satisfactory to date. Lack of adequate maintenance of irrigation and drainage systems preclude any significant improvement in average yields, estimated at 1.5 tonnes per hectare for wheat and 2.6 tonnes per hectare for maize. The 1998 cereal and pulse harvest is now estimated at 0.8 million tonnes, including about 200 000 tonnes of wheat. Aggregate output is 11 percent less than in 1997 and reflects lower plantings and crop damage to the wheat crop. In contrast, growing conditions for maize were satisfactory.

Wheat imports for the 1997/98 marketing year (July/June) reached 0.6 million tonnes, of which some 160 000 tonnes were food aid. It is expected that imports in 1998/99 will remain at around this level. Food aid pledges to date amount to nearly 130 000 tonnes. The country is self sufficient in maize.

KAZAKHSTAN (4 February)

The area sown to the minor winter grain crop (mainly wheat) declined by 6 percent to 0.7 million hectares. The bulk of the grain crop is planted in the spring. The 1999 agricultural campaign is expected to be difficult and the area sown to grains is expected to contract further. Farmers' financial problems have been exacerbated by the debts incurred as a result of 1998's drought-reduced harvest, making access to agricultural credit even more difficult. In addition, locusts could pose a threat to this year's crop unless adequate funds are made available in a timely manner.

The 1998 grain harvest is estimated by FAO at about 8 million tonnes, some 37 percent less than in 1997 as hot and dry weather from mid June to August caused the crop damage and reduced the area harvested to 11.4 million hectares. FAO's estimate of grain output is about 21 percent higher than the official figure of 6.4 million tonnes as farmers have under-reported yields systematically for a number of years.

The existence of some 2 million tonnes of carry-forward stocks has enabled the country to continue cereal exports in 1998/99. Exports between July-December 1998 totalled almost 1.4 million tonnes and the country could export up to 1.9 million tonnes in the marketing year until June 1999, mostly to neighbouring countries. Exports to the Russian Federation have dwindled owing to payment difficulties and the substantial quantities of food aid pledged. At the same time, in view of the devaluation of the Russian rouble the Government has had to suspend the free trade agreement with the Russian Federation and limit the inflow of Russian food products, notably cereals meat, powdered milk and butter.

KYRGYZ REPUBLIC (4 February)

Growing conditions for the major winter grain crop have been satisfactory to date but indications are that the area continued to fall as farmers divert land to fruit, vegetables and tobacco. The 1998 cereal harvest is officially estimated at about 1.6 million tonnes, cleaned weight, compared to 1.7 million in 1997. Following the sharp increase in recent years and reduced profitability for this crop, wheat production in 1998 declined by 6 percent to 1.29 million tonnes. Output of cotton, tobacco, potatoes and vegetables increased in 1998. Private farmers now produce just over half of the grain crop, as well as 61 percent of cotton, 60 percent of tobacco.

Cereal imports in 1998/99 are tentatively forecast at around 145 000 tonnes and include food aid pledges amounting to 58 000 tonnes.

MOLDOVA (4 February)

The early outlook for the 1999 winter wheat and barley crop, which accounts for about half of annual grain production, is mostly satisfactory. The aggregate 1998 grain harvest is officially estimated at 2.7 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, but well above the five-year average. Production of wheat (1 million tonnes) and barley (225 000 tonnes) is below average, reflecting dry conditions and low profitability.

With ample domestic supplies and carry-forward stocks, no significant commercial imports of cereals are expected 1998/99 marketing year (July/June). The high cost of production makes exports uncompetitive at current prices.

