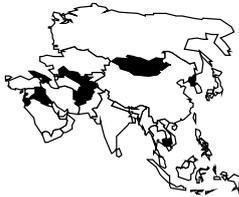


FOODCROPS AND SHORTAGES

No.5

November 2000

	<p>AFRICA: The food situation remains precarious in eastern Africa, due to drought and war in parts. More than 20 million people need emergency food assistance. The food shortages are expected to persist well into 2001. Prolonged dry weather in eastern and southern parts of Rwanda has resulted in serious food shortages in a number of districts. Elsewhere, production in Sierra Leone, Liberia and DRC remains constrained by current and past civil strife. In Zimbabwe, sharp increases in the price of fuel and basic staples have diminished access to food for large sections of the population.</p>
	<p>ASIA: In Asia, recent storms brought more misery to Bangladesh, whilst flood waters have yet to recede in Cambodia and Vietnam, seriously delaying main rice planting. Concerns also mount in India about another drought in parts affected last year, whilst drought has also reduced wheat and maize production significantly in China. Poor food supply prospects give cause for concern in DPR Korea, while in Mongolia severe malnutrition is reported. In Afghanistan, a grave food crisis has emerged due to prolonged drought and persistent conflict. Armenia, Georgia and Tajikistan also face severe food shortages.</p>
	<p>LATIN AMERICA AND CARIBBEAN: Hurricane "Keith" brought torrential rains seriously damaging crops in Nicaragua, Honduras and Belize, which had earlier been affected by dry weather. The worst affected country was Belize where enormous damage is reported to the agricultural export sector. The food outlook remains poor in these countries and also in El Salvador. Damage is also reported to agriculture in Guatemala, but production is unlikely to suffer seriously. In Mexico, spring/summer harvesting is underway and average output is expected.</p>
	<p>EUROPE: Prospects for the winter grain crops are uncertain due to adverse weather, with planting in parts of the EC disrupted by excessive rainfall. By contrast, in most eastern European countries dry weather persists and soils are too dry for good crop establishment. Cereal production in 2000 in the EC, CIS countries west of the Urals and the Baltics is forecast to increase compared to last year. In contrast, in the Balkans, spring production was sharply reduced due to hot/dry conditions.</p>
	<p>NORTH AMERICA: Winter wheat planting is virtually complete in the United States and early indications suggest little change in area from last year but crop establishment may be poorer than normal because of exceptionally dry conditions in many parts. In the United States, 2000 wheat production fell by some 3.5 percent below 1999 and coarse grains output was well down on earlier expectations though up on last year. In Canada, rain and cool weather delayed the 2000 harvest and wheat and coarse grain output is below average and down somewhat from last year.</p>
	<p>OCEANIA: In Australia prospects for the winter cereal crops have deteriorated following prolonged hot and dry weather in the last two months. FAO now forecasts wheat output in 2000 at 20 million tonnes, well down from 1999 and below average. Elsewhere, in Fiji the overall food situation remains satisfactory but serious nutritional problems persist in parts. In the Solomon Islands a recent peace agreement will improve access to vulnerable people.</p>



AFFECTED COUNTRIES^{1/}

UNFAVOURABLE PROSPECTS FOR CURRENT CROPS

<u>Country</u>	<u>Harvest date</u>	<u>Main contributory factors</u>
Armenia*	Aug./Sept.	Shortage of seed, economic constraints
Belize	Oct./Dec.	Torrential rains, flooding
Brazil	Aug./Dec.	Adverse weather
Congo, Dem.Rep.of*	Nov./Dec.	Civil strife
El Salvador	Nov./Dec.	Drought
Eritrea*	Nov./Dec.	War displacement, drought
Ethiopia*	Oct./Dec.	Late rains
Georgia*	July/Sept.	Shortage of seed, economic constraints
Haiti*	Nov./Dec.	Drought
Honduras	Nov./Dec.	Drought, torrential rains, flooding
Kenya	Aug./Nov.	Drought
Nicaragua	Nov./Dec.	Drought, hurricane rains, flooding
Sierra Leone*	Nov./Dec.	Civil strife
Sudan*	Nov./Dec.	Drought, civil strife
Tanzania	Jan./Feb.	Localized drought
Tajikistan*	Jun./Sept.	Shortage of seed, economic constraints

