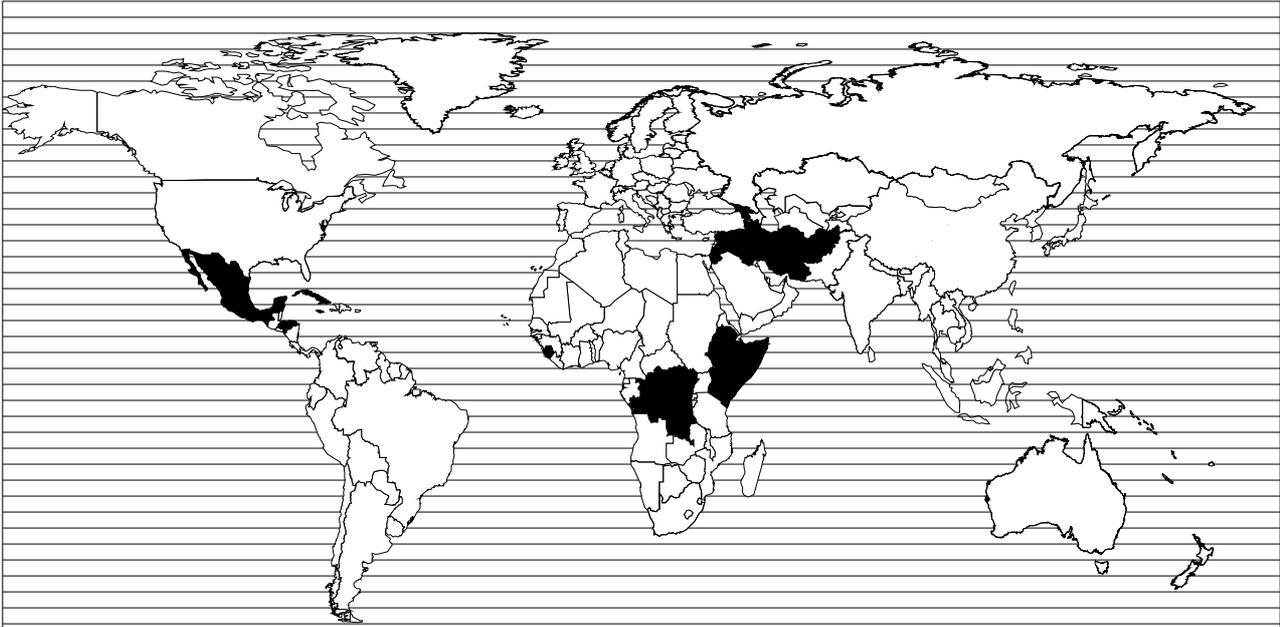


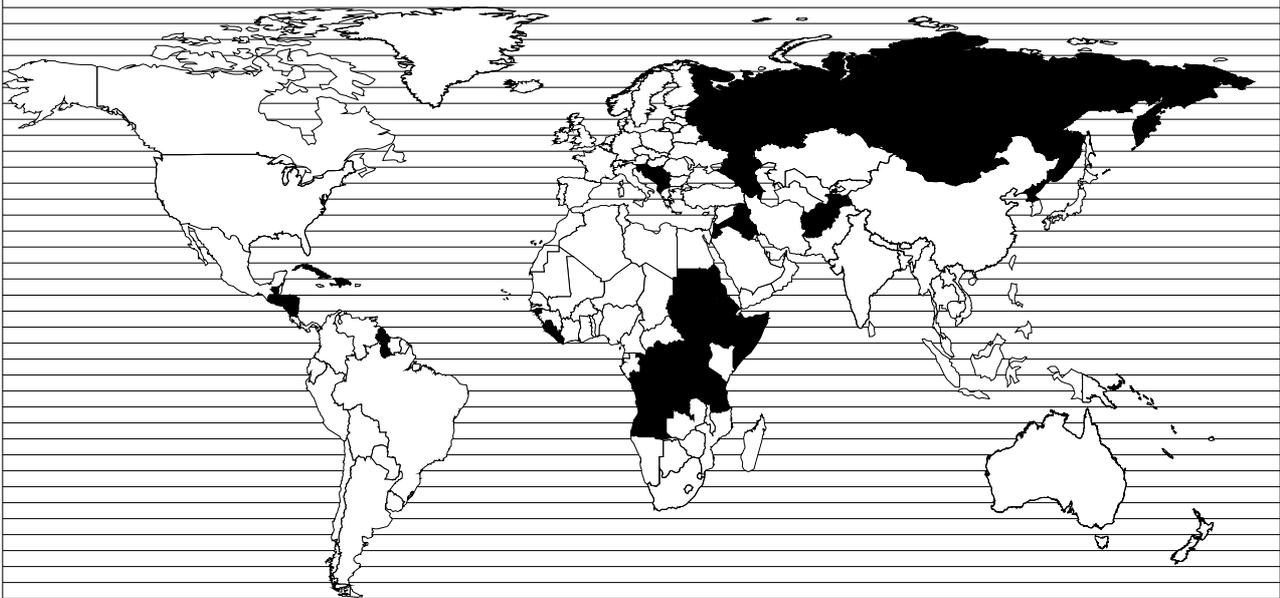
# FOODCROPS AND SHORTAGES

No.3

June 1999



UNFAVOURABLE PROSPECTS FOR CURRENT CROPS



FOOD SUPPLY SHORTFALL IN CURRENT MARKETING YEAR REQUIRING EXCEPTIONAL ASSISTANCE



## AFFECTED COUNTRIES <sup>1/</sup>

### UNFAVOURABLE PROSPECTS FOR CURRENT CROPS <sup>2/</sup>

<u>Country</u>	<u>Harvest date</u>	<u>Main contributory factors</u>
<u>Afghanistan*</u>	May/June	Weather anomalies, civil strife
<u>Armenia*</u>	Aug./Sept.	Dry conditions
<u>Congo, Dem.Rep.of*</u>	June/July	Civil strife
<u>Congo, Rep. of*</u>	June/July	Civil strife
<u>Cuba</u>	Mar./July	Drought, shortages of inputs
<u>Ethiopia*</u>	June/Aug.	Drought
<u>Honduras</u>	August	Reduced plantings, low prices
<u>Iran</u>	June/Aug.	Drought
<u>Iraq*</u>	May/June	Drought
<u>Israel</u>	Mar./Apr.	Drought
<u>Jordan</u>	May/June	Drought
<u>Kenya</u>	Aug./Oct.	Erratic rains, pests
<u>Mexico</u>	Oct./Nov.	Drought
<u>Sierra Leone*</u>	Nov./Dec.	Civil strife
<u>Somalia*</u>	Aug./Sept.	Drought/pests
<u>Syria</u>	June/July	Drought

### SHORTFALLS IN FOOD SUPPLIES IN CURRENT MARKETING YEAR REQUIRING EXCEPTIONAL AND/OR EMERGENCY ASSISTANCE (Total: 37 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** (5 countries):

**Afghanistan\***; **Iraq\***; **Jordan**; **DPR Korea\***; **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:

- Sudan

<sup>1/</sup> 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.

<sup>2/</sup> Main crop unless otherwise indicated.

## HIGHLIGHTS

**A major humanitarian emergency persists in the Balkans.** Although a peace accord was signed on 10 June, following three months of civil unrest in Kosovo Province of the Federal Republic of Yugoslavia, thousands of refugees, IDPs and returnees will continue to need emergency food and medical assistance in the coming months.

**The worst drought in decades has severely affected food production in the Near East,** with sharp reduction in output in Iraq, the Islamic Republic of Iran, Jordan, Syria and Israel. Food supply prospects are of particular concern in Jordan, as export revenues and food import capacity have fallen sharply. In Afghanistan, the lowest precipitation for 40 years, increased pest infestations and lower plantings due to diversion of area to more lucrative cash crops have sharply reduced the 1999 cereal output.

**Serious food supply difficulties persist in DPR Korea** where food shortages have resulted in chronic nutritional problems with serious long-term implications. In Indonesia, despite some recovery in production, large segments of the population remain severely exposed to food insecurity.

**In southern Africa, the food situation remains extremely difficult in Angola** for around 1 million additional IDPs following an escalation in civil unrest. Food supply difficulties are also anticipated in Zimbabwe where food prices have increased reflecting a reduced harvest and low carry-over stocks.

**In eastern Africa, the outlook for 1999 crops is mixed.** In Ethiopia, output of secondary "belg" crops is reported to have fallen sharply due to the failure of rains. Food supply difficulties are particularly serious in Somalia, where access to food aid is expected to deteriorate due to a resurgence in fighting in the south. Armyworms have damaged crops in several countries, including Kenya, Somalia, Tanzania and Uganda.

**Food security remains precarious in Sierra Leone** where insecurity continues to hamper agricultural rehabilitation and distribution of food aid. Prospects are better in Liberia but security remains unstable and the country continues to rely heavily on humanitarian assistance. The 1999 crop season has started in the Sahel, following the arrival of rains.

**In Central America, the area under cereals and beans is expected to be below average in 1999/2000** due to low prices. In Mexico, crops, livestock and pastures have been seriously affected by drought in several northern states, while in Cuba a prolonged dry spell in parts seriously affected minor foodcrops and pastures. In South America, maize production in Chile was poor due to drought.

**In the CIS, 1999 grain prospects are better than at the same time last year.** Output is expected to recover in the Russian Federation, Ukraine and Kazakhstan. However, persistent economic problems keep yields below average and grain supplies are likely to remain tight in 1999/2000, particularly in the Russian Federation.

**In the United States, despite generally favourable weather, wheat output in 1999 is expected to fall** by 12 percent due to the lowest winter area planted since 1972/73. Maize planting is complete under favourable conditions. In Canada, wet and cool weather hampered wheat planting in May but if conditions improve farmers could complete planting in coming weeks.

**In Australia, prospects for 1999 winter grain crops have improved** following the arrival of widespread rains in late-May.

## SUMMARY

### WEATHER CONDITIONS AND CROP PROSPECTS

In **northern Africa**, harvesting of winter grains is underway. Conditions have been mixed throughout the sub-region. In Morocco and Tunisia, wheat production is expected to fall this year due to inadequate rainfall and reduced planting. A sharp drop in barley production is also forecast in Morocco. In contrast, favourable conditions in Algeria and Egypt benefited both wheat and coarse grains, and output is forecast to increase. Planting of 1999 paddy is underway in Egypt.

In **western Africa**, rainfall so far has been erratic, increasing the risk of crop losses. Overall, the main maize crop is satisfactory in the south, while planting of millet and sorghum is almost complete in the north. The food outlook in Sierra Leone is very unfavourable due to persistent insecurity. Food supply and crop prospects have improved in Liberia due to peace and rehabilitation programmes, but the food situation remains precarious. In the Sahelian countries, planting of coarse grains is in progress following the start of the rains in April. Seed availability is generally adequate following record crops in the main producing countries in 1998.

In **central Africa**, coarse grain planting is underway in Cameroon and Central African Republic. Agriculture remains constrained by civil strife in the Republic of Congo and the Democratic Republic of Congo, where another poor B-season crop is about to be harvested.

In **eastern Africa**, early prospects for 1999 foodcrops are mixed. In Tanzania and Uganda, main season crops are being harvested and output is forecast to be normal/above normal, reflecting favourable weather. In Kenya and Somalia, 1999 main season cereal production is anticipated to be poor due to low and erratic rains and damage by armyworms. In Ethiopia, prospects for "belg" crops are unfavourable due to the failure of rains. In Sudan, 1999 wheat production is well below average due to reduction in area planted. In Eritrea, land preparation is underway for main season crops, but the performance of the short rains from March to May was poor.

In **southern Africa**, harvesting of 1999 main season cereal crops is complete. Despite abundant rains at the beginning of the season, dry spells and high temperatures from February in some countries affected yields more than anticipated earlier. Aggregate cereal output is estimated to be below average, as last year. However, production varies considerably. Malawi, Mozambique and Zambia had good crops, while production in Madagascar and Swaziland is anticipated to be close to average. In South Africa, cereal output is estimated to be lower than last year's reduced crop due to floods and dry spells. In Botswana, Lesotho and Namibia cereal production is higher than in 1998 but remains below average. In Angola, despite favourable weather during the season cereal production is below last year due to renewed civil war.

In **Asia**, dry weather in the first two dekads of June benefited harvesting of the winter wheat crop in main growing areas in northern China. More rain, however, is needed for emerging rice and maize crops in the south. Monsoon rains intensified over India, reaching as far north as Punjab/Haryana. The rains also favoured early planting of (kharif) rice and coarse grain crops. A normal monsoon, the 11<sup>th</sup> in succession, is forecast. In Pakistan, favourable weather from mid-February through April improved late season crop prospects for maturing wheat, indicating an upward revision in production. In Bangladesh, torrential rains resulted in floods in the south-east, resulting in some damage to crops. Current indications suggest that the country will receive heavy monsoon rainfall this year, as last year, raising concerns for widespread flooding and crop losses. Widespread and heavy rains also slowed rice planting in Japan, but boosted moisture supplies in southern and central parts. Dry weather across the Korean Peninsula is raising concerns for important food crops in the Democratic People's Republic of Korea, where rainfall has generally been lower than average since the beginning of the year. Much will depend on precipitation in the next two critical months for developing rice and maize. In Thailand, rainfall favoured main-season rice and maize, but in northern parts of Vietnam, some crop damage is reported due Tropical Cyclone Maggie. Elsewhere, in the Philippines, drier weather in the second dekad of June eased earlier wet conditions, whilst in main rice growing areas of Indonesia, irrigation supplies are reported to be adequate for the second-season crop. The most severe drought in decades drastically reduced wheat production in several countries in the Near East. In Jordan, 1998/99 wheat production is estimated at less than 13 percent of 1997/98. Well below average wheat production is also anticipated in Iraq and Syria. In Afghanistan, 1999 cereal output is expected to decline due to low rainfall and snow cover last winter, insecurity and shortage of inputs. In the eight CIS countries in Asia, main crop planting is underway in Kazakhstan. Moisture levels have been satisfactory, but a shortage of funds/credit is expected to reduce the area sown. In Uzbekistan aggregate sown area remained unchanged

but higher yields on private plots could raise output this year. In Turkmenistan grain production increased sharply in 1998 and only a marginal increase is forecast this year. In Tajikistan, the area sown to grains (notably wheat) declined and output is now forecast to decline to 420 000 tonnes compared to 510 000 tonnes last year. In Armenia, production is expected to fall due to a dry autumn and winter which reduced area sown and damaged winter wheat. In Kyrgyz Republic, a shift to more profitable crops continues and grain production could fall to about 1.5 million tonnes. In Azerbaijan, heavy rains favoured production, which is likely to remain at around 1 million tonnes, similar to last year. In Georgia, output could increase to 0.85 million tonnes compared to 0.8 million tonnes in 1998. In the Baltic countries, Estonia, Latvia and Lithuania winter wheat and rye benefited from a mild winter and the early outlook for spring grains is satisfactory.

In **Central America** and the **Caribbean**, early rains favoured planting of 1999/2000 first season cereal and bean crops. Area planted is expected to be average in most countries, with the exception of Honduras where low prices are a disincentive. Given normal conditions, production is expected to recover from last year, which was affected by hurricane "Mitch". In Mexico, a prolonged dry spell in several northern states severely affected crops, livestock and pastures. In Cuba, unusually dry weather in recent months seriously affected minor foodcrops and pastures, particularly in eastern provinces. In contrast, weather conditions favoured development of crops in Haiti and the Dominican Republic and average output is forecast.

