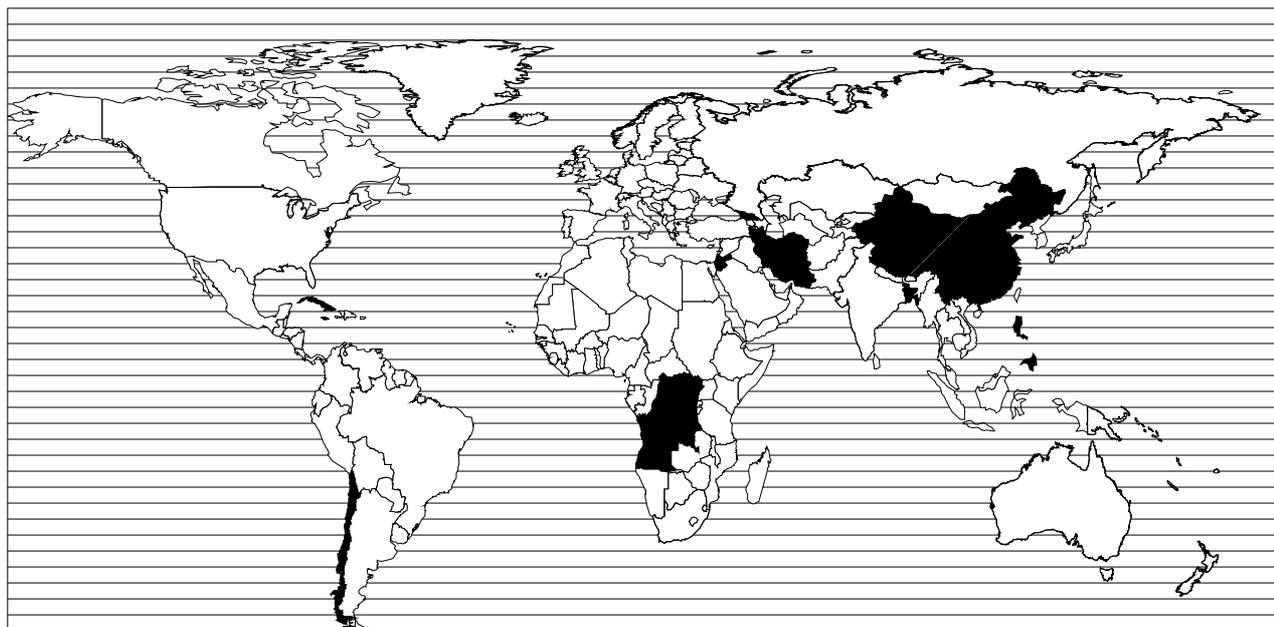


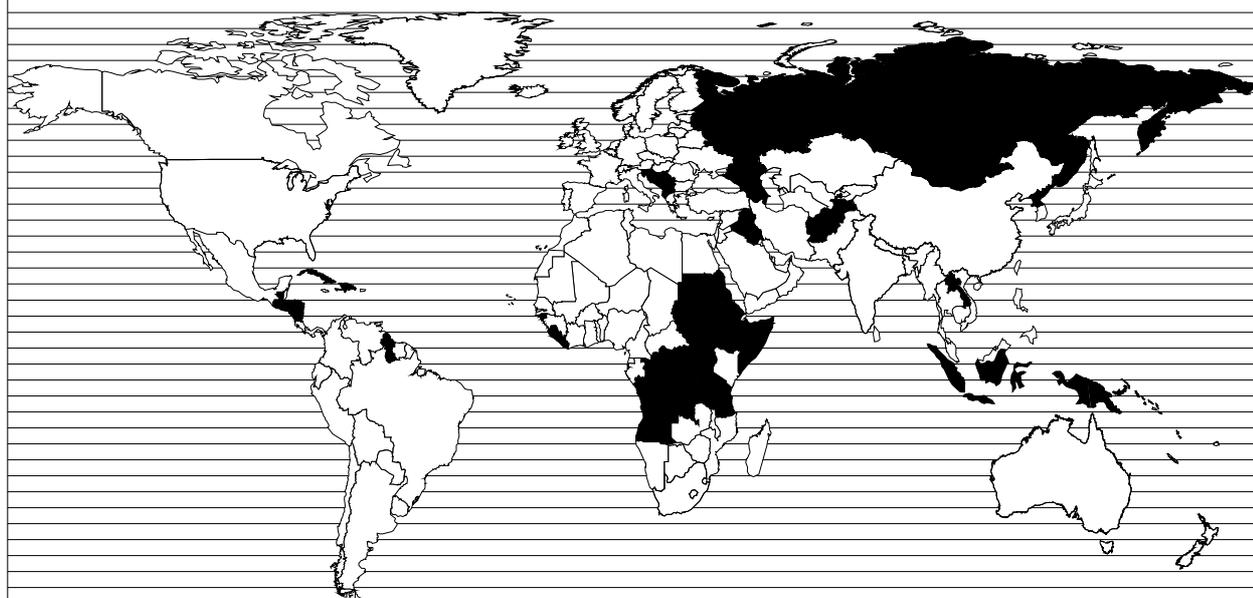
FOODCROPS AND SHORTAGES

No.2

April 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
Bangladesh	Apr./June	Drought
Chile	Mar./May	Drought
China	May/June	Drought
Congo, Dem.Rep.of*	Feb./Mar.	Civil strife
Cuba	Mar./July	Drought, shortages of inputs
Iran	June/Aug.	Drought
Israel	Mar./Apr.	Drought
Jordan	Mar./Apr.	Drought
Philippines	Mar./Apr.	Weather anomalies

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

AFRICA (14 countries):

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

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 (4 countries):

Albania, **Bosnia-Herzegovina***, **Former Yugoslav Rep. of Macedonia**, **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

A grave humanitarian catastrophe is unfolding in and around Kosovo Province of the Federal Republic of Yugoslavia where recent escalation in violence has led to large scale population displacement and severe deterioration in food security. Urgent food and medical assistance continues to be needed for the growing number of refugees in neighbouring countries. The food and health situation of the large number of internally displaced persons in Kosovo also gives cause for great concern. FAO is investigating the possibility of boosting agricultural production in Albania and the Former Yugoslav Republic of Macedonia hosting large numbers of refugees

Food supply difficulties persist in several parts of eastern Africa despite good 1998/99 production. The food situation is particularly serious in Somalia, which has been affected by six consecutive poor harvests. In Kenya, food shortages persist in the eastern provinces, whilst in Tanzania, severe food shortages are reported in Dodoma, Singida and Morogoro. The food situation also remains tight in southern Sudan, northwestern Rwanda and northern Uganda which have been affected by civil strife.

Food outlook is bleak in Angola, but overall harvest prospects generally favourable in southern Africa. 1999 crop production in Angola is expected to fall sharply due to renewed civil strife. Elsewhere in southern Africa, crop prospects are good as a result of generally favourable rainfall in most countries.

Food outlook remains grim in Sierra Leone due to insecurity and transportation problems. While the security situation has improved in Freetown, insecurity and violence persist in rural areas, displacing farming households. In neighbouring Liberia the food outlook is improving with the implementation of rehabilitation programmes, but the country remains heavily dependent on food aid. In the Sahelian countries, the food supply situation is generally satisfactory following record 1998 harvests, but remains tight in Guinea Bissau due to civil disturbances.

The prospects for 1999 winter grains in Asia is mixed. In China, severe drought and pests have seriously damaged winter wheat, but in India a record harvest is forecast. Recent rains have improved conditions for wheat in Pakistan and for the second rice crop in Thailand. Prolonged drought in Bangladesh has reportedly affected boro rice in some areas, while prospects for the main rice crop in Indonesia are favourable.

In the Near East, low rainfall may reduce the cereal harvests in several parts. The worst affected country is Jordan where concerns are mounting over imminent food supply problems. Many water reservoirs are depleted, raising concerns over water shortages later in the year. An FAO/WFP Mission is scheduled to visit the country in early May to make an on-the-spot assessment of the situation.

In the Caribbean, unusually dry weather in Cuba continues to affect crops particularly in areas severely affected by El Niño last year. In South America, 1999 maize production in Chile is expected to fall significantly due to extremely dry weather over several months.

In the CIS, 1999 grain and pulse production is expected to recover from the poor crop last year, but to remain below average. The outlook for winter wheat and rye has improved but substantial damage by winterkill is reported in the Russian Federation, where the area sown also declined.

In the United States, wheat output is expected to fall by 15 percent as a result of the lowest winter plantings since 1972/73. Planting of coarse grains is already underway in southern parts, with the area of maize and sorghum projected to decrease. In Canada, little change is expected in the spring grain area, to be planted shortly.

In Australia, prospects for the small 1999 summer coarse grains crop are good. Early indications point to little change in winter grain area to be planted soon.

SUMMARY

WEATHER CONDITIONS AND CROP PROSPECTS

In **northern Africa**, winter grains are heading throughout the region. Timely rains benefited crops in Morocco and parts of Algeria and Tunisia. During March, the highest amount of precipitation was recorded in southern Morocco and western Algeria. Farther east, periodic showers maintained generally adequate moisture conditions for winter grains in Algeria while unseasonably cool weather lowered crop-moisture requirements. Yield prospects for the winter grain crop in Morocco, Algeria, and Tunisia will be highly dependent on rain in coming weeks as the crop advances through the reproductive and filling stages.

In **western Africa**, the onset of rains in early March in southern parts of countries along the Gulf of Guinea allowed planting of the first maize crop, whilst seasonably dry conditions prevail in the north. In Liberia, agriculture is recovering with rehabilitation programmes and food aid distributions underway. In Sierra Leone, the humanitarian situation remains difficult but some limited rehabilitation activities are underway. In the Sahel, seasonably dry conditions prevail. 1998 aggregate cereal production in the nine CILSS countries is estimated at a record 10.9 million tonnes, some 35 percent above 1997 and 20 percent above average. Burkina Faso, Chad, Mali and Niger had record production, whilst output was above average in The Gambia and Mauritania and close to average in Senegal. In Cape Verde, however, output was below average. Cereal production in Guinea-Bissau is anticipated to be well below average due to civil strife hampering agriculture. Several countries have cereal surpluses for transfer to deficit areas within the countries, or for export or triangular food aid transactions.

In **central Africa**, planting of coarse grains is underway in southern Cameroon and Central African Republic. In eastern Democratic Republic of Congo, prospects are poor for the bean crop in Kivu due to shortages of inputs and civil unrest. Agricultural activities have also been hampered by civil disturbances in the Republic of Congo.

In **eastern Africa**, normal to above-normal rains in March favoured planting and establishment of the 1999 main season foodcrops in most countries. Early prospects are favourable throughout the sub-region. Rains also improved pastures and water supplies in pastoral areas previously affected by severe dry weather. In Sudan, however, the outlook for the irrigated wheat crop being harvested is unfavourable due to a sharp decline in plantings and high temperatures early in the season.

In **southern Africa**, harvest prospects are generally favourable following good rains in recent months. If favourable conditions continue, indications are that 1999 cereal production may exceed the 1998 production (18.3 million tonnes), which was 15 percent below average. Production is anticipated to recover in South Africa, Zimbabwe and Zambia, while good harvests are in prospect in Madagascar, Malawi and Swaziland. Above-average output is also expected in Mozambique, despite torrential rains in late February/early March, which resulted in flooding and loss of lives, property and crops in parts. Prospects remain uncertain in Namibia and Botswana where rainfall has been irregular. Sharply reduced production and tight food supplies are expected in Angola due to renewed fighting since late 1998. There will be heavy reliance on food assistance.

In **Asia**, the current outlook for winter grains, for harvest from April, remains mixed. In India, Pakistan and Bangladesh a good wheat crop is in prospect due to favourable weather and increased plantings. Favourable rainfall also benefited main-season rice in Indonesia and improved the outlook for secondary rice in Thailand. In contrast, drought seriously affected the winter wheat crop in major producing areas of China and the Islamic Republic of Iran, and also damaged the boro rice crop in parts of Bangladesh. In Afghanistan, prospects for the 1999 harvest in May/June remain uncertain due to ongoing fighting in the north and shortages of inputs. In DPR Korea, planting of main season crops will begin in May, but prospects remain uncertain due to economic problems and shortages of inputs.

In **Central America** and the **Caribbean**, conditions are favourable for planting first season cereal and bean crops. Assuming normal weather continues, production is forecast to be above 1998 and 1997 when crops were severely affected by hurricane "Mitch" and El Niño. In the Caribbean, in Haiti and the Dominican Republic, the outlook is good for recently planted coarse grain and paddy, while in Cuba, unusually dry weather continues to affect crops, particularly in areas struck by drought last year due to El Niño.

In **South America**, harvesting of 1999 maize is underway in southern areas. Average to above-average production is forecast in Argentina, Brazil and Uruguay, while in Chile, output is forecast to fall significantly due to severe dryness at planting. In the Andean countries, harvesting of 1999 main season crops is about to start in Bolivia and Ecuador, and a recovery is expected from last year's El Niño affected crops. In Peru, harvesting of yellow and white maize is underway and average/above-average outputs are forecast. In Colombia and Venezuela, planting of 1999 main season cereal and other food crops has begun and average plantings are tentatively forecast.