RUSSIAN FEDERATION (8 February)

Drought and economic problems reduced the 1998 aggregate grain (cereal and pulse) output to an estimated 55 million tonnes, compared to 88.6 million tonnes in 1997. FAO's estimate is 15 percent higher than the official 47.8 million tonnes, as farmers this year have underreported wheat output by 5 million tonnes according to the Minister of Agriculture and by up to 20 million tonnes according to the trade and other informed sources. The overall grain supply situation is tight but not critical, owing to the availability of large carryover stocks (in excess of 25 million tonnes) from last year's good harvest and the relatively high proportion of food quality grain in this year's crop. However, the overall situation masks significant disparity in the supply situation between regions. This disparity is exacerbated by local restrictions on the movement of grain, uncompetitive official purchase prices (US\$45 per ton for 3rd class wheat incl. taxes), and the impact of the deteriorating economic and financial situation. In addition, the large differential between domestic and international grain prices has stimulated exports of 0.9 million tonnes of cereals up to November 1997. The remote and most disadvantaged areas are particularly at risk as mobilizing and stockpiling reserves for the harsh winter months was impeded by the financial crisis in the autumn. The most vulnerable socio-economic groups, pensioners, orphans, the unemployed and households dependent on public salaries are also experiencing difficulties, especially in the large, depressed industrial cities.

Despite the poor harvest, cereal imports in 1998/99 are currently estimated at just over 4 million tonnes, compared to 3.5 million tonnes in 1997/98. Against this requirement, the country has received food aid pledges amounting to 3.8 million tonnes of cereals (including 2.8 million tonnes of wheat) as well as significant quantities of meat, oilseeds and meal. Virtually no food aid has been delivered to date, and the bulk of the shipments (not rolled over to 1999/2000) should arrive towards the end of the current marketing year, when the aggregate supply situation is expected to tighten.

Following the large expected stock drawdown this year, a significantly better harvest is needed next year but the outlook remains uncertain. The 1999 agricultural year is expected to be difficult. Budget allocations for agriculture have been halved, agricultural credit remains

scarce and in addition, two-thirds of the revolving soft credit fund for agriculture is still outstanding. Nearly 90 percent of farmers reportedly made losses in 1998. The availability of fuel, operational machinery and agrochemicals on farm is currently tighter than last year and there is a substantial backlog of autumn ploughing. Nevertheless, the spring grain planting target is 38 million hectares. Winter grains were planted on 13.15 million hectares, only 3 percent less than in the preceding year but crop condition on over 2 million hectares is poor.

TAJIKISTAN* (4 February)

The outlook for the 1999 wheat crop is satisfactory so far. Cereal production in 1998 is estimated at 510 000 tonnes, some 15 percent below the 1997 crop. This is due to a small shift in the area planted, back to cotton, after the good harvest in 1997 (about 600 000 tonnes) and lower yields due to floods in April. Production of cotton, a major export earner, increased by 9 percent to 384 000 tonnes, but remained well below the target of 0.6 million tonnes.

The cereal import requirement for 1998/99 (July/June) is tentatively estimated at about 360 000 tonnes of wheat and some rice. Food aid pledges amount to some 52 000 tonnes to date. The balance will have to be mobilized commercially.

An appeal was launched in December 1998 for a total of US\$24.8 million, to respond to the humanitarian and rehabilitation needs of over half a million vulnerable people during 1999. The appeal includes projects to enhance basic food production and food security as well as food for the populations at risk.

TURKMENISTAN (2 February)

The area sown to winter grains, for harvest in 1999 remained close to last year's high level of 570 000 hectares. Timely planting was facilitated by recent imports of farm machinery. The 1999 production target has been raised to 1.4 million tonnes. Official data indicate that the 1998 grain harvest of 1.24 million tonnes was on target and nearly twice as much as in 1997. By contrast, although the 1998 cotton harvest increased by about 12 percent to 0.7 million tonnes, it remained well below the target of 1.5 million tonnes in response to chronic problems in the sector. Official dissatisfaction with the cotton harvest has led to further reorganization of the agricultural sector. Reduced export earnings from both cotton and gas for a number of years in succession, has severely limited the availability of inputs and foreign exchange. In view of the good grain harvest, cereal imports in 1998/99 could fall to below 100 000 tonnes, mainly wheat and some rice.