In **South America**, harvesting of 1999 maize is complete in most southern countries. Average production is provisionally forecast, except in Chile, where output is poor due to a severe drought. In the Andean countries, harvesting of 1999 maize and other coarse grains is underway in Bolivia, Peru and Ecuador, and average to above-average output is forecast. Potato production is forecast to be above average in the first two countries. In Colombia, planting of 1999 coarse grains and paddy is almost complete. Maize production is expected to decline due to unfavourable weather at planting, while above-average output of paddy is anticipated. In Venezuela, 1999 paddy production is estimated to be slightly below average.

In **Europe**, latest indications confirm lower cereal production in the EC, 4 percent below 1998 at 202.5 million tonnes. This is due to reduced planting and unfavourable weather in parts. Drought conditions affected wheat in one of Spain's major producing areas and also in parts of Portugal, while ongoing maize planting in southwest France has been severely affected by heavy rains. Lower cereal output in 1999 is also expected in several eastern European countries due to reduced planting and/or adverse weather. In the Federal Republic of Yugoslavia, prospects for 1999 cereal production remain uncertain but output is likely to fall. Winter wheat planting was reduced while shortages of fuel and fertilizer and insecurity may have affected spring planting. In Kosovo Province, 1999 crop production will be extremely low, due to recent unrest. In the four CIS countries in Europe, an early, mild spring allowed early spring planting and improved conditions for winter crops. However, untimely frosts in May in parts of Belarus, the Russian Federation and Ukraine and economic problems are expected to depress yields. In Moldova, financial problems and limited marketing opportunities are expected to keep the 1999 harvest close to last year's level of 2.7 million tonnes. In the Russian Federation, FAO's early forecast of grain and pulse output remains at 65 million tonnes, slightly below the five year average but about 10 million tonnes higher than last year. This is due to incentives and expectations of normal weather. In Ukraine, the early outlook is good, as crops are in good condition and planting of spring grains is nearing completion. The aggregate output of grains and pulses is tentatively forecast at 32 million tonnes, 10 percent above last year.

In **North America**, wheat production in the United States is forecast to fall by about 12 percent, to some 61 million tonnes, due to the lowest area of winter wheat planted since 1972/73. Maize planting is near completion under generally favourable conditions. However, the area is expected to be lower than last year, and aggregate coarse grain production is forecast to fall by about 3 percent to 262 million tonnes. In Canada, wet and cool weather hampered wheat planting in May. However, planting could advance quickly if conditions improve in the coming weeks. Coarse grains planting will also depend on weather in the coming weeks, but indications point to a lower area due to a switch of land to other non-cereal crops.

In **Oceania**, prospects for 1999 winter crops in Australia are favourable following the arrival of widespread rains in late-May. Favourable production of around 21 million tonnes is expected in 1999.

## COUNTRY REPORTS <sup>1/</sup>

### **AFRICA**

#### **NORTHERN AFRICA**

##### ALGERIA (2 June)

Production of the 1999 winter crops being harvested is estimated at about 4.4 million tonnes, some 44 percent above last year and 86 percent above average. Favourable conditions boosted yields, resulting in a 40 percent increase in wheat output while barley output is forecast to increase by 500 000 tonnes from 1998, to 1.5 million tonnes.

As a consequence of the increase in production, imports of cereals, mostly wheat, are forecast at about 4.9 million tonnes in 1999/2000 (July/June).

##### EGYPT (2 June)

Early indications for the 1999 cereal crop point to an above-average output of some 18 million tonnes, some 4 percent above last year. Wheat output is expected to increase by about 4 percent while the maize crop is expected to be similar to last year's 6 million tonnes. Planting of the 1999 paddy crop is underway. Normal weather conditions have prevailed so far but the final area planted during the season will depend on the availability of irrigation water for rice production.

Imports of wheat in 1999/2000 (July/June) are forecast at 7.2 million tonnes and coarse grain imports, mostly maize, at 3 million tonnes.

##### MOROCCO (2 June)

Aggregate 1999 cereal output is forecast to drop sharply as a result of inadequate rainfall and reduced plantings. Reports of reduced sales of quality seeds and fertilizers also suggest that yields will be lower. The wheat crop is tentatively forecast at about 2.1 million tonnes, some 50 percent below 1998 and similar to the drought-reduced level of 1997. The winter barley crop, which was also affected by drought, is forecast to be 27 percent lower than the 1998 level of about 2 million tonnes. Maize harvest is expected to be similar to the 200 000 tonnes harvested in 1998.

Imports of wheat in 1999/2000 (July/June) are forecast at 2.7 million tonnes while coarse grain imports are projected at 1.5 million tonnes.

##### TUNISIA (2 June)

The aggregate output of the 1999 cereals is forecast at 1.7 million tonnes, some 2 percent higher than last year. Wheat production is forecast to decline by some 8 percent compared to the previous year. In contrast, barley output is expected to rise from 303 000 tonnes to about 455 000 tonnes, due to favourable conditions.

Imports of cereals in 1999/2000 (July/June), mostly wheat, maize and barley are forecast at some 1.6 million tonnes.

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

## **WESTERN AFRICA**

### **BENIN (21 June)**

The rainy season started in early March, with sufficient rainfall over the south to allow planting of the first maize crop. Rainfall decreased in May and early June but remained generally sufficient for adequate crop development, except in the north where reduced rainfall may have affected sorghum and millet development. Some replanting may have occurred in localized areas.

The overall food supply situation is satisfactory. The reduced demand from Sahelian countries that had a good harvest in 1998, is allowing prices to remain low. The cereal import requirement for 1999 (January/December) is estimated at 200 000 tonnes (including re-exports) of wheat and rice.

### **BURKINA FASO (22 June)**

The rainy season started with generally above-normal rains but precipitation reduced significantly in early June. First rains were registered in April in the south-west and the south-east. They progressed northwards in May over almost the entire country and were generally above normal except during the third dekad. In early June, precipitation decreased significantly over the entire country and weather remained dry in the centre and the north. Rains resumed in mid-June but remained below average in the north. Planting of millet and sorghum is now well underway. Land preparation is underway in the north. Some replanting may be necessary following the dry spell in early June. No pest activity is reported. Seed availability is generally adequate following the 1998 record harvest.

Aggregate 1998 cereal production is officially estimated at a record 2.65 million tonnes, some 32 percent above 1997 and 12 percent above average. As a result, the overall food supply situation is satisfactory. Markets are well supplied and prices of cereals are stable. However, some deficit areas remain vulnerable and may need some assistance during the lean season, notably in the provinces of Bazéga, Boulgou, Boulemdé, Kouritenga, Ouhoungou and Sanguié.

### **CAPE VERDE (21 June)**

Seasonably dry conditions prevail. Planting of maize normally starts in July with the onset of the rains on the main islands. Due to poor maize harvests in recent years, some problems of seed availability are likely in some areas.

The final production figure has been estimated at 4 900 tonnes, which is equal to the 1997 level but below average. Following successive poor harvests, some sections of the rural population may need assistance in food and/or seeds for the next season. The overall food supply situation, however, remains satisfactory as the bulk of food is imported. The cereal import requirement for 1998/99 amounts to 95 000 tonnes. 91 000 tonnes have been pledged of which 37 000 tonnes have been delivered so far.

### **CHAD (21 June)**

The growing season has started on time in the Sudanian zone. Following first sporadic rains in mid-March and in April in the extreme south, the rainy season really started in May in the south. Rains progressed northwards through late May but remains below normal in early and mid-June. Planting of coarse grains is underway in the south, in the Sudanian zone. Land preparation is about to start in the Sahelian zone.

No Desert Locusts activity is reported. Army worm infestations are reported on recently planted millet and sorghum crops in Tandjilé and the two Logone. Grain-eating birds are also reported in off-season rice fields in Chari-Baguirmi.

Final 1998 cereal production figures have recently been published. The aggregate output of cereal is estimated at a record 1.35 million tonnes, some 37 percent above 1997 and 48 percent above the last five-year average. The overall food supply situation is satisfactory, notably in the Sahelian zone which harvested well above average production. However, food supply difficulties are likely in areas of the Sudanian zone affected by flooding and/or poor crops in 1998, notably in Logone oriental and occidental and in Tandjilé, where a WFP Assessment Mission in May undertook nutritional surveys and recommended about 4 000 tonnes of food aid for 255 700 persons.

#### COTE D'IVOIRE (21 June)

The rainy season started in early March over the south, and in late March in the north. Overall rainfall remained below normal over the whole country in April and early May and increased in mid-May. Satellite images showed below-average vegetation over Man and Gagnoa areas in April, but crops seem to have recovered in May.

The overall food supply situation is satisfactory following the marketing of the 1998 crops. Organised repatriation is underway for about 100 000 Liberian refugees, remaining in western departments. Estimates for 1998/99 cereal production point to about 1.6 million tonnes. The cereal import requirement for 1999 (January/December), is estimated at 640 000 tonnes, mostly wheat and rice.

#### THE GAMBIA (21 June)

Rains started in early June in the east and the centre. Significant rains over the east and the centre permitted wet planting. Elsewhere, seasonably dry conditions prevail. Planting is expected to start in the weeks ahead with the onset of the rains. As a result of 1998 reduced harvest in some areas, localized seed availability problems are likely.

Aggregate 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. Markets are generally well supplied. However, some areas where millet production was poor may be at-risk of shortages during the next lean season, notably in the 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. A WFP Rapid Rural Appraisal mission visited 15 villages in the affected areas in late April/early May and estimated the number of affected people at 110 000, who need 2 671 tonnes of cereals, 400 tonnes of pulses and 167 tonnes of oil.

#### GHANA (21 June)

Rainfall started in early March over the south and reached the centre of the country in late March. Rainfall decreased substantially in late March and early April, which might have hampered crop development. However, vegetation images in May show about-normal vegetation.

The overall food supply situation is satisfactory. About 30 000 Liberian refugees still remain in the country and are receiving food assistance. Aggregate 1998 cereal production is estimated at 1.78 million tonnes and roots and tuber production at an above-average 13.44 million tonnes. The 1999 cereal import requirement is estimated at 475 000 tonnes, mostly wheat and rice.

#### GUINEA (21 June)

Rains started in mid April over the south, which is slightly later than normal. They reached the north of the country by the end of the month and remained widespread in May, allowing the planting of cereals. Below-normal rainfall in the east is likely to have hampered crop development.

The total number of refugees in the country is estimated at 614 000, of which about 414 000 are Sierra Leoneans and 200 000 Liberians. They are mainly in the south, putting a high pressure on natural resources and reducing food availability in these areas. Nearly 12 000 new refugees have arrived since the beginning of the year, following fighting in Sierra Leone. About 30 000 refugees

located in Geckedou and Forecariah camps are being relocated inside the country for security reasons. The 1999 cereal import requirement is estimated at 385 000 tonnes, mostly wheat and rice.

#### **GUINEA-BISSAU\* (21 June)**

The first significant rains in the east and south came in mid-May. After some sporadic showers in late April in the south-east, rains actually started in mid-May over all parts of the country except the north-west. They decreased in late May but resumed in early June. Precipitation remained below average during the second dekad of June. Land preparation for coarse grains is underway in the east and north. Planting of rice in seedbeds has also started. Transplanting will start in July/August after desalination of swamp rice fields with more rains. Seed availability problems are likely, following the 1998 reduced harvest due to civil strife.

The security situation remains calm following a coup on 7 May. Most displaced people following earlier fighting have returned home. A CILSS/Government crop Assessment Mission in late April estimated aggregate 1998 cereal production at a below average 131 300 tonnes, including 87 200 tonnes of rice (in paddy) and 44 100 tonnes of coarse grains. In order to avoid wide fluctuations of the price of rice, the Government decided on 28 May to impose price controls. The price is tentatively fixed at 11 000 to 12 000 CFA per 50 kg bag until 28 November. Food distributions are underway in the Oio and Cacheu regions for more than 100 000 beneficiaries. In Bissau, they have reached almost 200 000 beneficiaries.

#### **LIBERIA\* (21 June)**

Growing conditions have been satisfactory since the beginning of the rainy season, and torrential rainfall has been recorded in May and early June. Occasional fighting continues in the north, disrupting food aid deliveries and causing some population displacement to Guinea. The offices of humanitarian agencies in Voinjama, Kolahun and Vahun were looted in mid-April. Agencies are now storing food aid in country before the onset of rains, as transportation will become increasingly difficult due to poor infrastructure.

An FAO Crop and Food Supply Assessment Mission visited Liberia late last year and found that the overall food situation had improved significantly. The Mission estimated 1998 paddy production at 210 100 tonnes, 25 percent above 1997. Cassava production is estimated at 313 300 tonnes (fresh weight), some 96 percent of the pre-crisis average.

On the basis of an estimated population of about 2.8 million in 1999, FAO estimates 155 000 tonnes of cereals will need to be imported 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, estimated at 30 000 tonnes of wheat and 20 000 tonnes of maize products (maize meal and CSB). As of late May, 39 500 tonnes of food aid had been delivered.

#### **MALI (21 June)**

The growing season has started in the south. The first significant rains fell in the extreme south in mid or late April. They progressed northwards but decreased in late May. In early June, rains improved in the west. They remained generally average or below average during the second dekad of June. Land preparation is underway and first planting of millet and sorghum has started in the south. Pastures have started to regenerate in Sikasso, southern Kayes and Koulikoro regions. Seed availability is adequate following the 1998 record crop.

A large population of quelea grain eating birds covering about 200 hectares was reported in early May in Bakélé (Téhenkou region). Control operations have been undertaken over 150 hectares. The birds moved to the Office du Niger area in mid-May, where treatments are underway. Isolated Desert

Locusts may be present in a few areas in the Adrar des Iforas. Small scale breeding could occur once the seasonal rains commence.

1998 cereal production is estimated at a record 2.5 million tonnes, 13 percent above average and 3 percent over the record in 1994. The food supply situation is satisfactory and prices of cereals are stable. The early warning system (SAP) classified the arrondissements of Farach, Gargarde and Raz El Mä (in Goundam area), Bourem central and Bamba (in Bourem area) and Gao central as at risk of economic difficulties, but no food aid distributions are required.

#### MAURITANIA (21 June)

Seasonably dry conditions prevail, although some limited rains were registered in mid-May or early June in the centre-south, notably in eastern Gorgol and at Selibaby. Dry planting is underway in the extreme south-east, in Amourj and Bassiknou departments. Pastures are scarce in several regions, notably in Brakna and Trarza.

During May, isolated Desert Locusts were reported in a few places north of Zouerate and between Akjoujt and Atar at mid month. No significant developments are likely.

1998 cereal production is estimated at 189 700 tonnes, some 25 percent above 1997 and 11 percent above average. The overall food supply situation is satisfactory. Prices of rice are stable and below the 1998 level. Localised shortages are likely following reduced crops in some areas. The most vulnerable areas are Aftout and Affolé where WFP has undertaken a rapid rural appraisal mission in late March and estimated the food aid needs at 6 897 tonnes for 161 692 persons. A recent FEWS Assessment Mission in late May confirmed the seriousness of food supply difficulties in Aftout and Affolé. 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 (21 June)

First rains in late May permitted planting to start in most areas. The first rains started later than in 1998 but covered most producing zones, allowing planting to start everywhere except in Niamey area and in Agadez department. It is estimated that about 15 percent of the villages had done their planting as of late May. Rains remained below average in early and mid-June, which may necessitate replanting and delay generalization of planting. Dry planting is also underway countrywide. Seed availability is adequate following the 1998 record crop.

Rodents were reported following planting in Kélanam (Maïné arrondissement), northern Dakoro, Mayahi and Tessaoua (Maradi department), Abalak (Tahoua departement) and Gouré (Zinder department). Grasshoppers have also been reported in northern Diffa department and grain-eating birds in N'Guigmi arrondissement. Isolated Desert Locusts may be present in a few areas in Tamesna. Small scale breeding could occur once the seasonal rains commence.

