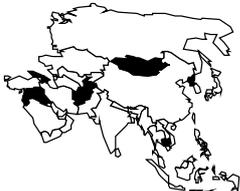


FOODCROPS AND SHORTAGES

No.4

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	<p>AFRICA: In eastern Africa, persistent drought conditions continue to undermine production in large areas, while war and civil strife in parts have severely limited farming activities. The number of people facing serious food shortages has increased to more than 20 million. In Southern Africa, the recent escalation of the civil conflict in Angola has resulted in fresh waves of displaced people who face severe food shortages. In the Great Lakes region, the food situation of the internally displaced people remains precarious as distribution of humanitarian assistance is hampered by insecurity.</p>
	<p>ASIA: Millions of people in Asia have been affected by heavy and extensive monsoon rains and floods. The worst affected countries include Cambodia, Laos, Viet Nam, India, Bangladesh and Nepal. Also a number of countries have been hit by a severe drought, particularly Afghanistan and the Islamic Republic of Iran. In the CIS countries, the food supply situation is extremely tight in Armenia, Georgia, Tajikistan and Uzbekistan due to drought.</p>
	<p>LATIN AMERICA AND CARIBBEAN: In Central America, an unusually long and severe summer dry spell ("canicula") has affected the 2000/01 first season cereal and bean crops in El Salvador, Honduras and Nicaragua, and below-average outputs are anticipated. In the Caribbean, foodcrops have also been seriously affected by drought in Haiti and Jamaica. In South America, prospects are unfavourable for the 2000 wheat crops in Brazil and Bolivia, as a result of adverse weather.</p>
	<p>EUROPE: The 2000 cereal crops in many central and eastern countries of the region have been struck by widespread drought lasting from the spring right through the summer. As a result, yields of cereals, especially the spring/summer crops, have been well below normal. Particularly sharp reductions are reported in Poland and Romania, normally the two largest producers among these countries. Elsewhere, in the CIS, larger crops are being gathered in the Russian Federation but output in the Ukraine and Moldova was affected by hot and dry weather.</p>
	<p>NORTH AMERICA: In the United States, total wheat production in 2000 is unchanged from last year's crop but is below the average of the past five years. By contrast, coarse grains output is set to rise thanks to a record maize crop expected. In Canada, where the harvest is just starting, wheat output is set to fall below the 1999 level and the average of the last five years. The coarse grains crop could rise marginally.</p>
	<p>OCEANIA: The 2000 winter grain harvest is getting underway in some parts of Australia and early prospects are favourable. Total wheat output is forecast at some 22 million tonnes, which would be down from last year's record output but above the average of the past five years. A potentially damaging locust plague is being monitored very closely so that timely control measures can be taken.</p>



CROP AND FOOD SUPPLY SITUATION

OVERVIEW

Severe weather disturbances have seriously jeopardised food prospects and supplies in various parts of the world and resulted in humanitarian crises. In Asia, heavy monsoon rains, tropical storms, typhoons and floods brought havoc to a number of countries including China, India, Bangladesh, Nepal, Cambodia, Thailand, Viet Nam and Laos. The natural disasters resulted in enormous economic damage, whilst hundreds of people were killed and hundreds of thousands evacuated. Serious food and medical emergencies are emerging in a number of areas, whilst relief operations are being impeded by lack of access due to flood waters. In contrast to recent floods, drought seriously affected food prospects in northern China, Islamic Republic of Iran, Korea DPR and Mongolia. The food supply situation also remains extremely tight in the eight CIS countries in Asia, which will result in sharply higher cereal import and food aid needs than last year. The worst affected countries are Armenia, Georgia and Tajikistan. Lower harvests are also expected in Azerbaijan, Kazakhstan and Uzbekistan. In the Near East, persistent drought continues to affect crop and livestock production in many parts, particularly in Iraq and Afghanistan, where millions of people are suffering from severe food shortages.

In eastern Africa, prospects are poor for 2000 crops due to continued drought and population displacement. More than 20 million people already face severe food shortages, which are likely to persist well into 2001. The worst affected countries include Kenya, where the main crop failed, Eritrea and Ethiopia, where more than 10 million people are estimated to need food assistance. Some 2.4 million people, mostly in southern Sudan, will also need food assistance, whilst several regions in Tanzania face acute food shortages due to drought. Dry conditions and drought in northern Africa, also mean that 2000 wheat production will be below normal and some 14 percent lower than last year. In contrast in southern Africa, despite dry weather at the beginning of the season and torrential rains subsequently, main producing areas benefited from favourable precipitation. Consequently production recovered substantially in South Africa, whilst Malawi, Zimbabwe, Zambia, Namibia and Botswana had above-average harvests. Serious food supply difficulties, however, persist in Angola, where civil war has led to severe food shortages and continues to disrupt agricultural production. Conditions were also generally favourable in western Africa, (Senegal, The Gambia, Mauritania and Mali) due to widespread and abundant precipitation. However, harvest prospects are less favorable in the rest of the Sahel, particularly in eastern Burkina Faso, Niger and Chad. Food supply prospects in Liberia and Sierra remain poor due to past and ongoing civil strife.

In Europe, in the four CIS countries west of the Urals, the food outlook in the Russian Federation is expected to improve with a better 2000 grain harvest, though it remains mixed in Ukraine due to erratic weather and ongoing problems in the agriculture sector. In the Balkans, Bosnia Herzegovina, Croatia and the Federal Republic of Yugoslavia were affected by hot dry weather in the spring and summer, resulting in sharply reduced spring crops.

The cereal outlook in El Salvador, Honduras and Nicaragua in Central America, Brazil and Bolivia in South America and Haiti and Jamaica in the Caribbean, remains poor or uncertain due to adverse weather during the season.

SITUATION BY REGION

Africa

In **eastern Africa**, the outlook for the 2000 crops is grim due to continued drought and war-displacement. As a result, the current critical food shortages are set to persist well into 2001. More than 20 million people are already facing severe food shortages. In Kenya, the long rains cropping season, which normally accounts for 80 percent of total annual food production, has largely failed due to a severe drought. The severe scarcity of water and pasture in northern and eastern parts resulted in large livestock losses. Nearly 3.3 million people are now estimated to be in need of urgent food assistance. In Eritrea, the food supply situation of the more than 1.5 million war-displaced people gives cause for serious concern. The mass displacement of farmers from the agriculturally rich regions of Gash Barka and Debub, accounting for more than 70 percent of the country's cereal production, has jeopardised this year's cropping season. Continued drought, in parts, has also aggravated the food supply situation of nearly 340 000 people. In Ethiopia, the overall food supply situation remains highly precarious. With the failure of the secondary "Belg" season crop, the number of

people in need of assistance has increased to more than 10 million. In eastern and southern Ethiopia, despite some beneficial rains recently, large numbers of people whose livestock and livelihoods have perished due to drought, depend solely on food assistance. In Somalia, a good main ("Gu") season crop is anticipated. Earlier in the year, a satisfactory secondary ("Deyr") season harvest in parts of the south has improved the food supply situation. However, serious food shortages are reported in several southern and northern parts of the country due to drought. Malnutrition rates are also increasingly reported, reflecting loss of livelihoods due to recurrent droughts, and longer-term effects of years of insecurity and lack of investment in the economy. In Sudan, despite a stable food supply situation overall, nearly 2.4 million people in the south and in pockets in Kordofan, Darfur, Red Sea and Kessela in the north depend on food assistance due to crop losses and population displacement by civil strife. In Tanzania, several regions are facing acute food shortages due to drought during the 1999/2000 cropping seasons. Production is expected to be reduced in the regions of Dodoma, Singida, Arusha, Morogoro, Kilimanjaro, Shinyanga, Mwanza and parts of Tanga due to late and insufficient rains. In Uganda, the overall food supply situation is satisfactory. However, the situation remains precarious in the north-east, mainly due to last season's poor harvest and loss of cattle due to raids. Food assistance continues to be needed for nearly 112 000 people in Bundibugyo District, in the west, displaced by civil unrest.

In **southern Africa**, despite dry weather at the beginning of the season and subsequent torrential rains which resulted in crop losses and severe flooding in several areas, the main growing areas in the sub-region benefited from abundant precipitation. However, the outturn varies from country to country. Production recovered substantially in South Africa, where large exportable surpluses of maize are available. There were also bumper harvests in Zimbabwe, Zambia, Namibia and Botswana. In Malawi, where maize production remained virtually unchanged from the record of last year, exportable surpluses are also available. By contrast, production declined in Mozambique following crop losses in southern parts due to devastating floods. The maize output also declined in Madagascar, affected by drought in the south and cyclones in the north. In Angola, where the persistent civil conflict continues to disrupt agricultural production, maize production fell for the second consecutive year. In Swaziland, a decrease in plantings, coupled with torrential rains that reduced yields, resulted in a sharp decline in this year's maize output. In Lesotho, the output declined slightly from last year's average crop.

Reflecting this year's good cereal harvest, the overall food supply situation in the sub-region is anticipated to improve. However, food assistance is still needed for 1.9 million displaced people in war-affected Angola and in parts of Madagascar, Malawi, Mozambique and Swaziland where production was reduced by dry weather or floods.

In **northern Africa**, wheat production in 2000 is estimated at about 9.7 million tonnes, some 14 percent less than last year's level and below the average of the last five years. The coarse grains crop is estimated at 7.6 million tonnes, 20 percent down on 1999. With the exception of Egypt where cereals are largely irrigated, dry conditions during the growing season resulted in sharply reduced output in all of the countries of the sub-region. As a consequence, increased cereal imports are anticipated in most countries during the 2000/01 marketing year (July/June).

In **western Africa**, harvesting is about to start in the Sahel and in the northern parts of the countries along the Gulf of Guinea. In the western half of Sahel (Senegal, The Gambia, Mauritania and Mali) following generally widespread and abundant precipitation over the main agricultural zones in July, crops are generally developing satisfactorily. By contrast, harvest prospects are less favourable in the rest of the Sahel as reduced rains affected crop development in central and eastern Burkina Faso, most parts of Niger and the Sahelian zone of Chad. Precipitation resumed in mid-September but crops have been stressed, reducing yield potential. In the southern parts of the countries along the Gulf of Guinea, the first maize crop has been harvested while the second maize crop has recently been planted. In the north, coarse grains are generally developing satisfactorily. In Liberia, harvest prospects remain poor due to the impact of past civil war, while in Sierra Leone, renewed fighting in May, the critical rice planting period, means that the country will continue to depend on food aid for the foreseeable future.

In **central Africa**, growing conditions are favourable so far in Cameroon and the Central African Republic. The security situation improved in the Republic of Congo following the peace agreement but food production has not yet recovered. In the Great Lakes regions, civil strife persists in the Democratic Republic of Congo, with massive population displacements and serious food and humanitarian conditions. In Burundi, dry weather adversely affected the 2000 B season crops in parts. The food situation of large numbers of people still in regroupment camps continues to be cause for serious concern.

Asia

A combination of heavy monsoon rains, tropical storms, typhoons and floods have seriously affected a number of countries in Asia including China, India, Bangladesh, Nepal, Cambodia, Thailand, Viet Nam and Laos. In addition to enormous economic damage, hundreds of people have been killed and hundreds of thousands have had to be evacuated. Serious food shortages are reported from a number of areas, whilst the risk of disease is increasing fast. Humanitarian relief operations are underway but are being impeded by lack of access to many areas due to high flood waters. In India, following floods in north eastern states earlier in the season, the latest casualties were the states of West Bengal, which had devastating renewed flooding, Uttar Pradesh and Andhra Pradesh. Hundreds died and many were left homeless and in urgent need of drinking water, food and medical assistance. As a consequence of the floods overall rice prospects from the main kharif season also remain uncertain. Elsewhere, typhoons displaced and killed a number of people in China at the beginning of September, particularly in Guangdong and Hunan province, where an estimated 40 000 hectares of crops were damaged or destroyed. In contrast, main wheat and maize producing areas in the north of the country were earlier affected by serious drought which will result in a decline in wheat production this year to some 10 percent below average. Maize production is also likely to fall to its lowest level in 6 years. Serious drought also continues to have severe consequences in the Islamic Republic of Iran, where major dams and hydro electric facilities are running dry due to lack of water, wheat and barley production have fallen sharply and hundreds of thousands of livestock have died. Recovery in the livestock sector is expected to be slow even if normal rains are received during the rainy season from September/October. Harvest prospects in the DPR Korea are also uncertain following erratic and below average rainfall in the run-up to the 2000 cropping season. Reduced domestic production this year will have serious repercussions on the country's food supply situation which remains highly precarious due to a combination of natural disasters and economic problems over the last five years. Drought in July/August also hampered crop and fodder recovery prospects in Mongolia which is still suffering the consequences of the worst winter in 30 years earlier this year, which liked thousands of livestock and destroyed the livelihood of large numbers of the mainly nomadic population.

Across the eight **CIS** countries in the Asian region, the overall food supply situation is extremely tight and cereal import and food aid needs are sharply higher than last year. In Armenia, Georgia and Tajikistan, below-normal winter precipitation and hot, dry weather in the spring and summer, coupled with persistent shortages of inputs and poor maintenance of irrigation systems has resulted in sharp yield losses both of rainfed and irrigated crops. In the worst affected areas, rainfed crops have failed and irrigated crop yields more than halved. This has resulted in serious food and seed shortages which need to be addressed if production is to recover next year. In addition to cereals, potatoes, fruit, vegetables, oilseeds and other crops on which households rely for food security have also been affected. Moreover natural pastures are scarce and the production of fodder is very low, necessitating considerable destocking. As livestock production forms an important part of household protein intake and, in addition, the sale of surplus livestock produce is a major source of rural households' cash income, there is a need this year, not only for increased food aid for human consumption but also feedgrains. All these countries will require substantial food aid to cover the shortfall in domestic production this year.

Indications are that the other CIS countries in the region have been affected to a lesser extent by the drought but lower harvests are expected in Azerbaijan, Kazakhstan and Uzbekistan. In Uzbekistan, the northern oblast Karakalpakstan has been affected by inadequate precipitation with the result that water levels in the man-made lake in the region fell to very low levels causing crop failure. The area itself is not a major producing area for cereals, although rice is important, but as it adjoins the Aral Sea Basin, living conditions are already very precarious even in normal times and the inhabitants vulnerable not only to shortages but also disease. In Kazakhstan, the government expects the 2000 cereal harvest to decline from last year's post independence bumper level of 14 million tonnes to 11 million tonnes. Achievement of this target will depend crucially on good weather (i.e. no early snowfalls) until the completion of the harvest in the face of high prices and shortages of fuel. Only in Turkmenistan has the harvest increased. Official reports indicate that the cereal production this year exceeded the target of 1.65 million tonnes.

In the **Near East**, persistent drought continues to affect crop and livestock production in many parts. In Iraq, two consecutive years of severe drought and inadequate availability of essential agricultural inputs decimated crops, exacerbating an already tight food supply situation. In Afghanistan, the escalation of conflict coupled with severe drought-induced crop and livestock losses have left millions of people with poor access to food. As the winter season approaches, the situation is likely to deteriorate. In Jordan, agricultural

production was sharply reduced for the second consecutive year due to continued drought. In Turkey, favourable weather conditions have helped crop production recover from last year's drought reduced harvest.

Latin America

In **Central America and the Caribbean**, the main food crop activities underway include harvesting of the 2000/01 first season cereal and beans crops. Crop prospects, particularly for maize, the main cereal, are unfavourable in El Salvador, Honduras and Nicaragua, as a consequence of a severe summer dry spell ("canícula") which affected these countries for an unusually long period. International food assistance has been distributed for the last two countries. In Mexico, harvesting of the important spring/summer maize crop is about to start, and early production forecasts point to slightly above-average outputs assuming rains stabilize in main growing areas. In the Caribbean, the outlook is poor for crop production in Haiti and Jamaica, as a result of extremely dry weather at planting, while in Cuba and the Dominican Republic average output is anticipated.

In the southern parts of **South America**, planting of the 2000/01 wheat crop has been completed. Crops have generally been affected by adverse conditions such as low rainfall, frosts, dry spells or excessive rains in some of the main growing areas, particularly Brazil. Harvesting of the 2000 maize crop in this country has also been affected by the erratic weather. In the Andean countries, the outlook is poor for winter wheat in Bolivia, due to heavy rains and flooding at planting, while in Peru, above-average output is anticipated. Average wheat output is also provisionally forecast in Colombia and Ecuador.

Europe

In the EC, aggregate 2000 cereal production is set to increase by about 6 percent from last year to nearly 215 million tonnes. Wheat accounts for about 7.5 million tonnes of the increase, with output rising to an estimated 105 million tonnes, while coarse grains output is estimated to rise by about 5 million tonnes to almost 108 million tonnes. The rice crop is similar to the previous year's at about 1.8 million tonnes.

The 2000 cereal crops in eastern parts of the region have been struck by widespread drought lasting from the spring right through the summer in many countries. As a result, yields, especially of spring/summer crops, have been well below normal. The final outcome of the maize crop is still not known but this crop has generally been the worst hit. Total cereal outputs are expected to be down in all the eastern countries, with particularly sharp reductions reported in Poland and Romania, normally the two largest producers.

In the four CIS countries west of the Urals (Belarus, Moldova, Russian Federation, Ukraine) the harvest is well advanced. In the Russian Federation the food supply situation is expected to improve somewhat with the 2000 grain harvest likely to reach up to 66 million tonnes, some ten percent more than FAO's estimate of production last year. In the Ukraine, a reduction in the availability of yield enhancing inputs on credit, as well as very mixed weather, have likely led to an even lower cereal harvest than last year's. FAO tentatively forecasts the 2000 grain harvest at 24.3 million tonnes, less than the 27 million tonnes estimated in 1999. In Belarus, the 2000 grain harvest could recover to an estimated 4.5 million tonnes, still remaining below average but well above last year's poor 3.6 million tonnes. In Moldova the winter cereal harvest, affected by persistent drought, has turned out somewhat better than expected but the outlook for maize remains uncertain. Indications are that aggregate grain output in 2000 could be as low as 1.8 million tonnes. Exports of wheat have been banned to ensure domestic supplies.

In the Baltic countries, the economic and food supply situation is recovering from shocks caused by the devaluation of the Russian rouble. Although winter conditions were generally favourable for wheat and rye, a hot/dry spell in May/June followed by excessive rains in July/August affected spring feed grains and grain output could be lower, particularly in Lithuania but also Latvia. Cereal imports are not a major feature and the impact will be felt mostly by the livestock industry which also relies on natural pastures.

In the Balkans, Bosnia Herzegovina, Croatia and the Federal Republic of Yugoslavia have suffered the effects of the hot and dry spring and summer, resulting in sharply reduced spring crops (maize, oilseeds, sugarbeet, potatoes and vegetables). In Bosnia Herzegovina, the wheat import requirement is likely to continue its upward trend. In Croatia the winter wheat harvest (1.1 million tonnes) has recovered from the poor level of last year but maize and other spring crop production is set to halve. Nevertheless, some wheat exports are still anticipated. In the Federal Republic of Yugoslavia, the 1999/2000 agricultural year has been

exceptionally difficult as the combined result of man-made disasters, floods and waterlogging in the winter and prolonged drought this spring and summer. Output of wheat is less than 2 million tonnes but adequate to meet domestic needs. The production of spring crops is very badly affected. The country relies on exports of agricultural produce including cereals, livestock products and fruit to pay for essential imports of fuel and the outlook is for a difficult year with rising prices for food and fuel. Populations on low incomes need assistance.

North America

Total wheat production in the United States in 2000 is estimated at 62.7 million tonnes, similar to the previous year. As of early September the earliest winter wheat planting for the 2001 crop was just getting underway in some states. Coarse grains output in 2000 is now forecast at about 286 million tonnes, 8 percent up from 1999. The increase largely reflects a sharp rise expected in maize output, which is set to reach a record 263 million tonnes, 12 percent up from 1999. In Canada, harvesting of the main spring cereal crops got underway in late August. Average to above-average yields are expected in most of the major producing areas and the total 2000 wheat production is officially forecast at 25.4 million tonnes. Coarse grain production is expected to increase marginally this year, and is currently forecast at 27 million tonnes.