COUNTRIES FACING EXCEPTIONAL FOOD EMERGENCIES (Total: 32 countries)^{2/}

<u>Country/Region</u>	<u>Reason for Emergency</u>	<u>Country/Region</u>	<u>Reason for Emergency</u>
<u>AFRICA</u> (16 countries)		<u>LATIN AMERICA</u> (3 countries)	
Angola*	Civil strife, population displacement	Haiti*	Structural economic problems
Burundi*	Civil strife and insecurity	Honduras	Adverse weather (hurricane Mitch)
Congo, Dem.Rep.*	Civil strife, IDPs and refugees	Nicaragua	Adverse weather (hurricane Mitch)
Congo, Rep. of*	Past civil strife		
Eritrea*	IDPs, returnees and drought	<u>EUROPE</u> (2 countries)	
Ethiopia*	Drought, IDPs	Russian Fed.	Civil strife, vulnerable groups
Kenya	Drought	F.Rep. Yugoslavia*	Vulnerable groups and refugees
Liberia*	Past civil strife, shortage of inputs		
Madagascar	Drought/cyclones		
Rwanda*	Drought in parts		
Sierra Leone*	Civil strife, population displacement		
Somalia*	Drought, civil strife		
Sudan*	Civil strife in the south		
Tanzania	Food deficits in several regions		
Uganda	Civil strife in parts, drought		
<u>ASIA</u> (11 countries)			
Afghanistan*	Civil strife, drought		
Armenia*	Drought, economic constraints		
Azerbaijan	Drought, economic constraints		
Georgia*	Drought, economic constraints		
Cambodia	Floods		
Iraq*	Economic embargo, drought		
Jordan	Drought		
Korea, DPR*	Economic problems		
Mongolia*	Economic problems, drought		
Tajikistan*	Drought		
Uzbekistan	Drought in KK		

^{2/} This updates information published in the November 2000 issue of Food Outlook.

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

1/ New countries included in this report compared to the last report, are underlined on this page; both here and in the text, countries with unfavourable prospects for current crop and/or uncovered shortfalls are marked in **bold** and those affected or threatened by successive bad crops or food shortages are marked with an asterisk (*). Definitions can be found on the Contents page.

CROP AND FOOD SUPPLY SITUATION

OVERVIEW

The number of people throughout the world experiencing severe food shortages has increased sharply from some 52 million people at the same time last year to 62 million currently. Much of this increase is in sub-Saharan Africa, where the number of people affected has increased from 19 to some 28 million. The situation is particularly tight in Kenya, Eritrea, Ethiopia and parts of Tanzania, which are likely to have serious food shortages well into next year. Elsewhere in the continent, although some improvement is seen in food production in Liberia and the Republic of Congo, the effects of civil war continue to disrupt agriculture and food supplies in Sierra Leone and the Democratic Republic of Congo. By contrast, food prospects are generally favourable in southern Africa, where 2000 production is forecast to increase by some 17 percent over last year.

The situation in large parts of Asia also remains extremely tight due to earlier drought and more recent floods. Parts of Cambodia and Vietnam still remain under water, constraining humanitarian and agricultural activities. Renewed drought in western and central India, for the second year running is likely to exacerbate an already difficult humanitarian situation. Elsewhere in the region earlier drought significantly reduced cereal production in many countries. The situation in DPR Korea, Afghanistan and Iraq, gives rise to particular concern as all these countries are in the midst of an already difficult food situation. The food situation in the CIS countries in Asia (Armenia, Georgia, Tajikistan) will remain extremely tight next year due to an estimated fall of 5 million tonnes in aggregate production.

Cereal production in the EC, CIS countries west of the Urals and the Baltics is forecast to increase compared to last year. In contrast, production in the Balkans, spring production was sharply reduced due to hot/dry conditions.

In the United States, 2000 wheat production fell by some 3.5 percent below 1999 and coarse grains output was well down on earlier expectations though up on last year.

SITUATION BY REGION

Africa

In **eastern Africa**, despite beneficial rains in parts, the food situation remains precarious due to the lingering effects of drought and civil strife in parts. Currently more than 20 million people need emergency food assistance whilst food shortages are expected to persist well into 2001. In addition, pastoralists in Somalia, Ethiopia, Eritrea, Sudan and Djibouti will be seriously affected by the recent ban (19 September) by major importing countries along the Arabian Peninsula on imports of livestock from these countries due to Rift Valley fever. A similar year-long ban in 1998 seriously affected the economies of exporting countries in the Horn.