1998 aggregate cereal production has been estimated at a record 2.97 million tonnes, about 72 percent higher than 1997 and about 44 percent above the five-year average. The overall food supply situation is satisfactory. 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 (21 June)

Rainfall in February/March allowed planting of the first maize crop and land preparation for rainfed rice. Rains remained low in the north, with none received in the extreme north (about one month late) which has delayed millet and sorghum planting. Together with reduced rains in May and early June, this could reduce yields and production.

Food supplies remain constrained by high post-harvest losses 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 (21 June)

Rains started early in the south-east. Substantial early rains were registered in the south-east in mid-May. In early June, above-normal rains covered the south and centre-east of the country, but decreased somewhat in mid-June. Planting of coarse grains is well underway in the south while land preparation is starting in the centre. Seed availability problems are likely in some areas following localized 1998 reduced harvest. No significant pest activity has been reported.

The overall food supply situation is satisfactory. Food markets are well supplied and the price of rice remains generally stable. The prices of millet and sorghum are also stable and 20-25 percent lower than in 1998. However, some localized food supply difficulties are expected for vulnerable groups affected by successive poor harvests in Louga, Tivaouane and M'Backé and in the regions of Fatick, 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\* (21 June)

**Growing conditions are satisfactory for recently planted rice and root crops and abundant rainfall was recorded in May. However, insecurity in most parts continues to disrupt agriculture and rehabilitation, mainly delivery of agricultural inputs. The security situation has improved during the past weeks and emergency distribution of seeds and tools is planned. This may not, however, be sufficient to allow recovery.**

**Estimates indicate that about 700 000 to 1 million people have been displaced country-wide. Most aid agencies have returned to Freetown where food distributions are underway. The nutritional situation of IDPs, however, remains precarious and food prices remain very high. Despite the recently signed cease fire and control of main roads to Bo and Kenema areas by ECOMOG forces, insecurity still restricts transport of food aid to these areas where large numbers of internally displaced persons are located. Prepositioned food aid stocks are almost exhausted and only limited quantities can be transported by air. As a result, food distributions to about 60 000 persons around Bo and Kenema may cease in June. Food aid deliveries to the north of the country are organized from neighbouring Guinea. Most humanitarian operations are constrained by poor infrastructure, severe fuel shortages and insecurity. It is estimated that about half of the population of the country remains out of reach of any assistance.**

**Despite satisfactory weather conditions, 1998 cereal output is estimated at 400 000 tonnes (paddy equivalent), 16 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. As of the end of May, 17 000 tonnes of food aid, mainly bulgur wheat, had been delivered.**

#### TOGO (2 June)

The rainy season started in early March in the south, allowing the planting of the first maize crop, and in mid April in the north, allowing land preparation for the planting of millet and sorghum. Conditions have been generally favourable so far.

The food supply situation is satisfactory. The aggregate cereal output for 1999 is estimated at 590 000 tonnes (paddy equivalent), lower than normal but offset by a 5 percent increase in roots and tubers production to 1.29 million tonnes. The cereal import requirement (including re-exports) for 1999 (January/December), is estimated at 115 000 tonnes. Due to a good harvest in the Sahelian

countries, cereal exports from Togo to Sahelian countries are expected to decrease significantly over past years.

## **CENTRAL AFRICA**

### **CAMEROON (21 June)**

Abundant rains in mid-May in central and southern parts compensated for reduced precipitation earlier.

Food supply difficulties are likely in northern areas affected by poor crops in 1998. A WFP Emergency Operation will provide 9 500 tonnes of food to 660 000 affected persons in northern parts.

### **CENTRAL AFRICAN REPUBLIC (21 June)**

Rains began early in February. They remained generally below normal in March and April but improved significantly in May, notably over the eastern half of the country, benefiting recently planted coarse grains.

Following a good cereal harvest in 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.

### **CONGO, DEMOCRATIC REPUBLIC OF\* (23 June)**

**The security situation remains tense in North and South Kivu provinces following bombing of Goma and Uvira on 11 May. People in Uvira region have been living in fear following devastation of entire villages. Despite peace negotiations, violence and attacks on villages have resulted in a dramatic increase in the number of refugees to Tanzania. Reports indicate that that some 240 000 families (1.2 million persons) have been affected by recent civil strife in North and South Kivu.**

**In Kasai Oriental, some 80 000 residents of Luambo town are reported to have fled into surrounding forests due to fighting. Less than 10 000 have returned home since the town was captured by rebels on 7 June, but food and medicines are in short supply. The total number of internally displaced people is estimated at 660 000, of which 220 000 in southern Kivu and 150 000 in Katanga. About 285 000 refugees from neighbouring countries are also present in DRC: 146 000 from Angola, 61 000 from Sudan, 32 000 from Republic of Congo, 25 000 from Rwanda and 20 000 from Burundi.**

**In Kinshasa, the food supply situation remains difficult. A recent nutritional survey indicated that almost 10 percent of Kinshasa's population suffered from acute malnutrition compared to 6.2 percent in 1998. As a result of increases in fuel prices, prices of basic food commodities have increased sharply. Insecurity and other economic problems limit transportation of goods to the capital.**

**In Bas-Congo, there are about 30 000 refugees who fled fighting between the government forces and the "Ninja" militia in the Pool region of the Republic of Congo.**

### **CONGO, REP OF\* (21 June)**

**Renewed fighting in mid-May between Government forces and Ninja militia resulted in fresh population displacements within Brazzaville. It is estimated that at least 10 000 people have been displaced from the Mukundu residential area near the airport to the north. Heightened**

**insecurity has also displaced residents from the Mikalou and Talangai areas of Brazzaville. The displacement of people and disruption of marketing activities have seriously affected the food supply situation.**

**An estimated 60 000 of the 200 000 residents of southern Brazzaville's Baongo and Makelekele districts displaced by conflict in December have returned from Pool region and northern Brazzaville since 1 May. The health and nutritional situation of IDPs is reported to be "serious". A new influx of refugees is now reported in DRC following renewed fighting in Congo.**

#### **EQUATORIAL GUINEA (2 June)**

**In addition to staples like 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 (5 June)**

**Production of main foodcrops (cassava and plantains) is estimated at about 330 000 tonnes. The country commercially imports the bulk of its cereal requirement, estimated at around 85 000 tonnes in 1999.**

### **EASTERN AFRICA**

#### **BURUNDI\* (6 June)**

**Harvest of 1999 second (B) season foodcrops is underway. Prospects are unfavourable as rains started one month late and ceased earlier than normal. Beans in highland areas were particularly affected. Frosts in March and armyworms in parts, particularly in the north, also negatively affected maize yields.**

**As a result, production is anticipated to decline compared to last year's B season. Bean production is expected to decline by a quarter. Since most of the annual cereal and beans production is obtained in this season, the supply of grains is anticipated to be tight in the second half of the year. The 1999 A season crops, harvested earlier, was also reduced by dry weather.**

#### **ERITREA\* (5 June)**

**Planting of 1999 long-cycle cereal crops is underway in the central highlands and south-western lowlands. The main rains are expected in July/August. Spring rains from March to May were reported to have been erratic and inadequate.**

**Despite the good harvest in 1998, the food situation is very tight for people in border areas of Gash-Barka and Debub affected by the war with Ethiopia. Under an Emergency Operation recently approved by FAO and WFP, international food assistance will be provided to 268 000 people most affected by the war, including 246 500 displaced and 21 500 deportees from Ethiopia, for a period of nine months.**

#### **ETHIOPIA\* (5 June)**

**Prospects for the 1999 Belg crop, now being harvested, are unfavourable, due to below-normal rains. Although Belg production accounts for only 7 percent of total cereal production, it is important in several areas where it provides the bulk of annual food supplies. The 1998 Meher harvest was satisfactory. However, several areas failed to produce enough**

and are in need of food assistance. With the anticipated reduction in Belg production, the magnitude of food shortages has increased in terms of numbers and areas affected. The worst hit area is the north-western Amhara Region, where some 2 million people face severe food shortages. The Government has recently appealed for 360 000 tonnes of food aid for an estimated 4.6 million vulnerable people, including those affected by the failure of the Belg season, as well as 385 000 internally displaced people due to the ongoing conflict with Eritrea.

Despite some beneficial rains in recent months, southern and eastern pastoral areas are yet to recover from consecutive years of drought and the severe shortages of water. The recent lifting of the ban on livestock imports from the Horn by Saudi Arabia is expected to increase incomes in pastoral areas. An Emergency Operation for food assistance to 1.2 million people, worth some US\$40.5 million was jointly approved by FAO and WFP on 31 May 1999. Against total food aid requirement of 551 271 tonnes food aid, pledges as of June 1999 amounted to about 360 000 tonnes, of which 195 000 tonnes have been delivered.

Planting of the 1999 Meher (main season) cereal crops is underway. Early prospects are not promising, as inadequate rains in much of Oromiya and southern Amhara Region have delayed land preparation and planting of long-cycle crops. Furthermore, the Government is reported to have treated about 350 000 hectares of army worm infestations, but the impact on crops is not yet known

#### **KENYA (5 June)**

Planting of 1999 main season cereal crops is complete. Although area planted is similar to 1998, official projections indicate 10 percent reduction in maize output due to scarcity of agricultural inputs, a shortage of cash to buy increasingly expensive inputs, and erratic rains at planting. Erratic rainfall and dry spells also increased armyworm infestation which may further reduce yields.

Despite a satisfactory food supply situation overall, following a good 1998 main season cereal crop, the food situation remains difficult in areas affected by the failure of the short rains. 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. Rainfall for this season has been insufficient to ensure that pastures and water supplies last until the next rains in October. 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\* (4 June)**

Harvest of the 1999 second season foodcrops is underway. The outlook is uncertain. A delay in the start of the rainy season was followed by abundant and well distributed precipitation in March. However, rains were below average in April and ceased early than normal, particularly in eastern parts. As a result, yield reductions are anticipated in several areas. The negative impact on cereal crops of armyworms attacks this season, was limited by control measures undertaken by the Government with the assistance of FAO and donors. The overall impact of the irregular rains on this season's production is currently being assessed by an FAO/WFP/Ministry of Agriculture Crop Assessment Mission at local level.

In Northwestern prefectures, a relative improvement in security conditions has allowed agricultural activities this season together with better access of about 600 000 displaced people to food assistance. However, shortages of pipeline food aid restricted distributions in May and June. In the absence of additional contributions, operations will cease by the end of July.

**SOMALIA\* (5 June)**

The outlook for the 1999 main "Gu" cereal crop, accounting for some 80 percent of annual production in normal years, is unfavourable. The area of maize and sorghum is expected to decline as a result of delayed and erratic rains since the beginning of the season, coupled with unusually high temperatures that resulted in the wilting of crops. Water levels in the Shabelle River are also reported to be below normal, reflecting below-average precipitation. In addition, armyworm infestations have been reported in Lower and Middle Juba, Lower Shebelle, Bakool and Hiran regions. Insecurity in parts has also disrupted planting.

In the North-west, scattered showers in March were followed by light rains in April which improved pastures, water supplies and livestock conditions. However, the rains did not provide enough moisture for crops to develop. A joint mission by FAO and the Food Security Assessment Unit (FSAU) in May estimated the area of cereals planted at 5 000 hectares, about 30 percent below last year. In North-eastern parts, rains in April improved pastures.

The already difficult food supply situation is anticipated to deteriorate in coming months, with population movements accelerated by renewed fighting around the town of Baidoa. Current estimates indicate that some 70 000 people have been displaced by food shortages and insecurity. A WFP relief food shipment of 5 000 tonnes of maize, to be distributed over the next four months for 500 000 people in southern Somalia, arrived in early June.

Saudi Arabia formally lifted a livestock import ban, imposed early last year on the Horn countries, on 25 May 1999. This is expected to bring much needed relief to livestock producers. Local markets in the Northwest and Northeast are reported to have responded immediately with an increase in livestock prices and activity.

A reduced 1999 Gu cereal crop would be the seventh bad harvest in succession. This would compound an already precarious food supply situation.

**SUDAN\* (5 June)**

Planting of 1999 main season cereal crops has started. Early prospects are favourable due to heavy rains during April and May. Pasture conditions are reported to be satisfactory in most regions, especially in the Upper Nile which was flooded last year.

The output of the recently harvested 1998/1999 wheat crop is provisionally estimated at 165 000 tonnes, about 70 percent below both last year's crop and the average for the last five years. A reduction of nearly 42 percent in the area planted due to high input costs and low

prices of imported wheat and wheat flour, coupled with late sowing and high temperatures are the main reasons for the drop.

Food shortages are reported in a number of locations in southern parts of the country. Intensified civil conflict earlier in the year, particularly in Bahr El Ghazal, and a recent influx of returnees, which coincided with the lean period for local residents, has aggravated an already precarious food situation. WFP reduced distributions for three months from June due to insufficient donor funding.

#### **TANZANIA (5 June)**

Harvesting of cereal crops has begun in unimodal central and western regions, while in the grain-basket southern highlands, harvesting is expected to start in August. An average level of production is anticipated for most parts except for the food insecure central regions, where below-average production is expected mainly due to moisture stress earlier in the season.

In bi-modal northern areas, rains favoured second-season Masika crops planted in March. However, an outbreak of armyworms in several regions damaged thousands of hectares. Pastures and livestock are reported to be in good condition.

The food supply situation has improved with the harvest, mainly in Dodoma and Singida Regions, where many households were receiving relief since October 1998. Food prices have declined since April with the harvest and commercial sale of Government imports.

#### **UGANDA (5 June)**

Prospects for the 1999 main season cereal crops are generally favorable. Crops stressed by a long dry spell in April in western parts recovered, as rainfall improved in May. Northern and north-eastern Uganda, where the season starts later, have received well-distributed rainfall since early April. The rains also improved pasture and livestock conditions in pastoral areas in the north-east.

Recent official reports indicate that the late start to the rainy season in March, along with dry conditions in parts of southern Uganda in April, provided favourable conditions for armyworm infestation in several districts. Control measures have been undertaken and only modest crop losses are reported.

The overall food situation is satisfactory. However, severe food difficulties persist in Rakai District, in the south-west, where a succession of poor harvests has depleted farm stocks. Food aid has relieved the situation somewhat but an estimated 30 000 people are still suffering acute food shortages. Food difficulties also persist in northern areas, where 400 000 people remain displaced by persistent insurgency. International food aid is being provided.

### **SOUTHERN AFRICA**

#### **ANGOLA\* (15 June)**

An FAO/WFP Crop and Food Supply Assessment Mission in May forecast the 1999 cereal production at 533 000 tonnes, which is 11 percent below last year's, mainly reflecting the impact of renewed displacement of rural people. Production of cassava, an important staple, is estimated to have declined slightly from last year, while bean production declined by an estimated 21 percent.

**For the 1999/2000 marketing year, domestic cereal supply, estimated at 562 000 tonnes, falls seriously short of national consumption requirements. Cereal import requirement for 1999/2000 marketing year is estimated at 505 000 tonnes, which compares with actual cereal imports of 420 000 tonnes during the previous marketing year. Of the estimated cereal import requirement, the Mission estimated that 325 000 tonnes would be imported commercially, leaving 180 000 tonnes to be covered by food aid.**

**In addition, the Mission highlighted the need to allocate land for cultivation by IDPs and the provision of the necessary agricultural inputs for the next season starting in October.**

#### BOTSWANA (1 June)

Harvesting of 1999 coarse grains is underway. Prospects are unfavourable. Abundant rains at the beginning of the season allowed an expansion in area planted to cereals and benefited crop establishment. However, a dry spell and high temperatures in February, followed by irregular and below average precipitation negatively affected crops. As a result, production is forecast to remain below average though above the poor crop in 1998.