Oceania

The 2000 winter grain harvest is just starting in parts of Australia and prospects are generally favourable. Latest official forecasts put the 2000 wheat crop at 22.2 million tonnes, down about 2 million tonnes from last year's record output, but still the third biggest crop on record. The largest threat to the crops, which could alter the current outlook is an, as yet, largely unhatched locust plague, which spreads from western New South Wales (NSW) through to southern parts of the national wheat belt and into Western Australia. However, the situation is being closely monitored so that timely control measures can be taken.

COUNTRY REPORTS ^{1/}

AFRICA

NORTHERN AFRICA

ALGERIA (19 September)

The 2000 cereal crop is estimated at 1.1 million tonnes, some 35 percent below the 1999 output which was already below average, as a result of inadequate rainfall during the growing period. Wheat production is estimated at about 750 000 tonnes. This is much below average and some 37 percent below the 1999 output. The barley crop is also less than half of the five year average. Imports of cereals, mostly wheat, are forecast to increase to about 7 million tonnes for the 2000/01 (July/June) marketing year.

EGYPT (19 September)

Cereal production in 2000 is estimated at about 19 million tonnes, slightly over the 1999 above-average crop. The wheat crop is estimated at about 6.7 million tonnes, some 5 percent over the 1999 harvest. Coarse grain production is expected to decrease to 6.3 million tonnes compared to 6.8 million tonnes last year. The 2000 paddy crop is growing under generally normal conditions. Area planted to rice is estimated at about 660 000 hectares, which is slightly above last year's level. Production is anticipated to reach 6 million tonnes, compared to 5.8 million in 1999.

Imports of wheat in 2000/01 (July/June) are forecast at 6.8 million tonnes and coarse grains, mostly maize, at 4.2 million tonnes.

MOROCCO (19 September)

Cereal production in 2000 is estimated at about 2 million tonnes, which is only 53 percent of last year's below average crop, as a result of inadequate rainfall and high temperature during the growing season. The wheat crop is estimated at about 1.35 million tonnes, some 37 percent below the 1999 reduced output. Production of coarse grains, at 639 000 tonnes, is 62 percent below the 1999 level.

Imports of wheat in 2000/01 (July/June) are forecast at 3.2 million tonnes while coarse grain imports are estimated at 2.1 million tonnes.

TUNISIA (19 September)

The output of the 2000 cereal crop is estimated at about one million tonnes, some 45 percent lower than last year, as a result of inadequate rainfall during the growing period. Wheat production is put at 795 000 tonnes, compared to 1.4 million tonnes in 1999, while barley output dropped to 200 000 tonnes, about half of the previous year's level.

Imports of cereals in 2000/01 (July/June), mostly wheat and maize, are forecast at about 1.8 million tonnes.

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

WESTERN AFRICA

BENIN (15 September)

Following abundant rains in June and early July, precipitation decreased significantly in mid-July in the south but resumed in late July and early August. Rains again decreased in the south in mid-August but increased to well above normal in early September. The first maize crop has been harvested in the south. Millet and sorghum crops are developing satisfactorily in the north.

Following an above-average cereal harvest in 1999, the overall food supply situation is satisfactory. Prices of millet are generally similar to those of last year at the same period while prices of maize are somewhat higher. Cereal imports, for domestic use and re-exports, during the 2000 marketing year are estimated at 145 000 tonnes and food aid requirements at 10 000 tonnes.

BURKINA FASO (22 September)

Below-normal rains in the centre and east have affected crop development. In August, precipitation was generally above normal and well distributed in the south and the west, being particularly abundant during the first dekad of the month. By contrast, rainfall was below normal in August over the eastern half of the country, except in the extreme north in late August. Cumulative rainfall as of late August was below average except in the west and the south-west. Rains were inadequate in early September but improved in the middle of the month. Early millet is being harvested in the south and south-east. Overall an average harvest is anticipated.

Pastures remain adequate countrywide and the level of water reserves is satisfactory. No significant pest activity is reported. A joint FAO/CILSS Crop Assessment Mission is scheduled in October to estimate 2000 cereal production.

Following a record crop in 1999, the overall food supply situation is satisfactory. Markets are well supplied. Prices of millet and sorghum have started to increase in rural and urban markets. The cereal import requirement for the 1999/2000 marketing year (November/October) is estimated at 155 000 tonnes, mainly wheat and rice.

CAPE VERDE (26 September)

The onset of seasonal rains in late July permitted widespread maize plantings. Rains continued in early August and became more abundant in late August, notably on Fogo, Santo Antão and Santiago islands. However, precipitation was generally below average. Heavy rains were recorded on 25-26 September on several islands. Crops are emerging satisfactorily and pastures are regenerating well. A joint FAO/CILSS Crop Assessment Mission is scheduled in late October to estimate 2000 cereal production.

1999 maize production has been estimated at a record 36 400 tonnes which is much higher than in 1998 and the last five-year average. Following this record crop, the overall food supply situation improved in rural areas affected by several successive poor crops. However, the bumper 1999 production will cover only about a quarter of consumption requirement, but available stocks and planned commercial imports or food aid for the year 2000 will be sufficient to cover the deficit. With these regular cereal imports, markets are well supplied and prices remain stable. The cereal import requirement for the 1999/2000 marketing year is estimated at 75 000 tonnes of which 50 000 tonnes are expected to be received as food aid. As of mid-September, 72 000 tonnes of food aid had been pledged and 46 500 tonnes had been received.

CHAD (15 September)

Crop development is satisfactory in the Sudanian zone but unfavourable in the Sahelian zone. Following well distributed and generally above-average rains in July, notably during the third dekad, precipitation remained adequate during August in the Sudanian and the Sudano-Sahelian zones but below average in the Sahelian zone. Precipitation remained abundant in early September except in the east of the Sahelian zone. Coarse grain crops are growing satisfactorily in the Sudanian zone. By contrast, in the Sahelian zone, where millet and sorghum are tillering/elongating, more rains are needed to meet water needs at this critical phase of their development.

Pastures are abundant both in the Sahelian and Sudanian zones. Grasshopper attacks have been reported in Chari-Baguirmi, Lac and Ouaddaï regions. Grain eating birds caused some damage to millet and maize in Guéra prefecture (in Mangalmé area). No Desert Locusts activity is reported while some Migratory Locusts have been seen in Ati area along the Batha river. A joint FAO/CILSS Crop Assessment Mission is scheduled in October to estimate 2000 cereal production.

Following an above-average harvest in 1999, the overall food supply situation is satisfactory. Farmers have replenished stocks for the second consecutive year or sold cereals to compensate for low cotton incomes and poor groundnut production. As a result, prices of cereals remained mostly stable during the lean season and were lower than in previous years in both Sudanian and Sahelian zones. However, they seasonably started to increase in August in some areas. In August, WFP launched a food aid distribution for about 150 000 persons in the Sahelian zone. The cereal import requirement for the 1999/2000 marketing year is estimated at 67 000 tonnes, including 12 000 tonnes of food aid.

COTE D'IVOIRE (15 September)

Abundant precipitation covered the northern half of the country in late July and early August while the southern half remained seasonably dry. Rains decreased in mid and late August but became more regular during the third dekad of September. In the south, the first maize crop has been harvested and the second one is now emerging. In the north, millet and sorghum are developing satisfactorily.

Following an above-average cereal harvest in 1999, the overall food supply situation is satisfactory. The cereal import requirement in 2000 is estimated at 675 000 tonnes, mainly rice and wheat. Some 86 000 Liberian refugees and 1 500 Sierra Leoneans remain in the west.

THE GAMBIA (15 September)

Crop development is generally satisfactory. Following widespread and above-average rains from late June to early August, precipitation decreased significantly during the second dekad of August. However, rains improved in late August and remained abundant in early September, preventing crop water stress. Coarse grains and upland rice crops are developing satisfactorily, while recently transplanted rice is emerging or tillering. Harvest prospects are favourable. A joint FAO/CILSS Crop Assessment Mission is scheduled in October to estimate 2000 cereal production.

Following a record crop in 1999, the overall food supply situation is satisfactory and markets are well supplied. Cereal imports for domestic use and re-export during the 1999/2000 marketing year are estimated at 114 000 tonnes.

GHANA (15 September)

Following above-average rains in late July and early August, precipitation decreased in mid and late August but improved, notably in the centre, in early September. The first maize crop has been harvested in the south. Millet and sorghum are developing satisfactorily in the north.

Reflecting an average cereal harvest in 1999, the food supply situation is tight in some areas, notably for populations affected by floods in 1999 in the Northern, Upper East and Upper West Regions. WFP provided emergency assistance to some vulnerable people. About 10 000 Liberian refugees remain in the country. Cereal imports during the 2000 marketing year are estimated at 485 000 tonnes and the food aid requirement at 46 000 tonnes.

GUINEA (15 September)

The evolution of the rainy season has been somewhat irregular. Abundant rains in early and mid-July were followed by more limited rains up to mid-August. Precipitation became particularly abundant countrywide during the last dekad of August and decreased in early September, notably in the east. Coarse grains are generally developing satisfactorily.

Following a record cereal harvest in 1999, the overall food supply situation is satisfactory. Markets are well supplied both in urban and rural areas. Surpluses were available in the Guinée Maritime and Guinée Forestière regions. Some 445 000 refugees remain in the country (120 000 from Liberia and 325 000 from Sierra Leone), located mainly in Gueckédou, Forécariah and N'Zérékore areas. They are receiving food assistance and are considered at moderate nutritional risk. Clashes between Guinean forces and fighters from Sierra Leone erupted in early September, displacing at least 1 000 Guineans.

GUINEA-BISSAU (15 September)

Rice seedlings have been transplanted following desalination of swamp rice fields. Rains were regular and well distributed in early August. They decreased significantly during the second dekad of the month but became particularly abundant countrywide during the third dekad of August and in early September. These strong rains benefited development of coarse grains in the east and north and the rice crop recently transplanted from seedbeds in the swamp rice fields.

Pastures are abundant. The pest situation remains calm. Some insect attacks have been reported in the south. A joint FAO/CILSS Crop Assessment Mission is scheduled in October to estimate 2000 cereal production.

The 1999 cereal production was above 1998 level but below the 1997/98 pre-crisis level and below average. The overall food supply situation has improved this year compared to 1999. However, some population groups with low purchase power are still facing food supply difficulties, notably in urban areas.

LIBERIA* (15 September)

Following generally widespread and abundant rains in May and June, which benefited rice planting, precipitation decreased in July but became well above average in early August. By contrast, rains remained limited or ceased from mid-August to early September in the south. Here dry conditions may have affected crop development. As in previous years, inputs were distributed by several NGOs in various areas. Marketing remains a major constraint as processing facilities and transport infrastructure are very poor. Post-harvest losses are also reported to be high.

With the exception of Lofa County, where an upsurge of civil disturbances erupted in June/July, relative peace in most areas has been beneficial for farming. The cultivated area of rice, the staple crop, should increase. It is estimated that about three quarters of Internally Displaced Persons have returned home and the remaining quarter may settle where they are.

Food aid distributions continue but the quantities received have decreased significantly. Humanitarian activities are evolving from emergency distributions and food for work towards development programmes. WFP is distributing food aid to about 420 000 Liberian returnees.

UNHCR is also assisting 33 000 Sierra Leonean refugees in camps in Montserrado and Sinje areas in Grand Cape Mount County.

MALI (15 September)

Growing conditions are generally favourable. Following generally well distributed and regular rains in June and July, precipitation remained abundant in early August. Rains decreased in mid-August, notably in the west, but they were above normal during the last dekad. Torrential rains causing 15 deaths were recorded on 25 August in Abeïbara, north of Kidal. Precipitation remained widespread but decreased in early September. Crops are generally growing satisfactorily despite some water stress reported in the centre-north. Millet and sorghum are in the elongation or heading stages and rainfed rice is tillering/elongating. Irrigated rice is emerging in the Office Mopti and Ségou irrigated areas while it is tillering/elongating in the Office du Niger zone.

Pastures are generally good. Grasshopper attacks were reported in the Sahelian zone and treatments have been undertaken. Low numbers of Desert Locusts may be present and breeding on a small scale in the Adrar des Iforas. A joint FAO/CILSS Crop Assessment Mission is scheduled in October to estimate 2000 cereal production.

Following two successive bumper crops, the overall food situation is satisfactory. Markets are well supplied and cereal prices are much lower than in previous years. The national early warning system (SAP) estimated that only 2 arrondissements out of the 173 it monitors in the centre and the north (namely Baye in the Bankass cercle and Diankabou in the Koro cercle), were moderately at risk of food shortages in 2000 following floods which destroyed rice crops in 1999. The cereal import requirement for the 1999/2000 marketing year is estimated at 100 000 tonnes of wheat and rice.

MAURITANIA (15 September)

Crop development is satisfactory reflecting generally widespread and adequate rains. Following abundant rains in late July, precipitation remained generally widespread and above normal in August. Substantial rains were registered in late August in Assaba and Gorgol. Following these good rains, crops are developing satisfactorily. Late plantings or replantings lasted up to late August.

Pastures are adequate countrywide. Grasshopper attacks have been reported in Brakna and Gorgol. A total of 878 hectares have been treated against grain eating birds, notably in Trarza. Low numbers of Desert Locusts were present during August in southern Brakna, Trarza and the two Hodhs. Small scale breeding is in progress in Brakna and will continue in the other areas. There may be a slight shift of populations towards the west when vegetation starts to dry. A joint FAO/CILSS Crop Assessment Mission is scheduled in October to estimate 2000 cereal production.

The food situation improved in rural areas following a favourable harvest in rainfed areas in 1999. Markets are well supplied. However, some populations remained vulnerable in some areas of Aftout and Affolé, Tagant, southern Assaba and the two Hodhs following reduced harvests. Food distributions have been undertaken in Brakna, Gorgol, Tagant and Trarza for populations affected by large floods in late 1999. The cereal import requirement for the 1999/2000 marketing year is estimated at 260 000 tonnes (excluding re-exports) and the food aid requirement at 25 000 tonnes.

NIGER (22 September)

Reduced rains in late August/early September affected crop development. Following widespread and regular rains in July, precipitation remained generally well distributed in early and mid August. However, rains decreased significantly during the last dekad of August over the western half of the agricultural zones of the country and remained limited in early September. They improved in mid-September but crops have been affected by the dry spell, notably in Diffa, Tahoua and Tillabery departments. As these areas are not major producing zones, overall an average harvest is anticipated. Localised flooding in Dioudou and Zabori areas, in Dosso department and in Mountséka and Baizo areas in Tahoua department affected many farms.

Infestations of grasshoppers are reported in various areas, notably in Diffa, Dosso, Maradi and Tahoua departments. Several thousand hectares have been treated. Treatments against grain eating birds have also been undertaken in Diffa and Tahoua departments. Scattered Desert Locusts were seen in the eastern Aïr. Small scale breeding may be in progress in the western and southern parts of the Aïr mountains and southern Tamesna where ecological conditions are favourable. A joint FAO/CILSS Crop Assessment Mission is scheduled in October to estimate 2000 cereal production.

Following a well above-average cereal harvest in 1999, close to the 1998 record, the overall food supply situation remains satisfactory. The national security stock has been partly reconstituted. Markets were well supplied and prices of cereals during the lean season were lower than previous years at the same period. However, following recent dry conditions and poor crop prospects, prices increased significantly.

NIGERIA (15 September)

Reflecting widespread and regular rains since early July, crop development is generally favourable. The first maize crop has been harvested in the south. Below-normal precipitation in late August/early September in the extreme north may cause water stress or crop failure.

The overall food supply situation is satisfactory. Some population, however, remain vulnerable following flooding in late 1999 in five States (Sokoto, Adamwara, Borno, Kwara and Niger). New flooding in 2000 inundated hundreds of hectares of farmland in Sokoto area in the north-west.

SENEGAL (15 September)

Following abundant rains in late July and early August which caused localized flooding in Dakar, Louga and Saint Louis areas, rains decreased significantly during the second dekad of August but resumed in late August, except in the north. Soil water reserves were generally sufficient to cover crop needs and crop development is reported to be normal in all the agro-ecological zones. However, reduced rains in the north in late August/early September and in the south-east in early September may cause water stress.

Pastures have regenerated satisfactorily following strong rains in late July/early August. Grasshopper attacks have been reported in Bambey, Gossas, M'Bour, Tivaouane and Thiès departments. Insect and rodent infestations are also reported. As of 29 August, 41 500 hectares had been treated of which 17 000 hectares against grasshoppers. A joint FAO/CILSS Crop Assessment Mission is scheduled in October to estimate 2000 cereal production.

According to national statistical services, aggregate cereal production in 1999 is estimated at a record of 1 256 000 tonnes (with rice in paddy equivalent), which is 35 percent above 1998 and 34 percent above the five-year average. The overall food situation is satisfactory. Markets are well supplied and the price of rice is stable. Prices of local cereals remained also mostly stable during the lean season. The cereal import requirement for the 1999/2000 marketing year is estimated at 760 000 tonnes, including 450 000 tonnes of rice.

SIERRA LEONE* (18 September)

Resurgence of civil disturbances in early May seriously disrupted agricultural activities at the critical planting period of the rice crop, the main staple. Due to insecurity, input distribution and on-going relief operations were suspended or seriously disrupted, notably in the north. The security situation improved from June/July but remains tense. Growing conditions were generally satisfactory. Following abundant rains in early and mid-July, precipitation decreased from late July to mid-August but improved significantly in late August and early September. Rice crop is now in the elongation phase but planted areas are likely to be significantly below last year's level and a reduced harvest is anticipated.

In addition to the 160 000 Internally Displaced Persons already registered, up to 150 000 new IDPs have been registered in the south and the west following the upsurge of fighting in May. About half a million persons have also been displaced and hosted by local communities in government controlled areas while it is estimated that 1 million persons are affected by the war in rebel controlled areas and are not accessible to humanitarian agencies. An estimated 420 000 Sierra Leonean refugees also remain in neighbouring West African countries, mostly in Guinea (more than 300 000) and in Liberia. Despite the hostilities, WFP and NGOs continued food distributions to approximately 100 000 beneficiaries. WFP reports a food pipeline shortfall of 1 774 tonnes of cereals until the end of September and 9 000 tonnes until the end of the year. With the rainy season, the food supply situation has deteriorated as many areas remain inaccessible due to transport problems. Recent assessments in Bumbuna and Daru areas reported high food needs among IDPs as road access is impossible due to insecurity. The country will continue to suffer a chronic food deficit and to be dependent on external aid for the foreseeable future.

TOGO (15 September)

Reflecting generally widespread rains, crops are developing satisfactorily. In the south, the first maize crop has been harvested while the second maize crop is emerging/tillering. In the north, coarse grains benefited from regular rains since July, except in mid-August.

Following a record cereal harvest in 1999, the overall food supply situation is satisfactory. However, people affected by floods in the regions of Kara (in the north), Plateaux (in the west), Maritime (in the south) and Savanes (in the extreme north) remain vulnerable during the lean season.

CENTRAL AFRICA

CAMEROON (15 September)

Following abundant and widespread rains in late July and early August, precipitation decreased in mid and late August in the south but resumed in early September. By contrast, in the north, precipitation remained adequate in August and decreased in early September. Coarse grains are generally developing satisfactorily.

Following an above-average cereal harvest in 1999, the overall food supply situation is satisfactory except in some flooded areas in the north. Congolese refugees are present in northern Cameroon. Cereal imports for domestic use and re-export during the 2000 marketing year are estimated at 290 000 tonnes, mostly wheat and rice.

CENTRAL AFRICAN REPUBLIC (15 September)

Following below-average rainfall during the first part of the rainy season in April/May, precipitation remained generally widespread and abundant since June, being particularly abundant in mid or late July and in early September. Therefore, the development of coarse grains is satisfactory.