The food situation is particularly serious in Kenya, Eritrea and Ethiopia, where large cereal imports, mostly as food aid, are still needed to stave off starvation. In Kenya, drought-induced food shortages still persist with nearly 3.3 million people estimated to be in urgent need of food assistance. The severe scarcity of water and pasture in northern and eastern parts resulted in large livestock losses. In Eritrea, mass displacement of farmers from the agriculturally rich regions of Gash Barka and Debub, accounting for more than 70 percent of cereal production, has jeopardised this year's cropping season. The food supply situation of the more than 1.5 million war-displaced people gives cause for serious concern. In Ethiopia, despite recent beneficial rains, the overall food supply situation remains highly precarious. An estimated 10 million people are in need of food assistance. In Somalia, a good main ("Gu") harvest preceded by a satisfactory secondary ("Deyr") season harvest in parts of the south has improved overall food prospects. In Sudan, overall prospects for 2000 cereal production are mixed. The food situation in some parts of the south is alarming due to drought and civil strife. In Tanzania, production in a number of regions is expected to fall due to late and insufficient rains. Several regions are facing acute food shortages. In Uganda, although the overall food supply situation is satisfactory, it remains precarious in the north-east, mainly due to last season's poor harvest.

In the Great Lakes region, prolonged dry weather from May to mid-October in Rwanda and Burundi adversely affected yields of basic staples (bananas and cassava), and delayed planting of the 2001 first

season cereal and bean crops. In Rwanda, the Government has appealed for assistance with food and agricultural inputs for 267 000 most affected people.

In **southern Africa**, planting of the 2001 coarse grain crop is underway. Average to above average rains from the second half of October improved soil moisture for field operations and benefited early-planted crops. Overall, growing conditions are favourable so far. However, planting reductions are anticipated in South Africa in response to low prices, and in Zimbabwe, with the planned resettlement programme on commercial farms, but these reductions could be compensated by increases in other countries. Harvesting of the 2000 wheat crop is well advanced in the sub-region. The aggregate output is forecast at 2.2 million tonnes, some 10 percent higher than in 1999 but still below the five year average. Output in South Africa, which accounts for over 80 percent of regional aggregate production, is expected to be 22 percent higher than the poor harvest of last year. In Zimbabwe, production is forecast to be one-quarter lower than last year due to insecurity at the time of planting.

The sub-region's 2000 aggregate coarse grain production is estimated at about 19 million tonnes, 24 percent higher than the previous year. The favourable production reflects abundant rains during the growing season, in spite of severe floods and crop losses in parts. Output increased substantially in South Africa, Zimbabwe, Zambia, Namibia and Botswana. In Malawi, production of coarse grains was at the same record level of last year. However, lower harvests were obtained in Mozambique, Madagascar, Angola, Swaziland and Lesotho.

The overall food supply situation is satisfactory reflecting this year's good cereal harvest and commercial import capacity of most of the countries of the sub-region. However, the food situation remains precarious for increasing numbers of internally displaced people in war-torn Angola; it is estimated that 1.9 million people are in need of emergency food assistance. Food aid is also needed for 240 000 people in drought-affected southern Madagascar, who are experiencing serious food difficulties. In Mozambique, despite significant improvement in the food supply situation in southern parts, food aid is still needed for 172 000 most vulnerable people, including those worst affected by severe floods early this year.

In **northern Africa**, land preparation is underway for planting of 2000 winter crops. Aggregate wheat production is estimated to be below average at 9.6 million tonnes, some 15 percent below last year. This is the result of prolonged dry conditions during the growing season which adversely affected yields and production in all of the countries of the sub-region, with the exception of Egypt where wheat is largely irrigated. In Algeria and Morocco, production is much below average and some 37 percent below 1999, while in Tunisia, output is down 43 percent and below average. The 2000 coarse grains crop in the sub-region is estimated at 8.7 million tonnes, about 12 percent below the previous year. This is the result of unfavourable weather conditions in Algeria, Morocco and Tunisia. In Egypt, output increased by about 3 percent.

In **western Africa**, harvest prospects are mixed. In the Sahel, harvesting of coarse grains is underway. Crops are generally satisfactory in the western half of the Sahel region, while dry spells in August/ September affected crops in central and eastern Burkina Faso, most parts of Niger and the Sahelian zone of Chad. A series of joint FAO/CILSS Crop Assessment Missions in the 9 CILSS member countries of the Sahel in October estimated aggregate 2000 cereal production at 9.5 million tonnes, some 16 percent below the record production in 1999. Below-average harvests are anticipated in Burkina Faso, Mauritania and Chad, while production is close to average in Mali and Niger, and above average in Cape Verde, Guinea Bissau and Senegal. A record crop is anticipated in The Gambia. Pastures are generally abundant throughout the pastoral zones but are now drying. Grasshopper attacks have been reported in Chad, Mali, Mauritania, Niger and Senegal. A small outbreak of Desert Locusts has been reported in central Mauritania and northern Mali.