Despite the reduced harvest, the overall food supply situation is anticipated to remain stable in 1999/2000 (April/March) reflecting the country's import capacity.

#### LESOTHO (1 June)

Harvesting of 1999 cereal crops is underway. Abundant rains from October to January pointed to a marked recovery in cereal production this year. However, below-average precipitation and high temperatures from February to mid-April, mainly in March at the critical growth stage, negatively affected crops. Favourable rains from late April could not prevent a reduction in yields, particularly of maize. As a result, cereal production is forecast to be below average though higher than the reduced harvest last year.

The food supply situation is satisfactory following adequate commercial imports in 1998/99, estimated at 109 000 tonnes of maize and 47 000 tonnes of wheat.

#### MADAGASCAR (2 June)

Harvesting of the 1999 main rice crop is well advanced. Prospects are favourable despite delayed rains and prolonged dry spells in some central areas. Overall, rainfall has been generally abundant during the season. Heavy rains in southwestern parts resulted in localized floods but overall benefited crop development. The incidence and negative impact of cyclones have been limited this season. Similarly, the locust situation has been generally calm. Control measures, coordinated by the Government and FAO teams, considerably restricted the impact of locust on crops. 1999 rice output is expected to be higher than last year.

The food supply situation is expected to improve during the 1999/2000 marketing year (April/March), particularly in drought-prone southern areas, where the price of rice increased last year. For the first time in recent years no department in the south will be classified as being in serious food supply difficulty.

#### MALAWI (4 June)

A bumper 1999 cereal crop is being harvested. This reflects generally abundant rains during the season, particularly in southern areas. In northern parts, despite a delay in the rainy season, precipitation was above average allowing some recovery of crops. Improved input availability also contributed to a sharp increase in yields.

Latest official forecast indicate a maize crop close to 2.4 million tonnes, one-third higher than last year's normal level. Cassava output is expected to increase by 12 percent to 944 000 tonnes. Production of other cereal and non-cereal crops is also anticipated to be good.

The country, which has been importing maize in recent years, is expected to have some 500 000 tonnes of exportable maize surpluses in marketing year 1999/2000 (April/March).

#### MOZAMBIQUE (8 June)

Harvesting of the 1999 coarse grains is well advanced. Abundant rains during the growing season resulted in localized floods and crop losses in central and southern parts, but overall benefited crop development. Production of the main maize crop is expected to increase for the fifth consecutive year, also reflecting a slight increase in the area planted. Exportable surplus of maize are anticipated. Outputs of beans, cassava, groundnuts and vegetables are also estimated to be good.

Reflecting the good harvest, prices of basic staple are declining. The overall food supply situation is to remain stable in marketing year 1999/2000. However, in several districts of the Inhambane Province, where excessive rains resulted in losses of crops, housing and infrastructure, food aid is required for some 70 000 most affected population. The Government has asked for international assistance. Continued assistance is also needed for large groups of vulnerable population.

#### NAMIBIA (2 June)

Harvesting of the 1999 coarse grains is almost completed. Provisional forecasts point to an output 25 percent higher than last year's poor level but still below average. Output of millet and sorghum is forecast to double to 60 000 tonnes but that of maize, at 7 000 tonnes, is just half that of 1998. The area planted and yields were affected by erratic and poorly distributed rains from the beginning of the season. Prolonged dry spells and high temperatures in January, February and March lowered yields.

The tight food supply situation, following the drought-reduced 1998 cereal crop, has eased somewhat with the arrival of the new harvest. Cereal import requirements are forecast to decline to some 130 000 tonnes in the 1999/2000 marketing year (May/April).

#### SOUTH AFRICA (2 June)

Harvesting of 1999 coarse grains is near completion. Official estimates indicate maize production at 6.8 million tonnes, some 16 percent lower than last year and below average. Rains during the season were abundant but irregular. Heavy rains and floods in mid- February coupled with a dry spell in late February/early March negatively affected yields. The decline in production also reflects a slight reduction in the area planted, due to diversion of land to the more profitable sunflower, production of which is estimated at 945 000 tonnes.

#### SWAZILAND (2 June)

Harvest of the 1999 maize crop is completed. Preliminary estimates indicate an output around the normal level of last year. Abundant rains in the first part of the season led to an increase in the area planted but a prolonged dry spell from January to March sharply reduced yield potential. Most affected by the dry weather are the southern parts of the country, where poor harvests have been gathered. Overall, preliminary estimates indicate a 199 maize output around the level of last year.

#### ZAMBIA (2 June)

Harvesting of the 1999 coarse grains, mainly maize, is well advanced. The outlook is favourable and the output is anticipated to recover from the poor crop of last year. Maize production is expected at a normal to above-normal level of 1 million tonnes, which is 82 percent higher than in 1998. Abundant rains during the growing season, particularly in southern areas, resulted in localized floods and crop losses but overall benefited crop development. However, in northern areas late and erratic rains have resulted in reduced yields in parts. Production of other basic staples, mainly cassava, is also good this season.

The food supply has eased with the arrival of the new harvest into the markets. Prices of maize are declining and are below their level of a year ago. Maize import requirements in marketing year 1999/2000 (April/March) are forecast to decline sharply from the previous year to about 250 000 tonnes.

#### ZIMBABWE\* (4 June)

Harvesting of the 1999 coarse grain crops, mainly maize, is near completion. Despite a significant increase in the area planted and good rains at the beginning of the season, crop yields were adversely affected by excessive rains in January and February. Latest forecasts indicate a maize output of 1.54 million tonnes, 5 percent above last year, but still below average. Millet and sorghum production is also forecast to decline.

Prices of basic food commodities have increase sharply since the same period last year, reflecting the unsatisfactory harvest and low carryover stocks. The food supply situation in the 1999/2000 marketing year (April/March) is anticipated to be tight. Maize import requirements are estimated at about 500 000 tonnes.

## ASIA

#### AFGHANISTAN\* (25 June)

The mildest winter in the last 40 years and an outbreak of pests have sharply reduced the 1999 cereal output. An FAO/WFP Crop and Food Supply assessment Mission which visited the country from 22 May to 23 June 1999 estimated the 1999 total cereal production at 3.24 million tonnes, about 16 percent below last year's bumper output of 3.86 million tonnes. As a result, the cereal import requirement in the 1999/2000 marketing year (July/June) is estimated at a record 1.1 million tonnes, of which more than 95 percent is wheat. Commercial cereal imports are estimated at 800 000 tonnes, leaving a deficit of 323 000 tonnes. The emergency food aid requirement (including food-for-work and food-for-seed), estimated at 97 000 tonnes, is already on the pipeline, leaving 226 000 tonnes to be covered by programme food aid.

Despite stable prices and well stocked food shops, access to food is severely constrained due to limited income generating activities and lack of employment opportunities outside agriculture. Further recovery in agriculture is hampered by damaged irrigation infrastructure and land mines. Of immediate concern are returnee expatriate Afghans and internally-displaced persons (IDPs) who are in need of urgent assistance. Moreover, the food supply problem is much more serious in such areas as Bamyán, Saripul, Faryab and Balkh due to the relatively higher damage to dryland foodgrain production where many are in need of emergency assistance.

International food aid is being distributed to about 8 000 vulnerable households in the central highlands and to some 21 000 people in the north-eastern province of Badakhshan. An estimated 63 000 returnees from Iran and Pakistan have also received food assistance. Vulnerable groups are being provided through urban bakeries and through institutional feeding programmes in hospitals, orphanages and health centres.

#### **ARMENIA\* (25 May)**

Official reports indicate that wheat area for harvest in 1999 was reduced to 86 000 hectares. Below-normal autumn and winter precipitation adversely affected potential yields and the 1999 grain production is likely to remain low. Currently it is estimated that the 1999 grain harvest could fall below 300 000 tonnes compared to 326 000 tonnes last year.

Against an estimated cereal import requirement of nearly 345 000 tonnes in 1998/99, food aid pledges of just over 18 000 tonnes have been reported to date. The balance is expected to be imported commercially, despite the devaluation of the dram, mostly from neighbouring countries. Agricultural output is increasing but growth remains constrained by purchasing power and structural problems in the sector. These include small size of farms, infrastructure unsuited to small-scale private farming and limited credit. Positive economic growth is also expected in 1999, despite the adverse effects of the crisis in the Russian Federation on trade, employment and remittances. Remittances from abroad are a major element of household budgets.

There is little scope at present for phasing out humanitarian assistance and WFP will continue to provide food assistance for relief and recovery to refugees and the most vulnerable amongst the local population. Assistance will focus on community based food-for-work activities for vulnerable groups who are able to work, supporting economic and social development. Limited general food distribution will improve nutrition for the most vulnerable. The programme will have a duration of three years and will be reviewed annually.

#### **AZERBAIJAN (25 May)**

The early outlook for 1999 grain production is satisfactory. Recent heavy rains caused some localized damage but have improved moisture reserves after a dry winter. Ongoing land privatization and dismemberment of State farms has led to an increase in food production (notably potatoes and animal products) at the expense of cash crops. In part, this reflects increased employment in agriculture, greater emphasis on rural household food security following liberalization of grain trade, but also the lack of viable marketing channels for produce. Some increase in output of basic foodstuffs is likely to continue. Assessing food production in the current transition remain difficult. However, 1999 grain production is tentatively forecast to remain similar to last year's level of 1 million tonnes.

The bulk of 1998/99 cereal import requirement, estimated at about 500 000 tonnes, will be imported commercially. Food aid deliveries, for vulnerable groups, amount to 16 000 tonnes of grain. Despite the negative impact of the Russian crisis (one quarter of Azerbaijan exports formerly went to the Federation) and slowdown in the oil industry, GDP growth is expected to remain positive in 1999. Nevertheless, parts of the population, including 12 percent which were displaced due to the dispute over Nagorno Karabakh, remain vulnerable and 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.

#### **BANGLADESH (2 June)**

Heavy and above-average rainfall in May, brought to an end several months of extremely dry conditions. The pattern of weather is attributed to a strong La-Niña affect in the region. Continuing heavy rains over short periods has increased the risk of flooding to which the country is seriously prone.

Despite a prolonged four month drought which depleted water tables, a bumper crop of irrigated boro paddy is officially forecast this year. Harvesting is almost complete and current Government estimates indicate boro production of around 9.0 million tonnes, some 1.1 million tonnes or 14

percent higher than last year. The revised target for boro production was 8.7 million tonnes. Most of the country's boro production comes from Dhaka and Chittagong Divisions in the north east, though, Rahshahi Division in the north west produces most rice annually. Improved rice supply prospects, have eased pressure on domestic rice prices and imports. Earlier, a bumper wheat crop of some 1.7 million tonnes was harvested, the second in succession, due to favourable conditions at harvest and higher yields. Total food grain production for 1998/99 is currently estimated at around 20.4 million tonnes.

#### CAMBODIA (2 June)

Consistent rainfall during late-April and early-May indicated the start of the rainy season. Unconfirmed reports, however, indicate that unusually early rains in April this year, the earliest for 10 years, caused some damage to the dry-season rice crop at harvest. However, increased precipitation should benefit main, wet season, production, planting of which begins this month for harvest in November. This year's dry-season paddy production from January to April was projected at around 723 000 tonnes, before damage, compared to around 742 000 tonnes last year. Aggregate wet season paddy production in 1998 was 2.7 million tonnes. As a result of a lower dry season crop than anticipated, aggregate 1998/99 wet and dry season paddy production is now put at around 3.43 million tonnes, compared to an earlier forecast of around 3.5 million tonnes.

#### CHINA (2 June)

Low temperatures, approximately one degree centigrade below last year, in Heilongjiang and Jilin provinces in north east are reported to have delayed planting and development of spring crops. Both provinces are important maize producers. Improved weather conditions in the later part of May, however, favoured crops, suggesting that 1999 maize production could be higher than the 120 million tonnes, currently forecast. In main wheat growing areas, particularly in Shandong Province, rainfall in the second dekad of May eased conditions somewhat on an estimated 2.7 million hectares following a prolonged drought earlier. In view of the earlier drought, which affected the main winter wheat crop, (around 90 percent of aggregate production), prospects are less favourable and output is forecast to fall to around 105 million tonnes, some 5 million tonnes lower than last year and 5 percent below the long term average. Higher imports are anticipated to meet demand for wheat. Overall a slight increase in aggregate crop area is anticipated this year and the food grain production target is 495 million tonnes, including tubers and pulses.

#### CYPRUS (5 June)

The 1999 output of wheat and barley crops, now being harvested, is estimated at 106 000 tonnes, about 63 percent above last year's reduced output but 6 percent below the average for the previous five years. Imports of wheat and barley in 1999/2000 (May/April) are forecast at 500 000 tonnes slightly above last year.

#### GEORGIA\* (25 May)

**The current production forecast is no better than the poor 800 000 tonnes last year. Winter grains, mainly wheat and barley, benefited from mostly satisfactory conditions but official reports indicate that the area sown to winter wheat has declined further by 18 000 hectares to 107 000 hectares. Even with average yields, the 1999 wheat harvest is officially forecast at about 150 000 tonnes, compared to 160 000 in 1998. However, official estimates tend to underestimate actual output. At the same time, yields are likely to remain low due to structural problems such as shortage of credit, inadequate marketing and processing facilities and poor irrigation and drainage systems. Market demand for foodstuffs and the availability of funds for inputs has been adversely affected by the depreciation of the lari, the growing budget deficit and the disruption of trade with the Russian Federation. As a result, humanitarian assistance to vulnerable groups will also remain necessary in 1999/2000.**

**Food aid deliveries of cereals in the 1998/99 marketing year amounted to some 90 000 tonnes, mainly wheat. The balance of the cereal import requirement is expected to be imported commercially. Indications are that registered imports of wheat and flour have fallen sharply after the 20 percent VAT on flour imports was also extended to wheat. Nevertheless, the overall food supply situation is satisfactory but in the more difficult economic climate in the wake of the Russian financial crisis, the vulnerable populations will continue to need assistance.**

**WFP has planned to provide 18 000 tonnes of food aid to 180 000 vulnerable people and targeted food-for-work schemes over a one-year period commencing in July 1999 with a new phase of the protracted relief and recovery operation. The emphasis in the new phase is to increase the number of food-for-work beneficiaries to assist vulnerable people to meet their food needs under the current conditions of decreasing purchasing power.**

#### INDIA (2 June)

High temperatures in late April/early May affected the rice and vegetable crop in parts, but greatly benefited harvesting of maturing wheat and oilseed crops. Early projections from the country's Meteorological Department forecast normal monsoon rains in 1999, which begin in the last week of May in the south and cover the entire country by September. The performance of the monsoon is essential for kharif rice and coarse grains crops. As a result of favourable weather, the 1999 estimate of wheat production has been revised up to a record 72.8 million tonnes, almost 2 million tonnes higher than earlier forecast and around 7 million tonnes or 10 percent higher than 1998. The previous record for wheat production was in 1997, when 69 million tonnes were produced. Due to improved production prospects, the wholesale price of wheat in Delhi and Bombay dropped appreciably.

Due to increased wheat and rice production, aggregate 1998/99 food grain production is estimated at over 201 million tonnes, 3 percent above an earlier projection and some 10 million tonnes higher than the previous year.