THE UKRAINE (8 February)

At this early stage, the outlook for the 1999 winter grain crops is satisfactory, given the economic situation. The area sown to winter crops in the public sector farms (which account for 88 percent of the agricultural land) remained stable at 7.5 million hectares, of which 6.9 million hectares were grain. The winter wheat area increased to 5.9 million hectares, while that sown to barley and rye declined. In addition, the private sector (subsidiary plots and individual private farms) plant about 0.5 million hectares to winter grains. Overwintering conditions to date have been mostly good and about 85 percent of the crop is reported to be in satisfactory condition. Some plantings occurred late and input use will remain very limited as suppliers are further tightening credit conditions following poor repayment rates again in 1998. Budget allocations for agriculture have increased, (as has inflation), and government influence is expected to remain pervasive in input provision and marketing, despite recovery of only 2.1 million tonnes of the 5.8 million tonnes of grain owed to the state for input supplies in 1988. The official target for the 1999-grain harvest is 35 million tonnes. Winter grain plantings reached 85 percent of target.

FAO estimates the 1998 grain harvest at nearly 30 million tonnes, including 17 million tonnes of wheat and 12 million tonnes of coarse grains. These estimates are 15 percent higher than the official figure of 26.5 million tonnes (including 14.9 million tonnes of wheat). Farmers this year hid large quantities of grain in response to the official prohibitions on grain shipments until all debts to the

budget and pension fund had been cleared. Despite the lower harvest, the country is likely to export up to 3.4 million tonnes of cereals in the current marketing year. By December 1998, 1.6 million tonnes had already been shipped.

UZBEKISTAN (3 February)

The early outlook for the 1999 main grain harvest is satisfactory. Winter wheat and barley was sown in a timely fashion, on 1.3 million hectares, including 1 million hectares of irrigated land on the large farms. In addition, the rural population has to plant additional area on their private subsidiary plots, where yields are increasing at a faster rate than on the large farms. The target for winter grain production in 1999 has been set at 4.6 million tonnes, including 4.0 million tonnes (3.8 million tonnes of wheat,) from the large farms and the balance from the private plots. This compares with an actual output of 3.8 million tonnes of wheat and barley in 1998, some 12 percent more than in 1997, but short of the target of 4.22 million tonnes. In addition, the country produced roughly 0.5 million tonnes of maize and rice, bringing the total 1998 grain output to 4.3 million tonnes (1997:3.8 million tonnes). By contrast, the 1998 cotton crop - a prime foreign exchange earner - declined by 12 percent to 3.25 million tonnes, due mainly to adverse weather, machinery shortages, the high cost of inputs (97 percent of the crop had to be picked by hand) and a lack of adequate incentives. All imports are being cut back to maintain a positive trade balance, but the 1998/99 cereal deficit, tentatively estimated at about 530 000 tonnes is expected to be imported commercially.

The Land Code, which came into effect in 1998, confirms the state as the sole owner of land but allows Uzbek citizens to lease land for agriculture or for the construction of housing.

EUROPE

EC (22 February)

With regard to 1999, early indications point to a likely downturn in wheat production, after last year's bumper crops in several countries. Winter wheat plantings in the EC are tentatively estimated to be down by between 2 and 6 percent, in response to an increase in the area set-aside requirements but also due to adverse weather at planting. Winter coarse grain plantings are also tentatively estimated to have fallen, and it is unlikely that spring plantings will increase much, if at all, because of the higher set-aside requirements this year. However, better yields could be expected for maize after last year's drought-affected levels.

ALBANIA (17 February)

No significant change is expected in cereal output in 1999. Production potential remains limited by the prevalence of subsistence methods on small plots of land. FAO's latest estimates put the deficit of wheat - the major staple - at about 350 000 tonnes in 1998/99. Supply of wheat is not reported to be a significant problem in the major urban centres, as imports of wheat and wheat flour either commercially or as food aid have been generally sufficient to meet demand. However, the food supply situation in the rural communities in the isolated northeastern parts of the country, which is normally difficult throughout the winter, is expected to be particularly tight this year given the influx of refugees from the conflict in the neighbouring Kosovo Province in the Federal Republic of Yugoslavia.

As of early February, Albania is reported to be hosting some 18 500 refugees from the civil unrest in Kosovo. Food distribution by WFP and several NGOs continues.