Reflecting generally favourable growing conditions, harvest prospects are favourable in the coastal countries along the Gulf of Guinea. However, In Sierra Leone, a resurgence of fighting in October affected agricultural activities and relief programmes and caused new population displacement. By contrast, in Liberia, some improvement in food production is anticipated; a GIEWS Crop Assessment Mission will review harvest prospects and the current food supply situation in late November/early December 2000.

In **central Africa**, crop prospects are generally favourable in Central African Republic and Cameroon. Following a peace agreement, the security situation has improved in the Republic of Congo but food production has not yet recovered. In the Democratic Republic of Congo, civil war continues to disrupt all economic and agricultural activities. The number of internally displaced people is estimated at 1.8 million but insecurity seriously hampers access to those in need of assistance.

Asia

Even though a number of countries have still to recover from earlier natural disasters, more typhoons and storms have increased problems, whilst recurrent or extended drought will bring further misery to parts. In the worst affected countries, following the worst floods in decades, flood waters are yet to recede in Cambodia and Vietnam, where concerns are mounting that planting of main season rice could be seriously delayed. Laos was also affected by floods, though the severity was not as extensive. In Bangladesh and the Philippines, typhoons in the later part of October resulted in further crop (mainly rice) damage. However, as these countries have two and three rice crops a year, overall prospects still remain satisfactory. In India, although a 12th normal monsoon was reported, overall there are renewed concerns about drought in western and central parts, particularly in Gujarat, Rajasthan, central Madhya Pradesh and Maharashtra, which were also affected by drought last year. The water situation is becoming critical as the water table has dropped considerably following two dry years, and there may be a serious water shortage for winter (Rabi) season planting to commence shortly. A serious drought significantly reduced wheat and maize production in China this year, as a result of which there was a reduction of 12 percent and 20 percent respectively compared to 1999. Rice prospects have, however, improved a little since the last report. The severe after-effects of drought also continue to be felt in the Islamic Republic of Iran, which too was affected by the second dry year in succession, particularly amongst livestock farmers as large numbers of animals died last year and prospects for recovery in livestock numbers next spring are poor. In cereals much will depend on rainfall for recovery in the main staple wheat, planting of which is underway. Serious food supply difficulties persist in the Democratic People's Republic of Korea, where a combination of drought during the season and serious underlying problems in agriculture resulted in a slump in 2000 cereal production, following two relatively stable years in 1998 and 1999. This year, the country has the largest food deficit since 1997 (also affected by drought), though in contrast this year the country does have a substantial amount of food aid pledged already in the pipeline. The combination of natural disasters (harsh winter last year and drought this year) and economic problems due to transition continue to have a serious affect on food supply prospects in Mongolia. Recent studies indicate that chronic malnutrition persists in a number of nomadic areas, with many families living in extreme poverty with almost no resources.

In several countries of the **Near East**, persistent drought and conflict have jeopardised the livelihood of millions of people. In Afghanistan, a very serious food crisis has emerged following two consecutive years of drought and continuing civil conflict. The 2000 drought has decimated crops and livestock across the country, with more than 3 million people in need of urgent assistance. In addition, intensified civil conflict, particularly in northern parts, has resulted in renewed population displacement, aggravating the precarious food situation. In Iraq, two years of drought have decimated crops and exacerbated already tight food supply situation. Similarly, the drought has severely affected crops and pastures in Jordan, leaving thousands of herders in need of assistance.

In the **CIS** countries in Asia, aggregate cereal production is estimated to fall by 5 million tonnes to 20 million tonnes, mostly due to a fall in wheat production. As a result, the overall food supply situation is expected to be extremely tight and cereal import and food aid needs are sharply higher than last year. In Kazakhstan, the harvest, forecast at 11.7 million tonnes is less than last year's bumper 14 million tonnes, but still about average and the country's exportable surplus of about 4.4 million tonnes could help to cover import requirements in the region.