The Food Corporation of India (FCI) has already procured 12.94 million tonnes of wheat from farmers for the 1999/2000 marketing year (April-March), the highest level in 10 years. The final estimate of procurement is likely to be a record 14 million tonnes. In addition, the quality of wheat procured is reported to be exceptionally good, due to low moisture levels. The Government recently approved the export of up to one million tonnes of wheat.

#### INDONESIA\* (2 June)

In western Java, rainfall in April/May increased moisture supplies for second-season crops, whilst mostly dry weather favoured fieldwork in eastern Java. Early weather indications and some recovery in the economy, suggest improved prospects for rice production in 1999, compared to last year, which is likely to result in some increase in the area of rice planted. In addition, reflecting investment and improvement of irrigation facilities, supported by the Government drive toward improved provision of credit and inputs, an increase in yields is also expected

The official projection for 1999 paddy production stands at 48.7 million tonnes, similar to the final estimate of 48.5 million tonnes for 1998. Based on the forecast, the rice import requirement for the 1999/2000 marketing year (April-March), is estimated at around 3.1 million tonnes. In addition to rice, some 3.3 million tonnes of wheat will be required in the current marketing year. With the downturn in the economy, the demand for relatively expensive wheat based products, especially in the fast-food sector, has fallen due to reduced incomes. Taking opening stocks and pledged bilateral wheat assistance into account, the uncovered import requirement for wheat in 1999/2000 is estimated at 2.2 million tonnes. In mid-May, the National Food Logistics Agency, BULOG, announced plans to sell some 500 000 tonnes of wheat in stock plus sugar and soybeans into the open market. Previously BULOG, was responsible for several commodities, including wheat and sugar, but now only has responsibility for rice. With increased liberalization, flour mills are now able to import wheat directly instead of purchasing through BULOG and part of the problem of large stocks with the agency were

its issue price which was un-competitive. BULOG is expected to procure between 1.5 to 2 million tonnes of rice from farmers this year.

Although the economic crisis has mainly affected food security in urban areas, through job losses and declining household incomes and access to food, the problem is spreading to rural areas, with increasing migration. In some rural areas, the population has risen substantially, putting severe pressure on services, increasing competition for jobs and depressing wages. Moreover, as most migrants are landless and have few savings or assets, their susceptibility to food shortages is becoming more pronounced. Notwithstanding the rise in rural poverty, the nutritional situation of the unemployed urban poor still gives most cause for concern. In these areas, despite prospects of modest recovery this year, large segments of the population remain severely exposed to food insecurity, as their ability to cope has been heavily eroded. Studies indicate growing nutritional deficiencies, particularly amongst at-risk groups such as children and expectant and lactating mothers.

International and bilateral food assistance to the country, has undoubtedly helped reduce the impact of the economic crisis on poor household. However, the solution to long term food insecurity lies in economic recovery and support to national and international measures to stimulate agricultural and economic recovery are also viewed as being essential.

#### **IRAN, ISLAMIC REPUBLIC OF (2 June)**

**Drought and the worst water shortage in three decades, severely affected domestic crop production this year. The Government is urging farmers to reduce water consumption and dig wells to make up for rainfall shortage. The worst affected areas are reported to be in dry land areas around Ardebil province in the north west, which depends almost entirely on rainfall. As a result of drought, a serious water problem is also expected in the country from June. Domestic wheat production is projected to fall to around 9 million tonnes this year, some 25 percent lower than last year. As a result of the shortfall in crop output, imports are likely to be appreciably higher this year.**

#### **IRAQ\* (5 June)**

**A drought considered to be the worst this century, severely damaged 1999 winter crops. Total precipitation in the rainfall season from October 1998 to March 1999 was about a third of average in most parts. Water levels in major rivers fell by more than 50 percent. In addition, crop production was constrained by serious shortages of essential agricultural inputs and the widespread incidence of pests, weeds and animal diseases. Recent reports indicate that more than 4.6 million donums under cereals, about 46 percent of total cultivated area, have been severely damaged. The drought is also causing serious damage to livestock, already hit by foot and mouth disease that has so far infected more than 2.5 million animals.**

**The UN Secretary- General has approved the distribution plan for the sixth phase of the "Oil-for-food" deal in May, allowing Iraq to sell up to US\$5.26 billion of oil over six months, to buy food, medicine and health supplies, and for emergency repairs to infrastructure.**

**Despite some improvement in the overall food supply situation following the implementation of the "Oil for food" deal, health and nutritional problems remain widespread in many parts. The drought conditions are anticipated to exacerbate existing food supply problems in the country**

#### **ISRAEL (5 June)**

**The outlook for the 1999 wheat crop, being harvested, is unfavourable due to severe drought conditions that also affected several other countries in the region. In April, the Government officially declared 1999 a drought year and introduced a 40 percent cut in water allocations to**

**farmers. Thousands of hectares under wheat were reported damaged. In 1998, wheat output was estimated at 168 000 tonnes, about 6 percent above average.**

**Imports of cereals in 1999/2000 (July/June) are forecast at some 2.6 million tonnes, similar to the previous year.**

**JAPAN (2 June)**

Rice planting is underway, though has been slowed somewhat by widespread heavy rain. The rainfall, however, boosted soil moisture supplies in southern and central parts. This year's rice area adjustment has been set at 963 000 hectares, similar to last year. Total potential rice area in the country is estimated at around 2.8 million hectares. Due to weaker demand for wheat products and stagnant demand for feed caused by a decline in the livestock population, the import of wheat and feed grains is expected to decline over the next year.

**JORDAN (5 June)**

**An FAO/WFP Crop and Food Supply Assessment Mission from 28 April to 15 May, found that the severest drought in decades decimated cereal crops and sharply reduced output of horticultural produce. The livestock sector was similarly affected and many sheep farms face financial ruin as costs soar and products diminish in quality and quantity. An outbreak of foot and mouth disease has exacerbated drought-induced production losses and further outbreaks of diseases are anticipated.**

**The unprecedented drought could not have come at a worse time as the country's capacity to increase imports is seriously constrained with high unemployment, reduced exports, a fall in foreign currency reserves and unsustainable debt repayment rate of US\$850 million per annum.**

**The Mission forecast the lowest recorded domestic cereal harvest at 13 000 tonnes in 1999. At this level, only about 0.6 percent of the domestic consumption needs, instead of the normal 10 percent, will be met. The Mission estimated a total cereal import requirement of 1.94 million tonnes, comprising 742 000 tonnes of wheat, 725 000 tonnes of barley, 370 000 tonnes of maize and 99 000 tonnes of rice for the 1999/2000 marketing year (July/June). About 80 percent of the requirement is anticipated to be covered commercially, leaving a deficit of 387 000 tonnes to be covered by emergency and programme food aid, of which 100 000 tonnes are already pledged. Of particular concern are some 180 000 small scale herders and landless rural households, who need an estimated 14 400 tonnes of wheat and 1 300 tonnes of pulses in emergency food assistance for eight months. Emergency support to the agricultural sector is also urgently needed to revive production for next year.**

**KAZAKHSTAN (25 June)**

The 1999 crop year is expected to be difficult in spite of some recovery expected in the 1999 grain and pulse harvest compared to last year's 7.3 million tonnes. Good precipitation this winter increased soil moisture reserves after last year's drought, but economic problems intensified. Planting of major spring grain crop is well underway but heavy rains hindered progress in some areas. In contrast, May has been relatively dry in the northwest and newly planted crops urgently need more rain. The shortage of working capital on farm for essential inputs has been exacerbated by the depreciation of the tenge following flotation. Farm credit is even scarcer than last year. For the 80 percent of farms which are in debt, - and whose bank earnings are impounded - barter is the only means of obtaining necessary inputs. However, farmers' ability to barter inputs has been affected by the poor harvest last year. The debt overhang, the shortage of working capital and shortages of fertilizer, machinery and agricultural chemicals are expected to result in a further reduction in area sown and crop yields. The area sown to winter grains declined by 12 percent to 0.7 million hectares. Latest official forecasts indicate that the aggregate area to be sown to grains for harvest in 1999 is likely to fall to about 11 million hectares, including 9 million hectares of wheat. Given normal weather, however, average yields could recover

from last year's poor level and the 1999 grain harvest is tentatively forecast to recover to 9.5 million tonnes.

Low oil prices and the impact of the Russian economic crisis have led to a contraction of the economy in 1998 and in 1999. In the first nine months of the current marketing year, 1.8 million tonnes of grains including wheat was exported. Following the devaluation of the tenge, exports have become more competitive and imports less attractive. Indications are that recently imposed duties of 200 percent on food imports from neighbouring countries will be removed.

#### KOREA, REPUBLIC OF (2 June)

Improved economic prospects this year, especially in the later half, suggest some recovery in the demand for basic food and meat products which has remained depressed in recent years, due to the financial crisis. Demand for milled wheat products remains steady, whilst demand for maize feed remains more constrained due to sluggish growth in the poultry and livestock industries.

Milled rice production in 1999/2000 is forecast at around 5 million tonnes.

#### KOREA, DEMOCRATIC PEOPLE'S REPUBLIC OF\* (29 June)

**A recent FAO/WFP Crop and Food Supply Mission to the country reiterated concerns raised by earlier assessments, particularly regarding declining nutritional standards. Large-scale food shortages have resulted in chronic nutritional problems in the population at large, which may have long term irreversible consequences. A nutrition survey last year, indicated that moderate and severe stunting, affected approximately 62 percent of children surveyed, while the incidence of moderate and severe underweight, or low weight for age was approximately 61 percent. The incidence of stunting is likely to remain high, irrespective of remedial nutritional actions now, though nutritional supplements could reduce wasting which is also widely observed. Although the 1998 nutrition survey provided valuable insight, there is still need to further verify the extent and depth of the nutrition problem, to pinpoint specific remedial actions. In view of this, the Mission underlines the need for a more comprehensive nutrition survey.**

**As food problems become chronic, it is becoming increasingly important that, in addition to cereals which have been the main component of food aid so far, foods providing essential amino and fatty acids and micronutrients be included to counter nutritional deficiencies. Therefore, it is imperative that international food assistance be further diversified to include a higher provision of oils and proteins.**

**The Mission also observed significant differences in food consumption. Some population groups, such as families receiving international food assistance and/or agricultural support, are in a better position to cope with food shortages than people in mountainous areas and in families of industrial workers, especially in non-agricultural areas. The income of these groups from productive activities has dropped in recent years and they have little recourse to meaningful coping strategies. Such families have hitherto depended almost entirely on Public Distribution System (PDS) rations. As food distributions ceased in April 1999, they have had to rely on alternative foods which have limited nutritional value. Moreover, the capacity of these groups to procure food in farmers' markets is highly limited, either because they are in non-agricultural areas and/or have limited resources to procure sufficient quantities. In view of these differences, the Mission expresses serious concern for the nutritional wellbeing of the population in areas in the North East of the country which are industrial and have limited agriculture. Although WFP is responding to these concerns by targeting more beneficiaries in the north-east and increasing rations, beneficiary cover and food for work programmes in these areas, future targeting needs to be refined further to reflect geographical and demographic factors.**

Based on estimates of rice and maize production in 1998 made by the last mission in October, and taking into account barley, wheat and potato production from this year's double crop, 1998/99 cereal availability has been revised to 3.78 million tonnes, about 9 percent above the initial estimate. Against this, utilisation needs, including food, feed and other uses (seed and waste) are assessed at 4.823 million tonnes, which leaves an import requirement of 1.04 million tonnes for the year. Of this requirement, it is estimated that commercial imports over the marketing year will remain unchanged at 300 000 tonnes. Food aid imports, already delivered and in the pipeline, amount to a further 642 000 tonnes. This leaves an uncovered import requirement of approximately 98 000 tonnes.

#### KYRGYZ REPUBLIC (26 May)

Agricultural policy is focussed on introducing private land ownership and increasing output of sugarbeet, maize, cotton and tobacco while keeping wheat production stable. The target for grain production in 1999 is 1.7 million tonnes. The harvest in 1998 is officially estimated at 1.6 million tonnes.

The outlook for the 1999 winter wheat crop remains satisfactory. Indications are that the shift from grain to industrial and other foodcrops will continue this year. The envisaged yield increases may prove difficult to achieve in view of the shortage of money on farm with which to purchase inputs, the devaluation of the som and intensified economic problems this year as a result of the Russian financial crisis. The 1999 grain harvest is tentatively estimated to remain at 1.6 million tonnes and to include 1.2 million tonnes of wheat.

Cereal imports in 1998/99 are forecast at about 120 000 tonnes. Food aid deliveries amounted to 4 000 tonnes and the balance was imported commercially. The country also exports an estimated 150 000 tonnes of wheat per year to neighbouring Uzbekistan and Tajikistan.

#### LAOS\* (2 June)

In the second dekad of May, scattered moderate to heavy rain was received, benefiting second (dry) season crops. 1998/99 paddy production is estimated at 1.77 million tonnes, some 21 percent above average for the previous five years and moderately higher than the previous year. Production remained satisfactory, despite dry spells in parts and sharp reduction in planting in upland areas. Favourable production is attributed to unusually low levels of flood damage and major expansion in the irrigated area under off-season paddy.

Commercial imports are expected to be negligible. Amongst vulnerable sectors of the population, however, project food aid continues to be needed to support well-targeted project interventions in areas affected by reduced rice production in 1998/99. 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.

The State Planning Committee and the Ministry of Agriculture and Forestry planned to undertake its first agricultural census in February/March with donor assistance. A broad range of data is to be collected in all 141 districts, including type of crops, inputs, farm size, use of labour and livestock.

#### LEBANON (5 June)

The output of 1999 wheat and barley, now being harvested, is expected to be about 62 000 tonnes, about the same as last year. Imports of wheat in 1998/99 (July/June) are forecast at some 0.5 million tonnes.

#### MALAYSIA (2 June)

Based on reports from the Meteorological Department, higher than average rainfall was received during the current inter-monsoon period. This is largely attributed to an ongoing La Niña affect, which is expected to gradually weaken from now until August. Although the southwest monsoon, which begins in June, is normally associated with a relatively dry period, this year higher than normal rains are expected. Paddy production in 1998, was estimated at slightly below average 2 million tonnes.

In recent months, almost one million pigs have had to be destroyed due to the spread of Japanese encephalitis, for which the animals are a carrier, which has killed around 100 people. The latest incidence of disease was in the state of Malacca.

#### **MONGOLIA\* (2 June)**

**Planting of the main wheat crop is underway in main producing areas for harvest in October/November. A combination of poor weather and continuing problems in the agricultural sector resulted in a further decline in cereal production in 1998. Wheat production in 1998 was around 195 000 tonnes, the lowest level in 3 decades, some 18 percent below 1997 and 34 percent below the average for the preceding five years. The Ministry of Agriculture and Industry has earmarked 253 000 hectares for cultivation in 1999. However, due to a shortage of seed, this target may not be attained. FAO is assisting the Government in agricultural production and reforestation programmes.**

**Dwindling domestic cereal supplies have resulted in deterioration in the country's ability to feed its people with the number of malnourished people rising sharply. Large imports continue to be necessary 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.**

**In view of food supply problems in the country, around 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 (2 June)**

Unusually heavy rains in April, resulted in slight damage to dry season rice in parts, particularly in the reclaimed areas of Nyaungdone. Main wet season rice planting is underway and will be completed by the end of June in most parts of the country. The rice will be harvested from October onwards. The main rice crop accounts for around 85 percent of aggregate production. Assuming normal weather conditions, an increase in production is tentatively forecast this year due to increased planting. Yields, however, continue to be constrained by a shortage of critical inputs. To encourage rice exports, the Government has introduced a number of policy initiatives, such as allowing entrepreneurs, who reclaim fallow and wet lands for paddy, to export 50 percent of production.