BOSNIA-HERZEGOVINA* (8 February)

Information on the cropping situation is scarce and unreliable. The area sown to winter wheat for harvest in 1999 has likely continued its declining trend as imports are available and other crops are more profitable. The cereal import requirement in 1998/99 is provisionally estimated

at about 275 000 tonnes. Against this requirement food aid pledges amount to around 90 000 tonnes to date.

BULGARIA (16 February)

Bulgaria's wheat output is expected to fall by about 15-20 percent in 1999 from the estimated 3.3 million tonnes last year. The area sown to winter wheat last autumn is officially estimated at about 900 000 hectares, down from 1.08 million hectares in the previous year. Yields are also expected to fall as about one-third of total area was sown after the normal end-October deadline, and use of herbicides is reported to be limited. Nevertheless, assuming favourable weather for the remainder of the season and adequate fertilizer applications this spring, the 1999 wheat output could be sufficient to meet expected domestic consumption needs.

CROATIA (8 February)

The early outlook for the 1999 winter grain crops is satisfactory, despite a reduction in the area sown. The area sown to wheat has been cut back to about 205 000 hectares but plantings of winter barley and rye increased. The 1998 grain harvest reached a bumper 3.3 million tonnes, including 1 million tonnes of wheat and 2 million tonnes of maize. The import ban on wheat, imposed in mid-1998 has been lifted but the import duty on wheat has been increased sharply.

CZECH REPUBLIC (16 February)

Official estimates put the winter grain area for harvest in 1999 at some 980 000 tonnes, about 13 percent down from the previous year's level. Of the total, wheat is estimated to account for about 730 000 hectares compared to 850 000 hectares in the previous year. As of mid-February, winter weather conditions for the dormant grains are reported to have been satisfactory so far.

ESTONIA (1 February)

The outlook for winter grains to be harvested in the spring of 1999 is satisfactory to date. Indications are that the area sown to wheat and rye remained close to the preceding year's 60 000 hectares. The 1998 grain harvest was somewhat less than 700 000 tonnes reflecting excessive rains during the harvest. The profitability of agriculture remains low. Progress with land privatization is slow - 75 percent of the land is still owned by the state - and uncertainty about ownership continues to have negative effects on productivity and investment. Exports of livestock products to the Russian Federation have been disrupted, further delaying recovery in the sector. The cereal import requirement in 1998/99 could be limited to small quantities of wheat and rye flour for human consumption.

FORMER YUGOSLAV REPUBLIC OF MACEDONIA (16 February)

Output of the 1998 cereal harvest is estimated at some 600 000 tonnes, virtually unchanged from the previous year's level. According to WFP information, there are no registered refugees from the Kosovo crisis in Macedonia currently, however, many women, children and elderly people from the southern areas of Kosovo are reported to have gone to stay with relatives there. Resources within the host families are not likely to be sufficient and the refugee families are expected to require assistance in the coming weeks. Furthermore, intensified fighting may force a new wave of refugees into Macedonia, particularly if they are unable to cross into Albania.

HUNGARY (17 February)

Latest information confirms earlier expectations for a reduced winter grain area for the 1999 harvest. Official reports indicate that wheat was sown on a total area of 700 000 hectares, 500 000 hectares down from the previous year's level. Farmers had limited incentive to plant wheat because of domestic market surpluses and poor price prospects. The ministry of agriculture will promote planting of high-quality durum wheat on the unsown area this spring.

LATVIA (8 February)

Recent cold weather has likely occasioned some winterkill but otherwise the outlook for the 1999-grain harvest remains satisfactory. The area sown to winter grains (mainly wheat and rye) is estimated at about 180 000 hectares, similar to the preceding year. The 1998 cereal and pulse harvest is declined to about 1 million tonnes, harvested from 0.5 million hectares. Output was 4 percent less than in the preceding year due to excessive rains. Nevertheless, cereal imports in 1998/99 are expected to continue their declining trend in part as food grain production increases and demand for feedgrains is depressed by the financial crisis in the Russian Federation.