Following a record cereal crop in 1999, the food supply situation remains satisfactory. The cereal import requirement for the 2000 marketing year is estimated at 29 000 tonnes, mainly wheat.

CONGO, DEMOCRATIC REPUBLIC OF* (15 September)

The civil conflict continues to escalate. Intense fighting in the past weeks was reported around the north-western city of Dongo but also in the eastern town of Butembo, 80 km from the Ugandan border, and in Walikale district. The hostilities have resulted in further displacement of people into the forests. The already serious food supply situation, following the disruption of agricultural production, is worsening with constant population movements,

as living conditions in the forests are inhospitable. Overall, it is estimated that over one million people are internally displaced. The food and nutrition situation of the displaced is precarious but insecurity and closure of roads hamper distribution of humanitarian assistance. The food supply situation is also tight in urban areas, particularly in the capital city Kinshasa, with a population of 7 million, as a result of the general disruption of economic and marketing activities and the large influx of displaced people. An FAO Crop and Food Supply Assessment Mission will visit the provinces of Kinshasa, Bandundu and Bas-Congo from 21 September to 10 October to evaluate the situation in accessible areas.

CONGO, REP OF* (15 September)

Following the December 1999 ceasefire between the government and opposition parties, the security situation improved in southern regions, the most affected by the conflict. As these areas account for more than half total crop production and the bulk of the supply to Brazzaville, the overall food supply situation improved significantly, notably in urban areas. However, the agriculture sector has yet to recover. The bulk of the estimated 810 000 people displaced by the war have returned to their homes. Their nutritional situation is reported to have stabilised, although they remain moderately vulnerable as many have lost their livelihoods. There are also 40 000 refugees from the Equateur province in DRC in northern areas, of whom 11 000 to 12 000 arrived in July following renewed fighting in Equateur Province. There are also 5 000 Rwandan refugees and 8 000 Angolan refugees. WFP provided food to some 200 000 persons in Brazzaville, Pointe Noire and accessible areas of Bouenza, Lekoumou, Niari and Pool during the first half of the year and plans to provide food to 120 000 persons until the end of the year. The cereal import requirement for the 2000 marketing year is estimated at 140 000 tonnes, mostly wheat and rice.

EQUATORIAL GUINEA (15 September)

Following mostly seasonably dry weather since mid-July, rains covered the entire country during the first dekad of September. The staple crops are sweet potatoes, cassava and plantains. The cereal import requirement for the 2000 marketing year is estimated at 9 000 tonnes of rice and wheat.

GABON (15 September)

Seasonably dry conditions prevailed in July and August. Rains resumed in early September. The main foodcrops are cassava and plantains but some maize is also produced (around 25 000 tonnes). The country commercially imports the bulk of its cereal requirement, estimated at around 82 000 tonnes in 2000.

EASTERN AFRICA

BURUNDI* (11 September)

Sowing of the 2001 A season crops is about to start. However, field operations are being delayed by lack of precipitation in the past months. Rains are urgently needed to avoid reductions in plantings. The area planted could also be negatively affected by shortages of seeds following the reduced harvests of the past two seasons. The Government, with support of international agencies and NGOs, is distributing seeds in the affected areas.

Food production of the 2000 B season was estimated by an FAO/WFP Crop and Food Supply Assessment Mission at 1.7 million tonnes, 3 percent below both last year and the past five-year average. The output of pulses declined by 20 percent and that of cereals by 6 percent, but those of root and tubers remained virtually unchanged from 1999. Areas most affected by the dry weather were the northern provinces of Kirundo and Muyinga, and the Moso region.

The food supply situation is very tight in these areas. In Kirundo province alone, it is estimated that 350 000 persons face food shortages. There is also serious concern for the food situation of large numbers of displaced persons, who remain in camps, where access to land is restricted. WFP plans to assist approximately 700 000 displaced, drought-affected and most vulnerable people until the end of the year. However, insecurity continues to hamper food distributions.

ERITREA* (18 September)

Prospects for 2000 main season cereal and pulse crops to be harvested from November are bleak, due mainly to the displacement of hundreds of thousands of farmers following escalation of the war with neighbouring Ethiopia in May/June 2000. The total area sown by end-July was less than 40 percent of normal due to displacement, loss of basic tools and destruction of basic infrastructure. Despite improved rains from the second-half of July, late and below-normal rains at the beginning of the season have also delayed planting and early establishment of crops. Gash Barka and Debub administrative zones (Zobas), which are the country's main grain producing areas and normally supply more than 75 percent of Eritrea's cereal production, have been at the centre of the recent clashes and may have little or no harvest in 2000. The failure of two successive rainy seasons in Anseba, North Red Sea and South Red Sea administrative zones has also severely affected nearly 340 000 people.

As the next harvest is only expected in November/December 2001, these regions known as "the bread basket of Eritrea" together with other parts will depend on emergency relief food for at least the next 18 months. In August, WFP distributed about 13 500 tonnes of food to more than 586 000 war-affected and 67 800 drought-affected people.

Donor support is sought for a revised Emergency Operation approved by FAO and WFP in June this year for a total of 151 000 tonnes of food assistance to 750 000 internally displaced people and for a UN Inter-Agency Appeal to assist some 335 000 drought affected people. By early September total pledges amounted to 90 800 tonnes of which about 55 000 tonnes had been delivered .

ETHIOPIA* (18 September)

Despite a late start of rains, the 2000 main "Meher" season crops are developing satisfactorily in important cereal producing areas of central, northern and western parts of the country. However, continued rains through October are necessary for crops to mature. Moreover, cereal production in eastern and southern parts of the country is expected to be well below last year's reduced crop.

The 2000 secondary "Belg" crop, normally harvested from June, has failed due to drought. Although Belg production accounts for only 8 to 10 percent of total cereal production, it is important in several areas where it provides the bulk of annual food supplies. The magnitude of food shortages has, therefore, increased in terms of numbers and areas affected. Food shortages in the pastoral areas of eastern and southern Ethiopia are particularly severe where large numbers of livestock have perished and a number of starvation-related deaths occurred.

With the failure of the Belg season, the number of people in need of assistance has increased to more than 10 million people, including 400 000 displaced by the border war with Eritrea. Consequently, the overall food aid requirement in 2000 estimated earlier at 886 000 tonnes has been revised upwards to 1.2 million tonnes. Total pledges by early September amounted to 1.11 million tonnes of which 638 000 tonnes had been delivered.

KENYA (18 September)

Prospects for the 2000 main "long rains" cereal crop, being harvested, are unfavourable. The long rains cropping season (March-May), which normally accounts for 80 percent of total annual food production, has failed due to a severe drought. With the exception of parts of Western Province and Nyanza Province, the rest of the country, including the "bread basket" Rift Valley Province, have received little or no rainfall, leading to widespread crop failure as well as large livestock losses in pastoral areas of the north, north-east and north-west. Current official forecast puts the 2000 long rains maize crop at only 1.4 million tonnes, 36 percent below the average of 2.21 million tonnes and 22 percent less than the drought-reduced 1999 long rains crop of 1.8 million tonnes. The bean crop, estimated at about 300 000 tonnes, is 20 percent below average.

The country's food supply situation continues to be a cause for serious concern with nearly 3.5 million people now estimated to be in need of urgent food assistance. Prices of major food commodities still remain up to 50 percent higher than the five year average. Pastoralists are of particular concern as they are faced with the fourth consecutive failure of the rainy season. Availability of pasture and water resources has declined severely triggering a sharp increase in livestock mortality. With no further rains expected until the onset of the short rains season in October, the situation could only get worse. Moreover, the short rains are minor in the pastoral districts and are unlikely to lead to any significant recovery.

An Emergency Operation for US\$88.5 million was jointly approved by FAO and WFP in June 2000 to assist some 3.3 million people for a period of 6 months. Earlier in May, the Government appealed for international food assistance amounting to US\$134.2 million, reflecting the large numbers of people faced with severe food shortages.

RWANDA* (11 September)

Planting of the 2001 A crop season is about to start. However, below average precipitation in August and the first dekad of September are delaying field operations. More rains are urgently needed to avoid reduction in plantings.

The output of the small 2000 C season, from July to August, mainly vegetables, is forecast to be reduced due to lack of soil moisture following a prolonged dry spell since April. Lack of rains is also affecting permanent crops.

Output of the 2000 B season was estimated by a joint Government/FAO/WFP/USAID/EU Mission at an overall good level of 3 million tonnes, well above last year's harvest. However, in the South and Eastern regions and Lake Kivu surrounding areas an earlier stop of the rains resulted in reduced yields of pulses and cereals. By contrast, food production increased substantially in the North-West provinces of Gisenyi and Ruhengeri and in Kibuye, where the normalization of security conditions allowed the return of populations and weather conditions favoured crop development. Following increased plantings, good productions were also obtained in the provinces of Byumba, Kibungo and Gitarama.

Overall, the food supply situation has improved following the 2000 B harvest, particularly in the North-west provinces previously affected by food shortages. However, in the areas where production was reduced by dry weather, the food and nutritional situation is reported to be deteriorating. The situation is particularly serious in the Bugesera region, affected by three consecutive poor harvest. It is estimated that 150 000 people in this region are in need of food assistance. Agricultural inputs for the coming season are also being distributed with assistance of FAO.

SOMALIA* (18 September)

The current "Gu" season cereal crop, being harvested, in southern Somalia is forecast at 214 000 tonnes, about 22 percent above the post-war (1993-1999) average but below the pre-war average of about 347 000 tonnes. Widespread rains in April/May and good "Hagay" rains at the beginning of July helped developing crops in Lower Shabelle, Middle Shabelle, Hiran Bay, Bakool and parts of Lower Juba. Improved security conditions have also encouraged some households to return to farms and farming. However, poor harvests are anticipated in some pockets of Gedo, Lower Juba and Middle Juba Regions due to erratic and insufficient rains. Moreover, the irrigated maize crop in Gedo region has been affected by very low levels of water in the Juba and Dawa Rivers.

Despite some improvement in the overall food supply situation in parts of southern Somalia, serious malnutrition rates are increasingly reported reflecting a serious decline in livelihoods due to recent droughts and the longer-term effects of years of civil strife and lack of investment in the economy.

Elsewhere, in north-western Somalia (Somaliland) late and erratic rains adversely affected the establishment of the Gu crop in some districts. The food situation is worsening in some agro-pastoral areas in Togdheer, Awdal and Sanag where successive below-normal rains have severely affected crop and livestock production. With community support waning, migration of people and livestock to Ethiopia and other regions is reported. A poor response is also reported to the UN Inter-Agency appeal which was launched in July 2000, for US\$15.6 million to assist some 750 000 vulnerable people.

The recent ban on livestock imports from some eastern African countries, including Somalia, by Saudi Arabia and other Gulf countries due to a Rift Valley Fever scare is expected to severely affect incomes of large numbers of pastoralists, as well as the import capacity of the country.

SUDAN* (18 September)

Prospects for 2000 crops, to be harvested from October, are mixed. Abundant rains in August in most parts of southern Sudan offset low and erratic rains earlier in the season but were too late to revive short-maturing sorghum that was adversely affected by a break in rains in June/July. Western Equatoria, Lakes and Jonglei Regions are anticipated to have good crops while in Upper Nile Region, insecurity and lack of adequate inputs are expected to adversely affect production. In northern Sudan, despite good rains in the second half of August, main crop producing regions, including Gedaref and Sennar, are deficient in moisture. The success of the season will depend on continued rains through September.

Food shortages are reported in a number of locations in southern parts of the country. Recent escalation of civil conflict, particularly in Upper Nile and Bahr-EI-Ghazal regions, disrupted agricultural production and resulted in loss of assets and access to markets, leaving thousands of people in urgent need of assistance. However, relative peace in most other locations has helped nutritional improvements and led to a decline in admissions to feeding centres. During August, WFP distributed 2 400 tonnes of food, about 32 percent of planned levels for Upper Nile and Jonglei Regions due to insecurity.

A joint FAO/WFP Crop and Food Supply Assessment Mission will visit southern Sudan in October and northern Sudan later in November/December to assess this year's crop harvest and food supply prospects for the 2000/01 marketing year.

TANZANIA (18 September)

Harvesting of the 2000 main season cereal crops is complete. Preliminary estimates put total cereal production (maize, paddy, wheat, sorghum and millet) at about 3.46 million tonnes,

nearly 20 percent below the five years average. The decline is attributed mainly to drought in several parts of the country.

However, the overall food supply situation has improved due to large maize imports which have resulted in a marked decline in food prices. Despite reduced pasture, livestock conditions are reported to be good. Cattle prices in July increased by 5 percent and 32 percent compared to June this year and July last respectively.

Food assistance will be required for nearly 1.3 million food insecure people, mainly in the regions of Dodoma, Mara, Shinyanga, Singida, Tabora, Tanga and southern Mwanza, who have suffered their third consecutive poor harvest.

UGANDA (18 September)

The outlook for the 2000 main season cereal crop is favourable. However, in some districts, including Kumi, Lira and Soroti, late and erratic rains have affected yields. Pasture and livestock conditions in pastoral areas in the north-east were reported to be adequate. Recent rains have also marked the beginning of the secondary season, enabling farmers with early sowing.

The overall food supply situation is adequate. Nevertheless, some parts of the country, including Masindi, Arua and Moyo districts were severely hit by recent drought. The food supply situation also remains precarious in Kotido and Moroto districts, with nearly 215 000 people needing urgent food assistance, mainly due to a poor harvest last season and loss of cattle due to raids. Furthermore, food assistance continues to be needed for nearly 112 000 people in Bundibugyo District displaced by civil unrest.

SOUTHERN AFRICA

ANGOLA* (15 September)

An escalation of the civil war in August, particularly in the eastern province of Moxico, has worsened an already dire humanitarian situation in the country. Heavy fighting continues to increase the movement of rural populations from the countryside to provincial capitals in Moxico, Bie and Uige provinces, as well as to neighbouring Namibia, Zambia and the Democratic Republic of Congo. According to UN-OCHA reports, seven to eight children die daily in Luau town near the border with the Democratic Republic of Congo due to starvation and malnutrition. The displaced population was estimated by the end of June at 2.5 million or 20 percent of the national population. Inadequate food aid pledges has also resulted in WFP having to cover only 1.1 million people of the 1.9 million estimated in need of emergency food assistance in accessible areas. Food distributions are likely to be reduced further if more pledges are not received. Donors are urged to make further contributions to prevent a deterioration of the already precarious food situation of the vulnerable populations.

The 2000 cereal harvest was estimated by an FAO/WFP Crop and Food Supply Assessment Mission at 504 000 tonnes, some 6 percent below last year and the second consecutive decline in production reflecting insecurity, irregular rains during the season and shortages of essential inputs. Main staple maize decreased by 8 percent. However, there was an increase in non-cereal crops, particularly rootcrops.

Cereal import requirement for 2000/01 (April/March) is estimated at 753 000 tonnes, of which 333 000 tonnes are required as emergency food aid.

BOTSWANA (15 September)

Latest official estimates indicate a 2000 cereal production close to 21 000 tonnes, including 11 000 tonnes of sorghum and 9 000 tonnes of maize. Despite an increase of 20 percent in plantings, production is only 9 percent higher than the reduced level of last year and below the average of the past five years. Heavy precipitation from December to February, resulted in severe flooding in eastern and southern parts causing severe damage to housing and infrastructure and severely reducing crop yields.

Pastures and livestock conditions are reported in good conditions reflecting the abundant precipitation during the rainy season.

Cereal import requirements in marketing year 2000/01 (April/March) are estimated at 250 000 tonnes, including 65 000 tonnes of wheat. This deficit is expected to be covered on commercial basis.

LESOTHO (15 September)

Latest preliminary estimates indicate a 2000 coarse grains production of 107 000 tonnes of maize and 20 000 tonnes of sorghum, 14 percent and 40 percent respectively lower than last year's levels. Late and insufficient rains at the beginning of the season, a prolonged dry spell in January and subsequent excessive rains until March resulted in a decline in plantings and yields.

Prospects for the 2000 wheat crop are uncertain. This reflects a decline in plantings and dry weather in the past months. More rains are urgently needed to avoid a reduction in yields.

Cereal import requirements in 2000/01 (April/March) are estimated at 238 000 tonnes, including 55 000 tonnes of wheat. Virtually all these requirements are anticipated to be covered by commercial imports.

MADAGASCAR (10 September)

Three successive cyclones and tropical storm during the growing season caused severe damage to crops and agricultural infrastructure in central and northern parts of the East Coast. In the South Region and central parts, drought severely reduced food production. Overall, 2000 cereal production, mainly paddy, was estimated by an FAO/WFP Crop and Food Supply Assessment Mission at 2.33 million tonnes, 15 percent below the good level of the previous year. Cereal import requirements for marketing year 2000/01 (April/March) have increased considerably to 518 000 tonnes, of which 426 000 tonnes are anticipated to be imported commercially. Emergency food aid for affected people was estimated at 30 000 tonnes, leaving an uncovered deficit of 62 000 tonnes.

The food supply situation is tight following this year's reduced cereal production. In the structurally deficit southern region, where food production was sharply reduced by dry weather and widespread shortages of sweet potato cuttings, prices of rice, roots and tubers have increased sharply. A recent survey of the food supply situation in the region indicates that 50 districts, out of 90 assessed, will experience food difficulties in the lean season. From this, 240 000 people in 19 districts are estimated to be in serious food difficulties following near crop failure. Food aid requirements for this population are estimated at 6 500 tonnes of food aid in the form of maize, the main staple of the region.

MALAWI (15 September)

Final official estimates indicate 2000 maize of crop of 2.47 million tonnes, only marginally lower than the 1999 record crop of 2.48 million tonnes. By contrast, production of minor rice and sorghum and millet declined from last year's level to 46 000 tonnes and 57 000 tonnes respectively. Despite late and erratic rains at the beginning of the season and subsequent floods and crop losses, abundant

precipitation during the growing the season allowed the recovery of crops and resulted in higher yields. Agricultural inputs distribution programmes also supported production of maize.

Reflecting another bumper maize harvest and large carry-over stocks, the country is estimated to have an exportable surplus for the second consecutive year of about 300 000 tonnes.

The overall food supply situation is anticipated to improve in marketing year 2000/01 (April/March) following this year's good harvest. Food prices are at low levels and decreasing. However, food aid assistance is needed for populations in the northern district of Karonga and in those of Chilkwawa, Nkhotakota and Nsanje, where production was sharply reduced by early dry weather and successive excessive rains.

MOZAMBIQUE (10 September)

Food production of the second season is estimated good reflecting adequate distribution of seeds, abundant soil moisture and normal to above-normal rains during the growing season. Reflecting the satisfactory outturn of the second season output, as well as food aid distributions during the past months, the food supply situation of large number of populations affected by unprecedented floods in February and March, have improved substantially. Free distribution of emergency food aid to 650 000 flood affected people will be terminated in mid-September. However, there are still many households, which remain isolated due to damage to roads and bridges without access to markets. Recent vulnerability assessments indicate that 172 000 people will require 44 000 tonnes of food assistance until the next main harvest in March 2000. Most of the assistance will be provided through WFP food-for-work projects. Seeds and tools will also be distributed to flood and drought affected farmers to ensure timely start of planting for the main season in October.

NAMIBIA (15 September)

Official estimates indicate a 2000 coarse grain crop of 136 000 tonnes, including 88 000 tonnes of sorghum/millet and 49 000 tonnes of maize. At this level, production almost double the reduced levels of the past two years but is still lower than the 1997 record of 166 000 tonnes. Normal to above-normal rains since the beginning of the season caused localized floods and crop losses but, overall, resulted in higher plantings and yields.

Preliminary forecast point to a 2000 irrigated wheat crop of 4 000 tonnes, 6 percent lower than last year due to a reduction in plantings. Water levels of the dams are reported at satisfactory levels. Pastures and livestock are reported to be in fair to good conditions.