In the majority of the smaller countries in the region, shortages of irrigation and rainfed water supplies have exacerbated chronic problems in the agricultural sector and resulted in poor harvests. In the most affected areas of Armenia, Georgia, Tajikistan and the Karakalpakstan Autonomous region of Uzbekistan, rainfed crops have virtually failed and irrigated crop yields more than halved. This has created food shortages and serious seed shortfalls, which need to be addressed if production is to recover next year. Cereals have been mostly affected, but also potatoes, fruit, vegetables, oilseeds and other crops on which households rely for food security. Moreover, natural pastures have become scarce and the production of fodder crops is low, necessitating considerable destocking. As livestock production is an important source of protein for households 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 but also assistance with feedgrains. The aggregate import requirement for the region is estimated at 3.8 million tonnes compared to 3.3 million last year. The food aid requirement is estimated at 981 000 tonnes, including 826 000 tonnes of wheat and 148 000 tonnes of coarse grains. Against this requirement pledges registered to date amount to 360 000 tonnes.

In Armenia, the aggregate grain harvest (219 000 tonnes), is down by 27 percent compared to 1999 while potato production is likely to fall by 40 percent to 250 000 tonnes. As a result, the cereal import requirement is estimated to rise to 515 000 tonnes and a food aid requirement of 145 000 tonnes. In Georgia, aggregate cereal production is now estimated at 343 000 tonnes, only 44 percent of estimated 1999 production and 52 percent of average. Georgia's cereal import requirement in 2000/01 is estimated at 748 000 tonnes, and the uncovered deficit at 235 000 tonnes. In Tajikistan, the cereal import requirement in the 2000/01 marketing year (July/June) is estimated at 794 000 tonnes. The uncovered food aid requirements amounts to 295 000 tonnes. In Uzbekistan, indications are that the aggregate 2000 cereal harvest will be 10 percent less than last year, falling below 4 million tonnes, and cotton production is also down. Affected populations in Karakalpakstan will need humanitarian assistance this year. In Azerbaijan below normal rainfall and water levels in major rivers have also resulted in crop losses. Elsewhere, water shortages have also resulted in more localized crop losses in Kyrgyzstan and Turkmenistan. Notwithstanding water shortages, the 2000 grain harvest in Turkmenistan is above target.

Latin America

In **Central America and the Caribbean**, the main food crop activities underway include planting of the 2000/01 second season cereal and bean crops. Sowing is almost completed. The food outlook is poor for El Salvador, Honduras and Nicaragua, which were affected earlier by an unusually long summer dry spell ("canicula") and recently by torrential rains and flooding caused by Hurricane "Keith". Belize has been most affected and enormous damage is reported to the agricultural export sector. Some damage is also reported to the agricultural sector in Guatemala, but near-average cereal and bean outputs are nevertheless expected. In Mexico, harvesting of the important spring/summer maize crop has only started and average outputs are tentatively forecast. In Haiti, aggregate 2000/01 cereal and other foodcrop outputs are expected to be reduced because of severe dry weather which affected the crops during the first half of the year. Average outputs are anticipated in Cuba and the Dominican Republic.

In the southern parts of **South America**, harvesting of the 2000/01 wheat crop has started. Weather conditions have severely affected the crops in Brazil and output is expected to be reduced. An average output is anticipated in Argentina, the main producer in the sub-region. In Chile and Uruguay, a recovery is expected from the previous year's weather affected crops. Sowing of the 2000/01 maize crop has also started in the southern areas and intended plantings are tentatively forecast at about average. In the Andean countries, a bumper 2000 maize crop is anticipated in Peru, and output is likely to be a slightly above-average in Ecuador. Average maize output is expected in Colombia and Venezuela. In Bolivia, fieldwork has started in preparation of the 2001 cereal and potato crops, although some early planting, particularly in the valleys, is also reported.

Europe

The aggregate 2000 cereal production in the EC is forecast at almost 216 million tonnes, 6 percent up from last year and 6 percent above the average of the past five years. Output of wheat and coarse grains has increased while the small paddy rice crop has declined. Prospects for the winter grain crops are uncertain after widespread heavy rains hampered planting in several parts, particularly in northern Italy. The exception to the overall wet pattern is the Iberian Peninsula, where more rainfall is needed to favour planting of the winter wheat and barley crops. Among the eastern European countries, persistent dry conditions are hampering autumn grain planting. Significant rainfall is needed, otherwise final areas planted could be less than intended and crop stands are likely to be in poor condition at dormancy, making them more susceptible to winter perils.