LITHUANIA (2 February)

Growing conditions for the winter-planted wheat and rye crop have been satisfactory to date. The 1998 grain harvest declined by 8 percent to 2.8 million tonnes, mainly due to excessive rains during the summer. Nevertheless, the country has an exportable surplus of food quality wheat and rye amounting to about 100 000 tonnes. The 1998 sugarbeet crop was also down but output of potatoes and vegetables increased. Exports of livestock products to the Russian Federation have been resumed, but at reduced volumes. Consequently, demand for animal feed is likely to remain depressed.

POLAND (17 February)

The winter grain area for the 1999 harvest is estimated to have remained similar to the previous year's. The areas sown to wheat and rye are put at about 2 million hectares and 2.3 million hectares respectively.

ROMANIA (17 February)

Latest information points to another decline in grain area for the 1999 harvest. Sowing operations last autumn were delayed due to adverse weather, and farmers' incentive was reduced by low market prices. Tentative estimates put the winter wheat area at about 1.6 million hectares. As of February 1999 many producers were reported to be still holding large stocks of the 1998 crop unwilling to accept the prices offered so far.

SLOVAK REPUBLIC (16 February)

Prospects for the 1999 cereal crop are uncertain. Winter wheat planting is reported to have been limited to about 250 000 hectares due to adverse weather last autumn. The planned area was 400 000 hectares. The Slovak Agrarian and Food Chamber will promote increased spring planting to compensate for the reduced winter grain area.

SLOVENIA (16 February)

Winter wheat plantings for the 1999 harvest are estimated to have fallen by about 10 percent, but weather conditions have been optimal so far and good yields are expected. Assuming normal weather conditions for the rest of the season wheat output is expected to match last year's 190 000 tonnes.

YUGOSLAVIA, FED. REP. OF (SERBIA AND MONTENEGRO)* (8 February)

The early outlook for the 1999 wheat harvest is unfavourable. Reports indicate that winter plantings have fallen well short of the target of 810 000 hectares. Persistent and heavy rains delayed planting and only 30 percent of the crop was sown in the optimum period. Unofficial reports indicate that the area sown to wheat fell to about 650 000 hectares from 785 000 in 1998. In addition, reduced domestic fertilizer production and high price vis-à-vis the price for wheat are expected to reduce use.

The 1998 grain harvest, officially put at an average 8.6 million tonnes was 17 percent less than the record 1997 harvest. A dry summer and excessive rains at harvest reduced maize production to 5.2 million tonnes; wheat output remained stable at 2.9 million tonnes. Despite the lower harvest, the country continues to have an exportable surplus of grains. However, the high cost of production and quality considerations limit the country's capacity to barter grain for essential imports.

In Kosovo Province, the overall number of displaced persons is estimated by UNHCR at about 21 000 in early February. Renewed displacement in some areas has been offset by an increased rate of return in others. Interagency convoys led by UNHCR continue to deliver food and non-food items to the displaced, returnees and host families but relief operations are being impeded by the difficult security situation. Regarding agricultural operations, wheat sowing last autumn is likely to have been very limited. Many villagers had fled their homes at planting time and much seed and equipment was looted or destroyed. The wheat crop in 1999 is likely to be well down from the normal output and the Province is expected to continue also into the next season to have an abnormally high wheat deficit.

NORTH
AMERICA

CANADA (22 February)

Latest estimates put the 1998 wheat crop at 24.4 million tonnes, somewhat more than earlier expected and virtually unchanged from the previous year but below the average of the past five years. The reduction was mostly due to smaller plantings. The bulk of the 1999 wheat crop will be sown in May-June. Early indications point to the likelihood of a further reduction in wheat area in 1999 due to poor price prospects. Aggregate output of coarse grains in 1998 is estimated at 26.8 million tonnes, 6 percent up from 1997, and above average.