The country has a structural deficit in cereals. Import requirements in marketing year 2000/01 (April/March) are estimated considerably lower than last year at 60 000 tonnes of maize and 50 000 tonnes of wheat, to be entirely covered by commercial imports and stocks held by commercial millers. Imports of maize and wheat until the end of July amounted to 12 000 tonnes and 27 000 tonnes respectively.

SOUTH AFRICA (15 September)

Official maize production estimates for 2000 have revised upwards to 10.2 million tonnes. This is 42 percent higher than last year's reduced harvest and above the average of the past five-years. This reflects an increase in the area planted and higher yields. Despite severe floods and crop losses in some provinces during the growing season, the maize belt was not affected and benefited from the abundant precipitation. Export surpluses are estimated at about 2 million tonnes and domestic prices have declined substantially from last year's level. This is likely to result in plantings reduction for the next season, starting in October.

The first official forecast of the 2000 wheat crop, to be harvested from October, point to a crop of 1.79 million tonnes, 14 percent above the reduced level of 1999 but still below average. The area

planted is estimated 18 percent higher than last year reflecting diversion of land from other crops, but yields are expected to be lower following erratic weather in the main growing area of Western Cape Province. At this level of production, imports of wheat in 2001 are projected at 700 000 tonnes.

SWAZILAND (10 September)

Preliminary official forecasts indicate a 2000 maize output of 72 000 tonnes, a reduction of over one-third from the good level of the previous year. A late start of the rainy season resulted in a decline of 10 percent in the area planted and negatively affected yields of early-planted crops. Subsequently, excessive precipitation, which resulted in severe floods in November/December and February/March, further lowered yields.

As a result of this year's reduced maize harvest, import requirements in marketing year 2000/01 (May/April) have increased to 40 000 tonnes. In addition, the country has a structural deficit in wheat and rice, estimated at 46 000 tonnes. Most of the food deficit is expected to be covered commercially. Vulnerability assessments have identified some 14 000 people in need of emergency food aid until the next harvest in May 2001.

ZAMBIA (10 September)

Latest official estimates indicate a bumper 2000 cereal harvest of 1.5 million tonnes, 43 percent higher than the reduced crop of last year. The maize crop is estimated at 1.3 million tonnes against 856 000 tonnes in 1999. Despite severe floods in early March and crop losses along the Zambezi Valley, the abundant rains during the growing season resulted in higher plantings and yields of the maize crop.

Early forecast points to a 2000 wheat crop of 90 000 tonnes, unchanged from last year's above average level.

Reflecting the good output, prices of maize are declining in the markets. If the production forecast materializes, the country is expected to be self-sufficient in marketing year 2000/01 (May/April). The overall food supply situation is anticipated to improve after two years of poor harvest. However, large numbers of vulnerable people will still experience food difficulties.

ZIMBABWE* (15 September)

Civil unrest since April 2000 continue to disrupt economic and agricultural activities. Despite an improvement in growing conditions for this year's main maize crop, harvesting was interrupted by the unrest which has already affected 1 600 commercial farms. Theft of grains is also reported. There is a climate of fear amongst the commercial farmers, many of whom have abandoned their farms, left livestock unattended and fled to the relative safety of urban areas.

Preliminary official forecasts point to a 2000 maize harvest of 2.15 million tonnes. This is well above both the reduced crop of 1999 and the average of the last five years. However, due to the disruption of harvesting and marketing activities on large-scale commercial farms, this production forecast of maize may not be achieved. A final estimate is yet to be made. If the official forecast of 2.15 million tonnes is attained, the country will be self-sufficient in maize in marketing year 2000/01 (April/March). However, in the lower case scenario of 1.9 million tonnes of maize, imports of about 250 000 tonnes would be necessary.

The civil unrest has also affected planting of the 2000 wheat crop, entirely produced by commercial farmers. The area planted is estimated to have declined by one-third from last year's level. FAO's early forecast point to a crop of 210 000 tonnes, a decrease of over one-third from the bumper crop of last year. A reduced wheat harvest will result in additional import requirements, projected at 105 000 tonnes, at a time when the country faces a serious shortage of foreign exchange.

Shortages of fuel and electricity and inadequate supply of raw materials are seriously disrupting industrial activities. Recently, the important gold mining sector suspended several operations. Thus, should there be a large drop in food production necessitating substantial amounts of imports, Zimbabwe's currently low import capacity would seriously constrain its ability to cover the shortfall commercially. Access to food by the poor is already constrained by a rapid rise in food prices. In early August the price of bread increased by 10 percent. Repeated devaluation of the national currency is likely to worsen the situation. There is particular concern for the food situation of farm workers who have been displaced or lost their jobs due to the farm invasions and who do not own land to grow foodcrops. It is estimated that some 20 percent of the population is employed in the commercial farms.

ASIA

AFGHANISTAN* (18 September)

The severe food supply difficulties due to drought have been exacerbated by the recent escalation of conflict, particularly in northern parts of the country. Displaced people continue to arrive in Herat city from the drought-affected areas of Ghor Province, at a rate of 30 to 50 families per day totalling about 1500 families in early September. Conflicts in drought-affected areas of northern Takhar have also triggered massive displacements.

An FAO/WFP Crop and Food Supply assessment Mission which visited the country from earlier in the year found that total cereal production in 2000, estimated at 1.82 million tonnes, is about 44 percent below 1999 and 53 percent compared to 1998. Cereal import requirements in the 2000/01 (July/June), estimated at a record high level of 2.3 million tonnes, are more than double the 1999 volume of 1.1 million tonnes. With estimated commercial cereal imports of about 1 million tonnes, some 31 percent higher than the estimate for last year, a huge deficit of about 1.3 million tonnes is forecast. WFP emergency food aid, in pipeline and pledged, amounts to 225 000 tonnes, leaving an uncovered gap of over 1.0 million tonnes.

ARMENIA* (11 September)

Persistent dry conditions since June, hot temperatures and hot and dry winds have caused extensive crop damage. A joint FAO/WFP Crop and Food Supply Assessment Mission which visited the country in August found that the outlook for crops had seriously deteriorated. Crops in the Ararat valley, which had access to irrigation water, have developed satisfactorily but elsewhere crops and pastures have been severely affected by drought, particularly in the northeast and in all upland areas. Early indications are that the aggregate 2000 cereal harvest will be about 216 000 tonnes, three-quarters of normal, while that of potatoes, a major staple in upland rural areas, could be reduced by even more.

Fodder crops and natural pastures for livestock have also been seriously affected and substantial destocking will be necessary. Income from the sale/barter of livestock products accounts for an important share of rural household budgets and is crucially important if rural households have to revert to the market to cover a part of their needs. Drought affected farmers are being hit both by reduced agricultural output for auto consumption and/or marketing and the declining prices for livestock products.

There is still food available in the market. The price of wheat in urban markets, largely supplied from imports, has not changed significantly but in rural markets prices of wheat, fodder crops and potatoes are rising and pronounced increases are expected towards the end of the year when rural households run out of supplies from this year's harvest. Meat prices, by contrast, are falling. Rural households, not in receipt of regular remittances from abroad, are likely to face food shortages. In urban areas also, poor households are likely to experience hardship. Despite financial stability and economic growth, a large proportion of the population remains effectively under or unemployed and poor.

Because of the drought, cereal import requirements, including food aid, in 2000/01 will increase sharply. This is due in part to the lower cereal production. In addition, although the harvest of potatoes will continue until later this year, early indications are that the harvest could be very poor indeed. If the country is to reserve seed potatoes from this year's harvest, it will be necessary to replace a proportion of human consumption of potatoes with imported wheat.

In 2000/01 the domestic cereal requirement is estimated at 731 000 tonnes, including 481 000 tonnes for human consumption. This represents 192 kg per caput, higher than usual in view of reduced availability of potatoes and most other domestically produced foodstuffs. Cereal imports in 2000/01 are estimated at 515 000 tonnes, including 458 000 tonnes of wheat. Commercial cereal imports amounted to an estimated 404 000 tonnes in 1999/2000 and are estimated to be 369 000 tonnes in the current year, reflecting growing debt and severe budget constraints. Food aid needs are estimated at 146 000 tonnes and include 109 000 tonnes of wheat for human consumption and 37 000 tonnes of barley to enable 60 000 cattle in the worst affected area to be kept alive during the winter and released into spring grazing in reasonable condition for milk production. Against the food aid requirement, 70 000 tonnes have been pledged to date leaving an uncovered requirement of 76 000 tonnes.

Income distribution is very uneven and living conditions precarious for many households. Purchasing power remains low and at times insufficient to cover the cost of the minimum consumption basket. In total, some 170 000 vulnerable people will be covered by WFP food assistance, including some 110 000 refugees and vulnerable persons being provided with relief food aid, while 60 000 will be reached through community based food-for-work activities, supporting economic and social development. The programme is planned for three years and will be reviewed annually. The Protracted Relief and Recovery Operation (PRRO 6120.01) is expiring on 30 June 2001. An emergency operation is under consideration to assist victims of a drought which has plagued the region and affected mainly the rural population of Armenia.

AZERBAIJAN (11 September)

The outlook for the 2000 foodcrops harvest has also been affected by the heatwave and drought this summer. Official indications are that spring crops, notably cotton, vegetables, fruit and potato, particularly in mountainous areas, have been affected. The extent to which the drought has affected the yield of winter wheat, harvested as of July, is uncertain. Below normal precipitation coupled with high evaporation also reduced the water levels in the Kura and Araz rivers used for irrigation. At the aggregate level, the output of crops is expected to be reduced by 15 - 25 percent. The drought has also affected animal pastures and fodder for the winter.

As the outlook for potato production is unfavourable, the cereal import requirement in 2000/01 is likely to rise to beyond the 600 000 tonnes envisaged earlier. If FAO's projection of 2000 grain production (1 million tonnes) materializes, imports of cereals in the 2000/01 marketing year are tentatively estimated at about 800 000 tonnes compared to 772 000 in 1999/2000. The bulk of this will be covered commercially, though vulnerable groups, including the internally displaced, still need targeted food assistance. WFP continues to support 485 000 beneficiaries through a 3-year Protracted Relief and Recovery Operation which started in July 1999. Total food commodities committed for the life of the project amount to 47 880 tonnes of food aid. The current programme supports IDPs with supplementary assistance, relief support to socially vulnerable groups, resettlement of refugees/returnees and recovery through food-for-work and food-for-training.

BANGLADESH (24 September)

In recent days, 35 000 hectares of rice and other crops were damaged by floods in several districts in the north west. With flood waters rising some 300 000 people have been evacuated, many from Chuadanga district, which was the worst affected.

Earlier in the first dekad of September, some 60 000 people were made homeless and several were killed by floods on Sandwip Island, situated 100 km off the mainland. The floods were caused by unusually high tidal waves in the Bay of Bengal. Problems of drinking water and food supplies are reported.

The main crop currently in the ground is the aman/monsoon paddy crop, which is normally planted in June/July for harvest in October. Although previously the crop was the largest of the country's three rice crops, in recent years the irrigated boro crop (planted in January for harvest in April/May) has gained in importance and is now almost similar in size. Earlier harvesting of the smallest aus rice crop was completed in July/August, with an output of 1.75 million tonnes. Current forecasts indicate that rice production in 2000/01 will be around 22.5 million tonnes, assuming a favourable boro crop next year. Of this, around 45 percent each will come from the aman and boro crops and 10 percent from aus rice. A combination of an increase in area planted, favourable weather and adequate input supplies, resulted in a bumper 1999/2000 rice production of 22.6 million tonnes, some 3 million tonnes above the previous year and some 23 percent above the 1995-1999 five year average.

Wheat production in 2000, however, was lower than target, which was partly attributed to delays in harvesting of the 1999 aman rice crop and excess residual soil moisture during the planting season. The area planted therefore was restricted to around 0.73 million hectares against a target of 0.87 million hectares. Favourable climatic conditions during the growing period, however, contributed to relatively better yields, which resulted in an output of around 1.7 million tonnes, some 9 percent above the five year average between 1995 and 1999. In 1999 the country produced a record wheat crop of 1.9 million tonnes.

The overall food situation remains satisfactory with adequate government food grain reserves. At the end of August 2000 there was a total of 1.29 million tonnes of grain in stock including some 690 000 tonnes of rice and 600 000 tonnes of wheat in the Public Food Grain Distribution System.

CAMBODIA (26 September)

Humanitarian and food supply concerns continue with the country still coping with the highest flood levels in 70 years. Although in parts the flood waters have begun receding, already over 135 people have been killed, with the possibility of more casualties. In addition to human casualties, some 5 000 livestock have also been killed. Seventeen of the country's 23 provinces were affected by floods and more than 270 000 hectares of rice damaged or destroyed. The economic damage to crops alone is officially estimated at around US \$10 million. Serious food shortages and escalating food prices are reported in a number of areas, whilst there is also chronic shortage of drinking water. The government has declared a state of emergency in several provinces and requested international humanitarian assistance for 600 000 of the worst affected people. The country is normally prone to flooding during the rainy season between August and September, though this year flooding started in early July and has been more extensive than normal. In the last serious floods in 1996, 169 people were killed. The International Federation of the Red Cross has issued an appeal for US \$1.6 million to assist flood victims in the country.

The main affects of the floods will be delays in ongoing land preparation, transplanting and planting of main wet season rice. Although the target for 2000/01 is 4.2 million tonnes, this now remains uncertain in view of the floods. In contrast to wide spread flood damage in the river delta, drought in parts such Kampong Spoe province destroyed rice nurseries further damaging overall prospects. Total 1999/2000 paddy production was a record estimated at a 4 million tonnes, some 500 000 tonnes or 14 percent above the previous year. Around 83 percent of paddy production is from the wet season crop, and the remainder from flood recession and dry season production. Rice also accounts for some 84 percent of annual food crop production and is planted on around 90 percent of cropped area, mainly in the Central Mekong Basin and Delta and the Tonle Sap Plain.

CHINA (26 September)

In the first week of September, Typhoon Maria killed 29 people and caused estimated damages of U S \$100 million in Guangdong and Hunan provinces and damaged or destroyed an estimated 40 000 hectares of crops. These two provinces are important rice producers and together normally produce some 21 percent of national rice production. The weather situation in the second dekad of September, however, was generally favourable across most of the country, with warm dry weather aiding maturation and harvesting of summer crops and planting of early winter crops. Harvesting of early rice, first of the three rice crops grown, is complete with production estimated at 37.5 million tonnes of paddy; some 8 percent below last year and the lowest level since the 1980s. In addition, official reports indicate that the intermediate rice crop, affected by drought in parts, will also register a decline compared to last year, while late rice has been affected by typhoon and storm activity, particularly in Fujian, Zhejiang and Guangdong provinces. Overall paddy production in 2000/2001, therefore, is currently forecast at around 186 million tonnes, some 12 million tonnes below 1999/2000. The flood damage comes on top of serious drought earlier which affected summer grain production, particularly in important producing areas in the north. The estimate for 2000 wheat production has been revised down further to 101 million tonnes, compared to 103 million tonnes earlier and 111 million tonnes in June. At this level, production would be some 10 percent lower than average for the last five years and almost 13 million tonnes or 11 percent lower than 1999. In addition, due to adverse dry conditions and to some extent falling acreage, maize production is expected to fall to its lowest level in 6 years to around 103 million tonnes, some 15 percent below average and 25 million tonnes below last year. Lower production will likely result in higher domestic market prices, increase demand for imports and reduce exports. Official reports indicate that this year's drought has been the worst in 20 years, damaging around 31 million hectares of summer and autumn crops.

Total grain production, including roots and tubers, is now forecast at 402 million tonnes this year, 7.45 million tonnes lower than forecast earlier and around 51 million tonnes lower than last year. In addition to weather disturbances, the decline in grain output this year is partly attributed to the reduction in procurement prices announced by the Government earlier in order to reduce large inventories. However there are indications that the Government will review procurement prices.

CYPRUS (18 September)

Aggregate 2000 wheat and barley output is estimated at 101 000 tonnes, some 20 percent below last year's good crop but similar to the five year average. Wheat imports in 1999/2000 (May/April) are forecast at 95 000 tonnes. Aggregate imports of barley and maize are forecast at some 540 000 tonnes, similar to last year.

EAST TIMOR (26 September)

The main agriculture activity currently is the harvesting of off-season maize and planting of off-season rice. Land preparation for main season production will commence in October, whilst planting will be undertaken in the months between November and January. Last year, despite serious disruption to agriculture, marketing and the economy, following civil disturbances, output of the main maize and rice crops was affected less than had been envisaged in the months following the crisis. Although maize planting was later, compared to the optimum planting date, the delay itself did not seriously affect yields, also as overall rainfall was favourable during the 1999/2000 crop season. FAO estimated maize and rice production for the current 2000/01 (April/March) marketing year at around 94 600 and 30 500 tonnes (milled) respectively. Allowing for stocks and pipe line food aid pledges the overall (net) deficit, in relation to utilization needs, was estimated 14 100 tonnes, part of which was expected to be covered by commercial/private imports and the rest by additional food aid pledges.

Food assistance continues to be provided by WFP, which so far this marketing year has distributed a total of 9 000 million tonnes of various commodities (rice, maize, pulses, vegetable oil, salt,

canned fish, etc) to beneficiaries through the different programmes such as vulnerable group feeding, food-for-work, food-for-training and school feeding.

GEORGIA* (18 September)

The Joint FAO/WFP Crop and Food Supply Assessment Mission which visited Georgia in August, found that Georgia faces a severe food crisis. Agricultural production in 2000 has catastrophically dropped as a result of the serious drought, which has affected both rain-fed and irrigated areas. Six regions, namely Kakheti, Mtskheta Mtianeti, Kvemo Kartli, Shida Kartli, Samtskhe-Javakheti and Imereti, have been the most affected. Cereal crops have largely been lost in the eastern part of Georgia. Although production improved moving further west and north, yield reductions were still assessed at 50 percent or more in these areas, whilst the quality of the grains produced was also very poor. In the irrigated areas, irrigation was generally inadequate, reducing yields by up to one half. The drought has affected all crops, not just cereals. The yield of potatoes, an important staple in the upland areas, is also poor particularly in the non-irrigated areas. Colorado Beetle further damaged the potato crop in the south and southwest. Sunflower output has been hard hit, as have the fruit, vegetables and grape harvests. Pasture and fodder crop production is affected, and will necessitate a reduction in animal numbers particularly in the east.

The Mission provisionally estimates total cereal production in 2000 at 326 000 tonnes, including 83 000 (1999: 226 000) tonnes of wheat. Output of maize and barley is tentatively estimated at about 225 000 tonnes and 15 000 tonnes respectively, pending completion of the harvest. At the forecast level, aggregate cereal output in 2000 would be only 42 percent of the estimated 1999 total cereal production and 49 percent of the average of the last five years.

With a minimum national cereal consumption requirement (including food, feed seed, losses) estimated at 1.07 million tonnes, Georgia's cereal import requirement in 2000/01 is estimated at 748 000 tonnes (620 000 tonnes of wheat, 88 000 tonnes of maize, 35 000 tonnes of barley and 5 000 tonnes of rice). Commercial imports are difficult to estimate precisely in view of informal imports and the volume of transit trade, but are estimated at 437 000 tonnes, while pledged food aid amounts to 88 000 tonnes. This leaves an uncovered deficit of 223 000 tonnes (112 000 tonnes of wheat; 80 000 tonnes of maize; 30 000 tonnes of barley; 1 000 tonnes of rice) which will need to be covered by additional food aid.

The Mission also established that cereal seed production had all but been lost, there being an estimated 4 000 tonnes of a required 30 000 tonnes in the country. Provision of winter wheat seeds to farmers will be paramount if production is to recover and food aid needs to diminish next year.

Emergency food aid is required for an estimated 696 000 worst affected drought victims and WFP is appealing for almost 66 000 tonnes for a period of 8 months (November to June), until the next main harvest.