In **Europe**, latest indications point to a fall in cereal production in 1999. Winter grain plantings fell in the EC, whilst excessive winter rainfall in northern parts at the same time as a long dry spell in southern Spain and Portugal is expected to reduce yields. Spring planting is underway throughout much of the Community but the outlook is uncertain. Elsewhere in Europe generally lower cereal production is expected in 1999. Limited demand depressed the grain market in 1998 in many central and eastern European countries. This reduced farmers' incentive to plant winter cereals for 1999 and also aggravated the tight financial situation of many farmers. In Croatia, the 1999 wheat production is expected to decline in response to a sharp reduction in the area sown due to economic problems and shortages of inputs. In the Federal Republic of Yugoslavia, 1999 wheat production is also expected to decline due to reduced plantings. In the Kosovo Province in particular 1999 crop production will be very limited due to the severe security problems. In the Former Yugoslav Republic of Macedonia and in Albania, the prospects for spring crop planting are still unclear. However, in view of the massive influx of refugees to these countries, FAO is already investigating possibilities where international assistance could help boost production in the area. In the Baltic countries, the outlook for winter cereals remains satisfactory. The area sown to winter grains remained fairly stable. Spring coarse grain plantings are unlikely to expand due to difficulties in the livestock industry. Given normal weather, 1999 grain production could recover somewhat in Latvia and Lithuania from last year.

In the **Commonwealth of Independent States (CIS)**, normal weather is expected to lead to a recovery in yields from last year. Area planted and yields still remain constrained by financial problems and restricted access to credit and inputs. The area under winter grains declined marginally, mainly due to reduced planting in the Russian Federation. Over 10 percent of the aggregate winter grain area may need to be reseeded. In Kazakhstan, planted area is expected to decline by 1 million hectares to 12.2 million. Based on winter and projected spring plantings, and given normal growing conditions, FAO forecasts 1999 grain and pulse harvest at 125 million tons – up from an estimated 108 million tons in 1998. In the Russian Federation, winterkill could be less than 2 million hectares, and 1999 production is currently forecast at 65 million tons.

In **North America**, wheat output in the United States is forecast to fall by about 15 percent, following the lowest winter wheat plantings since 1972/73. Early coarse grains crops have already been planted in some southern parts. First indications point to reduced maize and sorghum plantings. In Canada, the bulk of the wheat and coarse grain crops for harvest in 1999 will be planted in the coming weeks. Little change in area compared to the previous year is expected.

In **Oceania**, planting of the main 1999 wheat and coarse grains crops in Australia will begin in May. Early indications point to little change in area compared to the previous year. Harvest of the minor 1999 summer coarse grains crop, mainly sorghum and maize, is underway and a bumper output is expected after favourable winter rains encouraged plantings.

COUNTRY REPORTS ^{1/}

AFRICA

NORTHERN AFRICA

ALGERIA (12 April)

Generally dry conditions prevailed with little rainfall received except in isolated areas in eastern parts of the country during the last month. Conditions over the season, however, have been generally satisfactory for development of the main wheat and barley crops to be harvested later this month and in May. Crop production in 1998, increased significantly to 3 million tonnes, compared to 1.1 million tonnes in 1997, when drought reduced output. Cereal imports excluding semolina in 1998/99 is estimated at 5.5 million tonnes, around 7 percent lower than the previous year.

EGYPT (12 April)

Prospects for the wheat crop planted in October/November for harvest in April/May are favourable. Total plantings of mainly irrigated and lesser rain-fed wheat for 1998/99 are estimated at around 1.1 million hectares. The area planted represents a small decrease over the previous year, due to a shift from wheat to other crops like cotton. In recent years, yields have increased considerably, with average yield in 1998/99 forecast at around 6.3 tonnes/hectare in irrigated areas and around 3 tonnes/hectare in rain-fed areas. Production is forecast at 6.1 million tonnes, which would represent a marginal increase over the previous year. This year, to encourage farmers to sell wheat to the Ministry of Supply, the Government has set a procurement price of between US\$191-US\$200 per tonne equivalent depending on quality. These prices are considerably higher than prevailing international prices of around US\$125/tonne. To meet needs, the country will import around 7.5 million tonnes of wheat in 1998/99.

MOROCCO (12 April)

In view of late planting due to delayed rainfall and cool temperatures earlier in the crop season a considerable reduction in winter grain yields is expected this year compared to last. Despite significant improvement in rainfall in late February, which improved moisture conditions for crop development, overall grain production is expected to be down by over 40 percent compared to the 6.6 million tonnes produced in 1998. Assuming normal weather conditions through to the end of the season, total wheat (including durum) and barley production is projected at 2.3 million tonnes and 1.2 million tonnes respectively. To meet consumption needs, therefore, the country will need to import larger quantities of wheat and durum next year to offset low domestic production.

TUNISIA (12 April)

Crop prospects for winter grains, to be harvested from May, were favoured by increased rainfall in March, following several weeks of persistent dryness. The dryness appreciably reduced soil moisture levels which may effect overall yields. In 1998/99, the area sown to cereals, mainly wheat, is estimated at 1.3 million hectares, slightly lower than the Government target. The reduction was largely due to low rainfall in main growing areas at the time of planting.

WESTERN AFRICA

^{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 (*).

BENIN (6 April)

The rainy season started in early March, with sufficient rainfall over the south to allow the planting of the first maize crop.

The overall food supply situation is satisfactory following the main crop harvest. Planted area in 1998 was above normal, except for groundnuts. 1998/99 cereal output is estimated at about 820 000 tonnes. The reduced demand from Sahelian countries, which had good harvests has generally meant that prices have remained low. The cereal import requirement for 1999 (January/December) is estimated at 200 000 tonnes (including re-exports) of wheat and rice.

BURKINA FASO (6 April)

Seasonably dry conditions prevail and harvesting of off-season crops is underway. Aggregate cereal production for 1998 is officially estimated at a record 2.65 million tonnes, some 32 percent above 1997 and 12 percent above average.

Following record production, the overall food supply situation improved significantly and prices fell appreciably. The Government has bought 15 000 tonnes of cereals locally to replenish the national security stock to a recommended level of 35 000 tonnes. Some deficit areas remain vulnerable and may need some assistance during the lean season. These include the provinces of Boulgou, Bazéga, Oubritenga, Sanguié, Kouritenga and Boulkiemdé.

CAPE VERDE (6 April)

1998 maize production is 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. An FAO assessment is underway to estimate needs and assess the impact of the drought on the agricultural sector. The overall food supply situation, however, remains satisfactory as the country imports the bulk of its consumption requirement. The cereal import requirement for 1998/99 amounts to 95 000 tonnes. 89 400 tonnes have been pledged, of which 35 000 tonnes have been delivered so far.

CHAD (6 April)

Seasonably dry conditions prevail. Harvesting of recession crops is underway and prospects are generally favourable. Reflecting favourable growing conditions, notably in the Sahelian zone, 1998 cereal production is estimated at a record 1.28 million tonnes, some 30 percent above 1997.

The overall food supply situation is satisfactory, notably in the Sahelian zone which had well above average production. Cereal prices declined following the harvest, which should facilitate local purchases for replenishing the national security stock, which is almost exhausted. External assistance for local purchases, however, is required. Some food supply difficulties are likely in areas of the Sudanian zone affected by flooding and/or poor crops in 1998, notably in Logone, Tandjilé, and in parts of Mayo-Kebbi and Moyen-Chari prefectures. In these areas, prices of cereals decreased but remained above normal. Cash crop production also declined, limiting income for farmers.

COTE D'IVOIRE (8 April)

Following scattered rains in February the rainy season began in earnest in early March over the south. This allowed planting of the first maize crop. Seasonably dry conditions continue to prevail in the north.

The overall food supply situation remains satisfactory as 1998 crops are being marketed. Organised repatriation is underway for about 140 000 Liberian refugees, remaining in the western departments. Food assistance is being provided to 50 000 vulnerable people and 30 000 children through school feeding. 1998/99 cereal production is estimated at 1.6 million tonnes and the cereal import requirement for 1999 (January/December) at 640 000 tonnes, mostly wheat and rice.

THE GAMBIA (6 April)

Seasonably dry conditions prevail. 1998 cereal output is officially estimated at 114 000 tonnes, similar to 1997 and 9 percent above average.

The overall food supply situation is satisfactory given present rice stocks and planned imports. During the first half of March, about 20 000 tonnes of rice and wheat flour were imported. Markets are well supplied and cereal prices declined after harvest. However, some areas where millet production was poor may be at-risk of shortages during the next lean season. Areas giving most cause for concern include Lower and Upper Nuimis districts in the North Bank Division, Kiang West and Central in the Lower River Division and parts of Fonis of the Western Division. The Government has estimated the number of affected people at 133 200, who need 4 000 tonnes of cereals.

GHANA (12 April)

Rainfall started in early March over the south, reaching central parts by late March. Maize planting has started in the south while land preparation for rice planting is underway in the central parts. Aggregate 1998 cereal production is estimated at 1.78 million tonnes, slightly above last year. Rice and maize output has been normal to below normal, but is balanced by a good millet and sorghum production. Production has recovered in the extreme north, where crop production was severely reduced in 1997. The food supply situation is expected to remain satisfactory in this area in 1999. Production of roots and tubers is forecast to reach an above-average 13.44 million tonnes.

Around 30 000 Liberian refugees still remain in the country, receiving food assistance. The 1999 cereal import requirement is estimated at 475 000 tonnes, mostly wheat and rice.

GUINEA (3 April)

Dry condition prevail, except in the south where limited rainfall started in early March and increased towards the end of the month, allowing land preparation for maize and rice.

The total number of Liberian and Sierra Leonean refugees in Guinea is estimated at 614 000, of whom about 414 000 are Sierra Leoneans and 200 000 Liberians. The refugee population is concentrated in the south and has put additional pressure on resources and food. Cereal production in 1999 point to about 900 000 tonnes and the 1999 cereal import requirement is estimated at 385 000 tonnes, mostly wheat and rice.

GUINEA-BISSAU* (12 April)

Seasonably dry conditions prevail. Most of the people who were displaced following fighting last year or in late January have now returned home. A UN Mission visited the country in mid-March to review the current humanitarian situation and assess emergency needs. Food distributions are underway in the regions of Oio and Cacheu for more than 100 000 beneficiaries and have just started in Bissau, Cumura and Prabis, targetting between 350 000 and 400 000 beneficiaries. Emergency food distribution is also scheduled in Quinhamel and Bijagos Islands for a total of 22 000 beneficiaries. 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.

LIBERIA* (18 April)

An FAO Crop and Food Supply Assessment Mission visited Liberia late last year and found that the food situation had improved significantly. The Mission estimated paddy production in 1998 at 210 100 tonnes, some 25 percent above 1997 and about 70 percent of the pre-strife average. Cassava production is estimated at 313 300 tonnes (fresh weight), which is 96 percent of the pre-crisis average. The main factors which contributed to the increase in production include an expansion of area planted as a result of the return of large numbers of farm families, increased yields due to greater access to inputs supplied by NGOs (especially seeds and tools) and improved crop husbandry practices as more extension services become available. In addition, improved varieties of cassava have become more readily available from a number of NGO-supported projects. However, bad road conditions, eating habit as well as the lack of processing and preservation facilities, often lead to food insecurity during the "hungry" season from late June to October.

Food assistance is being delivered throughout most of the country, which has led to an improvement in the nutritional status of the population. Assistance is being provided to about 1.7 million IDPs and refugees from Sierra Leone. Organised repatriation is underway for about 480 000 Liberian refugees in neighbouring countries, of whom 80 000 have been repatriated. Resettlement of IDPs and refugees is taking place in the counties of Bomi, Grand Cape Mount, Grand Gedeh, Upper Lofa, Maryland and Sinoe. Due to the influx, however, these counties are experiencing food deficit. On the basis of an estimated population of about 2.8 million in 1999, the Mission estimated that Liberia will need to import 155 000 tonnes of cereals to meet consumption requirements. Commercial imports are anticipated at 100 000 tonnes of rice and 5 000 tonnes of wheat. The remaining 50 000 tonnes will need to be covered by food aid (30 000 tonnes of wheat and 20 000 tonnes of maize meal and CSB). Food aid in the form of rice is not foreseen.

MALI (6 April)

Seasonably dry conditions prevail and off-season crops are developing satisfactorily. 1998 cereal production is estimated at a record 2.5 million tonnes, 13 percent above average and 3 percent over the record in 1994. Low numbers of Desert Locusts may be present in a few areas of the Adrar des Iforas.

The food supply situation is satisfactory and prices of cereals have declined. There is a substantial surplus for local purchase, export or triangular transaction.