Generally favourable conditions last year, resulted in some increase in paddy production, to 17.8 million tonnes some 7 percent above the previous year.

Rice exports for 1999 are projected at 100 000 tonnes, compared to around 94 000 tonnes in the previous year.

#### **NEPAL (2 June)**

Wheat production this year is estimated at around 967 000 tonnes from an area of 650 000 hectares. This is around 4 percent above 1998 and slightly above average. Due to flood damage last year, the paddy crop was some 200 000 tonnes lower than 1997. Aggregate cereal production for 1998/99 is estimated at 5.9 million tonnes (paddy equivalent), some 5 percent lower than the previous year.

Agricultural productivity in the country remains poor and any growth in aggregate output in the past has largely been attributed to area expansion and not yield increase. Other factors that hamper

growth in the sector, include poor infrastructure (irrigation systems and roads) and irregular supply of essential inputs. To improve input supply and efficiency and stimulate growth, the government has deregulated fertilizer marketing and is planning to eliminate the fertilizer subsidy by July 1999

#### PAKISTAN (2 June)

In the third dekad of May a Tropical Cyclone "2A" devastated a number of towns and fishing villages along the southern coast near the city of Karachi. The worst affected districts were Thatta, Badin and Tharparkar. An estimated 700 people were killed and a further 2000 are missing. In addition to casualties, an estimated 18 000 hectares of crop land were damaged.

The recently harvested wheat crop is estimated at 18 million tonnes some 4 percent below last year. The decline is largely attributed to lower yields, due to reduced use of fertilizers, prolonged dry weather in rain-fed areas, which produce around 16 percent of total output, and late planting. Wheat production in the country is expected to remain stable around current levels in future due to competition from alternative crops and problems with salination, input supply and seed quality. Assuming normal weather, 1999 rice production is forecast at 5 million tonnes, similar to last year and around 18 percent the five year average between 1993 and 1997.

Wheat imports for the 1998/99 marketing year are estimated at 2.9 million tonnes and are forecast to increase in 1999/00, due to lower domestic production this year.

#### PHILIPPINES (2 June)

Drier weather in May reduced wet conditions and favoured second-crop grain harvesting. Earlier, above-normal showers persisted into April across eastern parts, slowing second-crop grain harvesting. Overall, abundant rains in the first quarter boosted paddy and maize production. 1999 first-quarter rice and maize output is the highest in the last five years and signals considerable recovery from El Niño reduced crops last year. Official reports indicate that first quarter paddy production was around 3 million tonnes compared to 2.2 million tonnes in the same period a last year, whilst maize production is estimated at 1.265 million tonnes some 60 percent higher compared to last year.

As a result of favourable first quarter production, grain stocks are high. Rice stocks were at 2.43 million tonnes at the beginning of April , up 11.6 percent from the previous year, while some 448 800 tonnes of maize were held in stock, up 31.4 percent from the previous year.

#### SAUDI ARABIA (5 June)

Production of wheat in 1999 is forecast at 1.8 million, about the same as last year. The Saudi Grain Silos and Flour Milling Organization (GSFMO) has decided in May to sell off its current stocks of barley, estimated at 890 000 tonnes. The sell-off is anticipated to cause a decline in Saudi imports in the next few months. Saudi Arabia is the world's largest importer of barley, accounting for nearly one-third of the world barley trade.

#### SRI LANKA (2 June)

In the later half of April torrential rains and floods, in Western and Southern districts of Colombo resulted in a number of casualties. Planting of the second Yala rice crop, which constitutes about a third of aggregate production, is near completion for harvest commencing August. Heavy rains earlier in the season which replenished irrigation tanks, together with attractive rice prices at the time of planting should favour overall Yala planting and production.

Aggregate 1998/99 paddy production is estimated at 2.7 million tonnes (1.87 million tonnes milled basis). The 1998 Maha crop was affected somewhat by heavy rains at ripening stage.

Official reports indicate that the country imported around 150 000 tonnes of rice last year and around 0.9 million tonnes of wheat. In recent years the per caput consumption of rice has declined as consumers switch to wheat based products.

#### SYRIA (5 June)

**The worst drought in recent years severely damaged the wheat and barley crops being harvested. Rainfall this year is reported to have been less than fifty percent of average. Several rivers were reported to have dried up affecting irrigated summer crops. Wheat production in 1999 is forecast at 2.8 million tonnes, well below last year's 4.1 million tonnes and about 30 percent below average. The barley crop is estimated at 700 000 tonnes, about 48 percent below average.**

**Wheat stocks are reported to be adequate but barley imports are anticipated to increase to meet feed demand as a result of the loss of pasture.**

#### TAJIKISTAN\* (27 May)

**The latest indications are that the 1999 grain and pulse harvest could be sharply lower than last year's officially estimated 500 000 tonnes. Preliminary official estimates indicate that the area sown to grains in 1999 fell by up to 90 000 hectares due to shortages of inputs (mainly seeds) and salinization. Up to 80 000 hectares of land has not been planted and about 10 000 hectares of irrigated land have been diverted back to cotton. In addition, a short, mild winter and wet spring favoured development of rust and smut and yields could be lower than last year's. At this early stage the 1999 cereal and pulse harvest is tentatively forecast to fall by 14 percent to 430 000 tonnes. In December 1998 a law was passed allocating another 28 000 hectares of land for private use. This was too late to effectively plant winter grains.**

**The shortfall in production will have to be met by food aid and commercial imports, mainly from Kazakhstan and Kyrgyzstan.**

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

#### THAILAND (2 June)

Early and widespread heavy showers over most parts of the country during April and May, significantly increased irrigation supplies for main-season rice and maize, though slowed harvesting of the second-season rice crop. Heavier showers in western parts caused some flooding. Overall, higher than normal rainfall during the dry season favoured the second season rice crop, now being harvested. Official reports indicate that production from the second rice crop will be around 4.5 million tonnes, compared to 3.8 million tonnes estimated earlier.

In anticipation of a better second season crop, the rice export target for 1999 was recently increased to 5.5 million tonnes from an earlier target of 5.3 million tonnes. In the first four months of the year, however, rice exports were 23 percent lower than in the same period last year. Around 1.83 million tonnes of rice was exported between January-April, compared to 2.37 million tonnes in the corresponding period in 1998.

#### TURKEY (5 June)

Output of the 1999 wheat crop is forecast at 20 million tonnes similar to last year while maize production is forecast to increase. However, these figures may be revised downwards as a result of the drought conditions in south-eastern and central parts of the country. 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.

#### TURKMENISTAN (28 May)

Harvesting of the 570 000 hectares sown to winter grains is underway. Growing conditions have been favourable this winter. Indications are that the 1999 winter grain production target of 1.3 million tonnes may be reached. In addition, the country produces some maize and rice. The cotton harvest target is 1.3 million tonnes. Actual production reached 700 000 tonnes in 1998.

#### UZBEKISTAN (28 May)

Harvesting of the 1999 winter grains has started in some areas. The outlook remains satisfactory but without essential inputs production is likely to be well short of the revised production target of 5.3 million tonnes. Indications are that the area has remained stable. On large farms, wheat and barley were sown on 1.3 million hectares, including 1 million hectares of irrigated land. 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 tonnes. Imports of grain are being reduced to maintain a positive trade balance, despite reduced cotton fibre exports and lower prices as well as disruption of trade with the Russian Federation and neighbouring states. The 1998/99 cereal deficit is expected to be imported commercially.

#### VIET NAM (2 June)

The rainy season began in the middle of April in main crop areas along the Mekong River Delta and central highlands. This signaled the earliest start to the wet season in three decades and brought to an end extreme dry weather in the Delta region. In normal years the wet season begins at the end of April or early May. Due to the dry weather earlier, 1998/99 winter-spring yields are expected to be somewhat lower than last year.

The country's target for rice exports in 1999 is 3.9 million tonnes, slightly above the 3.8 million last year. So far this year, some 1.3 million tonnes of rice have been reported, which is appreciably lower than the 2.3 million tonnes exported in the same period last year, when Indonesia and the Philippines were more active in the market. Earlier in the year, official reports indicated that some 2.3 million people were suffering food shortages caused by dry weather in northern and central provinces.

YEMEN (5 June)

Total cereal output in 1999 is forecast at 748 000 tonnes, about 10 percent below last year's bumper crop but about average.

Isolated adults of Desert Locusts may persist on the northern Red Sea coastal plains near the Saudi Arabian border and breed if additional rains fall.

Imports of cereals in 1999 - mainly wheat - are estimated at some 2.7 million tonnes.

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

COSTA RICA (22 June)

Planting of 1999/2000 first season cereal crops has been completed for harvesting from August. The early rains favoured crops and average to above-average maize and paddy production are provisionally forecast. In the south-western region of Brunca, the second biggest bean producer in the country, planting of the first season bean crop has been completed. Harvesting is due from July and an average outturn is anticipated. To meet domestic demand, however, about 90 000 to 100 000 tonnes of rice will need to be imported in 1999.

CUBA (22 June)

**Unusually dry weather continues to affect the country. Despite the beginning of rains, soil moisture levels remain low, affecting the development of cereal and minor foodcrops. Areas most affected include Camaguey in the eastern province and the extreme eastern provinces of Las Tunas, Granma and Guantanamo, earlier affected by El Niño induced drought. Minor foodcrops such as roots and vegetables are reported to be seriously affected, as well as pasture. Serious water shortages are also reported around the capital of Havana and the Isla de la Juventud. Harvesting of the important sugar crop is complete and output is estimated at about 3.7 million tonnes compared to 3.2 million tonnes last year.**

DOMINICAN REPUBLIC (22 June)

**Normal rains continue to benefit development of the 1999/2000 first season rainfed maize and minor foodcrops, mainly plantains and roots. Water reservoirs are also reported to be at satisfactory levels for the irrigated paddy crop being harvested. Pastures have also benefited from the rains. Timely technical and financial assistance have been provided to farmers affected last year by El Niño drought and hurricane "Georges". Early forecasts indicate that maize and paddy production will be average to above-average respectively, providing weather remains normal.**

#### **EL SALVADOR (22 June)**

Early arrival of the rainy season benefited planting of the 1999/2000 first season cereal and bean crops last month. The outlook is good and the area planted to maize, the main cereal, is forecast to be average. However, planting in some areas is reported to have declined due to high input costs and competition by low-priced imports. The anticipated recovery from the adverse effects of hurricane "Mitch" is largely due to rehabilitation programmes implemented by the Government in collaboration with the international community. Sorghum, paddy and bean planting is expected to be average. The food supply situation is under control. Food assistance will continue to be distributed to the hurricane affected population until August/September when harvesting of the first season crop is due to start.

#### **GUATEMALA (22 June)**

Planting of the 1999/2000 first season cereal and bean crops started last month with the arrival of the rainy season. Prospects are good and the area planted to maize, the main cereal, is anticipated to be about average. Average plantings of sorghum, as well as of paddy, are also expected. Food assistance from the international community continues to be distributed to the population severely affected by hurricane "Mitch" last year. International technical assistance is also being provided to affected small farmers.

#### **HAITI\* (22 June)**

Harvesting of the 1999/2000 first season cereal and bean crops is underway. So far, weather conditions have favoured developing rainfed and irrigated crops and early production forecasts indicate that maize, paddy and bean production will be average. Food aid continues to be distributed.

#### **HONDURAS (2 June)**

Planting of the 1999/2000 first season cereal and bean crops started in May with the arrival of rains. Despite favourable weather conditions, below-average plantings of maize, the main cereal, are anticipated due to low prices, as a result of a larger than expected 1998/99 second season ("postrera") maize crop and the competition of low priced imports, including substantial food aid, which continues to be distributed to people affected by hurricane "Mitch". The decrease in plantings is also attributed to the decrease in the purchasing power of the population, caused by the general recession currently affecting the county, and an anticipated reduced demand for feed. The area planted to sorghum, paddy and beans is also expected to decline. Low prices are also likely to reduce planting of other food items.

#### **MEXICO (12 June)**

Extremely dry weather continues to prevail particularly in northern states. By the end of May, ten states had been declared disaster zones by the Government. In Sinaloa and Sonora, where about 40 percent of irrigated wheat is grown, water reservoirs are reported to be virtually dry. Water rationing has begun in some of the affected areas. Harvesting of the 1999 wheat crop is near completion and output is likely to be lower than the average. Dry conditions have also been reported in southern parts, with the exception of Puebla, Oaxaca and parts of Veracruz where moderate rains were received in May. Prospects are uncertain for the important spring/summer maize crop currently being planted unless normal rains resume. The outlook is poor for the 1999 sorghum crop, of which some 40 percent is grown in the drought affected north-eastern state of Tamaulipas. Livestock pastures have also been severely affected by the dry conditions and an increasing number of cattle losses is reported.

#### **NICARAGUA (22 June)**

Normal rains have favoured planting of the 1999/2000 first season cereal and bean crops which started last month. The outlook is generally good and average maize plantings are expected. The area planted to paddy is also expected to be about average, but production is likely to be insufficient to meet domestic requirements. Average to above-average plantings of beans are also expected, reflecting attractive prices. However, some locations in the northern parts of the country, such as Esteli, Segovia, Huaco and parts of Jinotega are facing serious problems in fulfilling planting intentions mainly because of high farm input costs and financial constraints. Other parts of the Pacific coast are threatened by the lack of rain in the first half of June and crop prospects are uncertain unless normal rains resume. Food assistance from the international community continues to be provided to people affected by hurricane "Mitch".

#### **ST. KITTS AND NEVIS (2 June)**

Normal rains and ongoing rehabilitation of the agricultural sector benefited development of sugar, bananas and minor food crops. A recovery from last year's production, which was affected by hurricane "Georges", is anticipated.

### **SOUTH AMERICA**

#### **ARGENTINA (22 June)**

Relatively dry weather favoured harvesting of the 1999 coarse grains crops. By early June, about 85 percent of the area planted to maize had been harvested, compared to 75 percent the year before. Latest official forecasts indicate a maize output of around 13.7 million tonnes, some 5.7 million tonnes below last year's record but still about average. The decline largely reflects decreased plantings, as a result of unattractive prices to producers, and lower than normal yields because of reduced farm inputs. In contrast, above-average sorghum production is anticipated. Due to excellent paddy yields a record 1.6 million tonnes is currently forecast. Higher production also reflects increased plantings due to expanding exports.

Sowing of the 1999 wheat crop has started in some parts, particularly in the southern areas of Buenos Aires province. Intended plantings should improve from 1998 low level, but should still remain below the last 5-year average as farmers seem to be attracted by other more profitable crops.

#### **BOLIVIA (22 June)**

Planting of the 1999 wheat winter crop continues under dry weather in the eastern Department of Santa Cruz. Slightly increased plantings from last year are provisionally estimated as soil moisture is considered adequate due to previous heavy rains. Harvesting is due from September and an above-average output is forecast. Harvesting of the 1999 main season maize and barley crops continues and a significant recovery, particularly of maize is anticipated. Production of maize is forecast to be an above-average 646 000 tonnes.

Harvesting of the 1998/99 main potato crop is almost complete and about 730 000 tonnes are provisionally estimated compared to 495 000 tonnes the previous year.

#### **BRAZIL (22 June)**

Planting of the 1999 wheat crop continues under relatively dry conditions. The area planted is forecast to increase from last year's average level. This is largely due to Government measures to improve domestic production and reduce imports following the country's currency devaluation. Harvesting of the 1999 first (main) season maize crop is near completion, while planting of the second season crop in the southern states is well advanced. Aggregate output for both crops is

expected to be an average 32.4 million tonnes, compared to the 29.3 million tonnes produced last year, during which crops were affected by El Niño. Harvesting of paddy is near completion and output is provisionally estimated at a near record 11.4 million tonnes.