INDIA (25 September)

Following serious drought earlier in the year which affected a number of western and southern states, severe floods during the monsoon season have devastated many parts of the country killing several hundred people, displacing thousands and destroying crops. As a result of the disruption to agriculture, marketing and communications, the food supply situation in some states is extremely tight. The latest floods occurred in the country's most populous state, Uttar Pradesh, where weeks of heavy rains caused floods displacing thousands of people. Although water levels in the major rivers and tributaries have begun receding, an estimated 40 000 people remain homeless. The floods are estimated to have killed 306 people and damaged or destroyed nearly 200 000 hectares of crops. In mid-September, there were also renewed floods in parts of West Bengal which had also been affected earlier in the monsoon season. Reports indicate that the worst affected districts were Birbhum, Burdwan, Murshidabad and Malda, whilst major rivers and tributaries are flowing well

above danger levels. Several dams and barrages in the state are also above danger levels and are having to release large volumes of water. Around 600 000 people have been evacuated to safer locations, whilst latest reports indicate that some 500 people were killed. Elsewhere, at the end of August, in the southern state of Andhra Pradesh thousands of people had to be evacuated due to rising river levels following the heaviest rainfall in decades. An estimated 142 people were killed by the floods, whilst losses in property and crops were put at U S \$168 million. Monsoon floods earlier in the season, also killed several hundred people and destroyed crops in the northern state of Himachal Pradesh and the north eastern states of Bihar, West Bengal and Assam. The state of Assam was the worst affected, where some 3 000 villages were submerged, and an estimated 2.5 million people made homeless. Except for Himachal Pradesh, the remaining flood-affected states are all important rice producers, accounting for some 52 percent of total kharif or monsoon rice production. Due to flood damage and erratic rainfall in parts, overall rice prospects remain uncertain. Although the outlook in major rice surplus states of Punjab, Haryana and most parts of Uttar Pradesh remains favourable, rainfall in Bihar, Madhya Pradesh, West Bengal and Orissa, where the rice crop is mostly rainfed, has been erratic. In addition, the floods in Andhra Pradesh have reduced prospects of a bumper monsoon crop there. As result, aggregate 2000/01 rice production may be affected and be lower than the 90 million tonnes forecast earlier. Milled rice production in 1999/00 was a record 88.25 million tonnes, of which 75.6 million tonnes (86 percent) was from the main monsoon kharif crop and 12.6 million tonnes from the rabi crop.

In late August the Government announced the minimum support price for paddy for the 2000/01 marketing year (October/September) at 5 100 rupees or \$112 per tonne for common varieties and 5 400 rupees or \$118.7 per tonne for Grade A varieties.

In view of large wheat stocks following record wheat production of 74.2 million tonnes this year, the Government has allowed exports of up to two million tonnes during 2000/01. Export prices, allowing for transport and handling, remain unattractive compared to prevailing international prices and there is likely to be little demand.

On 1 July, the Food Corporation of India had wheat stocks amounting to around 28 million tonnes, almost twice the required minimum buffer of 14.3 million tonnes.

INDONESIA* (26 September)

Sunny dry weather in the first dekad of September, across the main rice producing island of Java, benefited development of second season rice, which is planted in July/August for harvest in October to December. To coincide with the north east monsoon, the main rice crop will be planted in November to January for harvest in April to June next year.

The estimate for paddy production for the 2000 calendar year has been revised up from around 49 million tonnes estimated in June to 51 million tonnes, compared to 49.1 million tonnes last year. Higher production is attributed to a long wet season and only minor incidences of pests and disease. At this level of production output will be around average for the five year period between 1995 and 1999. The area harvested remained around an average 11.5 million hectares. Due to higher domestic production, the estimate for imports in 2000 may be revised down somewhat. Since late 1998 the Government has allowed private imports of rice. The current import duty on rice is Rp.430/kg.

The overall food situation in the country continues to stabilize, following the economic crisis in 1997/1998, which was also compounded by a poor agricultural year due to El Niño. These factors together, eroded the livelihood of large sections of the population, increasing poverty levels and vulnerability to food insecurity. However, economic recovery in 1999 and this year, coupled with satisfactory agricultural prospects are likely to see continued recovery in key sectors such as poultry, for example, as demand for meat and hence feed is expected to increase. With continued economic recovery, poultry meat production is anticipated to reach 800 000 tonnes by the next marketing year, or around 90 percent of the pre-crisis level of 890 000 tonnes. The growth in the poultry sector, in turn is likely to induce recovery in the feed mill industry and demand for maize.

Despite a satisfactory situation overall, concerns remain for food security in parts of the country notably in West Timor, where the killing of UN humanitarian personnel in recent days has led to a tense security situation amongst refugees, particularly in areas where UN aid personnel have been withdrawn.

IRAN, ISLAMIC REPUBLIC OF (26 September)

The disastrous consequences of this year's severe drought continue to be felt in various sectors with major dams and hydro-electric facilities running dry. It is estimated that rainfall this year was around 140mm, well below an average of 260 mm. The drought, the worst since 1964, has affected an estimated 37 million people or over 50 percent of the population. Living conditions amongst the affected population are worsening rapidly putting tremendous strain on water for livestock and crops. The estimate of 2000 wheat production has been revised down significantly from an earlier forecast of 9 million tonnes in June. It is now estimated that output this year will be around 8 million tonnes, some 700 000 tonnes lower than the already drought reduced crop last year and almost 2 million tonnes below the five year average. Last year also saw wheat production fall by over 3 million tonnes, or around 25 percent, compared to 1998. In addition, the lack of rainfall and irrigation water will also have a serious impact on prospects for crop recovery next year. Wheat planting is normally undertaken during September/October with the crop harvested the following April/May. Rainfed barley which is imperative for livestock feed is also planted from September onward for harvest in March.

In the livestock sector, the indications are that the situation will almost certainly worsen by early 2001 as the breeding herd will not recover, even if adequate rains are received. So far an estimated 800 000 animals have died of starvation and disease. The tremendous pressure on water and other resources in rural areas, is having a serious impact on vulnerable groups, particularly in rural areas, who have limited alternative sources of income and incurred heavy losses last year. Many herders have had to sell livestock and migrate to cities.

In 1999/2000 the country was one of the largest importers of wheat in the world, with imports reaching almost 7 million tonnes, similar to record imports in 1996/97, which was also affected by drought. The successive fall in wheat production means that imports are likely to remain high.

In late August a United Nations appeal was made for funds for thousands of mobile and stationary water tankers for the rural population and animals, one million tonnes of emergency barley feed for livestock and 28 tonnes of vitamin and mineral feed.

IRAQ* (18 September)

Two consecutive years of severe drought and inadequate availability of essential agricultural inputs have severely affected the Iraqi agriculture. A recent FAO/WFP Food Supply and Nutrition Assessment Mission found that in the most affected centre/south areas, not only were the plantings reduced, but also some 75 percent of the cropped area under wheat and barley was heavily damaged and mostly used as grazing area for livestock. Cereal yields were reduced to all time low levels. In northern Governorates, insufficient and erratic rainfall continued during much of 1999/2000 crop season, with only one-third of the normal rainfall received in parts. As a result, total cereal production in 2000, estimated at some to 794 000 tonnes, is about 47 percent and 64 percent below the 1999 poor harvest and the previous five years average respectively.

Drought conditions also drastically reduced the water resources in rivers, dams, lakes and canals, some of which have virtually dried up. Shortage of imported feed, overgrazing, and inadequate veterinary services are the major constraints to the normal development of the livestock sector. Fish production has also decreased drastically. However, a positive and a notable progress has been made in the rehabilitation of the poultry sector since 1998, which has benefited from substantial Government interventions with funds generated from the oil-

for-food deal. Production of chicken and eggs are expected to increase significantly this year compared to last year and 1998.

Cereal imports since 1997/98 under the oil-for-food deal have led to significant improvements in the food supply situation. However, per capita cereal food consumption in 2000/01 is estimated to decline from the 1997/98 level. Furthermore, problems of delays in the flow of food imports continue to be reported, leading to repeated cases of low levels of MOU commodity stocks. There is need to ensure urgent and timely delivery of imports under MOU contracts, including food items but also agricultural inputs, such as appropriate seeds for the next season, failing which a production recovery will not be achieved.

ISRAEL (18 September)

Due to a severe drought that affected several countries in the Near East, output of the recently harvested 2000 wheat crop, is estimated at 50 000 tonnes, more than double last year's record low crop of 20 000 tonnes, but nearly 60 percent below the previous five years average. Cereal imports in 2000/01 (July/June) are forecast at some 2.9 million tonnes.

JAPAN (14 September)

In the second dekad of September, torrential rains following typhoon Saomai hit central parts of the country, flooding thousands of homes. An estimated 200 000 people had to be evacuated. Further typhoon activity and heavy rainfall was anticipated. Wide-spread rain also hampered rice maturation somewhat. The main harvest of rice will commence next month and extend into November. The Government has announced a 2.7 percent reduction in the support price of rice to 252 yen/kg, but no change in the land targeted for diversification. Since 1995, as part of the country rice area adjustment programme, area has declined by some 16 percent. As a consequence domestic (milled) rice production has declined from some 11 million tonnes in 1994 to an average of around 9 million tonnes in the last five years.

JORDAN (18 September)

Prolonged drought has decimated the 2000 wheat and barley crops. This is in the wake of a severe drought in 1999 that also seriously affected cereal and horticultural crops, and resulted in a decline of 88 percent in aggregate wheat and barley output to only 15 000 tonnes. The 2000 wheat crop is forecast at 20 000 tonnes, a slight recovery from last year, but only a third of the five year average. Similarly, the barley crop, estimated at 8 000 tonnes, is about 80 percent below average. The livestock sector was also severely affected, with sheep farmers the hardest hit.

KAZAKHSTAN (27 September)

The harvest is in full swing and returns confirm a lower harvest in 2000. The grain area for harvest is 12.3 million hectares. By late September, the average yield from the 11.2 million hectares harvested approached 1 tonne (bunker weight) per hectare compared to an average yield of 1.3 tonnes/ha last year. In northern Kazakhstan, dry conditions from mid June to end July adversely affected crop yields. Shortages and the high price of fuel are complicating the harvest and leading to increased losses. Locusts did not plague this year's crop, impeded by the relatively cold spring.

Given an average yield of about 0.9 tonne per hectare and an final area harvested of about 12 million hectares, FAO tentatively puts the 2000 grain harvest at 10.6 million tonnes, compared to the bumper 14.3 million tonnes last year. Wheat production is estimated to fall to 8.5 million tonnes from 11.2 in 1999 and coarse grain output is put at nearly 2 million tonnes (1999:2.8 million tonnes)

The country exported nearly 7 million tonnes of cereals in 1999/2000 including 6 million tonnes of wheat, mainly to other CIS countries. Exports in the current marketing year are expected to be less.

Russian import demand is also expected to be less. Some 350 000 tonnes have already been contracted by Tajikistan

KOREA, DEMOCRATIC PEOPLE'S REPUBLIC OF* (26 September)

In the second dekad of September, light to moderate rain over agricultural areas affected maize and early harvesting of rice somewhat. Earlier, on 31 August, continuous heavy rain over 27 hours and storms seriously affected north eastern parts of the country, particularly in north and south Hamgyong provinces, killing 42 people and causing extensive damage to infrastructure, communications and crops. The north east part of the country remains the most vulnerable to food supply difficulties as it is largely industrial and less agricultural than the country's bread basket in the south west. Latest indications suggest however that the bulk of the damage was to infrastructure and not crops.

Domestic food production prospects this year were also seriously affected by reduced rainfall and drought in the earlier part of the agricultural season. Although rainfall at the beginning of the year was higher, that in the subsequent months fell noticeably below average. This adversely affected soil moisture levels for the double crops of barley and wheat, which resulted in a reduction in yields. In addition, lower precipitation this year, coupled with below-normal rainfall in 1999, especially during the main rainy season June to August, also reduced water availability for replenishment of irrigation reservoirs, which are essential for crops, particularly at the early stages of growth before the onset of the main rainy season.

A joint FAO/WFP Crop and Food Supply Assessment mission is planned to visit the country in October to assess this year's crop harvest and food supply prospects for the 2000/01 marketing year from November to October.

KOREA, REPUBLIC OF (14 September)

Light moderate rain over agricultural areas affected maize and early harvesting of rice somewhat, whilst average temperatures were reported to be 1 to 2 degrees Celsius above normal. The main rice harvest will commence in October. The Government target for paddy production in 2000 has been set at 7 million tonnes, around average though some 3 percent lower than output last year. Prospects of economic recovery and growth, in the aftermath of the financial crisis in Asia, continue to improve signalling stronger demand for grains for food and feed. Wheat and maize are almost entirely imported, whilst the country on average produces around 5 million tonnes of rice (milled) per annum, during the main season which extends from around May to October. Last year, despite heavy flooding the rice crop was around 5.2 million tonnes, from an area of approximately 1.06 million hectares. The level of production was around 146 000 tonnes or almost 3 percent above output in 1998. In general, the number of productive farms and rice acreage is declining in the country as more land is made available to infrastructure and urban development. Any future expansion will come mainly from marginal and reclaimed land, including land subject to flooding.

KYRGYZ REPUBLIC (12 September)

Satellite imagery indicates that the country has suffered less than neighbouring countries from the ongoing drought. However, indications are that in the two southern oblasts, Djalalabad and Osh, crop intensity is less than last year. The major wheat harvest, which was harvested in July may not have been affected, but the yield of spring crops: maize, vegetables, potatoes etc could be lower than last year, notably in these densely populated oblasts, where the agricultural surpluses are less than in the northern areas.

In view of the somewhat lesser growing conditions, FAO does not anticipate an increase in grain production this year and tentatively forecasts the harvest to remain at 1.63 million tonnes, somewhat below target (1.7 million tonnes). In response to the reduction in the area sown to wheat (while that

of coarse grains increased), the output of wheat is tentatively estimated at 1.05 million tonnes (1999 1.1 million tonnes).

The overall food supply situation is expected to remain satisfactory but a large part of the population is very poor. The country is self sufficient in wheat and has exported considerable quantities (possibly up to 170 000 tonnes p.a.) to neighbouring Uzbekistan and Tajikistan.

LAOS* (14 September)

In September, typhoon Wukong (which also affected neighbouring countries extensively) caused serious flooding severely damaging 49 000 hectares of paddy, mainly in six central and southern provinces. In addition, several thousand families lost their homes and possessions, whilst many were evacuated. Although earlier estimates forecast paddy production this year at around 2.2 million tonnes, this remains uncertain in view of the damage. A tentative evaluation by WFP indicates that some food aid may be required, though currently the programme will continue to assist affected areas through food for work to rehabilitate fields and irrigation infrastructure, whilst project food aid will continue to be provided to well-targeted vulnerable groups in many of the flooded areas. In addition, in late September, The International Federation of Red Cross and Red Crescent Societies appealed for US\$512 000 to help flood victims.

LEBANON (18 September)

The output of the 2000 cereal crops is estimated at 67 000 tonnes, about the same as last year. Wheat imports in 2000/01 (July/June) are forecast at some 510 000 tonnes.

MALAYSIA (25 September)

The country produces an average of around 2 million tonnes of paddy annually, of which 60 percent is from the main and 40 percent from the off season crop. Production this year is forecast at 2.1 million tonnes, of which around 60 percent would be from the main and 40 percent from the off season crop. Normally a third of domestic consumption requirements of rice are imported into the country, whilst wheat and maize are almost entirely imported. In view of economic recovery in the country, following slow-down after the Asia crisis, imports of both wheat and maize are anticipated to increase to meet increasing demand.

The Government recently announced various strategies to enable sustainable food production to reduce dependency on imports. These include improving efficiency and productivity, introducing food production zones, strengthening marketing systems and food processing industries, developing infrastructure and human resources. The priority areas will be on rice, fruit, vegetables, fisheries and poultry farming.

Wheat imports are projected to increase somewhat to around 1.3 million tonnes in 2 000 as a result of higher demand due to economic growth and favourable export projections for processed food such as noodles and biscuits.

MONGOLIA* (25 September)

Drought during the critical summer months, during which the country's main staple wheat is produced, may adversely impact grain and fodder production. Wheat is normally planted in May/June for harvest in October. This in turn is likely to exacerbate serious problems that livestock herders are facing following severe winter conditions earlier in the year, that resulted in the death of several hundred thousand livestock and a sharp deterioration in the livelihood and food security of large numbers of nomadic families. Due to lack of fodder and feed many animals are already in a poor state of health and will be more susceptible to outbreaks of animal diseases. UN reports indicate that the drought has left 50 per cent of the country dry, 20 per cent suffering from severe water shortage and more than 450 000 people susceptible to food shortages in the short term. In addition many of the districts affected

were also affected by the harsh winter conditions last year. The situation may become worse as the National Agency of Meteorology forecasts continued unfavourable weather conditions with a lower than average precipitation.

The impact of natural disasters on livestock is of immense importance. The sector plays an extremely important part in the economy providing the main source of household income and a major source of foreign exchange. The heavy loss of livestock and the consequent reduction in meat supplies have resulted in a large increase (up to 40 percent) in livestock prices. This in turn has had a knock-on effect on inflation and the cost of living further exacerbating the food security of the poor and vulnerable groups. In addition to meat, there is serious shortage of milk, especially in rural areas, further restricting an important source of protein and nutrients in the diet. It has also been very difficult for nomadic families to find alternative sources of income, as most are poorly educated and trained for alternative employment. Nonetheless many have migrated to towns and urban centres compounding existing problems of unemployment and vulnerability to food shortages.

Current food shortages follow several years in which nutritional standards in the country have been falling due to significant changes in economic circumstance of large sectors of the population as the economy has been reoriented from one which was centrally planned to one which is market driven. This in particular has left many groups who were formally dependent on state employment and welfare exposed to economic uncertainties due to limited alternatives. Various reports in the mid-1990s indicated that those most affected by poverty and food insecurity included the unemployed, the elderly, female headed households, children, pensioners and small herders.

Nationally, to counter the fodder and feed needs the Ministry of Food and Agriculture took measures in July to increase hay and fodder production in unaffected areas for distribution amongst the affected rural population, and to provide provincial authorities with loans to cover the purchase of hay and fodder, the repair of existing wells and the installation of hand-operated wells. Arrangements were also made for the relocation of families and their herds from four drought affected provinces and for winter stocks and insulation. In addition, since March this year the Mongolian Red Cross has distributed a six-month supply of wheat flour and rice to 35 000 people in six of the worst affected provinces.

MYANMAR (25 September)

Harvesting of the main (monsoon) rice crop will commence in late September and continue into October/November. Main season rice normally accounts for around 85 percent of aggregate production the remaining 15 percent coming from the second, or dry season crop, which is planted in October/November for harvest the following April/May. Paddy production in 1999/2000, was officially reported at a record 19.8 million tonnes, whilst the target for 2000/01 is around 21 million tonnes.

NEPAL (25 September)

Heavy monsoon rains, floods and landslides, killed a number of people and displaced several thousand in the worst affected areas in central parts of the country. Crops, mainly rice, infrastructure and communication systems were also damaged, with the economic cost of losses currently put at around US\$6 million. There were also concerns regarding the food security situation in remote parts of the country, particularly Rukum District, where supplies were declining and access remains difficult for distribution. The current forecast indicates that paddy production this year will be above average and around 4 million tonnes.

PAKISTAN (25 September)

The monsoon rains are expected to begin withdrawing from now, though earlier additional heavy rains in parts caused unfavourably wet conditions, particularly for cotton. Current reports indicate

that due to a reduction in area and fall in yields that the rice harvest, due to commence in October, will be around 4.7 million tonnes, some 400 000 tonnes lower than production last year, though around 5 percent above average. In the last five year's average rice production has been in the order of 4.5 million tonnes. Of the total composition of rice, some 52 percent will be Basmati, 40 percent IRRI and 8 percent other varieties. Yields this year were additionally affected by lack of adequate irrigation water in parts, particularly in the Sindh, which is necessary at the beginning of the crop season, following severe drought earlier in the year.