UNITED STATES (22 February)

In the United States, the final official estimate of the 1998 wheat crop is 69.4 million tonnes, 3 percent up from 1997 and above the average of the past five years. The winter wheat area for the 1999 crop is estimated at 17.6 million hectares, the lowest since 1972/73 and down 7 percent from 1998. The reduction is due to low prices last autumn which reduced farmers incentive to plant wheat. While some of the area sown to winter wheat a year earlier is likely to be planted with spring wheat crops, much is expected to be given over to other crops such as feed grains or oilseeds, or left fallow, especially in the drier areas of the Great Plains. Crop conditions are reported to have been generally favourable across the Plains this winter so far. The final estimate of the United States 1998 coarse grains crop is 271.8 million tonnes, 4 percent up from the previous year's crop and above the

average of the past five years. Of the total, maize is estimated to account for about 248 million tonnes. The 1998 paddy crop is estimated at 8.5 million tonnes, the second largest crop on record. Planting of the 1999-rice crop is expected to start in April.

OCEANIA

AUSTRALIA (22 February)

The latest official estimate of the 1998 winter wheat output is 21.2 million tonnes, somewhat down from earlier expectations but still 9 percent up from the previous year's crop and well above the average of the past five years. Aggregate coarse grain output in 1998 is now estimated at 8.4 million tonnes, about 16 percent down from the previous year. Prospects for the small summer coarse grain crop for harvest in 1999 (mostly sorghum and maize) are favourable reflecting good planting conditions in late 1998. However, the area sown may have been limited by the larger availability of feed wheat and barley expected after rains caused downgrading of some crops during the recent winter grain harvest. The 1999 paddy crop is progressing well under favourable weather conditions. Output is forecast at a bumper level of about 1.35 million tonnes which, if realized, would be the second highest on record. Harvesting is expected to begin late February/early March.

FIJI (2 February)

Recent heavy rains have led to more flooding in the western region of Viti Levu, where previous floods on 19 January caused casualties and damage estimated at US\$2.34 million. This area, the country's main cane growing region, has been declared a disaster zone. Production of raw sugar in 1998, estimated at 250 000 tonnes, was 46 percent less than production of 450 000 tonnes in a normal year, due to a 10-month drought.

ESTIMATED 1998/99 OR 1999 CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/(thousand tons)