MAURITANIA (6 April)

Seasonably dry conditions prevail and off-season and recession crops are developing satisfactorily. 1998 cereal production is estimated at 189 700 tonnes, some 25 percent above 1997 and 11 percent above average. Scattered Desert Locust adults may be present and could breed in a few limited areas of the north between Akjoujt and Zouerate. No significant developments are likely.

The overall food supply situation is satisfactory but localised shortages are likely following reduced crops in some areas, notably in the wilayas of the Hodhs El Chargui and El Gharbi, Gorgol, Assaba and Guidimakha, as well as in some areas of Brakna, Tagant, Trarza. The cereal import requirement (including re-exports) for 1998/99 (November/October) is estimated at 320 000 tonnes and the food aid requirement at 35 000 tonnes.

NIGER (19 April)

Seasonably dry conditions prevail. 1998 aggregate cereal production has been revised down slightly to a record 2.97 million tonnes, about 72 percent higher than 1997 and about 44 percent above 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. The security situation is normal following the coup on 9 April, but some donors have suspended their aid. Low cereal prices following record crops in late 1998 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 the arrondissements of Bouza, Illela, Konni, Matameye, centre-Madaoua, centre-Mayahi, north-Mirriah, south-Ouallam, north-Tanout (Belbedji), north-Tillabery (Aiorou), south-Diffa and south-N'Guigmi.

NIGERIA (6 April)

Limited rainfall started in mid February in the south and increased in March, allowing planting of the first maize crop and land preparation for rainfed rice. Cereal output in 1998 is officially estimated at 22.8 million tonnes, about 4 percent above 1997. Production of roots and tubers, mainly cassava and yams, is estimated at an above-average 62 million tonnes.

Food supplies are still constrained by high levels of post-harvest loss and high distribution costs. The cereal import requirement for 1999 is estimated at 1.25 million tonnes, including 1.05 million tonnes of wheat and 150 000 tonnes of rice.

SENEGAL (6 April)

Seasonably dry conditions prevail. A joint FAO/CILSS Crop Assessment Mission in late October estimated 1998 rainfed cereal production at 976 400 tonnes, about 24 percent above 1997 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 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 departments of Louga, Tivavouane and M'Backé and in the regions of Fatik, Thiès, and Ziguinchor. 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* (6 April)

Despite some improvement in security, the food supply situation remains critical. In Freetown, limited food distributions are underway and the nutritional status of IDPs is stable. There are an estimated 700 000 displaced people, including 150 000 in Freetown, 30 000 in Lungi, 55 000 in Kenema, 4 000 in Bo, 13 000 in Blama, 17 000 in Kambia, 3 000 in Bombuna, 5 000 on Banana Island, and unconfirmed reports of some 18 000 in Shenge. Pockets of acute food shortage are located in these areas and some limited food distributions are underway

Humanitarian operations are still constrained by looting of warehouses and poor infrastructure. Insecurity in most parts of the country means that humanitarian assistance remains limited to the South and East. The main roads from Freetown to the central parts of the country (particularly to Bo and Kenema) are still insecure and allow only limited amounts of food aid to be transported. Severe food and fuel shortages are reported and are further hampering humanitarian operations. In addition, the rainy season, which usually begins in May, will make road travel more difficult. Rehabilitation activities, including distribution of seeds and tools and technical assistance, have been delayed or remain limited. As a result, agricultural production for the coming season beginning in May, will continue to decline.

Despite satisfactory weather, the area planted in 1998 was substantially lower than the previous year due to insecurity. Cereal output is estimated at 400 000 tonnes, some 20 percent lower than in 1997. FAO estimates Sierra Leone's cereal import requirement for 1999 at about 290 000 tonnes, including 140 000 tonnes of food aid.

TOGO (6 April)

The rainy season started in early March in the south, allowing planting of the first maize crop. Seasonably dry conditions prevail in the north.

The food supply situation is satisfactory. Aggregate 1998 cereal production is estimated at 590 000 tonnes, some 18 percent below the 1997 record and significantly below normal. Root and tuber production, which is less sensitive to dry periods, recorded a 5 percent increase over last year, reaching 1.29 million tonnes. The cereal import requirement for 1999 (January/December), is estimated at 75 000 tonnes. Due to a good harvest in the Sahelian countries, cereal exports from Togo to these countries is expected to decrease significantly.

CENTRAL AFRICA

CAMEROON (19 April)

1998 cereal output is estimated to be about average. Food prices decreased following the harvest and the food supply situation is satisfactory. In late March, following eruption of Mount Cameroon, 60 km west of Douala, people fled to Douala and Limbe, but the situation is now back to normal. Food supply difficulties are likely in northern areas affected by poor crops. A WFP Emergency Operation provided 6 000 tonnes of relief food for 210 000 people in the extreme north in 1998. A new emergency operation for six months will allow distribution of 9 500 tonnes of food to 660 000 persons in the north (10 percent) and extreme north (90 percent).

CENTRAL AFRICAN REPUBLIC (6 April)

Following good rainfall, a favourable cereal crop was harvested in late 1998. The food supply situation is satisfactory. For the 1999 marketing year (January/December), the cereal import requirement is estimated at 34 000 tonnes, mainly wheat. Some 7 500 refugees crossed to Bangui following the outbreak of fighting in Equateur province in DRC in December 1998/January 1999.

CONGO, DEMOCRATIC REPUBLIC OF* (6 April)

According to the last UN update, the number of internally displaced people (IDPs) in DRC is now estimated at 467 000. In Katanga province, an estimated 40 000 IDPs are scattered west of Manono, while some 50 000 residents of the Tchuapa and Ubangi districts in Equateur province fled renewed hostilities in the last days of March and were believed to be hiding in nearby forests. About 20 000 displaced people were staying with host families in the Kabare/Kalehe zones of South Kivu, while military activity has resulted in continued population displacement in the Walungu-Mwenga-Shabunda axis of the province. Many displaced people were reportedly arriving at Idjwi.

In North Kivu, people from the Masisi district were reported to be returning after eight months of displacement. However, frequent raids by Interahamwe militia continue to displace a considerable number of people in rural areas of Rutshuru-Kanyabayonga. Other population displacements were recently reported in Maniema and in Kasai Oriental provinces. In Uvira and Fizi areas of South Kivu, tension is reported between the local population and Banyamulenge in the haut and moyen Plateau. A recent FAO mission in northern and southern Kivu estimated that 240 000 families (1.2 million persons) have been affected by recent civil disturbances.

In Kinshasa, the food supply situation is difficult and prices of basic food commodities have increased sharply, notably following a large increase in fuel prices. The three provinces that traditionally provide Kinshasa with food are being overexploited due to the impact of the war and there is a risk that stocks will run out. Food production in Equateur province has diminished, while insecurity and other factors has limited transportation of goods to the capital. Similarly, the war disrupted the 1998/99 A season in Bas-Congo province and exports of locally-produced goods to Brazzaville have increased. Bandundu, the only source of food for Kinshasa's population that remained in full agricultural production, is now also meeting requests from the Kasais, and it is unclear how long the province will be able to send significant quantities to the capital. The situation may lead farmers in the food-producing provinces to sell all their supplies without keeping the necessary quantities for their own consumption or sufficient seeds for use in the next season. Meanwhile, imported goods have diminished since the recent introduction of foreign currency regulations. This has had a negative impact on food security.

CONGO, REP OF (6 April)

Electricity and water supplies have been partially restored in Bacongo and Makelekele districts of southern Brazzaville. These have been deserted by an estimated population of 200 000 since fighting in December 1998. However, markets and other basic services remain closed. Some 25 000 displaced people from southern Brazzaville were staying at 18 northern Brazzaville centres as of mid-March. They have not yet been officially authorised to move back permanently to Bacongo and Makelekele, although a few have resettled into their homes. Some of the nearly 100 000 displaced people who fled the southern town of Dolisie due to fighting between government forces and militia groups have started returning home. Clashes are continuing in the Pool region, where an estimated 120 000 Brazzaville residents fled in December.

EQUATORIAL GUINEA (6 April)

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 (6 April)

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* (1 April)

Normal to above normal rains during the past two months favoured planting and establishment of 1999 second season foodcrops. Until March FAO has distributed 2 874 tonnes of bean seeds to 243 000 most affected households. Prospects for the harvest from late May are favourable so far.

Due to irregular rains, which mostly affected cereals and beans, 1999 first season production is estimated at 1.1 million tonnes, 3 percent lower than the previous year and well below the pre-crisis average. Productions of these crops are estimated to have declined 5 percent and 14 percent respectively from 1998. Most affected areas are Bugesera, Buyogoma, Imbo and Moso.

Results of recent nutritional surveys indicate that the nutritional situation has improved since the second half of last year. This reflects a relative improvement in the security situation and increased access to land, markets and health centres.

Distribution of food aid to 138 000 most vulnerable displaced persons continue.

ERITREA* (1 April)

Preliminary estimates of 1998 grain crops, harvested at the end of last year, point to a record production of 458 000 tonnes of cereals and 33 000 tonnes of pulses, substantially above the previous year's level. As a result, import requirements in 1999 have declined by two-thirds from 1998 to 109 000 tonnes, mainly in the form of wheat for urban areas.

While the overall food supply situation has improved with the bumper harvest, the food position remains very tight for people in border areas of Gash-Barka and Debub affected by the war with Ethiopia since May 1998. Under an Emergency Operation recently approved by FAO and WFP, international food aid assistance will be distributed to 268 000 of the most affected population, including 246 500 displaced and 21 500 deportees from Ethiopia for a period of nine months starting in April.

ETHIOPIA* (1 April)

Adequate rains in March in growing areas favoured planting and establishment of the secondary "Belg" crops. The Belg season accounts for about 5 to 10 percent of aggregate annual cereal production, but it is important in Belg growing areas where it provides most of the annual food supplies.

The main 1998 "Meher" season was good with a bumper cereal and pulse crop of 11.7 million tonnes, one-third higher than in the previous year. However, in southern and eastern pastoral areas, dry weather during the rainy season from October to November, has resulted in poor conditions of pastures and animals, as well as severe shortages of water. Distribution of emergency water is underway in some areas. A recent Government/donor/international agency assessment of the situation indicates that most affected areas are Somali region and lowland Bale and Borena zones of Oromya regions. The food and water supplies in this area gives cause for concern. Prices of grains are increasing while those of livestock have declined markedly from last year. The current ban on livestock imports from these areas by Saudi Arabia has further affected incomes of the pastoral population. It is estimated that about 1.1 million people will require 89 000 tonnes of food aid for a period of six months. However, insecurity in the Somali region has prevented access to the needy population.

This year, despite a satisfactory food supply situation overall, some 2 million vulnerable people are estimated to require 180 000 tonnes of food aid during 1999. Food assistance is also required for 272 000 persons displaced by persistent armed conflict with neighbouring Eritrea. In view of ample domestic supplies, donors are recommended to support local purchases to provide some strength to the market. So far, pledges for local purchases amount to 108 000 tonnes of grains while those of imported food aid to 285 000 tonnes.

KENYA (1 April)

Planting of the 1999 main season "long rains" cereal crops has started favoured by adequate rains in March.

The output of the recently harvested 1998/99 "short rains" crops in western and eastern parts was sharply reduced by late and insufficient rains during the growing season. Preliminary estimates indicate a maize output of 100 000 tonnes, only one-quarter of average. Although the short rains accounts for only 15 percent of national production, it is the main crop in Eastern, Nyanza, Coast and parts of Central Province. In pastoral areas of these provinces, the dry weather has also resulted in shortages of water for humans and animals and in poor pasture conditions.

Despite a satisfactory food supply situation overall, following a good 1998 main season cereal crop, the food situation is difficult in areas affected by the failure of the short rains. Severe food shortages have been reported, particularly from Kiambu, Kirinyaga, Maragua, Thika and Nyeri districts in Central Provinces, as well as from several locations in Eastern Province. The situation is likely to deteriorate in the coming months with the depletion of food stocks. Food aid is urgently needed for the affected population.

RWANDA* (1 April)

Normal to above-normal rains in March benefited recently planted 1999 second season foodcrops. The early outlook is favourable.

Latest estimates of the 1999 first season indicate a total foodcrops production of 2.34 million tonnes, 14 percent above last year but slightly below the normal pre-war level. This includes 64 000 tonnes of cereals, 92 000 tonnes of pulses, 1.5 million tonnes of bananas, 646 000 tonnes of root and tubers and 50 000 tonnes of fruit and vegetables. While there has been a significant increase in production of root and tubers, and the output of bananas and plantains remains similar to last year, the season was mediocre for cereals and beans. Insufficient rains during the growing season resulted in reduced yields of grains and production is estimated to be some 15 percent lower than in the 1998 A season.

Supplies of basic staples, other than grains, is satisfactory. Prices of sweet potatoes and cassava have declined to one-third their level a year ago. This has improved access to food of the poorest strata of population. Indications point to a general improvement in the nutritional status of the population. However, the food situation remains tight in the northwestern prefectures of Giseny and Ruhengeri where persistent civil strife has disrupted agricultural activities and continue to hamper food aid distributions. Relative improvements in security conditions early in the year allowed the Government to resettle part of the displaced population. From the approximately 600 000 internally displaced people, including those living and those not living in camps, half have been resettled in new sites. International food aid for the most affected distribution is estimated at 52 000 tonnes for the period January-June 1999.