Despite this year's serious drought, especially in Baluchistan and the Sindh, wheat production was a bumper 22 million tonnes, some 2 million tonnes above target and 4 million tonnes above 1999. Increased production was largely attributed to higher than target output in Punjab province, the largest producers, where a combination of higher support prices and increased use of fertilizer and other inputs increased area and yields. Average wheat production in the five years between 1995 and 1999 was around 17.5 million tonnes compared to food requirements of around 18.5 million tonnes.

In view of increase wheat production this year, the government is reported to be considering a reduction in wheat export prices to encourage exports to neighbouring Afghanistan.

PHILIPPINES (25 September)

In the first dekad of September, heavy monsoon showers resulted in coastal flooding along the western and southern coast of the main island Luzon. Elsewhere, dry weather prevailed reducing moisture levels for development of main season rice, harvesting of which will commence in October. In late August, Ministry of Agriculture, predicted that dry spells and drought this quarter, may adversely affect development and output of main season rice and maize, particularly in rice in main producing regions in central Luzon and western Visayas, and maize in the Cagayan Valley region and Mindanao island. The department of soil and water is also expecting that the country may be affected by El Niño related drought next year. The Government is increasing resources to rehabilitate irrigation systems to mitigate the effects of possible drought. The official estimate for paddy production in the 2000 calendar year is put at 12.3 million tonnes. Of this, some 6.8 million tonnes is expected from the July to December crop.

SAUDI ARABIA (18 September)

Production of wheat in 2000 is estimated at 1.5 million tonnes, about the same as last year, but nearly 10 percent below the five years average. Barley import in 2000/01 (July/June) are currently forecast at 4.7 million tonnes.

SRI LANKA (25 September)

Harvesting of the second, irrigated, Yala crop planted in April is near completion, whilst land preparation of the main Maha crop will be under way in parts. The dry season crop accounts for around 33 percent of aggregate rice production in the country the bulk coming from the Maha crop planted in October/November to coincide with the main (north-west monsoon) rainy season. Paddy production has averaged around 2.5 million tonnes in the last five years from 1995 to 1999. In addition to rice, the country's main staple, some 850 000-900 000 tonnes of wheat are imported annually to meet demand, for bread and other wheat based products.

SYRIA (18 September)

The output of the recently harvested 2000 wheat crop, estimated at 3.6 million tonnes, is about 33 percent above last year's well below-average crop and about average. The barley crop has also recovered to average levels.

In 1999, the worst drought for decades reduced barley production to about 380 000 tonnes, around 72 percent below the average of the previous five years, while wheat production, at

2.74 million tonnes, was about 28 percent below average. The drought had also led to a significant increase in sheep mortality rates that seriously affected household incomes.

TAJIKISTAN* (13 September)

An FAO/WFP Crop and Food Supply Assessment Mission which visited the country in July found that a severe drought had reduced the 2000 cereal harvest to 236 000 tonnes, down by 47 percent compared to 1999. Output of all other crops, including potatoes, vegetables and cotton have also been affected. The Mission observed that both the winter and spring rainfed wheat crop, normally harvested during June-July, had almost totally failed in most places as a result of drought. Drought has also affected barley production and is severely constraining the prospects for other secondary crops (rice, maize). The irrigated wheat has also been affected, as water levels in rivers and canals have been reduced. The problem was compounded by the poor condition of the irrigation systems due to lack of maintenance. Lack of quality seeds has been another constraint. The impact of drought this year has been particularly severe, as it has hit when agriculture was already in decline because of intensifying problems relating to seed availability and decaying irrigation facilities.

Because of the drought, the cereal import requirement in the 2000/01 marketing year (July/June) is estimated at 794 000 tonnes, including 787 000 tonnes of wheat. After taking into account a projected commercial import of 403 000 tonnes and the pledged food aid of 74 000 tonnes, the uncovered food aid requirements amount to 317 000 tonnes. A shortfall of this magnitude for this impoverished country, if not addressed by the international community, could have disastrous implications for the population. In addition, the country urgently needs assistance with seed for planting starting in October.

Given that an estimated 85 percent of the population is poor, the steep drop in cereal production this year spells very bleak prospects for a very large proportion of the population. Many are already in dire conditions and the situation will worsen for increasing numbers in coming months as they exhaust whatever cereal output they have gathered or will gather as well as other means of coping that they may possess. An estimated 3 million people fall in this category, with about 2 million facing a desperate plight. Thus, with access to food through own production steeply reduced or destroyed and with virtually no means (inadequate employment opportunities and other sources of income) of accessing food through markets, these people cannot meet their basic minimum nutritional requirements during 2000/01, unless assistance is provided by the international community.

Even if rainfall and snowfall improve next year, the next wheat crop will not be available until June-July 2001. However, if rains fail again, emergency assistance to Tajikistan for the purpose of life saving alone would involve much larger operations. The evolving critical food supply and cereal production conditions and access of the needy to food need to be monitored carefully with a view to making adjustments to the ongoing assistance programmes and/or designing appropriate new ones.

WFP has launched an appeal for 126 000 tonnes of food aid worth \$62 million to implement an emergency operation to assist over one million people threatened by famine over the next nine months. Without assistance, about 1.2 million people will face a desperate situation with virtually no employment opportunities or other sources of income to purchase food from the market.

THAILAND (25 September)

Flood waters in north and north-eastern parts, began receding in the last few days as rains eased, but left a number of people dead, thousands displaced and extensive damage to property in their aftermath. Official estimates indicate that some 836 of around 2 000 sub districts in the country were affected, whilst the economic damage was put at about US \$30 million. Around 645 000

hectares of crops were damaged or destroyed in over 24 provinces. Flood damage to rice in lower areas may, however, be offset by the beneficial effects of additional rain on higher ground.

In view of recent events, overall rice prospects in 2000/2001 remain uncertain. Latest official projections before the floods forecast the main rice crop at around 19.04 million tonnes. In addition, the second rice crop, planted in January to March for harvest in May/June, normally produces around 4.3 million tonnes. The country is the largest rice exporter in the world and has a target to export some 6 million tonnes in 2000.

TURKEY (18 September)

Output of the 2000 wheat crop is estimated at 19 million tonnes about 5 percent above last year's drought reduced crop, but about average. Maize production is also forecast to increase by nearly 8 percent to 2.2 million tonnes compared to the average. Wheat imports in the current 2000/01 (July/June) marketing year are expected to be around 1.3 million tonnes, similar to last year. Maize imports are projected at 950 000 tonnes, some 200 000 tonnes higher than in the previous year.

TURKMENISTAN (13 September)

The 2000 winter grain harvest reached 1.7 million tonnes, above target (1.645 million tonnes) and some 280 000 tonnes more than in 1999. The increase is mainly in response to the advances in land reform, under which most farmers are holding their land under leasehold. In an attempt to increase cereal, notably wheat, production, the area sown to winter crops was reportedly increased by almost 100 000 hectares, to 680 000 hectares, bringing some virgin land into production. In addition, substantial resources are reported to have been allocated to farmers to expand rice production, which is targetted to reach 200 000 tonnes per annum in the coming three years. Indications are that 70 000 hectares have been sown to rice and nearly US\$10m million allocated to the purchase of quality seed, in an attempt to raise yield. Larger areas sown are being supported by the import of agricultural machinery. However, a shortage of irrigation water, because of the drought, which has affected Central Asia, could result in disappointing rice yields. The 2000 cotton harvest is reported to be 1.3 million tonnes, similar to last year's level.

UZBEKISTAN (18 September)

Indications are that the 2000 cereal harvest is less than last year. Reduced precipitation over the winter and dry conditions in the north have resulted in less availability of irrigation water and losses of rainfed crops. Official reports indicate that on the large farms, some 3.1 million tonnes of wheat and barley have been harvested, less than the (ambitious) target of 4.3 million tonnes. In addition, small holders also have to plant wheat and were expected to produce 600 000 tonnes. The output of this sector has not yet been reported but is tentatively estimated by FAO at 500 000 tonnes. This would bring aggregate wheat and barley output to 3.6 million tonnes, compared to 3.7 million tonnes last year, despite an increase of 50 000 hectares in the irrigated area sown to wheat. Output of spring grains (maize and rice) is also likely to be affected so that aggregate cereal production may not be more than 4.1 million tonnes, compared to 4.3 million tonnes in 1999. The availability of yield enhancing inputs and of irrigation water - Uzbekistan shares the waters of rivers which flow into the Aral Sea with neighbouring countries - remain a major constraint while the lack of land and market reforms also constrain the country's efforts to increase cereal yields. The northern areas of Karakalpakstan have been particularly affected by the drought. Indications are that the bulk of the mainly rainfed crops and rice have been damaged. Much of the country is arid or semi-arid and the dry conditions have adversely affected animal pasture. With regard to cotton, the major cash crop, the outlook is also for a smaller harvest than last year.

The cereal import requirement in 2000/01 is anticipated to increase beyond the 0.6 million tonnes imported in 1999/2000.

VIET NAM (25 September)

The worst flooding in 40 years in the Mekong Delta has resulted in 43 deaths, large scale displacement of people, whilst many homes have been destroyed and some areas are facing serious food shortages. In addition some 100 000 hectares of rice have been damaged or destroyed, whilst the economic cost so far is put at US\$26 million. To date, flood water levels in the Mekong River system are all above Alarm Level III, which signifies highly dangerous flood conditions, similar to levels reached during exceptionally disastrous floods in 1961, 1966, 1978 and 1996. The UNDP flood warning centre forecasts that in the next three to five days, upstream flood water levels on the Tien and Hau Rivers will likely reach peak flood levels of around 5 metres.

The worst affected areas are Long An, Dong Thap and An Giang which border Cambodia. The estimated death toll so far in these areas is 25, whilst up to 400 000 people have had to be evacuated.

Earlier in the first dekad of September, tropical storms also resulted in crop damage in central parts, whilst heavy rain along coastal areas of the Red River Delta, delayed harvesting of "10th" month rice on of the . In northern parts of the country 10th month rice is normally planted in June/July for harvest from the middle of September, whilst in the south, the growing period is longer, with harvesting commencing from late October onwards. Notwithstanding the full extent of any flood damage, current forecasts point to a 10th month paddy crop of around 8.3 million tonnes, slightly down on last year. Paddy production in 1999/2000 was 31.7 million tonnes, of which almost half came from the main winter/spring crop, planted from January to March, for harvest in April to July depending on location.

To supplement Government relief efforts, the International Federation of the Red Cross, has appealed for US \$1.5 million to assist 125 000 worst affected people in the Mekong Delta.

Due to a slow down in rice trade in the world market, rice export revenues have been lower this year than anticipated. The Government recently revised down its rice export target for 2000 to 3.8 to 3.9 million tonnes compared to over 4 million tonnes earlier. In the first eight months of this year, 2.4 million tonnes of rice were exported a drop of 37 percent compared to the same period last year.

YEMEN (18 September)

Sorghum production in 2000 is forecast at a below-average 380 000 tonnes. In contrast, the wheat crop is expected to recover to about 156 000 tonnes, about 4 percent above average. Small scale breeding of desert locust could extend into areas of recent rainfall in the eastern desert. Hoppers are likely to appear from early October and may form small groups or bands.

Imports of cereals in 2000 - mainly wheat - are estimated at some 2.6 million tonnes.

CENTRAL
AMERICA
(including the
Caribbean)

COSTA RICA (11 September)

Harvesting of the 2000/01 first (main) season cereal and bean crops is underway. Weather conditions are reported normal and maize output is anticipated to be average assuming present weather conditions persist. The outlook is also good for the bean crop, although output from the first season crop represents 10 to 15 per cent only of total annual production. A slightly above-average paddy output is forecast.

Wheat imports in marketing year 2000/01 (July/June) should be close to the previous year's 195 000 tonnes. Maize imports (July/June) should be also closely similar to last year's 300 000 tonnes, and

mostly yellow in response to the consistent demand from the animal feed industry. Rice imports in 2001 marketing year (January/December) are forecast to be about 90 000 tonnes, also similar to the previous year.

CUBA (11 September)

Harvesting of the 2000/01 first season maize and irrigated paddy crops are underway. Rains during the month of August were reported normal in most parts of the country, but moisture deficits are still registered in the eastern provinces. The situation needs to be closely monitored as a consequence of the prolonged dry weather that has been affecting these areas, particularly the provinces of Las Tunas, Granma and Santiago de Cuba. Some important moisture deficits are also localized in the south-eastern parts of the province of Camaguey. Despite the normal to abundant rains reported in the last three months these were not enough to restore normal moisture levels. Technical rehabilitation projects in collaboration with the Government, in an effort to counteract the impact of the drought, are being implemented in the most affected provinces.

Wheat imports in marketing year 2000/01 (July/June) are forecast to be similar to the previous year's volume of some 900 000 tonnes. Yellow maize imports (July/June) are expected to be about 270 000 tonnes, also close to the previous year. Rice imports in marketing year 2001 (January/December) should still be about 400 000 tonnes, similar to marketing year 2000, despite an anticipated improved production. This is in order to meet the strong domestic demand for this important staple.

DOMINICAN REPUBLIC (11 September)

Harvesting of the 2000/01 first season cereal crops has been recently completed under normal weather conditions. Slightly above-average maize and sorghum outputs have been collected, reflecting the consistent demand from the poultry and swine feed industry. Production from the irrigated paddy crop is provisionally estimated at an about average 500 000 tonnes. Average outputs from other important foodcrops, such as roots and plantains, have also been gathered.

Wheat imports in marketing year 2000/01 (July/June) should be about 270 000 tonnes, slightly below the previous year. Maize imports, mostly yellow, are also expected to remain close to the previous year's level of some 700 000 tonnes. Rice imports in year 2001 (January/December) are early forecast at about 70 000 tonnes.

EL SALVADOR (11 September)

Harvesting of the 2000/01 first season cereal and bean crops continues under normal weather conditions, following an unusually long dry summer spell ("canicula") in July which severely affected the crops in some areas. Particularly affected were the eastern parts of the country, the Department of Santa Ana in the north-west, some areas in the south-western Departments of Ahuachapán and Sonsonate and the western part of the Department of Chalatenango in the north. Production of maize, the main cereal, is thus provisionally forecast at a slightly below average 570 000 tonnes, while that of sorghum is expected at a below-average 145 000 tonnes. By contrast, production of beans, an important staple in the population's diet, is forecast to be average as the bulk of the crop had already been harvested in the main producing areas and the remaining plantings were not affected by the drought. Some localized damage is reported to the paddy crop, but output is nevertheless forecast to be about average. Food assistance, as a component of various reconstruction projects (food for work) is still being distributed in some areas, following hurricane "Mitch" devastating impact at the end of 1998.

Wheat imports in marketing year 2000/01 (July/June) are anticipated to be about 180 000 tonnes, similar to the previous year. Maize imports are forecast to increase from 175 000 tonnes to some 245 000 tonnes to compensate for the drought inflicted production losses.

Imports of rice in 2001 marketing year (January/December) should be about 20 000 tonnes, similar to 2000.

GUATEMALA (11 September)

Harvesting of the 2000/01 first season cereal and bean crops continues under normal weather conditions. The country has been only slightly affected by the severe dry spell ("canícula") which has hit most of the Central American countries and only localized losses in areas along the Pacific coast are reported. Average maize and sorghum outputs are thus anticipated. Production of paddy is forecast to be above average. Food assistance continues to be distributed through reconstruction projects (food for work) following the passage of hurricane "Mitch".

Wheat imports in marketing year 2000/01 (November/October) are forecast to increase from the previous year's 380 000 tonnes to some 390 000 tonnes, while maize imports should remain closely similar to last year's volume of 550 000 tonnes. Rice imports in marketing year 2001 (January/December) are expected to be about 30 000 tonnes, similar to the last two years.

HAITI* (11 September)

Harvesting of the 2000/01 first season cereal and bean crops has been completed. The outlook is poor as plantings were delayed and reduced by a severe dry spell which particularly affected large areas of the Central Plateau, the North, the North-east, the North-west and parts of the Grand 'Anse in the South-west of the country. A detailed assessment of the damage has not been made available, but losses in maize and sorghum production are provisionally estimated at about 30 percent of last year's average output levels. The bean crop grown in the mountains of the North is also reported to have greatly suffered from the drought. Water reservoirs have been reported at below-average levels thus also affecting the irrigated paddy crop in the main producing area of the Artibonite. Prospects are uncertain for other important foodcrops such as roots and tubers, manioc, and also peanuts. Food assistance from the international community continues to be distributed through development projects to some sectors of the population. By early September, some 8 000 tonnes have been delivered so far against pledges of 60 000 tonnes for the 2000/01 marketing year.

Wheat imports in marketing year 2000/01 (June/July) are expected to be closely similar to the previous year's 330 000 tonnes, while commercial maize imports are provisionally forecast to increase from 70 000 tonnes to some 75 000 tonnes. Rice imports in marketing year 2001 (January/December) are provisionally forecast at 170 000 tonnes.

HONDURAS (11 September)

Harvesting of the 2000/01 first season cereal and bean crops is underway. The country has been severely affected by an unusually long dry spell in July ("canícula") with consequent damage to the developing crops. Localized losses in the amount of 20 percent or more of anticipated grain production are reported in the southern parts of the Department of Lempira, as well as in the southern Departments of Choluteca and Valle, and the Department of Francisco Morazán in the center. By contrast, production of beans has been spared of the adverse effect of the drought. Production of maize, the main cereal, is tentatively forecast at about 500 000 tonnes, which compares to the last 5-year average of 590 000 tonnes. Paddy production is also expected to be low. Food assistance from the international community is being distributed to drought affected rural families as well as it continues to be delivered to hurricane "Mitch" affected population.

Wheat imports in marketing year 2000/01 (July/June) are forecast to increase slightly from the previous year's 205 000 tonnes to some 210 000 tonnes. Maize imports are also forecast to increase from 250 000 tonnes to some 280 000 tonnes to compensate for the losses in

production. Rice imports in marketing year 2001 (January/December) are provisionally forecast at about 95 000 tonnes.

JAMAICA (11 September)

The country has been struck by a long severe drought earlier in the year which affected some 2 800 hectares of growing important foodcrops, such as roots and tubers, plantains, fruits and vegetables. About 2 500 to 3 000 rural families were seriously affected. The majority of these farmers were left with no seedlings to plant and almost no farm inputs. Emergency rehabilitation projects from the international community to assist the affected small farmers are being prepared in response to the appeal made by the Government.

MEXICO (11 September)

Land is being prepared for planting, from October, of the 2000/01 irrigated wheat crop in the northwest main growing areas. Generally dry weather prevails but water reservoir levels are considered adequate following normal rains in August and preceding weeks. Harvesting of the 2000 maize crop (spring/summer plantings), the main crop, is due to start from October. Recent light to moderate rains benefited the developing crops along the eastern growing belt, as well as in the important producing southeastern state of Chiapas. However, additional rain is needed particularly in the large producing southwestern areas of the country. Early production forecasts point out to a slightly above-average output, assuming normal rains resume during the rest of the growing period. In the north-east, additional rain is needed for the spring sorghum crop, to be harvested from late October. A slightly above-average output is anticipated, provided normal rains also resume in these areas.

Wheat imports in marketing year 2000/01 (April/March) are expected to be about 2.5 million tonnes, which compares to the previous year's 2.7 millions. Maize imports (October/September) are provisionally forecast at about 4.8 million tonnes, closely similar to the year before.

NICARAGUA (11 September)

Harvesting of the 2000/01 first season cereal and bean crops is underway. The country has been affected by an unusually severe summer dry spell ("canícula") with consequent damage to crops, particularly maize. Preliminary official figures indicate that some 27 000 hectares of maize have been affected in the nation as a whole, which represent about 14 per cent of the total area planted to maize. But localized losses, particularly in León and Madriz in the north, far exceed the latter figure. Serious damage is equally reported for the important bean crop. Some damage to the sorghum crop is also reported. About 2 200 hectares of rainfed paddy were affected, which is the equivalent of some 3 to 4 percent of the area planted to paddy. Below-average coarse grain and bean outputs are thus anticipated, while that of paddy is forecast to be slightly below average. Food assistance from the international community is being distributed to the drought affected population, as well as it continues to be delivered to hurricane "Mitch" victims.