In the CIS countries west of the Urals, the harvest is virtually complete. Indications are that aggregate output in Belarus, Moldova, the Russian Federation (RF) and Ukraine is about 8 million tonnes above last year, reflecting a better harvest (+11 million tonnes) in the RF and Belarus but poorer crops in Moldova and the Ukraine. Aggregate wheat production could increase by about 3 million tonnes while that of coarse grain increased by 5.5 million. Aggregate cereal imports are expected to fall by 4 million tonnes to nearly 6 million tonnes, reflecting an easier supply situation in the RF, but tight supplies elsewhere. In the RF the 2000 grain harvest is likely to reach 71 million tonnes, nearly twenty percent more than FAO's estimate of production last year. Cereal imports in 2000/01 could halve compared to last years' 8 million tonnes. In Ukraine, chronic economic problems on farm and very mixed weather, have likely led to an even lower cereal harvest (25 million tonnes) than last year's (26 million tonnes). The country has already imported 100 000 tonnes of wheat in July alone, compared to imports of just under 0.5 million tonnes in 1999/2000. After three poor

harvests in succession cereal exports in 2000/01 are anticipated to fall from 3 million tonnes in 1999/2000. In Belarus, the 2000 grain harvest could recover to an estimated 4.7 million tonnes, still remaining below average but well above last year's poor 3.6 million tonnes. In Moldova, drought has likely reduced aggregate grain output in 2000 to 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 the setback received from the devaluation of the Russian rouble. The 2000 cereal harvest has recovered sharply in all three countries.

In the Balkans, Bosnia Herzegovina, Croatia and the Federal Republic of Yugoslavia have suffered the effects of a 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 last year's poor level but maize and other spring crop production is sharply down and no exports of maize (also some wheat) are anticipated. In the Fed. Rep. 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 finance essential imports of fuel and the outlook is for a difficult year with rising prices for food and fuel. Populations with low incomes need assistance.

North America

Winter wheat planting in the United States is virtually complete. Planting pace was slower than normal due to excessively dry conditions. Early indications point to little change in the area sown from last year's level. However, because of the lack of moisture, crop stands in many parts may be below average condition going into the winter which would make them more vulnerable to winter perils. Officially, the 2000 wheat harvest is now estimated at 60.5 million tonnes, about 3.5 percent below 1999. The latest forecast for coarse grains is about 278 million tonnes, well down from earlier expectations because of dry weather late in the season but still 5 percent up from 1999. In Canada, the bulk of the 2000 harvest is complete, later than normal due to rain and cool temperatures. Output of both wheat and coarse grains is down somewhat from last year and the average.

Oceania

In **Oceania**, prospects for this year's wheat and small coarse grains crops in Australia have deteriorated following persisting hot and dry weather in the last two months. Crops in the north and west in particular have been hit by hot and dry weather, which has adversely affected yields and quality. FAO now forecast wheat output in 2000 at 20 million tonnes, well down from 1999 and below average.

COUNTRY REPORTS ^{1/}

AFRICA

NORTHERN AFRICA

ALGERIA (7 November)

Land preparation is underway for planting of the winter crops. The 2000 cereal crop stands at about 1.1 million tonnes, 35 percent below the 1999 below-average output, as a result of inadequate rainfall during the growing period. Wheat production is about 37 percent below the 1999 output while barley is 27 percent less than the below-average level. Imports of cereals, mostly wheat, are expected to increase significantly for the 2000/01 (July/June) marketing year. A few Desert Locust swarms could appear in the south from northern Mali during November.

EGYPT (7 November)

Planting is underway under favourable conditions for the mostly irrigated winter crops. The 2000 cereal production is estimated at about 19.9 million tonnes, some 3 percent over last year's above-average crop. The wheat crop is estimated at about 6.6 million tonnes, up 3 percent over the 1999 harvest while coarse grain production is estimated at 7.4 million tonnes compared to 7.2 million tonnes last year. The 2000 paddy harvest is anticipated to reach 5.9 million tonnes, slightly over last year's outcome, which was above average.

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 (7 November)

Land preparation has started in farming areas for the 2000/01 winter crops. Cereal production in 2000 stands at about 2 million tonnes, 53 percent of last year's below-average crop, as a result of adverse weather conditions during the growing season. Wheat production is estimated at about 1.35 million tonnes, which is below average and some 37 percent down on the 1999 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 2.8 million tonnes while coarse grain imports are at 2.1 million tonnes.

TUNISIA (7 November)

Cereal production in 2000 is estimated at about one million tonnes, some 45 percent below last year, following inadequate rainfall during the growing period. The wheat crop stands at 795 000 tonnes, a 43 percent drop while barley output at 200 000 tonnes, is 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 (6 November)

Following generally abundant and widespread rains, except in early June and in mid-July in the south, the rainy season is now drawing to a close. Rains have ceased in late October in the north; they are still present in the south. Planted areas increased significantly from last year's level for all cereals. Harvesting of millet and sorghum is underway. The second maize crop is developing satisfactorily in the south.