#### CHILE (22 June)

Harvesting of the 1999 maize crop is near completion and production is estimated at 635 000 tonnes compared to 945 000 tonnes in 1997/98. This is due to severe drought. The barley crop was also affected and about 86 000 tonnes are provisionally estimated compared to 115 000 tonnes last year.

Planting of the 1999/2000 wheat crop is about to start under generally dry conditions, except for parts in the north. An increase in planting is anticipated providing normal rains resume.

#### COLOMBIA (22 June)

Planting of the 1999/2000 first (main) coarse grains crop, principally maize, is near completion. Harvesting is due from September and early forecasts indicate that production should decrease from last year's 1.2 million tonnes to an average 1 million tonnes. This is the result of heavy rains and flooding which affected the crops at planting. Sowing of the 1999 paddy crop is complete, for harvest from August, and the area planted is estimated to be about average. To meet domestic demand, however, about 350 000 tonnes to 400 000 tonnes will need to be imported in the 2000 marketing year (January/December).

#### ECUADOR (22 June)

Harvesting of the 1999 maize crop (white and yellow) is underway and the bulk of the harvesting operations are expected to take place between May and August. Despite heavy rains and flooding in coastal areas at planting, aggregate output is expected to recover from last year's El Niño affected crop to a near average 588 000 tonnes. Harvesting of the 1999 paddy crop is well advanced and output is forecast to be an average 1.2 million tonnes.

#### GUYANA (2 June)

**Adequate rains have benefited the development of the 1999 paddy crop. Harvesting is near completion and output is provisionally estimated at some 600 000 tonnes. This represents a recovery from last year's El Niño affected crop.**

#### PARAGUAY (2 June)

Planting of the 1999 wheat crop is underway and average plantings are anticipated. Harvesting of the 1999 maize crop is complete and an above-average 860 000 tonnes has been produced.

#### PERU (2 June)

Harvesting of the 1999 wheat crop is underway. Output is anticipated to be slightly below-average due to lower plantings. Harvesting of the maize crop (yellow and white) continues and production is expected to be lower than last year's record, but nevertheless remains slightly above average. Harvesting of the paddy crop is underway and production in the first three months is estimated at about 405 000 tonnes compared to 262 000 tonnes the year before. A bumper crop of some 1.6 million tonnes is expected. This largely reflects increased plantings in response to expanding exports, possibly to neighbouring countries, coupled with favourable weather conditions.

**SURINAME (3 June)**

Paddy harvesting is near completion. The crop has benefited from adequate rains and output is provisionally estimated at an average 225 000 tonnes.

**URUGUAY (20 June)**

Harvesting of the 1999 maize crop is complete and output is estimated at an average 151 000 tonnes. Harvesting of paddy has also been completed and a bumper crop of 1.2 million tonnes is estimated.

Land is being prepared for planting of the 1999/2000 wheat crop and plantings are expected to increase from last year's low level, when the crops were affected by adverse weather.

**VENEZUELA (20 June)**

Normal rains benefited planting of 1999 maize and the area planted is expected to be about average. Paddy harvesting is complete and output is estimated at about 673 000 tonnes, similar to 1998 and slightly below average.

**EUROPE**

**EC (4 June)**

FAO's latest forecast puts aggregate 1999 cereal production in the EC at 201.7 million tonnes, about 4 percent below last year, but still just above the average of the past 5 years. The reduced crop expected reflects reduced areas due partly to adverse weather and partly to a 5 percent increase in the compulsory set-aside requirement. In addition, less favourable winter/spring weather is expected to result in lower average yields throughout most of the community. Wheat output is forecast at 98.6 million tonnes, 4 percent lower than 1998, while aggregate output of coarse grains is also forecast to fall by about 4 percent to 101.2 million tonnes. In the EC, the 1999 paddy season is underway. Current indications point to an area of 400 000 hectares and to an output of 2.7 million tonnes, almost unchanged from last year. Weather conditions have been generally favourable so far during the season in most parts. Drought affected wheat in one of Spain's major producing areas and also in parts of Portugal, while maize planting in southwest France has been severely hampered by heavy rains.

**ALBANIA (4 June)**

**The crisis in the Balkan region and the influx of large numbers of refugees into Albania from neighbouring Kosovo Province in the Federal Republic of Yugoslavia is not expected to significantly affect 1999 cereal crop production. Aggregate cereal output in 1999 is tentatively forecast at about 450 000 to 500 000 tonnes, somewhat down from the average of the past few years, mostly due to reduced planting because of adverse rainfall during autumn planting last year. Wheat (the basic food cereal) is expected to account for about 350 000 to 400 000 tonnes. Thus, the deficit of wheat which would have to be imported to meet normal consumption requirements in 1999/2000 is estimated to be about the average of the past few years at 300 000 to 350 000 tonnes.**

However, a difficult food supply situation persists in north-eastern parts of the country, which are normally food insecure, and where the bulk of the Kosovar refugees have been located. Although large-scale relief operations for refugees are ongoing, there are long-term food security implications for vulnerable groups. In response, an FAO/WFP Mission visited the country in June to assess the overall food situation, the food outlook for 1999/2000 and to analyse the impact of the crisis on food and labour markets and household food security. The report of the Mission will be issued shortly.

**BELARUS (25 May)**

Spring grain planting is underway. Growing conditions for 1999 winter grains have been mostly satisfactory to date although late frosts in May caused some damage. In an attempt to increase self-sufficiency in grains, all regions have been ordered to increase planted area. However, indications are that yields remain depressed due to economic problems and a shortage of credit and hard currency to finance essential inputs. The official 1999 grain and pulse production target, has been reduced from 7.3 to 6.3 million tonnes.

Following poor grain production in 1998 (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 reach only about 400 000 tonnes, as market demand for livestock products has collapsed and foreign exchange constraints limit feedgrain imports.

#### **BOSNIA-HERZEGOVINA\* (28 May)**

**Indications are that the crop and overall food supply situation have not been unduly disrupted. Food imports continue to reach the country via Croatia. Although detailed cropping information remains unreliable, indications are that the area of spring and winter crops remained fairly stable. However, mines in agricultural areas means that only limited scope exists to increase planted area beyond current levels. Overwintering conditions have been satisfactory. The food processing industry is plagued by a shortage of working capital to pay farmers and of raw materials.**

#### **BULGARIA (7 June)**

Weather conditions over the past two months have been generally favourable for the 1999 wheat crop, and contrary to earlier concerns over farmers' lack of finances for inputs, fertilizer and herbicide applications are reported to have been adequate and widespread, especially in the major producing areas. However, after a significant reduction in plantings last autumn, 1999 wheat production, now forecast at about 2.7 million tonnes, would still be some 18 percent lower than the previous year. Spring planting was delayed due to frequent rainfall. According to official information, by-mid May, maize had been planted on about 320 000 hectares. With planting usually undertaken until the end of May, it is likely that the final area is somewhat larger, and could be similar to the 380 000 hectares planted last year.

#### **CROATIA (28 May)**

The area sown to wheat fell sharply, from 242 000 to 150 000 hectares in response to shortages of working capital and seeds. Overwintering conditions have been generally satisfactory, but output is likely to be only about two-thirds of last year's 1 million tonnes. There are plans to increase the spring crops to 711 000 hectares whilst production of sunflower, sugarbeet, soya and barley is to benefit from more state support with inputs. However, as trade and the economy continue to be affected by ongoing war in the region, prospects for planting targets being achieved are not good. Moreover, the area to be sown to maize is also likely to be reduced.

#### **CZECH REPUBLIC (7 June)**

In the Czech Republic, the overall cereal area for the 1999 harvest is expected to be down by about 8 percent compared to 1998. Assuming normal yields, aggregate cereal output is forecast to fall by about 5 percent to 6.4 million tonnes.

**ESTONIA (28 May)**

Spring grain planting and emergence is underway but crop establishment is being affected by cold weather. Aggregate area of grains has stabilized at about 350 000 hectares per annum. The early outlook for 1999 cereal production is satisfactory and output could reach 700 000 tonnes. A crop insurance scheme, covering grain, potatoes and rape has been introduced, and is being supported by the government. GDP is expected to remain positive in 1999 despite setbacks in the livestock industry and disruption of trade with the Russian Federation.

**FORMER YUGOSLAV REPUBLIC OF MACEDONIA (16 June)**

**Cereal production in 1999 is expected to be about 750 000 tonnes, virtually unchanged from the previous year. Wheat is expected to account for about 300 000 tonnes.**

**The north-western parts of the Former Yugoslav Republic of Macedonia have faced additional strain on resources this winter and spring due to the crisis in the Balkans and the influx of large numbers of refugees. An FAO/WFP Mission visited the country in June to assess the current food situation and outlook for 1999/2000, and to undertake an in-depth analysis of the impact of the crisis on food and labour markets and household food security. The report of the Mission will be issued shortly.**

**HUNGARY (7 June)**

Wheat production this year is forecast to fall to 3.2 million tonnes, some 35 percent lower than 1998. Farmers' incentive to plant wheat last autumn was dampened after they experienced severe marketing problems with their 1998 crops, but adverse weather also had a large impact on the final area sown. Moreover, severe flooding in early spring is reported to have seriously damaged several thousand hectares. The final area for harvest in 1999 is expected to be about half of that in the previous year. To compensate for the reduced wheat area, and smaller crop expected, the maize area planted this spring has been increased by some 20 percent to about 1.2 million hectares. Maize could be used to replace feed wheat for certain livestock.

**LATVIA (28 May)**

With the livestock industry and the economy in general adversely affected by the financial crisis and reduced import demand in the Russian Federation and growing stocks, the area planted to cereals (winter and spring) is likely to remain fairly stable. 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.

**LITHUANIA (29 May)**

Spring grain planting is well advanced but crop emergence and establishment was slowed by cold weather this spring. Growing conditions for the winter-planted wheat and rye crop have been satisfactory to date. Given difficulties in the livestock industry and the accumulation of stocks, 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.

**MOLDOVA (26 June)**

The outlook for 1999 grain production is satisfactory. Growing conditions for winter grains (mainly wheat and barley) were mostly satisfactory and planting of spring grains is virtually completed. Even with normal weather this year, however, yields are likely to remain well below potential due to shortage of farm capital, devaluation of the lei, economic recession and shortages of fuel.

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.

#### **POLAND (7 June)**

In Poland, lower cereal production is in prospect. Although the winter grain area for the 1999 harvest is estimated to have remained similar to the previous year's, yields are expected to be lower as many farmers are facing financial problems which will reduce input use. Output of wheat is tentatively forecast at 8.7 million tonnes compared to the bumper 9.5 million tonnes in 1998.

#### **ROMANIA (7 June)**

Another reduced wheat crop is expected in 1999. In view of the smaller area sown last August, even if yields improve considerably from the 1998 levels, wheat output is forecast at only 5 million tonnes, compared to 5.2 million tonnes in the previous year. The summer maize crop, however, is expected to recover from last year's low level to reach about 10.5 million tonnes.

#### **RUSSIAN FEDERATION (25 June)**

**Current indications point to a recovery in cereal production this year compared to last year (estimated at about 55 million tonnes by FAO). Output, however, could remain somewhat below average. Favoured by an early spring and despite economic problems, spring grain planting is nearing completion and indications are that the target of 38 million hectares will be met if not surpassed. Farmers are expected to maximize the area sown to grains as prices are high and grain provides an inflation-proof means of payment. Good precipitation this winter in most areas recharged soil moisture reserves but late frosts in May and high temperatures in June caused some damage. However, even if normal weather prevails until the harvest in September/ October, inflation and the chronic shortage of inputs are expected to keep yields below average. The bulk of inputs will have to be procured by barter, but resources from last year's poor harvest are limited. Fuel prices have risen sharply, adding to farmers' difficulties.**

**The outlook for winter grains remains favourable. The area sown fell by 4 percent and of the 13 million hectares sown, crops on 1.9 million hectares were affected by winterkill (1998 1.1 million hectares). Growing conditions have been mostly satisfactory except in parts of the North Caucasus (Stavropol and Rostov) and overall winter crops are in a better condition than last year. Provided weather remains favourable, average yields could be higher than last year and winter grain output could increase by some 10 percent to about 21 million tonnes including 15 million tonnes of wheat compared to 14 million in 1998. FAO tentatively forecasts 1999 grain production at 65 million tonnes, including some 33 million tonnes of wheat (1998:30 tonnes) and 30 million tonnes of coarse grains (1998: 22.6 tonnes).**

**Despite last year's poor harvest and reduced imports, the overall food supply situation is not critical but stocks are being drawn down sharply and the price of wheat, in nominal terms, has doubled to around US\$95-100 per tonne. The shortage and high price of feedgrains has adversely affected livestock production and output, even of poultry - a sector which was showing signs of recovery until this year - is forecast to decline. However, demand for livestock products has also fallen because of the loss of purchasing power in the population. In the coming months, the scarcity of stock feed is likely to ease with the growth of natural pasture. Current indications are that in-country stocks are sufficient to meet food demand until the end of the current marketing year. About half of food aid pledged in 1998/99 (3.8 million tonnes of grain as well as meat, dairy and soybean products) is now expected to arrive between July and September 1999. These deliveries will help to ease the tight supply situation until the completion of the harvest and contain prices. However, the outlook is for the grain supplies to also remain tight in 1999/2000.**

SLOVAK REPUBLIC (7 June)

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. Increased spring planting was planned to compensate for the poor winter crop area but the final outcome is not yet known.

SLOVENIA (7 June)

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.

THE UKRAINE (25 June)

Given normal weather until the completion of the harvest, the 1999 cereal and pulse harvest is expected to recover from last year's drought reduced 29.5 million tonnes. (FAO estimate), despite the widespread economic difficulties, shortages of inputs, heavy weed infestation and untimely frosts in May.

Spring grain planting is virtually completed. Despite an earlier start, planting progress is not as rapid as last year but indications are that the target of 4.8 million hectares sown (and reseeded) to spring grains (excluding maize) on the public farms will be achieved. As winter grains were sown on about 7 million hectares, the aggregate area sown to grains is likely to decrease by about 1 million hectares to 14 million. However, given better weather, the area harvested could remain similar to last year's and average yields are likely to recover somewhat. Soil moisture reserves for spring crops have been replenished. Overall, growing conditions have been satisfactory although unseasonably cold weather in May caused some crop damage and crops in some central areas now need more rain urgently. Official reports of crop damage on 1.3 million hectares are proving exaggerated and in part represent farms' attempts to reduce debt repayment obligations and retain output for private disposal. Winter grains have benefited from the good spring weather and are, on the whole, in good condition. The latest official estimates indicate that only 0.8 million hectares, or about 11 percent of the crop were affected by winterkill compared to 1 million hectares last year. Grain production on private farms and household plots is likely to increase.

Given normal weather conditions, 1999 grain production is tentatively projected at 31.8 million tonnes, some 2 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 1 million tonnes to 14.5 million tonnes, if the expected shift to barley this spring occurs. In view of current dry conditions, 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 have been cleared, add further uncertainty to forecast and supply analysis. Despite the lower harvest, the country is likely to export close to 5 million tonnes of cereal in the current marketing year. By end April, 4.5 million tonnes of cereals (including 3.4 million tonnes of wheat) had already been exported officially.