SOMALIA* (1 April)

Rains in the first two dekads of March, improved pastures conditions and water supplies in pastoral areas in Northwestern areas affected by dry weather in the previous "Deyr" season. The rains also improved soil condition for planting of the next main "Gu" season, about to start. FAO is currently distributing 560 tonnes of sorghum seeds to 28 000 drought-affected farmers in Bay and Bakool regions.

The recently-harvested 1998/99 secondary "Deyr" cereal crops was estimated at 80 000 tonnes, twice the poor level of 1997/98 which was affected by severe floods, but still 25 percent below pre-civil strife levels. Despite an increase in plantings, late and below-average rains from October to December negatively affected yields. Insufficient rainfall 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 on livestock imports from Somalia by Saudi Arabia. Population movements, particularly from the worst affected Bay and Bakool 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 food shortages and insecurity. Emergency food aid is being distributed.

SUDAN* (1 April)

Harvesting of the 1998/99 irrigated wheat crop is underway. The outlook is unfavourable. The area planted is estimated to have declined by a half from last year's level to 140 000 hectares. High production costs and comparatively lower prices of imported wheat and wheat flour, coupled with planting delays due to early flood damage to pumps and irrigation infrastructure negatively affected plantings. Yields are also expected to be reduced because of unseasonable high temperatures in December and January. The latest forecast points to a crop of 280 000 tonnes, a decline of 48 percent from last year.

The 1998 coarse grains harvest is estimated at a record 5.3 million tonnes. Production of sorghum increased 36 percent from the previous year to 4.3 million tonnes, while that of millet rose by 56 percent to 1 million tonnes. Export availabilities, mostly sorghum, are currently estimated at 719 000 tonnes. Prices of sorghum have fallen below production cost in main producing areas following a bumper harvest and large carryover stocks. This may depress plantings for the next season from June.

Despite abundant food supplies, the food situation remains tight in the South affected by prolonged civil conflict, which has resulted in the collapse of all economic activities. It is estimated that 2.3 million war affected people are in need of 173 000 tonnes of emergency food assistance during 1999. In view of the ample domestic availability, local purchases for food aid are highly recommended in order to support markets. However, more pledges are urgently needed to avoid a break in distributions as food stocks, particularly of non-cereal items, are at dangerously low levels.

TANZANIA (1 April)

Abundant rains in March, which followed a dry spell in February, improved prospects for the 1999 main "msimu" crops in southern, central and southwestern highland regions. The outlook for the harvest from June is satisfactory so far. The rains in March also benefited planting and establishment of early sown crops of the "masika" season in bi-modal areas of the north and northeast. In these areas, affected by severe dry weather during the previous "Vuli" season, the precipitation helped to regenerate pastures and livestock conditions.

The food supply situation is satisfactory for basic staples, other than cereals. However, as a result of poor second season ("Vuli") maize production and higher than anticipated storage losses last year, maize supplies remain tight. The price of maize, which reached a peak in January this year, declined in February and March but still remains one-third above last year. In contrast, prices of rice, beans and non-cereal crops have declined in most regions.

The number of people vulnerable to food shortages due to localized crop losses during the 1998 main season has increased with the failure of the 1998/99 "Vuli" season. It is now estimated that 1 million people in thirteen regions affected by reduced harvests are in need of food assistance. The food supply of this population is precarious, particularly in the regions of Dodoma, Singida and Morogoro, where deaths by starvation have been reported. Against a requirement of 29 000 tonnes of food aid for the period April to June, until the next harvest, international food aid is estimated at 20 000 tonnes, all of which has been pledged. The Government has pledged the remaining 9 000 tonnes but its emergency reserves have been virtually depleted.

UGANDA (1 April)

Above-normal rains in the two first dekads of March favoured completion of planting of the 1999 first season food crops and benefited early sowed crops. Early prospects are favourable. The rains also improved pasture and livestock conditions in eastern pastoral parts previously affected by dry weather.

The 1998/99 second season maize and bean crop was reduced, but remained satisfactory for other staples. Prices for most commodities have stabilized during the past month. The overall food situation remains satisfactory. However, severe food difficulties persist in Rakai District, where a succession of poor harvests has depleted farm stocks. Food aid distributions have improved the situation but a recent assessment Mission to the area estimated that 30 000 people are still suffering acute food shortages. Food difficulties also persist in northern areas, where 400 000 people remain displaced because insecurity. International food aid is being distributed.

SOUTHERN AFRICA

ANGOLA* (1 April)

Food production in 1999 is expected to be sharply reduced and the country will need massive food assistance during the coming months. Despite adequate rainfall over most regions since October, the area planted to crops is reported to have declined considerably this year due to renewed civil strife since December. Many farmers have abandoned land to join the rapidly increasing number of displaced people and refugees. Consequently, the 1999 crop is expected to be sharply lower than production in recent years. This will aggravate an already precarious food supply situation.

The country will, therefore, rely heavily on food assistance to meet food needs in the 1999/2000 marketing year. Food prices have risen sharply in many regions, which has reduced access to food of the majority of the population. Difficulties in distributing relief assistance have exacerbated the situation, leading to increasing malnutrition, particularly among internally displaced people. The immediate need is to assist the rapidly increasing number of new internally displaced people, now estimated at over 600 000 people, largely concentrated in the provinces of Huambo, Bie, Malanje, Huila and Uige. By the end of March food aid pledges amounted to about 141 700 tonnes, of which 139 000 tonnes have been delivered so far. An FAO/WFP Crop and Food Supply Assessment Mission is scheduled to visit the country in May.

BOTSWANA (1 April)

Prospects are generally favourable for the 1999 cereal harvest currently underway in some areas. Satellite images indicate that normal to above-normal rainfall was received in several areas during the December-January period. This followed a prolonged dry spell in February and early March. Rains in the last two decades of March provided some improvement. With areas planted reported to be substantially higher than in 1997/98, a recovery in production is expected this year, following last year's below average harvest.

The national food supply situation is generally satisfactory. The anticipated increase in output should reduce import needs. As in past years, domestic cereal availability and planned imports should adequately cover the country's needs for the new marketing year 1999/2000.

LESOTHO (1 April)

Prospects are generally favourable for the 1998/99 season crops. Preliminary indications are that the area planted was higher than last year due to good early rains coupled with Government subsidies to farmers, particularly for the purchase of seeds and fertilizer. Cumulative rainfall received between October and January ranged from normal to above normal for most areas, but dry conditions prevailed over much of the country in February and early March, causing serious crop moisture stress. This may affect yields in some areas.

The national food supply situation is expected to tighten towards the end of the marketing season, as available commercial imports appears to be less than anticipated. The Government Drought Relief Programme is expected to provide assistance to some 400 000 vulnerable people from February 1999 to June/July 1999.

MADAGASCAR (1 April)

Harvesting is underway for the 1999 paddy and other crops. Prospects are generally good for most crops, as rainfall has been favourable in most areas. Normal to above-normal rainfall was received in many growing areas in December and January. This included parts of the normally dry south-west where conditions continue to be fair, despite a dry spell in February, which may adversely affect crop yields. The incidence and negative impact of cyclones have also been relatively limited this year. Although locusts continue to be a threat to crops in several areas, their impact has also been limited so far, and control measures continue to be applied by the Government, with donor assistance.

With a relatively good harvest in prospects, the food supply situation is expected to improve during the 1999/2000 marketing year. In the drought-prone south, some relief assistance will continue to be needed for vulnerable population groups with limited means of subsistence.

MALAWI (1 April)

Production prospects are generally favourable for the 1998/99 crop Season. Satellite images indicate that rainfall has been abundant and widespread, covering most parts of the country. Most parts of the southern region received above-normal rainfall by late January, resulting in some flooding. In northern areas, despite a late start, widespread precipitation between January and March benefited crops. Initial indications are that the maize harvest could be higher than last season's above-average crop. The food supply situation continues to be generally satisfactory as a result of favourable production last year.

MOZAMBIQUE (1 April)

Initial indications point to another above-average cereal harvest this year, due to favourable rainfall and an increase in area planted. Following a delayed start to the season in northern and north-eastern provinces (Cabo Delgado, Nampula and Niassa Provinces), rainfall in February and March has been normal to above-normal. However, in central parts, floods caused by torrential rains in late February affected several districts of Inhambane Province, with some loss of life, crops and property. In these otherwise drought prone areas, an estimated 40 000 hectares of arable land were flooded, over 70 000 people were affected, and roads damaged badly. The Government has appealed for international assistance amounting to US\$12.4 million, for food, seeds and tools, as well as for the repair of damaged infrastructure.

The national food security situation for the 1998/99 marketing year remains generally satisfactory. The steady increase in food production in recent years has meant that the country is now self-sufficient in maize and has exportable surpluses for deficit countries in the sub-region. The import requirement of rice and wheat is estimated at 67 000 tonnes and 145 000 tonnes respectively and will be met through the private sector.

NAMIBIA (1 April)

Rainfall has been irregular during much of the growing season, remaining below-normal until January. Abundant rains in late January and early February in northern areas were followed by prolonged dry spells and high temperatures in various places. As a consequence, the outcome of the season remains uncertain.

The national food supply situation is anticipated to be tight in the upcoming marketing year 1999/2000 (May/April) due to several consecutive years of drought-reduced production. The cereal import requirement will continue to exceed 150 000 tonnes for the marketing year, much of which is expected through commercial channels.

SOUTH AFRICA (1 April)

Abundant rains between November and mid-February were followed by a prolonged dry spell, particularly over northern and eastern provinces. This stressed the maize crop, which was at grain filling stage. As a result, maize production is officially forecast at 6.5 million tonnes, slightly below last year's reduced production and below average. However, showers from mid-March are expected to reduce some of the stress. The overall outcome of the season will depend on conditions during the next few weeks prior to harvest.

The official estimate of the 1998/99 winter wheat crop currently stands at a below average 1.5 million tonnes, 36 percent lower than 1997/98. This is attributed to low international and domestic prices.

SWAZILAND (1 April)

Rainfall during the 1998/99 crop season has been generally favourable, with an early start and cumulative levels ranging from normal to above normal in most areas. Despite a localized dry spells which may adversely affect yields in certain areas, a good harvest is expected.

The food supply situation for the 1999/2000 marketing year is expected to remain satisfactory. Domestic availability of cereals and planned commercial imports are expected to adequately meet domestic demand.

ZAMBIA (1 April)

Favourable and well-distributed rainfall has been received over most parts of the country during much of the crop season. Favourable yields are expected in areas where inputs were delivered and purchased in good time. Notwithstanding the general outlook, poor and low yields have been reported in outlying areas such as Chama and Isoka Districts of the Eastern and Northern Provinces respectively due to poor rainfall. Crops have failed in other places due to non-availability and unaffordable inputs. Flash floods due to heavy rainfall, also destroyed crops and infrastructure in various areas, especially in North-Western, Central, Western and Eastern Provinces.

The food supply situation is likely to remain tight in areas affected by floods and crop failure. In certain locations, there are reports of early/premature harvesting of food crop before they reached full maturity/ripeness. The situation of these areas will need to be monitored carefully, given the serious implications on household food security in the upcoming marketing year.

ZIMBABWE* (1 April)

Prospects are generally favourable for 1998/99 season crops, with abundant and widespread rain received since October in most areas. However, continued heavy rains, particularly in the communal farming sector, which accounts for some 70 percent of maize production, resulted in flooding, water-logging and severe leaching of essential nutrients in many areas. This has raised concerns that crops in low-lying areas could suffer yield losses from water-logging and leaching of fertilizers. In the normally dry southern provinces which received good early rains in mid-October, an above-average maize harvest is in prospect. Livestock are also in excellent condition in these areas.

With a good cereal harvest anticipated, the national food supply situation is expected to improve during the upcoming 1999/2000 marketing year (April/March). Despite reports of price rises in cereals during the January/March period, which were due to distribution problems, available supplies are expected to cover consumption needs until the beginning of the new harvest in April.

ASIA

AFGHANISTAN* (12 April)

Food production continues to be severely constrained by lack of essential agricultural inputs and continuing insecurity in parts of the country. Imports of cereals in 1998/99 are forecast at 740 000 tonnes, similar to the previous year.

In view of continuing food supply problems, a joint FAO/WFP Crop and Food Supply Assessment Mission is scheduled to visit the country in early May. In addition due to ongoing food problems, the UN is to re-establish offices in the country after several months of absence. Six international UN staff from main agencies will be posted to Kabul. Other staff will be posted to Kandahar, Herat and Jalalabad. The primary role will be administer humanitarian aid. Wheat flour for subsidized bakeries project will continue to be brought in by WFP. which currently assists some 200 bakeries in Kabul and 87 in Jalalabad. The bakeries represent the largest component of WFP's assistance programme to Afghanistan, 56 percent of the 119 000 tons of programmed food aid. Other WFP's activities include

institutional feeding (hospitals, orphanages, etc.), winter emergency feeding, assistance to returnees and IDPs, food-for-work projects limited to life-saving activities with other implementing partners, and food-for-seed projects in cooperation with FAO.