Reflecting increasing planted areas and generally adequate growing conditions, harvest prospects are favourable. The overall food supply situation is satisfactory. Prices of cereals decreased somewhat with the arrival of fresh products on the markets. 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 (6 November)

Following generally adequate rains since the start of the rainy season, below-normal rainfall in August over the eastern half of the country affected crop development. Cumulative rainfall is below average except in the west and the south-west. These dry conditions significantly reduced yield potential, notably in the centre and the east. Pastures remain generally adequate countrywide. No significant pest activity is reported.

A joint FAO/CILSS Crop Assessment Mission in mid-October estimated the 2000 cereal production at 2 286 200 tonnes, which is 15 percent below 1999 level and 6 percent below the last five years average. The overall food supply situation is likely to tighten in some areas, notably in the centre and the east where cereal production decreased significantly. However, farmers stocks are generally well replenished following 1999 record crop.

CAPE VERDE (6 November)

Unfavourable growing conditions in August or early September affected recently planted maize crops. However, crop conditions improved significantly with heavy rains received in late September and October on most islands. A joint FAO/CILSS Crop Assessment Mission in late October estimated the 2000 maize production at 18 500 tonnes, which is significantly below 1999 record crop but remains well above average.

Following two successive good harvests, the overall food supply situation is satisfactory. However, local production covers only about a quarter of consumption requirement and the country relies on imports and food aid to cover its needs. With available stocks and planned commercial imports or food aid for next months, markets should remain well supplied and prices remain stable. As of mid-October, 72 000 tonnes of food aid had been pledged and 42 000 tonnes had been received.

CHAD (6 November)

Following generally above-average rains in July, precipitation decreased significantly in the Sahelian zone in August, improved in early September, except in the east of the Sahelian zone, and remained widespread but low during the second dekad, moving southwards during the third dekad and in early October. In the Sahelian zone, millet and sorghum suffered water stress and harvest prospects are not favourable. Pastures are starting to dry up in the Sahelian zone. Grasshopper attacks have been reported in several regions. Grain eating birds caused some damage to millet and maize in Guéra prefecture. No Desert Locust activity is reported, while some Migratory Locusts have been reported in Ati area along the Batha river.

A joint FAO/CILSS Crop Assessment Mission in late October estimated the 2000 cereal production at 890 000 tonnes, which is 28 percent below 1999 record level and 16 percent below the last five years average. Following this reduced harvest, the food supply situation is likely to tighten, notably in the structurally deficit zones of Batha, Biltine, northern Guéra, Kanem, Lac, Logone, western Mayo Kebbi, central Moyen Chari and Ouaddaï. However, following 1998 and 1999 above-average harvests, farmers could replenish their stocks.

COTE D'IVOIRE (6 November)

Following widespread and abundant rains in mid-September, precipitation decreased in late September and early October but improved in mid-October. In the south, the second maize crop is developing satisfactorily. In the north, millet and sorghum are now being harvested. Harvest prospects are generally favourable

Following an above-average cereal harvest in 1999, the overall food supply situation is satisfactory. However, recent civil disturbances affected marketing activities. Substantial quantities of rice, exceeding average annual imports, have been received. Some 86 000 Liberian refugees and 1 500 Sierra Leoneans remain in the west.

THE GAMBIA (6 November)

Cumulative rainfall this year has decreased compared to 1999 but rains were better distributed. Pest infestation remained limited. A joint FAO/CILSS Crop Assessment Mission estimated the 2000 cereal production in mid-October. The total harvested area under cereal is estimated at 137 979 hectares representing a 19 percent increase from last year and 32 percent above the last five year average. Overall yields are expected to increase from last year level by 5 percent for late millet and by 2 percent for swamp rice. By contrast, they decreased for sorghum. The total production for cereal is estimated at a record of 174 000 tonnes representing an increase of about 15 percent compared to last year and 46 percent from the last five years average.

Following two successive record crops in 1999 and 2000, the overall food supply situation is satisfactory. In spite of the increase in food production, two risk zones have been identified : Lower Rived Division (LRD) (Jarra East and Jarra Central) and Central River Division (CRD) North (all the five districts : Lower and Upper Saloun, Nianija, Niani and Sami) will have a short fall of food due to blister beetles and striga infestations in the fields. Poor germination of groundnut due to high infestations of seeds at storage level also resulted in decreasing groundnut production.

GHANA (6 November)

Following widespread and above-normal rains in early and mid-September, precipitation decreased in late September and early October but improved in mid-October. Rains ceased in the north in late October. They remained widespread in the centre and the south. The second maize crop developing satisfactorily in the south. Millet and sorghum are being harvested in the north.