COUNTRY	Marketing year	1997/98 or 1998			1998/99 or 1999			
		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		25 172.0	1 926.2	27 094.2	25 178.0	9 596.4	1 434.9	8 161.5
Northern Africa		13 618.2	64.9	13 683.1	13 135.0	7 209.1	17.4	7 191.7
Egypt	July/June	10 360.7	52.4	10 413.1	10 420.0	5 106.6	17.4	5 089.2
Morocco	July/June	3 257.5	12.5	3 270.0	2 715.0	2 102.5	0.0	2 102.5
Eastern Africa		3 622.8	1 060.2	4 679.0	3 210.0	668.8	593.8	75.0
Burundi	Jan./Dec.	41.5	0.5	42.0	65.0	0.0	0.0	0.0
Comoros	Jan./Dec.	41.8	4.2	46.0	46.0	1.0	1.0	0.0
Djibouti	Jan./Dec.	61.7	8.8	70.5	78.0	0.0	0.0	0.0
Eritrea	Jan./Dec.	195.6	103.3	298.9	280.0	15.9	15.9	0.0
Ethiopia 2/	Jan./Dec.	46.4	577.0	623.4	20.0	309.5	309.5	0.0
Kenya	Oct./Sept.	1 803.0	87.6	1 890.6	880.0	41.4	41.4	0.0
Rwanda	Jan./Dec.	38.1	162.1	200.2	170.0	62.0	62.0	0.0
Somalia	Aug./July	268.7	11.3	280.0	400.0	17.8	17.8	0.0
Sudan	Nov./Oct.	509.0	69.9	578.9	675.0	91.3	91.3	0.0
Tanzania	June/May	617.0	31.5	648.5	596.0	129.9	54.9	75.0
Southern Africa		1 631.9	375.7	2 007.6	2 726.0	1 432.2	552.6	879.6
Angola	April/March	350.8	159.7	510.5	471.0	249.2	125.6	123.6
Lesotho	April/March	127.0	7.8	134.8	188.0	18.2	5.8	12.4
Madagascar	April/March	175.4	38.0	213.4	205.0	49.7	20.1	29.6
Malawi	April/March	113.0	3.6	116.6	102.0	55.3	25.1	30.2
Mozambique	April/March	151.9	164.8	316.7	212.0	336.8	252.4	84.4
Swaziland	May/April	61.5	0.0	61.5	63.0	10.0	10.0	0.0
Zambia	May/April	369.0	1.8	370.8	660.0	125.5	25.5	100.0
Zimbabwe	April/March	283.3	0.0	283.3	825.0	587.5	88.1	499.4
Western africa		5 616.4	413.2	6 029.6	5 413.0	280.1	264.9	15.2
Coastal countries		3 379.7	259.6	3 639.3	3 465.0	125.5	117.5	8.0
Benin	Jan./Dec.	110.8	11.6	122.4	120.0	2.4	2.4	0.0
Cote d'Ivoire	Jan./Dec.	600.7	21.0	621.7	645.0	1.4	1.4	0.0
Ghana	Jan./Dec.	417.4	51.5	468.9	500.0	63.6	63.6	0.0
Guinea	Jan./Dec.	406.0	4.0	410.0	410.0	5.1	5.1	0.0
Liberia	Jan./Dec.	86.0	104.5	190.5	155.0	20.7	12.7	8.0
Nigeria	Jan./Dec.	1 450.0	0.0	1 450.0	1 250.0	0.3	0.3	0.0
Sierra Leone	Jan./Dec.	213.1	63.6	276.7	290.0	32.0	32.0	0.0
Togo	Jan./Dec.	95.7	3.4	99.1	95.0	0.0	0.0	0.0
Sahelian countries		2 236.7	153.6	2 390.3	1 948.0	154.6	147.4	7.2
Burkina faso	Nov./Oct.	195.9	19.8	215.7	170.0	28.8	28.8	0.0
Cape Verde	Nov./Oct.	30.5	50.5	81.0	95.0	48.4	48.4	0.0
Chad	Nov./Oct.	64.0	24.1	88.1	72.0	2.5	2.5	0.0
Gambia	Nov./Oct.	116.1	5.5	121.6	124.0	0.0	0.0	0.0
Guinea Bissau	Nov./Oct.	104.1	0.9	105.0	92.0	2.6	2.6	0.0
Mali	Nov./Oct.	84.3	9.9	94.2	80.0	4.7	4.7	0.0
Mauritania	Nov./Oct.	301.9	14.9	316.8	290.0	23.0	23.0	0.0
Niger	Nov./Oct.	477.9	26.1	504.0	220.0	30.8	30.8	0.0
Senegal	Nov./Oct.	862.0	1.9	863.9	805.0	13.8	6.6	7.2
Central Africa		682.7	12.2	694.9	694.0	6.2	6.2	0.0
Cameroon	Jan./Dec.	257.5	2.5	260.0	260.0	2.5	2.5	0.0
Cent.Afr.Rep.	Jan./Dec.	37.1	1.9	39.0	39.0	0.0	0.0	0.0
Congo, Dem R	Jan./Dec.	252.8	2.2	255.0	250.0	1.3	1.3	0.0
Congo	Jan./Dec.	119.2	1.7	120.9	123.0	2.0	2.0	0.0
Eq. Guinea	Jan./Dec.	8.3	0.7	9.0	9.0	0.0	0.0	0.0
Sao Tome	Jan./Dec.	7.8	3.2	11.0	13.0	0.4	0.4	0.0

ESTIMATED 1998/99 OR 1999 CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/ (thousand tons)