Recently, due principally to poor living and nutritional conditions and lack of treatment, approximately 200 people died of an infectious disease in northern parts of the country. The WHO was requested to assist in combating the illness.

BANGLADESH (10 April)

Recent reports indicate that persisting drought have affected "boro" crops in the south-western region of the country. The production target for the wheat crop is 1.98 million tonnes, against the previous year's crop of 1.8 million tonnes. The target for the 'boro' rice crop is 8.4 million tonnes, against the previous year's harvest of 8.1 million tonnes, mainly due to an expansion in area planted. 1998/99 paddy production is estimated at 26.7 million tonnes, about 2 million tonnes below the previous year, reflecting severe damage caused by the floods which affected most of the country during July to September 1998.

Planting of the 'aus' rice crop, for harvest in July/August, is underway. Overall, a slight increase in output is anticipated in the 1999/2000 crop year owing to an expected increase in the area planted. As of end-February 1999, out of total estimated food aid of 1.68 million tonnes for 1998/99, nearly one million tonnes (60 percent) have already been delivered.

CAMBODIA (1 April)

An FAO/WFP Crop and Food Supply Assessment Mission, which visited the country in January, estimated the 1998/99 total paddy production at 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 (15 April)

Despite recent widespread rains, severe drought, plant disease and insects have seriously affected production of the winter wheat crop, for harvest from April 1999. The drought is reported to have affected an estimated 22.3 million hectares, mainly in northern parts.

Planting of the 1999 early rice crop is underway and preliminary reports indicate an expansion in area. Widespread rain (15-50 mm) in March boosted moisture supplies for early rice transplanting in the south-east.

CYPRUS (12 April)

The wheat and barely crops to be harvest from May are reported to be in satisfactory condition. The aggregate area sown was around 60 000 hectares, similar to the previous year. Barley production in 1998 was revised to 53 000 tonnes, which represented an appreciable increase over 1997.

INDIA (1 April)

A bumper foodgrain crop is officially forecast in 1998/99, despite heavy rains and floods late last year which damaged the "kharif" rice crop in major producing areas in the south. With a record wheat crop of about 71 million tonnes expected, total foodgrain production is forecast to be more than 200 million tonnes, compared to 192 million tonnes last year. Paddy production for the 1998/99 season is forecast at 123.5 million tonnes, similar to the previous year.

The Government forecast the purchase of more than 13 million tonnes of wheat from farmers this year compared with 12.6 million tonnes last year due to higher expected output.

INDONESIA* (1 April)

An FAO/WFP Crop and Food Supply Assessment Mission which visited the country from 15-24 March found that, in addition to generalized economic problems, the food supply situation continues to be affected by political instability, poor security and escalation in civil unrest in parts. Consequently, there are indications that markets are failing, as traders are reluctant to hold stocks or transport large consignments due to security concerns. Such failures, together with the diminished role of the National Logistics Planning Agency, BULOG, have led to considerable variation in supplies and price across the country, further restricting the access of the poorest to markets. In general, despite expectations of some recovery in agriculture and the economy this year, longer-term prospects for employment and growth remain uncertain.

According to official reports from the Central Bureau of Statistics, 1999 paddy production is forecast at 48.6 million tonnes, against the Government's target of 52 million tonnes, and similar to the Bureau's 1998 final estimates of 48.5 million tonnes. Based on this forecast, the rice import requirement for the 1999/2000 marketing year (April-March), is estimated at around 3.1 million tonnes, of which approximately 1.3 million is covered by pipeline commercial and soft loan imports and food aid. This leaves a deficit of about 1.8 million tonnes of rice to be covered by commercial/concessional imports, loans, grants and targeted food aid. In addition to rice, some 3.3 million tonnes of wheat will be required in the current marketing year. There are large wheat stocks in the country, amounting to 500 000 tonnes, due to reduced demand. Taking these stocks into account and including bilateral wheat assistance in the pipeline, the uncovered import requirement for wheat in 1999/2000 is estimated at 2.2 million tonnes.

IRAN, ISLAMIC REPUBLIC OF (1 April)

Record low autumn rainfall has resulted in water shortages and affected crops in most parts, including primary winter wheat growing regions in the north-west and north-east of the country. The country has faced several water shortages and droughts in recent years, which were blamed for reducing harvests and the increase in cereal imports.

Paddy output in 1998 is estimated at 2.9 million tonnes, slightly above 1997. 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* (12 April)

Low rainfall and high temperatures have adversely affected 1999 winter crops, especially rain-fed areas in the north. Agricultural production also continues to be affected by serious shortages of essential inputs such as fertilisers and replacement parts for machinery. 1998 cereal production was around 2.48 million tonnes, some 12 percent above the 2.2 million tonnes produced in 1997, which was affected by drought.

The "Oil for Food" agreement has helped ease the food supply situation in the country, but malnutrition remains widespread in many parts.

ISRAEL (12 April)

The driest winter in years is likely to seriously affect the wheat and barley harvest this year, which will commence in April. Only around 20 percent of the country's requirement of wheat is met by local production, the rest being imported. Around 175 000 tonnes of wheat and barley were produced in 1998, which represented an increase of 19 percent over the previous year. For the 1998/99 marketing year (July/June) cereal imports are estimated at 2.6 million tonnes.

JAPAN (1 April)

Planting of the 1999-rice crop is expected to start in May. The Government has set this year's rice area adjustment at 960 000 hectares, similar to last year. Paddy output in 1998, estimated at 11.2 million tonnes, is about 10 percent below 1997 and 12 percent lower than the average for the preceding five years. This is mainly due to lower area and floods last summer.

JORDAN (12 April)

Prospects for food production in 1999 have been seriously affected by a severe drought. Government estimates indicate that rainfall by the end of February was 25-30 percent of normal, whilst temperatures were above average. Many reservoirs are reported to be less than half full due to the shortage of rainfall.

This has reduced production of the main wheat and barley crop and destroyed pastures for livestock, on which a large number of the population depend for their livelihood. Although in normal years the country imports a significant proportion of its food needs, the trade embargo on Iraq has affected the economy, as Iraq was an important market for Jordanian exports. This, therefore, has had a negative impact on foreign exchange earnings and hence the capacity of the country to import food. In addition to loss of export revenues from traditional exports, Jordan has also been affected in recent years by the decline in foreign remittances from Jordanian's working overseas and by rising unemployment which has put additional strain on coping mechanisms. Economic problems have also affected the agriculture sector through increases in the cost of irrigation water and the abolition of subsidies on fodder. It is estimated that as a result, the contribution of agriculture to GDP has declined from 4.4 percent in 1995 to 3.2 percent in 1998.

The food supply situation, particularly among poorer sectors of the population is therefore becoming a matter of growing concern. In view of this, in May, an FAO/WFP Crop and Food Supply Assessment Mission will visit the country to make an assessment of the situation.

KOREA, REPUBLIC OF (1 April)

Harvesting of the barley crop, which normally accounts for some 5 percent of aggregate cereal production, has begun and indications are that production will be similar to last year's level of 280 000 tonnes. The target for paddy production in 1999 has been set 7 million tonnes.

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 growing season.

KOREA, DEMOCRATIC PEOPLE'S REPUBLIC OF* (19 April)

The food situation in the country continues to remain grim despite some recovery in domestic cereal production in 1998. Total cereals production (milled basis) in 1998 was estimated at about 3.5 million tonnes, up from 2.3 million tonnes produced in 1997 but about

9 percent below the average for the previous five years. Against this the country needs about 4.8 million tonnes for total cereal utilization, leaving an overall import requirement of over 1.35 million tonnes. Even assuming the country could import 300 000 tonnes of this commercially it would still be left with a substantial deficit of 1.05 million tonnes.

In view of the severity of the food situation, an Emergency Operation to provide food assistance to Korea DPR, worth some US\$267.2 million was jointly approved by FAO and WFP on 15 April 1999. Notwithstanding emergency food assistance, the country is still left with a substantial food deficit this year that needs to be covered by programme food assistance through bilateral channels. 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. 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* (1 April)

A recent FAO/WFP 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. This is despite localized dry spells and a sharp reduction in rice planting in the upland. 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. 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 is 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 (12 April)

Like other countries in the region, agriculture production has been affected by low rainfall this year. Reports indicate that important water reservoirs like Qauaoun lake are less than one third full. Production of cereals in 1998 was an average 67 000 tonnes. Total cereal (mainly wheat) imports for the 1998/99 marketing year (July/June) are estimated at around 0.7 million tonnes.

MALAYSIA (1 April)

Light to moderate showers in March improved moisture for crops. Due to drought, the aggregate output of paddy in 1998 is estimated at 2 million tonnes, about 100 000 tonnes below the previous year and about 5 percent below average.

MONGOLIA* (15 April)

Cereal production (mainly wheat) declined further in 1998, as a consequence of snow damage and continuing problems in the sector. Wheat production in 1998 is estimated at 195 000 tonnes, about 13 percent below 1997 and 34 percent below the average for the preceding five years.

As in many economies in transition domestic food production has been declining with the break-up of state farms and reduced input use, which are no longer subsidized. Dwindling

domestic cereal supplies have resulted in deterioration in the country's ability to feed its people with the number of malnourished rising drastically. Large imports will be necessary in the 1998/99 marketing year to meet requirements, a situation further compounded by low cereal reserves, a decline in export trading and the country's capacity to import sufficient quantities of grain commercially to meet the deficit.

So far, about 60 000 tonnes of food aid have been pledged, of which 45 000 tonnes have been delivered. A further 48 000 tonnes of wheat seed have also been provided.

MYANMAR (1 April)

Overall growing conditions have been satisfactory for the summer rice crop, for harvest from April. Total Paddy production in 1998/99 is estimated at 17.8 million tonnes, up from 16.7 million tonnes in 1997/98. This is mainly due to increased area.

NEPAL (1 April)

Harvesting of the wheat crop is underway and preliminary projections indicate an output of about 1 million tonnes, slightly above 1998. Mainly due to heavy monsoon rains and floods the aggregate cereal output in 1998 is estimated at a reduced 5.9 million tonnes, some 300 000 tonnes below 1997 and about average.

PAKISTAN (1 April)

Widespread and heavy rains from January have improved the growth of crops in main growing regions. The condition of the wheat crop, for harvest in April/May, is reported to be satisfactory throughout the country. The 1999 wheat target is 19 million tonnes, similar to last year's crop of 18.7 million tonnes.

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 (1 April)

Heavy rains and showers, mainly in eastern parts, continued to hamper second-crop grain harvesting but increased moisture supplies for the next main season crop. In February, floods and landslides due to torrential rains damaged the rice and maize crop in southern Mindanao.

The output of paddy in 1998/99 is put at 10.2 million tonnes, slightly above the previous year's drought-reduced harvest, but about 3 percent below 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 (12 April)

The main wheat harvest will commence later this month/early May. Coarse grain imports for 1998/99 (July/June) are forecast to increase by some 400 000 tonnes to 6.2 million tonnes. Last year, the Government allowed the private sector to import barley, which was previously controlled by the state Grain and Flour Mills Organisation (GSFMO). The last barley import tender issued by GSFMO was for 1.14 million tonnes in March last year. Since then GSFMO has not imported barley, allowing private traders to buy internationally without restrictions.

SRI LANKA (1 April)

Harvesting of the 1999 "maha", main season, paddy crop is underway. Output is expected to be below last year due to lower planted area. Rainfall from the north-east monsoon in the period 1 October 1998 to 25 February 1999 has been normal to above normal in all eight monitored provinces, similar to last year.

Overall output of paddy in 1998 is estimated at 2.7 million tonnes, about 18 percent higher than the previous year due to area expansion.

SYRIA (12 April)

Poor rainfall has affected the wheat and barley crops, to be harvested from May. Reduced precipitation this year has also meant that some tributaries of the Barada River are now dry. The lack of rainfall may increase pressures later in the year, when demand for irrigation increases. The pattern of rainfall on cereal production in the country is of considerable importance as an estimated 75 percent of cropped area is rain-fed. Wheat production in 1998/99 is forecast at an above average 4.1 million tonnes.

An estimated 150 000 tonnes each of wheat flour and rice are expected to be imported in the current 1998/99 (July/June) marketing year, whilst maize imports are put at 340 000 tonnes.

THAILAND (1 April)

Unseasonable showers in February and March favoured second-season rice, however, output is expected to be below last year due to water shortages earlier. Despite Government calls to save limited water reserves by reducing the rice area, the high prices that prevailed at planting period have encouraged farmers to increase cultivated area.

Paddy production in 1998/99 is officially forecast at 21.5 million tonnes compared to 22.6 million tonnes last year.

TURKEY (12 April)

Weather conditions through February, favoured prospects for the wheat and barley crop. Overall, wheat and maize areas increased slightly at the expense of cotton, the procurement price of which remains low. Wheat production is projected to be similar to last years record crop of around 21 million tonnes, whilst maize production is also forecast to increase.