Wheat imports in 2000/01 marketing year (July/June) are forecast to be about 100 000 tonnes, closely similar to the previous year. Maize imports are expected to increase from last year's some 75 000 tonnes in order to help cover production losses.

SOUTH AMERICA

ARGENTINA (11 September)

Planting of the 2000/01 wheat crop has been completed following some delays due to the lack of rain in the important producing areas in the south of Buenos Aires Province. Additional top soil moisture is required in most of the large growing areas to help the developing crops which are due

for harvesting from late October. Harvesting of the 2000 maize crop has been recently completed and output collected is provisionally estimated at an above-average 16 million tonnes, reflecting enlarged plantings with respect to the previous year in response to expanding exports, as well as satisfactory yield outturns. By contrast, a below-average paddy output was collected, mainly due to reduced plantings caused by an anticipated decline in imports to neighbouring countries.

BOLIVIA (11 September)

Harvesting of the 2000 winter wheat crop is underway in the main producing eastern Department of Santa Cruz. A below-average output is anticipated as a consequence of the heavy rains and flooding which affected plantings. By contrast, normal weather in the high plains is benefiting harvesting of the winter sorghum crop as well as early planting of the important potato crop.

Wheat imports in 2000/01 marketing year (July/June) is expected to increase from the previous year's some 260 000 tonnes to about 325 000 tonnes in order to compensate for the decline in production.

BRAZIL (11 September)

Harvesting of the 2000 wheat crop has started in the main producing states of Parana and Rio Grande do Sul, which together account for almost 85 to 90 percent of the domestic output, as well as in the other main producing areas. Recent abundant rains in the former state, the largest producing state, helped improve soil moisture for the developing crop which had suffered from an earlier drought and a most severe frost in July, with resulting damage to plantings. The anticipated losses in production in Parana have been compensated in part by improved yields in Rio Grande do Sul, the second largest producing state, and Santa Catarina; however, preliminary assessments of damage indicate that aggregate output for the country is expected to decline by about 35 percent from last year's average production of 2.4 million tonnes. The July frost also damaged the developing second season crop ("safrinha") maize crop, which had also been affected by the earlier dry spell. Aggregate maize production (both crops) in 2000 is provisionally estimated at a slightly below-average level and considerably lower than earlier production forecasts. By contrast, the heavy rains contributed to planting of the 2000/01 first season maize crop which has recently started.

CHILE (11 September)

Generally dry weather prevails in the main producing areas following the torrential rains which in June affected large parts of the country, particularly in the metropolitan area of the capital and surrounding provinces. Conditions are reported normal for the developing 2000/01 wheat crop to be harvested from December. Planting of the 2000/01 maize crop has only started and intended plantings should increase from the previous year's below-average 69 000 hectares.

Wheat imports in marketing year 2000/01 (December/November) should be similar to the previous year's some 750 000 tonnes. Maize imports (February/January) are also forecast to be closely similar to the volume of 1.1 million tonnes during marketing year 1999/2000.

COLOMBIA (11 September)

Normal to above-normal rainfall continues over most of the country. Harvesting of the 2000/2001 first season (main) coarse grain crops continues and maize output, mostly for human consumption, is provisionally forecast at an average one million tonnes. A slightly below-average sorghum output is expected. By contrast, a slightly above-average paddy crop is anticipated.

Wheat imports in marketing year 2001 (January/December) should be about 1.2 million tonnes, closely similar to the volume anticipated during marketing year 2000. Maize imports, largely for the animal feed industry, in marketing year 2001 (January/December) are also expected to be closely

similar to those of the previous year. Paddy imports in 2001 (January/December) are forecast to be about 350 000 tonnes.

ECUADOR (11 September)

Normal rains have resumed in most areas following the torrential rains which months earlier seriously affected the country. Harvesting of the 2000 yellow maize crop has been completed while that of the maize is about to start. Early production forecasts indicate that aggregate maize output (both crops) should improve from last year and reach a slightly above-average level.

Harvesting of the paddy crop has been completed and a below-average output has been collected, largely reflecting unattractive prices to the producer and financial constraints to the agricultural sector in general.

Wheat imports in marketing year 2000/01 (July/June) should be similar to the previous year's volume of 490 000 tonnes. Maize imports are forecast to decline from last year's some 170 000 tonnes to about 110 000 tonnes.

PERU (11 September)

Dry weather prevails over most of the country, with exception of the northeastern departments of Loreto, Amazonas and San Martin, where normal to abundant rains are reported. The bulk of the 2000 wheat crop has been collected and output is provisionally estimated at an above-average 160 000 tonnes. Harvesting of the 2000 white maize crop is well advanced and output gathered in the first seven months of the year is estimated at about 254 000 tonnes which compares to 222 000 collected during the same period the year before. Harvesting operations of the yellow maize crop continue and about 565 000 tonnes have been gathered (January/July) compared to 482 000 tonnes at the same time the year before. A considerably above-average output (white and yellow maize) for the year is forecast. Paddy output is expected to decline from 1999 record level but should nevertheless remain at an above-average level.

Wheat imports in marketing year 2001 (January December) should slightly increase from the previous year's volume of 1 250 000 tonnes. Maize imports in 2001 (January/December) are forecast to be closely similar to this year's some 650 000 tonnes. Rice imports in 2001 (January/December) should also be closely similar to the volume of 350 000 tonnes which are provisionally estimated in 2000.

URUGUAY (11 September)

Planting of the 2000/01 wheat and barley crops has been virtually completed. Considerably enlarged plantings with respect to 1999/2000 crops are provisionally estimated, as the latter were severely affected by a most severe prolonged drought. Harvesting is due from late November. Planting of the 2000/01 maize and sorghum crops has started, as well as that of the important paddy crop, and increased plantings are also anticipated.

VENEZUELA (11 September)

Normal to abundant rains have benefited the developing 2000/01 first season (main) cereal crops, as well as that of other staple foodcrops. Harvesting is underway and near average maize and paddy outputs are anticipated. Sorghum output is expected to be below-average.

Wheat imports in marketing year 2000/01 (July/June) are forecast to increase slightly from the previous year's 1.25 million tonnes. A slight increase in maize imports with respect to last year is also forecast.

EUROPE

EC (14 September)

In the EC, results of the cereal harvest so far continue to point to a larger output this year. FAO's latest forecast of the Community's aggregate cereal crop is 214.9 million tonnes which, although marginally down from that in the previous report, is nevertheless some 6 percent up from the 1999 output. Of this, wheat is forecast to account for 105.1 million tonnes, almost 8 percent above 1999. The bulk of the increase in wheat output is expected in Germany, the United Kingdom and Spain, although several other countries are also reported to be harvesting slightly larger crops this year. The quality of this year's crop is expected to be quite variable reflecting the variable weather conditions throughout the region. The Community's largest producer France is reported to have an above-normal proportion of low quality wheat, which will be suitable only for animal feed, but over all countries an average crop is expected. Production of all the main coarse grains is also expected to increase this year in the EC. Outputs of barley, oats and rye are forecast to increase by 6 percent, 10 percent and 5 percent respectively. Prospects for the maize harvest are also favourable and current indications point to a slightly larger crop of about 38 million tonnes this year. However, as the harvest is just starting in the main producing areas the final outcome will not be known for some time yet. The 2000 paddy harvest is getting underway in the EC. Drought conditions in the southern parts of Portugal and Spain at planting time are expected to have had some negative impact on yields. Total production is forecast to be slightly below last year's estimated output of about 2.6 million tonnes.

ALBANIA (15 September)

Aggregate cereal production is expected to be about average this year at between 550 000 to 600 000 tonnes.

BELARUS (13 September)

Satellite imagery confirms official forecasts of a somewhat better grain harvest than last year's poor 3.6 million tonnes. However, bearing in mind untimely frost in May, hot dry conditions in June, pervasive economic problems and shortages of inputs, FAO tentatively forecasts the 2000 harvest at 4.5 million tonnes cleaned weight at most.

In 2000/01, the country will need to import cereals for human consumption. Aggregate cereal imports in 2000/01 are estimated at about 1.1 million tonnes.

BOSNIA-HERZEGOVINA* (13 September)

The downward trend in winter grain plantings is continuing, reflecting poor profitability of wheat in both BiH and Rep. Srpska. By contrast, the area sown to maize continues to increase but yields are expected to be less than last year in response to hot and dry weather this summer. Animal fodder and pastures were also affected. To meet consumption demand, wheat imports have increased steadily and in the 2000/01 marketing year are projected to increase beyond the 300 000 tonnes imported in 1999/2000.

BULGARIA (15 September)

In Bulgaria, the wheat harvest is complete and output is officially estimated at 3.1 million tonnes, similar to the previous year's crop. Coarse grains output is set to drop, however, reflecting the adverse effect of spring drought and a summer heat wave on developing maize crops. Bulgaria normally produces about 1.6 million tonnes of maize but latest indications suggest this year's crop could fall well below 1 million tonnes.

CROATIA (13 September)

The 2000 wheat harvest, officially reported at 1.08 million tonnes, is better than expected after the hot dry weather experienced in many and June. This outcome is nearly double that of 1999 (0.558 million tonnes). However, spring crops have been badly affected by the drought and output of maize is expected to be only half of target, while the yield of sunflower is likely to be even less. Output of fruit, grapes and sugarbeet are also affected, as are pastures and fodder crops. The aggregate 2000 cereal harvest could fall to about 2.3 million tonnes, below average and lower than last year's about average 2.9 million tonnes.

Despite the lower output, the country plans to export about 200 000 tonnes of wheat in 2000/01.

CZECH REPUBLIC (15 September)

In the Czech Republic, total wheat production is estimated close to the 1999 level at about 4 million tonnes, despite larger plantings. The reduction is due to drought which caused yields to fall significantly. Output of barley, which is mostly spring grown and was thus most affected by the drought, is estimated to have fallen sharply from last year, reflecting lower yields and a smaller area.

ESTONIA (14 September)

The outlook for the 2000 harvest is uncertain. Hot and dry weather in May/June has been followed by excessive rainfall in July/August. The area sown to winter wheat and rye increased. Nevertheless the 2000 harvest could be somewhat below the 5 year average of 570 000 tonnes.

FORMER YUGOSLAV REPUBLIC OF MACEDONIA (15 September)

In the Former Yugoslav Republic of Macedonia, after earlier favourable conditions, drought conditions also set in during the late spring and summer reducing cereal yields. The aggregate cereal crop in 2000 is expected to be about 650 000 tonnes, of which wheat would account for about 320 000 tonnes.

HUNGARY (15 September)

Cereal crops in Hungary have been severely affected by drought during the 2000 growing season, but conditions for wheat have not been as bad as in 1999 when also the planting season was affected by adverse weather and, as a result, the area fell sharply. Output of wheat is now estimated at about 3.8 million tonnes. This is above last year's drastically reduced crop of 2.6 million tonnes but, nevertheless, well below the 1997 and 1998 levels of around 5 million tonnes. Coarse grain yields have been hit more by the exceptionally hot dry spring weather: barley output is estimated at just 900 000 tonnes compared to the average level of about 1.2 million tonnes and the maize crop could also be well down at about 5 million tonnes, compared to over 7 million tonnes in 1999, and an average of about 6 million tonnes.

LATVIA (14 September)

Hot and dry weather in May and June were followed by excessive rains in July/August. A poor start to the spring crop growing season, mixed growing conditions, and harvest losses as a result of water logging and delays, are likely to constrain the recovery from last year's grain harvest officially estimated at a poor 787 000 tonnes. However, the areas sown to winter crops increased and overwintering conditions were good. The 2000 cereal output is tentatively forecast at 0.8 million tonnes, somewhat below average. With livestock production remaining depressed, imports of cereals in recent years are limited to about 50 000-70 000 tonnes per annum, mainly of bread quality wheat.

LITHUANIA (14 September)

The outlook for 2000 grain harvest has deteriorated following excessive rains in July/August which followed hot and dry conditions in May and June. The aggregate area sown to grains - at 1.061 million hectares - remained very close to last year's. The 2000 grain harvest is anticipated to recover somewhat from last year's poor level of 2.1 million tonnes but nevertheless to remain below average. The yield of most spring crops, (spring grains, fodder, sugarbeet, potatoes) which experienced dry conditions plus subsequent flooding and waterlogging is likely to be less than last year, while that of winter crops, which overwintered well, could be higher than last year's.

MOLDOVA (15 September)

Untimely frosts and persistent dry conditions from April to late June have compromised the outlook for the 2000 grain harvest, which have affected grains, fodder, fruit and grape production. Wheat production, initially targeted at 1 million tonnes, is officially reported to be 780 000 tonnes, which is better than earlier estimates and close to last year's poor level. Output of barley is reported to be 152 000 tonnes. The outlook for the maize harvest is still uncertain. The onset of rains in July has improved the outlook for spring sown crops somewhat but ever so, the aggregate 2000 grain harvest is anticipated to be well below average and below last year's poor level of 2.2 million tonnes.

The 2000 wheat harvest is adequate to meet food consumption needs but the shortage and high price of animal feed will necessitate substantial destocking. The government has prohibited wheat exports this year and is trying to procure 60 000 -80 000 tonnes for domestic reserves.

POLAND (15 September)

In Poland, conditions for cereal production have been particularly bad this year. Late spring frosts were followed by exceptionally hot and dry conditions and heavy summer rains have disrupted harvesting. Wheat output is estimated at 8.2 million tonnes, down almost 10 percent from last year. Coarse grain output is also forecast to be sharply reduced as a result of the adverse conditions. Rye production could fall to as low as 4 million tonnes, nearly 30 percent below the average of the past 5 years and barley output is forecast at just 2.8 million tonnes, 20 percent below the five-year average.

ROMANIA (15 September)

Romania has been struck by a severe drought this summer, reported to be the worst in the past 30 years, which has had a devastating impact on the 2000 cereal output. The latest official estimate of the wheat crop is 4.3 million tonnes, somewhat better than some predictions earlier in the summer but nevertheless about 9 percent down from 1999 and over 20 percent down from the five-year average. The summer maize crop has been much harder hit, however, and latest indications point to an output of just about 5.5 million tonnes, compared to the five-year average of about 10 million tonnes.

RUSSIAN FEDERATION (18 September)

The 2000 grain harvest is well underway and yield returns confirm forecasts of a higher output than last year's poor crop, officially estimated at only 55 million tonnes of grains and pulses. However, yields in some areas affected by summer hot and dry conditions, such as the Urals, have been lower than anticipated. Current indications are that the 2000 harvest could be around 66 million tonnes, or some 10 percent higher than FAO's estimate of output last year. However, the final outcome depends crucially on the extent of the loss in yield potential due to summer dry conditions in the virgin lands and on harvesting all of the area sown - 1 million hectares less than in the preceding year.

Falling prices for cereals confirm the outlook for a better harvest. Provided the harvest forecast materializes, the cereal import requirement in 2000/01 could fall significantly below the nearly 8 million tonnes imported in 1999/2000.

In Chechnya, 2000 agricultural production was greatly compromised by the security situation as well as the shortages of machinery, fuel and inputs. The outlook for winter grain planting for harvest next year is also reported to be bleak due to lack of financial resources and fuel. Latest reports indicate that only 40 000 hectares have been prepared for autumn sowing.

In Chechnya many people are destitute and having to face another harsh mountain winter with inadequate shelter, food, water, sanitation and infrastructure. A large proportion of the population of Chechnya needs food aid to survive but pledges to date fall well short of the needs. A recent UN Inter-Agency Assessment of the situation in Grozny indicated that there is an acute need for food aid, including for communal kitchens and bakeries which are no longer operational due to shortage of food. These were an important source of nourishment for vulnerable groups, such as the elderly, children and handicapped people.

WFP is currently distributing food to 35 000 beneficiaries in three districts of Grozny and has planned to cover additional 23 000 beneficiaries of the fourth district in Grozny from September. However, food aid pledges to support WFP operation in Chechnya fall well short of requirements.

SLOVAK REPUBLIC (15 September)

In the Slovak Republic, contrary to expectations much earlier in the season, aggregate cereal output is estimated to be lower than last year's already reduced crop. After favourable planting and overwinter conditions, dry and hot weather affected crops in the spring and summer and yields have been lower than normal. The aggregate cereal output is not expected to be much more than 2 million tonnes, compared to about 2.8 million tonnes in 1999.

SLOVENIA (15 September)

In Slovenia, a further decline in cereal output is expected this year due to the adverse spring/summer conditions. Aggregate cereal output is forecast at between 400 000 and 450 000 tonnes.

THE UKRAINE (18 September)

With harvesting of grains other than maize nearing completion, forecasts of another poor cereal harvest have been confirmed. Average yields per hectare as reported by the government are about 5 percent less than last year. In addition, the issue of whether the 10.8 million tonnes of wheat, 7 million tonnes of barley, 1 million tonnes of rye and 800 000 tonnes of oats, officially harvested according to the Ministry of Agricultural Policy, is cleaned or bunker weight has not been clarified. Until the harvest of maize is completed, FAO tentatively forecast the 2000 grain production (including an estimated 2.1 million tonnes of maize) at 23.9 million tonnes. This estimate is some 10 percent higher than current official yield indication might indicate to allow for underreporting. Persistent government interference in the grain market this season has created a lot of uncertainty and has not been advantageous to producers or traders.

Provided the harvest forecast materializes, grain production in the Ukraine has declined for three successive years. The country remained a net exporter of 2.3 million tonnes of cereals (mainly wheat and barley) in 1999/2000, officially registered imports of wheat reached almost 450 000 tonnes in 1999/2000 and could exceed this amount in the current marketing year.

YUGOSLAVIA, FED. REP. OF (SERBIA AND MONTENEGRO)* (18 September)

An FAO/WFP Crop and Food Supply Assessment Mission visited the Federal Republic of Yugoslavia (FRY) (excluding the UN Administered Province of Kosovo) between 21 June and 7 July 2000 and traveled widely throughout the main agricultural areas. The Mission found that the agricultural sector in the country has been generally in decline since the early 1990's, but that the 1999/2000 cropping year was particularly difficult. Man-made and natural disasters, (sanctions, bomb damage, floods, water logging and prolonged drought), shortages of inputs, particularly fertilizer, but also fuel, and low prices have combined to reduce the areas sown and average yields of both winter and spring crops.

The Mission estimated that the wheat area for harvest in Serbia and Montenegro for 2000 has fallen to 581 000 hectares, from 619 000 in 1999 and 800 000 in 1991, in response to poor price incentives and critical shortages of fuel and fertilizer. Based on the Mission's estimate of the area sown, (which is well below the official figure of 650 000 hectares) the Mission estimates the 2000 wheat harvest at between 1.66 million tonnes (low scenario) to 1.8 million tonnes (best case). This is less than the official estimate of 2.3 million tonnes.

The yield potential of spring crops such as maize, sugar beet and soya has also been severely compromised by the high temperatures and water shortages this spring and summer well into August. In fact, soaking rains are necessary to replenish soil moisture reserves for winter wheat, shortly to be planted. Reduced availability of animal feed could lead to further sharp reductions in animal numbers.

Domestic production and the volumes of agri-food exports necessary to secure essential import requirements, particularly oil, and gas and medicines determine domestic food availability. The country needs to import 70 percent of its fuel requirements and traditionally has financed them by industrial and agricultural exports. With contracting GDP, industry in ruins, and the share of agriculture in GDP increasing, agri-food exports accounted for 22 percent of exports by value in 1999. Exports of agricultural products, including maize and a small amount of wheat, are continuing in 2000 but were below target. The government has indicated that some 2.8 million tonnes of wheat are available in the country which is more than adequate to cover domestic demand. Considerable stocks from last year's bumper maize harvest (6.1 million tonnes) will help to offset this years harvest which could be halved.