**YUGOSLAVIA, FED. REP. OF (SERBIA AND MONTENEGRO)\* (30 June)**

**No firm data is yet available but the outlook for the 1999 grain production has likely been affected heavily by chronic shortage of farm funds and inputs, and damage to industries serving agriculture and infrastructure. Spring sowing operations were considered a strategic priority. Official plans called for spring crops to be planted on 2.5 million hectares, including 1.5 million hectares of maize and other spring grains and every effort was made to ensure funding. Official reports indicate that this target was achieved. Indications are that the area sown to sugarbeet, sunflower and soya, crops, the production of which is supported by the Government, increased by up to 20 percent. However, shortages of inputs and fuel,**

disruption of labour and damage to fields and other infrastructure are likely to keep yields low. The area sown to winter wheat fell well short of the target of 810 000 hectares mainly in response to economic difficulties, notably rapid inflation and shortages of money as well as persistent and untimely rains. Unofficial reports indicate that the area sown to wheat fell to about 638 000 hectares from 795 000 in 1998, but even this estimate is unconfirmed.

In the Province of Kosovo, the output of all crops is expected to be very low in 1999 due to civil unrest since March 98, which escalated to a crisis situation in March 1999, resulting in large scale population displacement. A peace accord signed on 10 June has allowed refugees to begin to return to their homes. Large-scale international assistance has already been mounted within the Province to address the needs of thousands of IDPs who have been living in very difficult conditions throughout the crisis and for the returnees who will largely have no means to support themselves in the coming months.

## **NORTH AMERICA**

### **CANADA (4 June)**

In Canada, the official March seeding intentions report pointed to a marginal reduction in the wheat area compared to the previous year. Planting started in early May but progress during the month was slow due to wet conditions. Furthermore, the cool wet weather is reported to be favouring disease build-up, which may prove detrimental to crops. However, assuming an improvement in the weather and normal conditions prevail in June and July, farmers could still manage to meet their planting intentions and wheat output in 1999 is forecast at about 23.5 million tonnes. The area sown to coarse grains is also forecast to be reduced somewhat this year as farmers are expected to switch land to other non-cereal crops. Although much still depends on the weather for the remainder of the planting season, aggregate coarse grains production in 1999 is tentatively forecast to fall to about 25 million tonnes, compared to nearly 27 million tonnes in 1998.

### **UNITED STATES (4 June)**

Aggregate (winter and spring) wheat production in 1999 is officially forecast at 61.1 million tonnes, 12 percent down from the previous year, mostly reflecting a significant reduction in winter wheat plantings and lower yields expected after last year's records. The estimate of winter wheat plantings remains unchanged at 17.6 million hectares, about 7 percent down from the previous year and the lowest level since 1972/73. However, favourable winter weather conditions have resulted in lower winter kill-out rates and the reduction in the harvested area is expected to be less significant. With regard to the spring wheat crop, planting was almost complete by mid-May and the area is forecast to increase by some 1 percent to 7.95 million hectares. Maize planting got off to a slow start in late April due to wet weather. However, conditions improved in May and by the end of the month, planting was virtually complete, ahead of the 5-year average. The final area sown to maize should be about 30 million hectares, 2 percent down from the previous year, as indicated in the USDA's 1999 Prospective Plantings Report. Assuming yields are on trend, the 1999 maize output is expected to decrease by some 3 percent. Aggregate 1999 coarse grains output in the United States is forecast at about 263 million tonnes. Planting of the 1999 paddy crop is nearing completion and a record output of about 9.4 million tonnes is anticipated, 11 percent up from the previous season. The forecast is based on USDA's March Prospective Plantings, which reports that farmers are expected to plant about 1.5 million hectares to rice, up by over 100 000 hectares from the previous season and the second highest on record. A survey of the actual planted area will be conducted in June.

## **OCEANIA**

### **AUSTRALIA (4 June)**

Planting of the 1999 winter wheat and coarse grain crops is underway. Latest indications still point to a marginal increase in the wheat area this year. After some planting delays due to dry conditions in April

and early-May, widespread rains in late-May improved planting conditions and favoured early crop development. With subsoil moisture levels reported to be generally adequate to support crops through the middle and late part of the season, prospects for the remainder of the season are favourable and another good wheat crop is expected in 1999 at about 21.3 million tonnes, marginally above the previous year's level. The barley crop, which is normally planted a little later than wheat is expected to remain similar to last year's 5.4 million tonnes. The 1999 paddy harvest is almost complete and reflecting very favourable growing conditions throughout the season, output is forecast to reach 1.35 million tonnes, up slightly from the previous season and very close to the record established in 1997.

#### FIJI (25 June)

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.

#### PAPUA NEW GUINEA (25 June)

The country has received normal to above-normal rains during the current growing season, which benefited crops. Prospects for crops, mainly roots and tubers to be harvested from June, appear to be good. However, the food situation is expected to remain difficult for vulnerable groups and those who lacked basic inputs such as seeds and cuttings at planting time.

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

COUNTRY	1997/98 or 1998 Actual imports			Total import requirements (excluding re-exports)	1998/99 or 1999 Import position		
	Commercial purchases	Food aid	Total commercial and aid		Total commercial and aid	Food aid allocated committed or shipped	Commercial purchases
<b>AFRICA</b>	<b>24 877.2</b>	<b>1 885.5</b>	<b>26 762.7</b>	<b>25 118.0</b>	<b>16 208.2</b>	<b>1 695.1</b>	<b>14 513.1</b>
<b>Northern Africa</b>	<b>13 009.7</b>	<b>64.9</b>	<b>13 074.6</b>	<b>13 735.0</b>	<b>12 018.1</b>	<b>16.5</b>	<b>12 001.6</b>
Egypt	9 933.7	52.4	9 986.1	10 220.0	8 681.6	13.0	8 668.6
Morocco	3 076.0	12.5	3 088.5	3 515.0	3 336.5	3.5	3 333.0
<b>Eastern Africa</b>	<b>3 762.9</b>	<b>998.6</b>	<b>4 761.5</b>	<b>3 296.0</b>	<b>1 371.0</b>	<b>793.2</b>	<b>577.8</b>
Burundi	41.5	0.5	42.0	65.0	0.0	0.0	0.0
Comoros	41.8	4.2	46.0	46.0	5.6	1.0	4.6
Djibouti	61.7	10.8	72.5	66.0	5.2	2.0	3.2
Eritrea	223.7	103.3	327.0	109.0	15.6	15.6	0.0
Ethiopia 2/	61.8	546.1	607.9	185.0	374.5	359.0	15.5
Kenya	1 874.7	76.0	1 950.7	1 129.0	319.0	79.2	239.8
Rwanda	58.1	141.8	199.9	215.0	96.8	96.8	0.0
Somalia	265.1	16.6	281.7	385.0	149.9	47.8	102.1
Sudan	509.0	63.3	572.3	500.0	176.1	119.6	56.5
Tanzania	625.5	36.0	661.5	596.0	228.3	72.2	156.1
<b>Southern Africa</b>	<b>1 349.4</b>	<b>373.3</b>	<b>1 722.7</b>	<b>2 055.0</b>	<b>1 238.2</b>	<b>466.4</b>	<b>771.8</b>
Angola	350.8	157.3	508.1	495.0	419.0	142.5	276.5
Lesotho	127.0	7.8	134.8	188.0	162.4	6.0	156.4
Madagascar	176.2	38.0	214.2	205.0	85.0	24.8	60.2
Malawi	113.0	3.6	116.6	232.0	74.1	37.1	37.0
Mozambique	151.9	164.8	316.7	212.0	301.7	222.7	79.0
Swaziland	61.5	0.0	61.5	63.0	60.1	0.0	60.1
Zambia	369.0	1.8	370.8	660.0	135.9	33.3	102.6
<b>Western africa</b>	<b>6 077.7</b>	<b>436.3</b>	<b>6 514.0</b>	<b>5 318.0</b>	<b>1 530.6</b>	<b>409.3</b>	<b>1 121.3</b>
<b>Coastal countries</b>	<b>3 801.3</b>	<b>287.8</b>	<b>4 089.1</b>	<b>3 395.0</b>	<b>1 164.7</b>	<b>182.4</b>	<b>982.3</b>
Benin	110.8	10.2	121.0	125.0	29.1	8.0	21.1
Cote d'Ivoire	603.3	22.6	625.9	640.0	53.0	1.4	51.6
Ghana	419.4	51.8	471.2	475.0	139.4	61.4	78.0
Guinea	403.1	6.9	410.0	385.0	21.1	18.1	3.0
Liberia	94.6	105.3	199.9	155.0	72.2	68.8	3.4
Nigeria	1 844.7	0.0	1 844.7	1 250.0	780.7	0.3	780.4
Sierra Leone	206.2	87.6	293.8	290.0	24.4	24.4	0.0
Togo	119.2	3.4	122.6	75.0	44.8	0.0	44.8
<b>Sahelian countries</b>	<b>2 276.4</b>	<b>148.5</b>	<b>2 424.9</b>	<b>1 923.0</b>	<b>365.9</b>	<b>226.9</b>	<b>139.0</b>
Burkina faso	195.2	20.5	215.7	150.0	50.9	50.8	0.1
Cape Verde	35.5	45.5	81.0	95.0	91.1	91.1	0.0
Chad	64.0	21.5	85.5	72.0	4.1	4.1	0.0
Gambia	116.1	5.5	121.6	124.0	14.8	3.0	11.8
Guinea Bissau	103.4	0.9	104.3	92.0	33.3	19.7	13.6
Mali	84.3	9.9	94.2	80.0	14.7	5.7	9.0
Mauritania	303.1	17.3	320.4	305.0	15.8	15.5	0.3
Niger	478.6	25.5	504.1	200.0	30.4	30.4	0.0
Senegal	896.2	1.9	898.1	805.0	110.8	6.6	104.2
<b>Central Africa</b>	<b>677.5</b>	<b>12.4</b>	<b>689.9</b>	<b>714.0</b>	<b>50.3</b>	<b>9.7</b>	<b>40.6</b>
Cameroon	257.5	2.5	260.0	280.0	18.7	2.6	16.1
Cent.Afr.Rep.	37.1	1.9	39.0	34.0	0.0	0.0	0.0
Congo, Dem.Rep.	247.8	2.2	250.0	250.0	21.1	4.7	16.4
Congo, Rep.	119.2	1.7	120.9	130.0	10.1	2.0	8.1
Eq. Guinea	8.3	0.7	9.0	9.0	0.0	0.0	0.0
Sao Tome	7.6	3.4	11.0	11.0	0.4	0.4	0.0

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

COUNTRY		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
<b>ASIA</b>		<b>39 322.0</b>	<b>3 115.3</b>	<b>42 437.3</b>	<b>43 299.0</b>	<b>32 638.1</b>	<b>4 542.8</b>	<b>28 095.3</b>
Afghanistan	July/June	569.1	138.0	707.1	740.0	129.6	102.3	27.3
Armenia	July/June	235.0	154.0	389.0	342.0	40.0	18.0	22.0
Azerbaijan	July/June	370.0	60.0	430.0	476.0	390.8	16.0	374.8
Bangladesh	July/June	2 698.3	549.4	3 247.7	5 500.0	5 488.0	1 311.0	4 177.0
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	10 109.9	90.1	10 200.0	10 300.0	6 808.5	179.4	6 629.1
Georgia	July/June	447.0	160.0	607.0	609.0	213.0	90.1	122.9
India	April/March	2 263.9	208.4	2 472.3	1 700.0	1 842.6	415.2	1 427.4
Indonesia	April/March	6 857.9	0.0	6 857.9	8 840.0	8 343.2	1 291.7	7 051.5
Korea, D.P.R.	Nov./Oct.	578.6	1 196.6	1 775.2	1 850.0	288.8	288.3	0.5
Kyrgyz Republic	July/June	59.0	72.0	131.0	116.0	83.8	4.0	79.8
Laos	Jan./Dec.	60.7	4.3	65.0	67.0	8.0	8.0	0.0
Maldives	Jan./Dec.	34.3	2.7	37.0	35.0	37.0	0.0	37.0
Mongolia	Oct./Sept.	170.0	30.0	200.0	193.0	60.3	60.3	0.0
Nepal	July/June	24.0	4.9	28.9	59.0	24.7	24.7	0.0
Pakistan 4/	May/April	4 147.9	173.1	4 321.0	2 921.0	2 467.9	350.2	2 117.7
Philippines	July/June	4 600.0	8.5	4 608.5	3 901.0	4 280.4	52.5	4 227.9
Sri Lanka	Jan./Dec.	999.0	81.5	1 080.5	1 102.0	470.3	109.7	360.6
Syria	July/June	916.2	21.0	937.2	750.0	315.2	16.9	298.3
Tajikistan	July/June	280.0	128.0	408.0	368.0	258.6	42.0	216.6
Turkmenistan	July/June	204.0	0.0	204.0	51.0	52.2	0.0	52.2
Uzbekistan	July/June	935.0	0.0	935.0	629.0	366.8	0.0	366.8
Yemen	Jan./Dec.	2 703.7	16.3	2 720.0	2 670.0	667.4	161.5	505.9
<b>CENTRAL AMERICA</b>		<b>3 450.3</b>	<b>285.1</b>	<b>3 735.4</b>	<b>3 713.0</b>	<b>2 168.1</b>	<b>517.6</b>	<b>1 650.5</b>
Cuba 5/	July/June	1 521.2	104.6	1 625.8	1 625.0	451.9	10.9	441.0
Guatemala	July/June	972.1	12.5	984.6	930.0	734.8	72.6	662.2
Haiti	July/June	420.0	115.0	535.0	480.0	309.1	149.1	160.0
Honduras	July/June	370.8	23.0	393.8	500.0	386.5	114.5	272.0
Nicaragua	July/June	166.2	30.0	196.2	178.0	285.8	170.5	115.3
<b>SOUTH AMERICA</b>		<b>1 343.4</b>	<b>74.5</b>	<b>1 417.9</b>	<b>1 226.0</b>	<b>529.6</b>	<b>209.7</b>	<b>319.9</b>
Bolivia	July/June	321.8	68.0	389.8	501.0	288.0	197.3	90.7
Ecuador	Jan./Dec.	1 021.6	6.5	1 028.1	725.0	241.6	12.4	229.2
<b>OCEANIA</b>		<b>338.4</b>	<b>8.0</b>	<b>346.4</b>	<b>326.0</b>	<b>71.6</b>	<b>8.6</b>	<b>63.0</b>
Kiribati	Jan./Dec.	8.0	0.0	8.0	8.0	8.0	0.0	8.0
Papua New Guinea	Jan./Dec.	275.4	8.0	283.4	263.0	8.6	8.6	0.0
Samoa	Jan./Dec.	17.0	0.0	17.0	17.0	17.0	0.0	17.0
Solomon Isl.	Jan./Dec.	26.0	0.0	26.0	26.0	26.0	0.0	26.0
Tuvalu	Jan./Dec.	1.0	0.0	1.0	1.0	1.0	0.0	1.0
Vanuatu	Jan./Dec.	11.0	0.0	11.0	11.0	11.0	0.0	11.0
<b>EUROPE</b>		<b>690.0</b>	<b>38.4</b>	<b>728.4</b>	<b>803.0</b>	<b>194.7</b>	<b>133.7</b>	<b>61.0</b>
Albania	July/June	365.7	2.3	368.0	398.0	91.6	31.9	59.7
Bosnia&Herzegovina	July/June	214.3	36.1	250.4	290.0	93.1	91.8	1.3
Macedonia, FYR	July/June	110.0	0.0	110.0	115.0	10.0	10.0	0.0
<b>TOTAL</b>		<b>70 021.3</b>	<b>5 406.8</b>	<b>75 428.1</b>	<b>74 485.0</b>	<b>51 810.3</b>	<b>7 107.5</b>	<b>44 702.8</b>

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.\$ 1505 in 1996), 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.

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### DEFINITIONS:

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

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

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

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

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