Despite the increase in domestic production, the country will still need to import large quantities of wheat to meet needs. Wheat imports in the current 1998/99 (July/June) marketing year are expected to be around 0.9 million tonnes, some 36 percent lower than in 1997/98. Maize imports are also projected to decline to 650 000 tonnes, some 200 000 tonnes lower than in the previous year. Future consumption of maize is projected to increase steadily due growth in the dairy, livestock and poultry industries.

VIET NAM (1 April)

It is officially estimated that nearly 1.5 million people have been affected by food shortages in central and northern Vietnam due to crop failure caused by prolonged drought and flooding last year.

Light showers in March were beneficial to winter-spring rice transplanting in the Red River Delta, but more rain is needed. Harvesting of the crop has also started in some areas but yields may have been affected by the moisture stress caused by unusually low water levels. The Government's target for the winter-spring rice crop is 14 million tonnes.

Paddy production in 1998 is estimated at 28.4 million tonnes, slightly lower than the previous year but about 8 percent above average for the preceding five years. 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 (12 April)

Rainfall and temperatures for the main, sorghum and millet crops to be harvested at the end of the year, are reported to be normal. Total cereal output in 1998 is officially put at 833 000 tonnes, of which 474 000 tonnes was sorghum and 167 000 tonnes wheat. Last years cereal production was some 30 percent higher than 1997, which was marked by poor weather and inadequate supplies of essential agricultural inputs.

CENTRAL
AMERICA
(including the
Caribbean)

ANTIGUA AND BARBUDA (6 April)

Normal weather has resumed and growing conditions are reported to be satisfactory for minor foodcrops, vegetables and roots, which were previously affected by hurricane "Georges" in 1998. A programme for rehabilitation of agricultural activities, with international assistance, is being implemented.

COSTA RICA (6 April)

Planting of the 1999/2000 first season maize and paddy crops has begun. The area is expected to be similar to 1998/99, when the production recovered from the 1997/98 El Niño. Some cash and food crops in southern areas, such as Pérez Zeledón and Coto Brus, suffered particularly last year from the impact of hurricane "Mitch" and a recovery in production is anticipated.

CUBA (6 April)

Planting of 1999 irrigated paddy (spring crop) has started while that of the rainfed (winter) paddy has been completed. Harvesting of potato and other minor foodcrops is also underway. The crop outlook is uncertain, due to unusually dry weather and the fact that several weeks remain before the next rainy season. Moisture levels continue to decline in the eastern provinces, which were affected by a severe drought in 1998. Harvest of the important 1998/99 sugar cane crop, the main agricultural export, is well advanced. Output is officially forecast at 3.8 million tonnes compared to 3.2 million tonnes last year, the lowest production level in many years.

DOMINICAN REPUBLIC (6 April)

Weather conditions favoured planting of 1999 first season foodcrops and development of irrigated paddy. Production is expected to recover from last year, when crops were affected by severe dry weather and hurricane "Georges". Livestock pastures are also reported in satisfactory condition. Recovery of the agricultural sector is being supported by Government programmes with support from the international community.

EL SALVADOR (6 April)

Normal to above-normal rains benefited the development of 1998/99 third season maize and bean crops and a partial recovery is anticipated from the losses incurred to the second season crops by hurricane "Mitch" in 1998. Production of maize for the year (three crops) is forecast at 554 000 tonnes, which is higher than the 508 000 tonnes in 1997/98 but less than the 630 000 tonnes produced in 1996 and the 682 000 tonnes anticipated this year before the hurricane. Output of beans is forecast at 46 500 tonnes compared to 68 000 tonnes anticipated earlier. Consumer prices for basic grains and beans are stable and declining

slightly due to imports from the United States and neighbouring countries. Food aid from the international community continues to be distributed to about 60 000 people.

GUATEMALA (6 April)

Harvesting of the 1998/99 second season cereal and bean crops has been completed, land preparation for planting of the 1999/2000 first season crops will commence in late April. 1998/99 maize production is provisionally forecast at a below-average one million tonnes, due to reduced plantings and the effect of hurricane "Mitch". Production, however, was higher than last year's 880 000 tonnes when crops were significantly affected by El Niño. Production of sorghum and beans was below average due to the hurricane. Food aid continues to be distributed to about 65 000 people.

HAITI* (6 April)

Weather conditions favoured planting of the 1999/2000 first season maize and bean crops. Planting of irrigated paddy is also underway. Harvesting will commence in June and average to slightly above-average production is tentatively forecast, assuming normal weather persists. Food aid continues to be distributed. Some 150 000 tonnes in cereals have been pledged in 1998/99 (July/June) of which 110 000 tonnes have been delivered.

HONDURAS (6 April)

Harvesting of 1998/99 second season maize and beans has been completed. Weather conditions during the season have been generally favourable for crop development. As a result, an additional 100 000 tonnes of maize is provisionally expected for 1998/99 to about 505 000 tonnes, compared to 411 000 tonnes previously forecast in December. Production of beans has also improved and output is presently estimated at 64 700 tonnes compared to 61 000 tonnes estimated earlier. Increased production has contributed to the depression of market prices. In contrast, production of sorghum and rice was lower than previously estimated. Sorghum output is presently estimated at about 71 300 tonnes and milled rice 13 000 tonnes, compared to 85 000 tonnes and 18 000 tonnes respectively forecast earlier. Food assistance continues to be provided to some 810 000.

MEXICO (6 April)

Harvesting of 1999 wheat in irrigated areas in the north-west is about to start. Prospects are good and output is provisionally forecast at an average 3.4 million tonnes, compared to 3.2 million tonnes in 1998. The increase is attributed to higher yields. Planting of 1999 spring/summer maize, for harvesting from September, is about to start under generally dry conditions. The area planted is nevertheless expected to be close to the slightly above-average 1998 level unless present dry conditions persist.

NICARAGUA (6 April)

Harvesting of 1998/99 third season ("apante") maize and beans has been completed. Land preparation is also underway for planting 1999/2000 first season crops from May. The "apante" output of maize and beans is provisionally estimated at about 83 000 tonnes and 82 000 tonnes respectively. This represents a significant recovery from losses caused by hurricane "Mitch". The recovery is mainly due to favourable weather and government rehabilitation programmes in collaboration with the international community. Consumer prices have consequently declined and exports of beans have been made to neighbouring countries which were also affected by the hurricane. Food aid continues to be distributed to some 400 000 beneficiaries while large-scale programmes for rehabilitation of infrastructure are also underway.

ST. KITTS AND NEVIS (6 April)

The agricultural sector is gradually recovering from severe damage inflicted by hurricane "Georges" last year. A programme for the rehabilitation of the agricultural sector has benefited planting and development of sugar, the main source of employment in the country, bananas, and minor food crops.

SOUTH AMERICA

ARGENTINA (6 April)

Harvesting of the 1999 maize crop is underway. Although rains have been irregular during the season, causing some delay in harvest operations, so far there has been no adverse effect on the crop. By mid-April, about 29 percent of the area planted had been harvested compared to 39 percent the year before. Production is tentatively forecast at an above average 13.5 to 14 million tonnes, compared to last year's record of 19.4 million tonnes. This reflects decreased plantings, largely attributed to unattractive prices. Paddy harvesting is also underway and a record 1.45 million tonnes is anticipated.

BOLIVIA (6 April)

Normal to above-normal rains are reported in several parts of the country since early-March following weeks of dry weather which could have an adverse effect on the developing crops, particularly in the main producing eastern Department of Santa Cruz. In the highlands and valleys, by contrast, cold spells have affected the crops. Harvesting of the 1999 main season cereal crops is about to start and a recovery in production, mainly coarse grains, is anticipated from last year's El Niño affected crops. Improved outputs are also anticipated from the important potato crop, as well as other root crops.

BRAZIL (6 April)

Harvesting of the 1999 main maize crop is well advanced in the main producing states of Paraná, Santa Catarina and Rio Grande do Sul. Although adverse weather at planting and that of recent weeks have affected yields, maize production from both crops (the second crop currently being planted) is forecast at an average 34 million tonnes. This compares to last year's low 30 million tonnes when the crops, particularly in the north and north-east, were severely affected by drought. Harvesting of the 1999 paddy crop is also well advanced and a well above average 10.5 to 11 million tonnes is forecast.

CHILE (6 April)

Dry weather conditions continue to prevail, with the exception of some parts in the north. A severe dry spell lasting several months has affected crops. As a result, the government declared an alert in 120 agricultural locations in central parts of the country. Power supply has been rationed. Production of the recently harvested 1998/99 wheat crop declined from last year's above-average 1.7 million tonnes to below-average. Harvesting of the 1999 maize crop has only started and the outlook is poor as plantings were severely affected by drought. Output is currently forecast at a low 650 000 tonnes.

COLOMBIA (6 April)

Above-normal rains are reported over most of the country, except for some areas in the northern Andean highlands where dry weather has prevailed for several weeks. Planting of the 1999 main season cereal crops has only started and the area planted is expected to increase from 1998 below-average level, mostly as a result of a production purchase agreement between the feeding industry and farmers. Sorghum plantings are also anticipated to be below average mainly due to unattractive prices which have induced farmers to switch to more profitable crops.

ECUADOR (6 April)

Above-normal rains by end- February caused flooding, particularly in the coastal provinces of Esmeraldas, in the north, and the central and southern Manabi and Guayas, with consequent adverse effect on the crops. Harvesting of the 1999 main season yellow maize crop is about to start and, despite the heavy rains, output is expected to increase significantly from 1998 when the crops were severely damaged by El Niño. White maize harvesting will commence mainly from June. Paddy harvesting is also about to start and a significant recovery from last year's affected crop is anticipated.

GUYANA (6 April)

Weather conditions have been dry since March, but have not seriously affected paddy. Harvesting is about to start and a recovery is expected from last year's El Niño affected crop. Output is tentatively forecast at an above-average 600 000 tonnes.

PARAGUAY (6 April)

Normal weather resumed in March benefiting the harvesting of 1999 maize. Output is tentatively forecast at about 860 000 tonnes, slightly below last year.

PERU (6 April)

Weather conditions benefited the development of the 1999 wheat crop (to be harvested from May) and an above-average production is tentatively forecast. Harvesting of the 1999 white maize has only started while that of yellow maize is underway. Production of yellow maize output is anticipated to be average while that of white maize is expected to be above-average. Harvesting of the 1999 paddy crop is underway and output is provisionally forecast to be close to 1998 near record level.

SURINAME (6 April)

Normal rains have benefited the development of the 1999 important paddy crop and output is tentatively forecast at 200 000 tonnes, a significant recovery from last year's El Niño affected crop. Outputs from other cash crops, such as bananas, and minor food crops in general are also expected to improve.

URUGUAY (6 April)

Harvesting of the 1998/99 maize and sorghum crops is underway while that of the barley crop is due to start from May. Prospects are good and average to above-average outputs are anticipated. Harvesting of the important paddy crop has started and a near-record output is expected, a substantial recovery from last year's El Niño affected crop.

VENEZUELA (6 April)

Normal rains benefited land preparation for 1999 coarse grain and paddy planting. The area planted to maize is expected to be similar to 1998 average, reflecting steady domestic demand. A slight decline in the area planted to paddy is expected in anticipation of decreasing exports to neighbouring countries.

COMMONWEALTH OF INDEPENDENT STATES

ARMENIA* (25 March)

The 1998 cereal and pulse harvest is officially estimated at 326 000 tonnes, including some 240 tonnes of wheat. The outlook for the current wheat crop remains uncertain as winterkill could be greater than last year. In the North Caucasus region, however, the outlook for winter wheat has improved somewhat. The country is mobilizing high-grade seed for spring planting.

The cereal import requirement in 1998/99 is estimated at about 342 000 tonnes. Against this requirement, food aid pledges of 50 000 tonnes have been reported to date and the balance would have to be imported commercially. Despite the economic crisis in the Russian Federation, GDP growth remained a robust 6 percent in 1998 and is also expected to remain positive this year. However, as extended family support and private remittances play an important role in survival, household vulnerability has increased owing to the loss of such remittances, and the return of expatriate workers from Russia. Hence, there is little scope at present for phasing out humanitarian assistance for the most vulnerable. WFP will therefore continue to provide food assistance to refugees and IDPs as well as to the most vulnerable amongst the local population. In addition to humanitarian assistance food will also be provided through food for work programmes. The programme will be reviewed annually and be for a duration of three years.

AZERBAIJAN (25 March)

The early outlook for 1999 grain production is satisfactory. But increased difficulty in importing essential inputs could keep output close to last year's poor 1 million tonnes, including some 900 000 tonnes of wheat. In the current marketing year, the cereal import requirement is estimated at 565 000 tonnes. Food aid deliveries, for distribution to the vulnerable populations, amount to 18 000 tonnes of grain and the balance is likely to be imported commercially. GDP continued to grow in 1998, but growth will be slower in 1999 as the fallout of the Russian financial crisis coupled with low oil prices affect the economy. Vulnerable populations, including a large proportion of the 12 percent of the populations which is still displaced as a result of the unresolved dispute over Nagorno Karabakh, will continue to require humanitarian assistance. WFP will continue its current programme in support of the most vulnerable IDPs, while income generation activities will be expanded. The programme will be reviewed annually and has a tentative duration of three to five years.