COUNTRY	Marketing year	1997/98 or 1998			1998/99 or 1999			
		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		38 047.0	2 094.1	40 141.1	39 673.0	21 556.7	3 809.1	17 747.6
Afghanistan	July/June	562.0	138.0	700.0	740.0	28.7	20.7	8.0
Bangladesh	July/June	2 698.3	549.4	3 247.7	3 500.0	3 707.6	1 369.4	2 338.2
Bhutan	July/June	15.0	0.0	15.0	20.0	0.0	0.0	0.0
Cambodia	Jan./Dec.	43.5	16.5	60.0	60.0	1.0	1.0	0.0
China 3/	July/June	10 810.0	90.1	10 900.1	12 680.0	4 376.2	206.5	4 169.7
India	April/March	2 263.9	208.4	2 472.3	1 511.0	1 676.2	385.8	1 290.4
Indonesia	April/March	6 857.9	0.0	6 857.9	8 185.0	5 990.3	1 270.0	4 720.3
Korea, D.P.R. 5/	Nov./Oct.	955.5	749.4	1 704.9	1 800.0	79.5	79.5	0.0
Laos	Jan./Dec.	53.7	4.3	58.0	60.0	15.5	15.5	0.0
Maldives	Jan./Dec.	32.3	2.7	35.0	37.0	1.7	0.0	1.7
Mongolia	Oct./Sept.	170.0	30.0	200.0	200.0	60.0	60.0	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	2 221.0	2 161.8	365.2	1 796.6
Philippines	July/June	4 599.7	8.5	4 608.2	3 700.0	2 859.4	2.5	2 856.9
Sri Lanka	Jan./Dec.	1 222.8	81.5	1 304.3	1 200.0	201.5	1.5	200.0
Syria	July/June	886.8	21.0	907.8	790.0	116.9	11.1	105.8
Yemen	Jan./Dec.	2 703.7	16.3	2 720.0	2 870.0	280.4	20.4	260.0
CENTRAL AMERICA		4 373.2	208.7	4 581.9	4 758.0	858.2	376.5	481.7
Cuba 5/	July/June	1 523.8	31.2	1 555.0	1 625.0	139.5	0.0	139.5
Dominican Rep.	Jan./Dec.	928.2	0.1	928.3	990.0	155.8	133.0	22.8
Guatemala	July/June	972.2	12.5	984.7	935.0	181.8	55.5	126.3
Haiti	July/June	412.2	112.4	524.6	480.0	140.4	105.6	34.8
Honduras	July/June	370.8	23.0	393.8	550.0	136.2	28.5	107.7
Nicaragua	July/June	166.0	29.5	195.5	178.0	104.5	53.9	50.6
SOUTH AMERICA		1 386.1	74.5	1 460.6	1 126.0	159.2	144.3	14.9
Bolivia	July/June	321.8	68.0	389.8	501.0	144.3	144.3	0.0
Ecuador	Jan./Dec.	1 014.3	6.5	1 020.8	575.0	14.9	0.0	14.9
Suriname 5/	Jan./Dec.	50.0	0.0	50.0	50.0	0.0	0.0	0.0
OCEANIA		330.0	8.0	338.0	339.0	8.0	8.0	0.0
Kiribati	Jan./Dec.	8.0	0.0	8.0	8.0	0.0	0.0	0.0
Papua New Guinea	Jan./Dec.	267.0	8.0	275.0	275.0	8.0	8.0	0.0
Samoa	Jan./Dec.	17.0	0.0	17.0	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/		3 203.9	608.5	3 812.4	3 447.0	1 298.3	429.3	869.0
Armenia	July/June	208.0	153.0	361.0	338.0	63.0	50.0	13.0
Albania	July/June	365.7	2.3	368.0	368.0	32.0	32.0	0.0
Azerbaijan	July/June	364.0	60.0	424.0	520.0	249.0	19.0	230.0
Bosnia&Herzegovina 5/	July/June	214.3	36.1	250.4	275.0	89.3	89.3	0.0
Georgia	July/June	425.0	164.0	589.0	606.0	208.0	129.0	79.0
Macedonia, FYR	July/June	240.0	0.0	240.0	240.0	0.0	0.0	0.0
Kyrgyz Republic	July/June	59.0	68.0	127.0	145.0	116.0	58.0	58.0
Tajikistan	July/June	269.9	125.1	395.0	360.0	203.0	52.0	151.0
Turkmenistan	July/June	223.0	0.0	223.0	70.0	41.0	0.0	41.0
Uzbekistan	July/June	835.0	0.0	835.0	525.0	297.0	0.0	297.0
TOTAL		72 512.2	4 920.0	77 428.2	74 521.0	33 476.8	6 202.1	27 274.7

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

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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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