Nevertheless, the outlook for 2000/01 is for food supply to tighten considerably and prices to rise further, jeopardizing the food security of the low-income population. The availability of food at the low, controlled prices, already inadequate, is decreasing while an increasing amount of food is being channelled to the more loosely regulated, higher priced market. At the same time, real salaries and wages are decreasing. Food already accounts for a significant proportion of the household budgets of the population with low incomes.

WFP is currently targeting about 700 000 refugees and socially vulnerable people. In addition the ICRC assists 200 000 IDPs with an individual food ration and 100 000 beneficiaries (social cases) through a hot meal under their soup kitchen programme.

NORTH
AMERICA

CANADA (15 September)

As of mid August the winter wheat harvest in Canada was well underway or nearing completion in some areas. Harvesting of the main spring crops got underway in late August. Warmer temperatures in July in the main wheat producing areas of Western Canada favoured crop development after generally wetter and colder than normal conditions in June. It is reported that there is potential for average to above-average yields in most of the major producing areas. Latest official reports

forecast the total 2000 wheat production at 25.4 million tonnes. Coarse grain production is expected to change little this year, and is currently forecast at 27 million tonnes. Although barley output is forecast to increase, reflecting larger plantings, outputs of the other small coarse grains could decline somewhat. Early indications point to a smaller maize crop also, although the harvest is still some way off.

UNITED STATES (15 September)

The latest USDA Crop Production report in September, put total wheat production in the United States in 2000 at 62.7 million tonnes, up about 1 million tonnes from the forecast in June and similar to the output level in 1999. The latest revision mostly reflects upward adjustment to the forecast for spring wheat, which is now put at over 19.3 million tonnes, compared to 16.4 million tonnes in 1999. As of early September the earliest winter wheat planting for the 2001 crop was just getting underway in some states. Coarse grains output in 2000 is now forecast to be significantly larger than expectations in June, mostly reflecting generally favourable growing conditions throughout July and August. Based on the USDA's latest Crop Production report, aggregate coarse grain output in 2000 is now forecast at about 286 million tonnes, 8 percent up from 1999. The bulk of the increase compared to the previous year is accounted for by a larger maize crop, which is set to reach a record 263 million tonnes, 10 percent up from 1999. As of early September, The outputs of barley and oats are also expected to be somewhat above the previous year, but the sorghum crop will be smaller. The 2000/01 rice crop is expected to be down by about 6 percent, at 8.7 million tonnes, reflecting a significant reduction in plantings as declining rice prices last season have caused farmers to switch to potentially more lucrative crops.

OCEANIA

AUSTRALIA (15 September)

Prospects remain satisfactory for the 2000 winter grain crops and early harvesting is reported to be underway in some parts. Latest official forecasts put the 2000 wheat crop at 22.2 million tonnes, down 600 000 tonnes from the June forecast and about 2 million tonnes from last year's record output, but still the third biggest crop on record. Barley production is seen to rise 32 percent from last year's reduced crop to 5.6 million tonnes. The largest threat to the crops, which could alter the current outlook is an, as yet, largely unhatched locust plague, which spreads from western New South Wales (NSW) through to southern parts of the national wheat belt and into Western Australia. It is reported that up to 1.5 million hectares of crop land are infested with eggs. The first hatchings are reported to have begun in western NSW, and the situation here, and throughout the whole of the affected area continues to be closely monitored. Assuming adequate and successful control of the locust threat in the remainder of the season, the expected grain output should be achieved. The 2000 paddy season is complete and the output is officially estimated at about 1.1 million tonnes, 21 percent down from 1999's exceptional crop.

SAMOA (20 September)

The country has received normal to above-normal rains this year, which has benefited crops, mainly roots and tubers, and harvest prospects are favourable so far. A strong recovery is also in prospect for the taro crop, the main staple crop and a major source of export revenues, which was wiped out by the Taro leaf blight between 1994 and 1996. The new and more resistant varieties now planted by farmers appear to be doing well and a strong comeback of taro is already noted in the local markets. The experience has also prompted farmers to diversify farming crops extensively to include other agricultural crops such as taamu, yams, cassava and breadfruit to meet the local demand.

**ESTIMATED CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/
a) 1999/2000 or 2000 estimates (in thousand tonnes)**

COUNTRY	Marketing year	1998/99 or 1999			1999/2000 or 2000			
		Actual imports			Total import requirements (excluding re-exports)	Import position		
		Commercial purchases	Food aid	Total commercial and aid		Total commercial and aid	Food aid allocated committed or shipped	Commercial purchases
AFRICA		26 408.6	2 189.0	28 597.6	27 845.0	22 352.1	2 418.3	19 933.8
Northern Africa		15 445.0	22.9	15 467.9	14 275.0	14 275.0	73.3	14 201.7
Egypt	July/June	10 883.0	12.9	10 895.9	9 820.0	9 820.0	64.1	9 755.9
Morocco	July/June	4 562.0	10.0	4 572.0	4 455.0	4 455.0	9.2	4 445.8
Eastern Africa		2 353.2	1 257.2	3 610.4	5 404.0	3 498.3	1 645.7	1 852.6
Burundi	Jan./Dec.	65.5	4.5	70.0	106.0	15.4	12.4	3.0
Comoros	Jan./Dec.	45.8	0.2	46.0	46.0	0.2	0.0	0.2
Djibouti	Jan./Dec.	116.1	9.1	125.2	108.0	5.4	0.0	5.4
Eritrea	Jan./Dec.	87.2	23.8	111.0	190.0	94.0	90.8	3.2
Ethiopia 2/	Jan./Dec.	20.8	623.5	644.3	1 200.0	1 114.6	1 114.6	0.0
Kenya	Oct./Sept.	709.7	103.0	812.7	1 800.0	480.8	82.6	398.2
Rwanda	Jan./Dec.	40.1	181.9	222.0	175.0	136.3	135.8	0.5
Somalia	Aug./July	277.7	42.5	320.2	310.0	310.0	41.7	268.3
Sudan	Nov./Oct.	697.4	218.6	916.0	1 019.0	653.1	132.3	520.8
Tanzania	June/May	292.9	50.1	343.0	450.0	688.5	35.5	653.0
Southern Africa		1 363.0	460.5	1 823.5	1 894.0	1 867.4	280.8	1 586.6
Angola	April/March	353.8	151.1	504.9	505.0	494.2	140.9	353.3
Lesotho	April/March	213.3	12.7	226.0	238.0	238.0	3.0	235.0
Madagascar	April/March	124.1	18.6	142.7	229.0	228.8	5.8	223.0
Malawi	April/March	144.8	46.2	191.0	122.0	121.9	63.0	58.9
Mozambique	April/March	105.0	191.1	296.1	293.0	292.9	62.9	230.0
Swaziland	May/April	65.0	10.0	75.0	73.0	57.6	0.0	57.6
Zambia	May/April	357.0	30.8	387.8	434.0	434.0	5.2	428.8
Western africa		6 600.3	416.1	7 016.4	5 544.0	2 549.0	384.0	2 165.0
Coastal countries		4 819.7	192.6	5 012.3	3 694.0	1 908.6	213.4	1 695.2
Benin	Jan./Dec.	110.4	9.3	119.7	115.0	32.7	6.0	26.7
Cote d'Ivoire	Jan./Dec.	820.6	37.1	857.7	675.0	513.1	10.2	502.9
Ghana	Jan./Dec.	451.6	23.3	474.9	485.0	260.6	81.1	179.5
Guinea	Jan./Dec.	347.4	29.4	376.8	350.0	23.1	0.5	22.6
Liberia	Jan./Dec.	137.9	64.0	201.9	200.0	83.5	83.5	0.0
Nigeria	Jan./Dec.	2 563.8	0.0	2 563.8	1 470.0	941.0	0.3	940.7
Sierra Leone	Jan./Dec.	264.5	25.5	290.0	329.0	36.3	27.8	8.5
Togo	Jan./Dec.	123.5	4.0	127.5	70.0	18.3	4.0	14.3
Sahelian countries		1 780.6	223.5	2 004.1	1 850.0	640.4	170.6	469.8
Burkina faso	Nov./Oct.	191.6	37.3	228.9	155.0	31.6	18.0	13.6
Cape Verde	Nov./Oct.	30.3	65.1	95.4	75.0	71.6	71.6	0.0
Chad	Nov./Oct.	60.0	15.9	75.9	67.0	17.0	11.8	5.2
Gambia	Nov./Oct.	123.3	3.8	127.1	114.0	4.5	4.5	0.0
Guinea Bissau	Nov./Oct.	64.0	11.6	75.6	99.0	5.8	5.2	0.6
Mali	Nov./Oct.	116.2	5.6	121.8	100.0	26.8	13.1	13.7
Mauritania	Nov./Oct.	214.3	27.8	242.1	260.0	27.3	13.2	14.1
Niger	Nov./Oct.	306.7	35.6	342.3	220.0	5.1	2.3	2.8
Senegal	Nov./Oct.	674.2	20.8	695.0	760.0	450.7	30.9	419.8
Central Africa		647.1	32.3	679.4	728.0	162.4	34.5	127.9
Cameroon	Jan./Dec.	267.2	2.6	269.8	290.0	59.7	7.8	51.9
Cent.Afr.Rep.	Jan./Dec.	29.8	1.2	31.0	29.0	2.7	0.6	2.1
Congo, Dem.Rep.	Jan./Dec.	234.6	15.4	250.0	250.0	26.3	16.6	9.7
Congo, Rep.	Jan./Dec.	93.0	12.0	105.0	140.0	68.0	4.6	63.4
Eq. Guinea	Jan./Dec.	14.0	0.0	14.0	9.0	1.7	0.9	0.8
Sao Tome	Jan./Dec.	8.5	1.1	9.6	10.0	4.0	4.0	0.0

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a) 1999/2000 or 2000 estimates (in thousand tonnes)

COUNTRY	Marketing year	1998/99 or 1999			1999/2000 or 2000			
		Actual imports			Total import requirements (excluding re-exports)	Import position		
		Commercial purchases	Food aid	Total commercial and aid		Total commercial and aid	Food aid allocated committed or shipped	Commercial purchases
ASIA		33 716.4	4 615.6	38 332.0	38 811.0	34 278.4	3 390.9	30 887.5
Afghanistan	July/June	668.4	77.2	745.6	1 127.0	1 130.8	137.5	993.3
Armenia	July/June	271.0	20.0	291.0	419.0	419.0	16.0	403.0
Azerbaijan	July/June	712.0	26.0	738.0	772.0	772.0	36.0	736.0
Bangladesh	July/June	2 897.0	1 313.1	4 210.1	2 171.0	2 171.1	1 017.5	1 153.6
Bhutan	July/June	18.8	1.2	20.0	22.0	22.0	0.0	22.0
Cambodia	Jan./Dec.	47.9	12.1	60.0	60.0	34.2	18.0	16.2
China 3/	July/June	8 240.1	259.9	8 500.0	10 000.0	10 000.0	192.0	9 808.0
Georgia	July/June	507.0	98.0	605.0	513.0	513.0	69.0	444.0
India	April/March	1 427.4	262.6	1 690.0	2 088.0	2 088.7	280.1	1 808.6
Indonesia	April/March	6 172.3	1 127.7	7 300.0	6 465.0	6 465.0	508.3	5 956.7
Korea, D.P.R.	Nov./Oct.	1 027.3	728.7	1 756.0	1 855.0	646.2	500.0	146.2
Kyrgyz Republic	July/June	134.0	7.0	141.0	269.0	269.0	79.0	190.0
Laos	Jan./Dec.	51.2	15.8	67.0	67.0	2.7	2.7	0.0
Maldives	Jan./Dec.	36.1	4.9	41.0	36.0	3.0	0.0	3.0
Mongolia	Oct./Sept.	132.7	60.3	193.0	203.0	40.0	40.0	0.0
Nepal	July/June	50.0	24.7	74.7	118.0	118.2	6.3	111.9
Pakistan 4/	May/April	2 725.9	195.5	2 921.4	2 021.0	2 021.0	267.3	1 753.7
Philippines	July/June	3 451.5	2.5	3 454.0	3 826.0	3 826.0	50.0	3 776.0
Sri Lanka	Jan./Dec.	1 183.5	115.5	1 299.0	1 155.0	630.7	53.0	577.7
Syria	July/June	750.9	18.1	769.0	1 762.0	1 762.0	22.2	1 739.8
Tajikistan	July/June	323.0	80.0	403.0	594.0	594.0	82.0	512.0
Turkmenistan	July/June	75.0	0.0	75.0	14.0	14.0	7.0	7.0
Uzbekistan	July/June	560.0	0.0	560.0	634.0	634.0	0.0	634.0
Yemen	Jan./Dec.	2 253.4	164.8	2 418.2	2 620.0	101.8	7.0	94.8
CENTRAL AMERICA		3 459.3	458.7	3 918.0	3 974.0	3 972.9	473.5	3 499.4
Cuba 5/	July/June	1 567.9	27.9	1 595.8	1 571.0	1 571.0	50.6	1 520.4
Guatemala	July/June	944.4	89.0	1 033.4	973.0	973.5	48.5	925.0
Haiti	July/June	380.2	119.2	499.4	571.0	571.0	160.7	410.3
Honduras	July/June	441.4	95.7	537.1	587.0	586.6	110.2	476.4
Nicaragua	July/June	125.4	126.9	252.3	272.0	270.8	103.5	167.3
SOUTH AMERICA		1 063.9	176.1	1 240.0	1 001.0	611.4	197.4	414.0
Bolivia	July/June	210.1	155.9	366.0	271.0	271.2	46.2	225.0
Ecuador	Jan./Dec.	853.8	20.2	874.0	730.0	340.2	151.2	189.0
OCEANIA		423.0	8.0	431.0	381.0	28.2	0.6	27.6
Kiribati	Jan./Dec.	8.0	0.0	8.0	8.0	0.0	0.0	0.0
Papua New Guinea	Jan./Dec.	360.0	8.0	368.0	318.0	28.2	0.6	27.6
Samoa	Jan./Dec.	17.0	0.0	17.0	17.0	0.0	0.0	0.0
Solomon Isl.	Jan./Dec.	26.0	0.0	26.0	26.0	0.0	0.0	0.0
Tuvalu	Jan./Dec.	1.0	0.0	1.0	1.0	0.0	0.0	0.0
Vanuatu	Jan./Dec.	11.0	0.0	11.0	11.0	0.0	0.0	0.0
EUROPE		530.3	121.2	651.5	857.0	857.0	174.0	683.0
Albania	July/June	268.9	26.1	295.0	405.0	405.0	19.1	385.9
Bosnia&Herzegovina	July/June	199.4	92.1	291.5	290.0	290.0	61.5	228.5
Macedonia, FYR	July/June	62.0	3.0	65.0	162.0	162.0	93.4	68.6
TOTAL		65 601.5	7 568.6	73 170.1	72 869.0	62 100.0	6 654.7	55 445.3

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 1997), which is in accordance with the guidelines and criteria agreed to by the CFA should be given priority in the allocation of food aid. 2/ Includes refugee needs.

3/ Includes import requirements of Taiwan Province. 4/ Excludes Afghan refugee requirements.

**ESTIMATED CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/
b) 2000/2001 estimates for LIFD countries which have entered the 2000/2001 marketing year (in thousand tonnes)**

COUNTRY	Marketing year	1999/2000 or 2000			2000/2001			
		Actual imports			Total import requirements (excluding re-exports)	Import position		
		Commercial purchases	Food aid	Total commercial and aid		Total commercial and aid	Food aid allocated committed or shipped	Commercial purchases
AFRICA		16 709.6	431.3	17 140.9	19 809.0	4 021.3	437.6	3 583.7
Northern Africa		14 201.7	73.3	14 275.0	16 335.0	3 662.1	133.9	3 528.2
Egypt	July/June	9 755.9	64.1	9 820.0	11 020.0	2 650.9	3.9	2 647.0
Morocco	July/June	4 445.8	9.2	4 455.0	5 315.0	1 011.2	130.0	881.2
Eastern Africa		921.3	77.2	998.5	1 020.0	20.4	20.4	0.0
Somalia	Aug./July	268.3	41.7	310.0	330.0	19.1	19.1	0.0
Tanzania	June/May	653.0	35.5	688.5	690.0	1.3	1.3	0.0
Southern Africa		1 586.6	280.8	1 867.4	2 454.0	338.8	283.3	55.5
Angola	April/March	353.3	140.9	494.2	753.0	141.5	141.5	0.0
Lesotho	April/March	235.0	3.0	238.0	238.0	2.2	2.2	0.0
Madagascar	April/March	223.0	5.8	228.8	518.0	15.2	15.2	0.0
Malawi	April/March	58.9	63.0	121.9	40.0	12.9	12.9	0.0
Mozambique	April/March	230.0	62.9	292.9	413.0	154.8	110.2	44.6
Swaziland	May/April	57.6	0.0	57.6	88.0	10.9	0.0	10.9
Zambia	May/April	428.8	5.2	434.0	404.0	1.3	1.3	0.0
ASIA		30 049.6	2 770.2	32 819.8	32 438.0	4 403.7	1 333.6	3 070.1
Afghanistan	July/June	993.3	137.5	1 130.8	2 321.0	49.6	49.6	0.0
Armenia	July/June	403.0	16.0	419.0	515.0	68.9	68.9	0.0
Azerbaijan	July/June	736.0	36.0	772.0	800.0	6.0	6.0	0.0
Bangladesh	July/June	1 153.6	1 017.5	2 171.1	2 100.0	386.4	61.4	325.0
Bhutan	July/June	22.0	0.0	22.0	22.0	0.0	0.0	0.0
China 3/	July/June	9 808.0	192.0	10 000.0	12 755.0	1 074.5	0.0	1 074.5
Georgia	July/June	444.0	69.0	513.0	748.0	88.0	88.0	0.0
India	April/March	1 808.6	280.1	2 088.7	250.0	195.3	145.3	50.0
Indonesia	April/March	5 956.7	508.3	6 465.0	6 740.0	1 021.1	408.5	612.6
Kyrgyz Republic	July/June	190.0	79.0	269.0	125.0	60.0	60.0	0.0
Nepal	July/June	111.9	6.3	118.2	79.0	0.2	0.2	0.0
Pakistan 4/	May/April	1 753.7	267.3	2 021.0	290.0	103.2	103.2	0.0
Philippines	July/June	3 776.0	50.0	3 826.0	3 360.0	1 029.3	211.0	818.3
Syria	July/June	1 739.8	22.2	1 762.0	840.0	200.2	10.5	189.7
Tajikistan	July/June	512.0	82.0	594.0	794.0	74.0	74.0	0.0
Turkmenistan	July/June	7.0	7.0	14.0	10.0	3.0	3.0	0.0
Uzbekistan	July/June	634.0	0.0	634.0	689.0	44.0	44.0	0.0
CENTRAL AMERICA		3 499.4	473.5	3 972.9	3 966.0	552.6	223.8	328.8
Cuba	July/June	1 520.4	50.6	1 571.0	1 567.0	31.3	0.0	31.3
Guatemala	July/June	925.0	48.5	973.5	970.0	176.9	98.7	78.2
Haiti	July/June	410.3	160.7	571.0	575.0	97.9	59.6	38.3
Honduras	July/June	476.4	110.2	586.6	622.0	165.6	42.5	123.1
Nicaragua	July/June	167.3	103.5	270.8	232.0	80.9	23.0	57.9
SOUTH AMERICA		225.0	46.0	271.0	336.0	34.8	34.8	0.0
Bolivia	July/June	225.0	46.0	271.0	336.0	34.8	34.8	0.0
EUROPE		683.0	174.0	857.0	701.0	85.4	85.4	0.0
Albania	July/June	385.9	19.1	405.0	331.0	6.0	6.0	0.0
Bosnia&Herzegovina	July/June	228.5	61.5	290.0	290.0	77.4	77.4	0.0
Macedonia, FYR	July/June	68.6	93.4	162.0	80.0	2.0	2.0	0.0
TOTAL		51 166.6	3 895.0	55 061.6	57 250.0	9 097.8	2 115.2	6 982.6

SOURCE: FAO

for footnotes, please see page 51.

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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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