BELARUS (25 March)

Growing conditions for 1999 winter grains have been mostly satisfactory to date. However, yields could remain below average due to difficulties in mobilizing inputs in the current economic situation. Although winter wheat area (for harvest in 1999) is reported to have increased by a further 10 percent, there is a significant backlog of autumn fieldwork. All regions have been ordered to increase the minimum area sown to grain by up to 20 percent this year. The extent to which farmers can comply realistically, and still obtain reasonable yields, will depend heavily on the availability of central government subsidies and adequate and timely availability of inputs. The 1999 grain production target of 7 million tonnes may not be achieved.

Following the poor 1998 grain harvest (officially estimated at 4.9 million tonnes), the country has to import at least 300 000 tonnes of foodgrains. Aggregate cereal imports in 1998/99 are expected to fall to about 500 000 tonnes, as foreign exchange constraints limit feedgrain imports. Price controls on many basic foodstuffs have led to chronic shortages of eggs, butter, oil and bread in shops. Small-scale household production of basic foodstuffs, which accounts for between one fifth and one third of household income, provide an important buffer for food security.

GEORGIA* (25 march)

The outlook for 1999 winter crops, mainly wheat and barley remains satisfactory and output could recover somewhat from last year's low level (230 000 tonnes) due to crop damage following high windstorms. However, disruption in trade with the Russian Federation and increased difficulty in mobilizing inputs as well as lack of adequate maintenance of irrigation and drainage systems are likely to keep average yields low.

In the 1998/99 marketing year the country is expected to import about 0.6 million tonnes of cereals, mainly wheat. Food aid pledges to date amount to nearly 130 000 tonnes and the balance is likely to be imported commercially. The country is self sufficient in maize.

KAZAKHSTAN (25 March)

The 1999 crop year is expected to be difficult. Farm credit, is scarcer than last year and farmers' ability to barter inputs has been affected by the poor harvest last year. The situation has also been compounded by the disruption to trade and marketing following the financial crisis in the Russian Federation. The bulk of 1999 grains will not be planted until May. The aggregate area to be sown to grains is forecast to fall to 12.2 million hectares, including 10 million hectares of wheat. This compares to reported sowings of 13.5 and 10.7 million hectares respectively last year. However, as only 11.3 and 9.1 million hectares respectively were harvested, the 1999 grain harvest could recover from last year's poor level of 7.3 million tonnes, provided the weather is better and planting targets are met. (As farmers are pressured to plant grain, the areas sown tend to be over-reported). The minor winter grain crop (mainly wheat) is still dormant. Some 0.7 million hectares were planted, 6 percent less than in the preceding year. After many years of inadequate herbicide use, weed growth is reported to be a major problem this year.

The 1998 grain harvest is now estimated by FAO at about 7.3 million tonnes, some 42 percent less than in 1997 in response to economic problems and dry weather. Carryover stocks could enable the country to export up to 1.9 million tonnes of cereals in 1998/99. By December 1998 some 1.4 million tonnes had already been shipped. Following the collapse of the Russian rouble and the sharp fall in the exchange rates of currencies of many neighbouring countries, the government has banned the inflow of Russian food products and imposed duties of 200 percent on food imports from neighbouring Kyrgyzstan and Uzbekistan. Import duties on sugar and meat are to be increased in April.

KYRGYZ REPUBLIC (24 March)

A law which will enable private citizens to buy, sell and use land as collateral has been passed and is expected to be implemented by mid-1999. Agricultural production, which accounts for about 50 percent of GDP, increased by 2 percent in 1998. Full land privatization is expected to result in rapid growth in the sector.

The current outlook for the 1999 winter wheat crop remains satisfactory. Indications are that the shift from grain to industrial (tobacco, sugarbeet and cotton) and other foodcrops will continue this year. The 1998 cereal harvest is officially estimated at about 1.62 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 1.29 million tonnes.

Cereal imports in 1998/99 are tentatively forecast at around 145 000 tonnes including food aid pledges amounting to 56 000 tonnes. The country also exports grain to neighbouring Uzbekistan and Tajikistan.

MOLDOVA (25 March)

Winter grains (mainly wheat and barley) are emerging from dormancy and the current outlook is mostly satisfactory. The aggregate 1998 grain harvest is officially estimated at 2.7 million tonnes, against 3.3 million tonnes last year. Production of wheat (1 million tonnes) and barley (225 000 tonnes) was below average, reflecting dry conditions and low profitability.

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

RUSSIAN FEDERATION (26 March)

Current indications suggest that 1999 grain and pulse production is expected to recover from last year's extremely low level (estimated at 55 million tonnes by FAO) but to remain below average. Given normal weather, yields could recover from last year's drought-affected levels. Farmers are also expected to increase grain area as it provides an inflation-proof means of payment. However, the economic situation in the country and on farm is expected to make the mobilization of the necessary inputs even more difficult than in preceding years, despite special programmes being devised by the government to assist farmers. The bulk of inputs will have to be mobilized by barter and resources from last year's poor harvest are limited. Economic difficulties in the autumn resulted in a 4 percent drop in the area sown to winter crops, and of the 13 million hectares sown, crops are now reported to be in a poor condition on 1.6-2 million hectares. There is a large backlog of autumn field work to be completed in spring. Spring grain plantings are targeted at 38 million hectares. However, with plantings only just starting in the extreme south, it is too early to judge if the target will be achieved. At this early stage FAO tentatively forecasts the 1999 grain harvest at 65 million tonnes, including some 33 million tonnes of wheat (1998:30) and 30 million tonnes of coarse grains, unchanged from last year.

Following last year's poor harvest, the overall food supply situation is not critical but stocks are being drawn down sharply and feedgrains are reported to be short supply. However, at the forecast level, this is inadequate to meet current domestic demand, estimated at about 70 million tonnes per annum. The outlook is for the grain supply situation to remain tight also in 1999/2000. The price of food quality wheat has doubled since May 1998 and that of feed barley has increased even more. However, at US\$87 and US\$57 per tonne, they remain well below international prices. The differential between domestic and international prices for grain has resulted in exports of about 1.3 million tonnes up to February 1999. The governments have banned the signature of new export contracts for grains, but grain will continue to be shipped against contracts already signed.

Despite the poor harvest, cereal imports in 1998/99 are not expected to exceed 3.5 million tonnes, the same as 1997/98. The country has received food aid pledges amounting to 3.8 million tonnes of grain (as well as meat, dairy and soybean products). The first food aid shipments have just arrived and the bulk of the shipments (not rolled over to 1999/2000) should arrive in the lean season before the 1999 harvest, when the aggregate supply situation could tighten.

People in remote and disadvantaged areas are experiencing hardship as a result of steady economic stagnation, the reliance on increasingly expensive imports of food, and sharply reduced purchasing power. This year, the situation is worse partly because reprovisioning in the summer months was disrupted by the financial crisis and partly as the cost of transport, without subsidies central government subsidies, is prohibitively high. The most vulnerable socio-economic groups, pensioners, orphans, the unemployed and households dependent on public salaries are also experiencing difficulties, especially in large, depressed industrial cities.

TAJIKISTAN* (29 February)

Agricultural production on large state farms continues to decline but supply is buffered by production on lands farmed privately or leased from the state. In December 1998 a law was passed allocating another 28 000 hectares for private use. This is too late to effectively plant winter grains. Nevertheless, the outlook for the 1999 wheat crop is satisfactory so far and, given normal weather, the 1999 cereal harvest could be somewhat higher than the 510 000 tonnes estimated for 1998.

The cereal import requirement for 1998/99 (July/June) is tentatively estimated at about 370 000 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, mainly in Kazakhstan and Kyrgyzstan.

GDP growth was positive in 1998, but the outlook for this year may be affected by low export prices of aluminium and cotton and repercussions of the economic crisis in the Russian Federation. 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 (29 March)

To date, the outlook for winter grains, on some 570 000 hectares, remains satisfactory. 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 double 1997. In addition, the area to be sown to sugar is targeted to triple. Reduced export earnings from cotton and gas over several years have severely limited foreign exchange earnings and input availability. The country aims to increase grain and cotton production, to reduce import bills and increase export potential. In view of a good grain production, cereal imports in 1998/99 could fall to about 50 000 tonnes, mainly wheat and some rice.

THE UKRAINE (28 March)

Better growing conditions are expected to result in higher grain production than last year's drought reduced 29.5 million tonnes. (FAO estimate). However economic problems - in 1998 92 percent of farms reportedly operated at a loss and a sharp contraction in the availability of imported inputs are expected to keep yields low. At the start of the spring planting season, the deliveries of inputs mobilized domestically or in the neighbouring countries (fuel) were also sharply down.

Spring grain planting is underway in southern areas. Officially, the aggregate area to be sown to grains for harvest in 1999 is expected to remain fairly stable at 14.5 million hectares. In 1998, however, grains were harvested from only 12.7 million hectares, and current indications are that in 1999 the area for harvest could be somewhat larger. Of the area sown to winter grains (estimated at about 7.4 million hectares) less than 1 million hectares is expected to require reseeding. Fertilizer applications were very limited as suppliers are further tightening credit conditions and raising already high prices. Given normal weather conditions, 1999 grain production is tentatively projected at 32.5 million tonnes, some 3 million tonnes more than last year. Output of wheat could increase by at least 1 million tonnes to reach 18 million tonnes and that of coarse grains could increase by nearly 2 million tonnes to 13.5 million tonnes, if the expected shift to barley this spring occurs. With the bulk of coarse grains still to be planted, these forecasts are highly tentative. Farmers' practice of hiding substantial quantities of marketable grain in response to the official prohibitions on grain shipments until all debts to the budget and pension fund add further uncertainty to forecast and supply analysis. Despite the lower harvest, the country is likely to export up to 3.5 million tonnes of cereals in the current marketing year. By February 1999, 2.9 million tonnes had already been shipped.

UZBEKISTAN (28 March)

In response to economic and foreign exchange problems, due to low production and international prices of cotton and the repercussions of the crisis in the Russian Federation, the government has announced higher agricultural production targets. Grain production is now targeted at 5.3 million tonnes, compared to the estimated 4.3 million tonnes harvested in 1998. The cotton target is 4.0 million tonnes (1998:3.2), and potatoes 0.8 million tonnes (1998: 0.75). The grain production target is unlikely to be realized this year, as the bulk of grains were sown in the autumn. Achievement of the goals for the other crops will depend crucially on the availability of inputs and better incentives for farmers.

The outlook for the 1999 grain harvest remains satisfactory, provided the fertility of irrigated areas is maintained. In the state sector, 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 private plots, where yields are increasing at a faster rate than on large farms. The target for winter grain production in 1999 had previously been set at 4.6 million tonnes, including 4.0 million tonnes (3.8 million tonnes of wheat) from large farms and the balance from private plots. This compares with an estimated output of 3.8 million tonnes of wheat and barley in 1998. In addition, the country produced roughly 0.5 million tonnes of maize and rice, bringing total 1998 grain production to 4.3 million. Imports are being reduced 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.

EUROPE

EC (9 April)

Latest indications for the Community's 1999 cereal crops continue to point to a downturn in production. Adverse weather conditions in some parts last autumn, weaker prices and a 5 percent increase in the compulsory set-aside requirement led to a smaller winter grain area. Most of the reduction was in wheat. In addition, excessive winter rainfall in northern parts and a long dry spell in southern Spain and Portugal is likely to reduce average yields. Spring planting is underway throughout much of the Community but the outlook is uncertain. Plantings are somewhat behind schedule in northern parts due to excessive soil moisture, while it is still unclear exactly how much of the 5 percent increase in compulsory set-aside has been accounted for by smaller winter plantings and thus how much adjustment may have to be made in spring crop areas. At this stage, FAO tentatively forecasts a reduction of about 5 percent in the Community's wheat output in 1999 from last year's bumper level, and a 2-3 percent reduction for coarse grains.

ALBANIA (9 April)

No significant change is expected in cereal output in 1999. Wheat production is expected to remain about 350 000 to 400 000 tonnes, leaving a deficit of about 350 000 tonnes to be imported in 1999/2000 to meet normal consumption requirements. With regard to the current 1998/99 marketing year, supplies of wheat in the major urban centres have been generally sufficient to meet demand.

The food supply situation in the rural communities in the isolated north-eastern parts of the country, which is normally difficult throughout the winter, has worsened in recent weeks due to the massive increase in the number of refugees crossing the border from the neighbouring Kosovo Province in the Federal Republic of Yugoslavia. Relief operations for refugees and to support local families hosting refugees have been ongoing throughout the winter, but international assistance has now been stepped up to a massive scale. As of early April, UNHCR reported that Albania was hosting some 300 000 refugees.

In view of the rapidly evolving situation, which is likely to have long-term food security implications for the region, FAO has fielded a mission to Albania in early April to identify assistance likely to be necessary in the near future for refugees and the host families engaged in agriculture.

BOSNIA-HERZEGOVINA* (8 April)

Information on the cropping situation remains 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 tentatively estimated at about 290 000 tonnes. Against this requirement food aid pledges amount to around 90 000 tonnes to date.

BULGARIA (9 April)

Weather conditions in March were generally favourable for crop development. The condition of winter wheat is generally satisfactory, but output is expected to fall in 1999, by about 15 to 20 percent (from the estimated 3.3 million tonnes last year), due to reduced and delayed planting and limited use of inputs. Spring planting operations are underway and some 400 000 hectares of maize are expected to be sown, similar to the previous year.

CROATIA (8 April)

The outlook for the 1999 winter grain crops remains generally satisfactory, despite a reduction in the area sown. The area sown to wheat has been cut back to about 150 000 hectares but plantings of winter barley and rye increased.

CZECH REPUBLIC (9 April)

Despite generally favourable weather conditions in recent months, a reduced cereal output is in prospect in 1999. Output of wheat is tentatively forecast to fall to about 3.5 million tonnes, compared to about 3.9 million tonnes in 1998, mostly due to reduced plantings.

ESTONIA (30 March)

Growing conditions for winter grains to be harvested in the spring of 1999 have been generally satisfactory so far. Indications are that the area sown to wheat and rye remained close to the preceding year's 60 000 hectares. Winter grains are still dormant and spring coarse grains will be planted later this month. The area sown is expected to remain stable. With exports of livestock products to the Russian Federation disrupted, there is little incentive to increase fodder grain production.

FORMER YUGOSLAV REPUBLIC OF MACEDONIA (9 April)

Current prospects point to little change in the 1999 cereal output. The country is estimated to have produced some 600 000 tonnes of cereals in 1998, of which wheat accounted for about 300 000 tonnes.

A recent influx of refugees from the neighbouring Province of Kosovo in the Federal Republic of Yugoslavia, has put an unprecedented strain on local resources. As in other parts of the region, relief operations for refugees have been ongoing throughout the winter, but international assistance has now been stepped up. As of early April, UNHCR reported that the Former Yugoslav Republic of Macedonia was hosting some 120 000 refugees. FAO fielded a mission to Albania in early April to identify assistance needs for refugees and host families engaged in agriculture.

HUNGARY (9 April)

Dry weather in the second half of March helped dry soils after severe flooding earlier in the month caused by rapid snow melt. Worst affected areas were in the east and northeast where some wheat crops are expected to have been completely destroyed. Prospects for winter wheat were already poor due excessive moisture and early frost last autumn. Although the full extent of the damage is not yet known, wheat output is now likely to fall somewhat short of the 5 million tonnes anticipated earlier. Wet soils earlier in March, also delayed spring sowing operations significantly. The area planted to maize could increase to counter the reduction in wheat and earlier sown spring crops.

LATVIA (28 March)

The outlook for 1999 grain production remains satisfactory. Given better weather, aggregate output is forecast to recover from last year's poor level of 970 000 tonnes. The area sown to winter grains (mainly wheat and rye) is estimated at about 180 000 hectares, similar to the preceding year.

LITHUANIA (29 March)

Growing conditions for the winter-planted wheat and rye crop have been satisfactory to date. Spring coarse grains are still to be planted. Given difficulties in the livestock industry, the area sown to grains in 1999 is not expected to increase substantially from the 1.2 million hectares last year. Normal weather could result in somewhat better yields and output is tentatively projected at 2.9 million tonnes compared to 2.8 million tonnes in 1998.

POLAND (9 April)

Current indications are that 1999 cereal production will be reduced. Although the winter grain area for the 1999 harvest is estimated to have remained similar to the previous year's, and the final outcome of the spring planting season is still far from certain, yields are projected to be lower as many farmers are facing financial problems which will reduce input use. Output of wheat is tentatively forecast at below 9 million tonnes compared to the bumper 9.5 million tonnes in 1998.

ROMANIA (9 April)

Prospects for 1999 cereal production remain generally satisfactory despite flooding on more than 45 000 hectares in March. Official reports in late March indicated that the outlook for wheat was unaffected by the flooding which was concentrated in the northern counties near the border with Hungary. However, in view of the reduced area sown last August, even if yields improve considerably from the previous year's reduced level, it is unlikely that 1999 wheat output could match the 5.2 million tonnes produced in 1998. In late March, land preparation for spring cereal planting was reported to be well advanced although actual sowing was just getting underway.

SLOVAK REPUBLIC (9 April)

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

SLOVENIA (9 April)

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 be similar to the 190 000 tonnes last year.

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

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 638 000 hectares from 795 000 in 1998. In addition, reduced domestic fertilizer production and high price vis-à-vis the price for wheat are expected to reduce use.

In Kosovo Province, recent escalation of the unrest, which has affected the area since March 1998, has led to a serious deterioration in food security. With regard to the current 1998/99 cropping season, prospects are grim. Almost no wheat planting was undertaken last autumn due to insecurity and/or the lack of basic equipment and seeds. The situation has deteriorated further for spring grain and vegetable planting and the output of all crops is expected to be very low in 1999. Moreover, huge losses of livestock due to violence, disease and abandonment are also reported, exacerbating the problems of food supply for those who still remain in the province. The situation gives rise for great concern as many of the population were already dependent on relief aid in late 1998, while the intensified violence in recent weeks has brought to a halt all relief operations in the Province. Without significant improvements in the security situation in Kosovo relief operations can only be directed at the refugees who have already left the Province. The food supply situation for IDPs and the remainder of the population is expected to deteriorate sharply and the crisis will have profound long-term food security implications.

NORTH AMERICA

CANADA (9 April)

The bulk of the 1999 wheat crop is due to be sown in May/June. Planting intentions are uncertain and are likely to be influenced by market developments in the coming weeks. However, latest indications based on projected returns for Canadian producers in 1999, indicate little change over the area and production of wheat in the previous year. The bulk of the coarse grains crops will be sown in May-June.

UNITED STATES (9 April)

A significant reduction in wheat output is expected in 1999. Latest official estimates put winter wheat plantings at 17.6 million hectares, the lowest since 1972/73 and down 7 percent from 1998, while early indications for spring wheat plantings point to an area similar to the previous year's level of 8 million hectares. Assuming the forecast spring wheat area materializes, even if normal conditions prevail for the rest of the growing season, wheat output in the United States is forecast to fall to about 59 million tonnes, compared to some 69 million tonnes in 1998. Some early coarse grains crops are already in the ground in southern parts, but the bulk of the maize planting in the Corn Belt states takes place from late April. Early indications in the USDA Prospective Plantings report point to a slight reduction in maize plantings this year, to 31.7 million hectares. The sorghum area is also expected to decrease somewhat. Planting of the 1999 rice crop is underway. In response to lower rice prices, early forecasts point to an area of about 1.3 million hectares, some 4-5 percent down from last year.

OCEANIA

AUSTRALIA (9 April)

Planting of the main 1999 wheat and coarse grains crops is due to start in May. Early indications for wheat point to another good crop of about 21 million tonnes. However, the final area planted will depend greatly on weather conditions and developments in international markets during the planting season. Prospects for the winter coarse grains are somewhat uncertain pending clarification of the wheat situation and developments in the feed grain market in coming weeks. However, output of barley, the major winter coarse grain, is expected to remain at some 5 million tonnes. Harvest of the minor 1999 summer coarse grains crop, mainly sorghum and maize, is underway and bumper production is expected after favourable winter rains encouraged increased plantings. The 1999 paddy season also benefited from very favourable growing conditions. Harvesting is ongoing albeit at a slower pace than in the previous two seasons. The current forecast points to an output of 1.35 million tonnes, up slightly from the previous season. However, the impact of recent torrential rains on rice in New South Wales, where most of the rice is produced, is yet to be ascertained.

FIJI (6 April)

Earlier this year, heavy rains and floods led to serious flooding in the western region of Viti Levu. The cost of damage was estimated at over US\$2.34 million. In 1998, sugar production was severely affected by drought, which reduced output to 250 000 tonnes, compared to an around 450 000 tonnes in an average year. Following the La Niña related drought FAO is processing an assistance project for the distribution of vegetable and cassava seeds.

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		37 715.9	2 541.3	40 257.2	42 076.0	28 466.5	4 419.3	24 047.2
Afghanistan	July/June	569.1	138.0	707.1	740.0	89.8	66.3	23.5
Bangladesh	July/June	2 698.3	549.4	3 247.7	4 859.0	5 507.0	1 680.0	3 827.0
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	5 894.7	133.6	5 761.1
India	April/March	2 263.9	208.4	2 472.3	1 700.0	1 661.9	249.3	1 412.6
Indonesia	April/March	6 857.9	0.0	6 857.9	8 185.0	7 673.1	1 291.7	6 381.4
Korea, D.P.R. 5/	Nov./Oct.	578.6	1 196.6	1 775.2	1 950.0	213.6	213.4	0.2
Laos	Jan./Dec.	60.7	4.3	65.0	67.0	15.5	15.5	0.0
Maldives	Jan./Dec.	34.3	2.7	37.0	35.0	1.7	0.0	1.7
Mongolia	Oct./Sept.	170.0	30.0	200.0	200.0	60.3	60.3	0.0
Nepal	July/June	24.0	4.9	28.9	99.0	24.7	24.7	0.0
Pakistan 4/	May/April	4 147.9	173.1	4 321.0	2 921.0	2 452.9	350.2	2 102.7
Philippines	July/June	4 600.0	8.5	4 608.5	3 700.0	3 777.9	52.5	3 725.4
Sri Lanka	Jan./Dec.	1 222.8	81.5	1 304.3	1 200.0	358.6	108.6	250.0
Syria	July/June	916.2	21.0	937.2	790.0	292.9	11.1	281.8
Yemen	Jan./Dec.	2 703.7	16.3	2 720.0	2 870.0	440.9	161.1	279.8
CENTRAL AMERICA		4 379.3	285.2	4 664.5	4 708.0	2 096.2	558.2	1 538.0
Cuba 5/	July/June	1 521.2	104.6	1 625.8	1 625.0	299.8	7.4	292.4
Dominican Rep.	Jan./Dec.	929.0	0.1	929.1	990.0	518.6	118.5	400.1
Guatemala	July/June	972.1	12.5	984.6	935.0	465.0	49.1	415.9
Haiti	July/June	420.0	115.0	535.0	480.0	237.2	150.0	87.2
Honduras	July/June	370.8	23.0	393.8	500.0	361.6	105.1	256.5
Nicaragua	July/June	166.2	30.0	196.2	178.0	214.0	128.1	85.9
SOUTH AMERICA		1 393.4	74.5	1 467.9	1 126.0	375.8	192.7	183.1
Bolivia	July/June	321.8	68.0	389.8	501.0	180.3	180.3	0.0
Ecuador	Jan./Dec.	1 021.6	6.5	1 028.1	575.0	188.0	12.4	175.6
Suriname 5/	Jan./Dec.	50.0	0.0	50.0	50.0	7.5	0.0	7.5
OCEANIA		338.4	8.0	346.4	354.0	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.	275.4	8.0	283.4	290.0	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/		3 182.0	615.4	3 797.4	3 499.0	1 454.3	428.9	1 025.4
Armenia	July/June	235.0	154.0	389.0	342.0	71.0	50.0	21.0
Albania	July/June	365.7	2.3	368.0	368.0	44.4	32.0	12.4
Azerbaijan	July/June	360.0	60.0	420.0	565.0	346.0	18.0	328.0
Bosnia&Herzegovina 5/	July/June	214.3	36.1	250.4	290.0	91.9	91.9	0.0
Georgia	July/June	425.0	163.0	588.0	605.0	228.0	129.0	99.0
Macedonia, FYR	July/June	240.0	0.0	240.0	240.0	0.0	0.0	0.0
Kyrgyz Republic	July/June	57.0	72.0	129.0	141.0	115.0	56.0	59.0
Tajikistan	July/June	260.0	128.0	388.0	368.0	216.0	52.0	164.0
Turkmenistan	July/June	204.0	0.0	204.0	51.0	41.0	0.0	41.0
Uzbekistan	July/June	821.0	0.0	821.0	529.0	301.0	0.0	301.0
TOTAL		71 997.0	5 411.8	77 408.8	77 020.0	46 767.2	7 164.4	39 602.8

SOURCE: FAO

1/ Includes food deficit countries with per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. U.S.\$ 1465 in 1995), which is in accordance with the guidelines and criteria agreed to by the CFA should be given priority in the allocation of food aid. The status of Iran still to be 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.

Enquiries may be directed to Mr. Abdur Rashid, Chief, Global Information and Early Warning Service, Commodities and Trade Division, (ESC), FAO, Rome (Telex: 610181 FAO I, GIEWS Direct Facsimile: 0039-06-5705-4495, E-mail INTERNET: GIEWS1@FAO.ORG).

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