Following a reduced harvest in 1999 and poor crop prospects this year, the food supply situation is tight in some areas. 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 (6 November)

The evolution of the rainy season has been somewhat irregular this year. 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, decreased in early September, notably in the east, and improved in mid-September. Again in October, rains were well below average in early October and became very strong in mid or late October. Coarse grains are generally developing satisfactorily although flooding may have occurred in some areas.

Reflecting good harvest prospects and following a record crop in 1999, the overall food supply situation is satisfactory. Markets are well supplied both in urban and rural areas. **However, recent rebel incursions in Guinea from Sierra Leone have severely affected agriculture and marketing activities, notably in the Guinea Forestière region. More than 400 000 refugees from Liberia and Sierra Leone remain in the country, located mainly in Gueckédou, Forécariah and N'Zérékore areas. They are receiving food assistance and are considered at moderate nutritional risk. Six sites for new camps have been proposed to shelter some 125 000 vulnerable refugees from Sierra Leone and Liberia camped in border areas.**

GUINEA-BISSAU (6 November)

Precipitation seasonably decreased in late September/early October but well abundant and above-normal rains have been registered countrywide in mid-October, benefiting the rice crop. Coarse grains are now being harvested in the east and the north and the rice crop is developing satisfactorily in the swamp rice fields. Pastures are abundant. The pest situation remained mostly calm, but some insect attacks have been reported locally.

A joint FAO/CILSS Crop Assessment Mission in mid-October estimated 2000 cereal production at 168 000 tonnes which is 21 percent above the previous year's level and is close to the pre-crisis level of 1997. The overall food supply situation is satisfactory. Markets remain well supplied and prices are stable. However, some population groups with low purchase power are facing food supply difficulties, notably in urban areas.

LIBERIA* (6 November)

Rainfall was below normal from mid-August to early October, although it was widespread. However, above-average rains were received countrywide from the second dekad of October. With the exception of Lofa County, relative peace in most areas has facilitated farming. The rice crop, the main staple, is generally developing satisfactorily and cultivated areas are anticipated to have increased. A GIEWS Crop and Food Supply Assessment Mission will visit the country in late November/early December to estimate 2000 crop production and assess the current food supply situation.

Fighting in northern Lofa County intensified in October and displaced thousands of people, notably in the towns of Gorlu, Ganglota and Selayae, many of whom need humanitarian assistance. Security remains precarious. WFP is distributing food aid to about 420 000 Liberian returnees. It is estimated that about three quarters of Internally Displaced Persons have returned home while the remaining quarter settled where they were. UNHCR is also assisting 33 000 Sierra Leonean refugees in camps in Montserrado and Sinje areas in Grand Cape Mount County.

MALI (6 November)

Rains were generally well distributed and regular in June, July, August and September over the main producing areas. Pastures are generally abundant. Grain-eating birds were reported in the rice producing areas along the Niger river and treatments have been undertaken. Grasshopper attacks were also reported locally. Desert Locusts were seen in western Adrar des Iforas mainly between Tessalit and the Algerian frontier during September and in western Adrar des Iforas in early October. Several swarms could start to form and, as conditions are beginning to dry out, they may move north into southern Algeria or north-west into northern Mauritania.

A joint FAO/CILSS Crop Assessment Mission in late October estimated the 2000 cereal production at 2 386 300 tonnes. This is 17.5 percent below last year's record (2 893 600 tonnes) but remains very close to the last five years average. Following two successive bumper crops in 1998 and 1999, farmers stocks have been well replenished. They were estimated by the statistical services at

520 000 tonnes. The national security stock is also at its recommended level of 35 000 tonnes (plus 25 000 potential tonnes with the "financial" security stock). With traders and other organisations stocks, there was a stock of more than 3 months of consumption needs before this year's harvest. Therefore, the overall food situation is satisfactory. However, some areas may be at risk of food shortages following poor harvests, notably in Mopti, Gao, Kidal, Tombouctou et northern Ségou regions. Prices of cereals are likely to increase in these areas due to lower production and stronger demand from neighbouring Burkina Faso and Niger which gathered lower crops than in 1999.

MAURITANIA (6 November)

Following generally widespread and above-normal rains in July and August, growing conditions were favourable for rainfed crops. Unusual substantial late rains were registered in mid-October. Prospects for off-season recession crops are less favourable than last year as dams are not fully filled and the Senegal river reached a lower level this year. Irrigated rice has been planted with some delays in Brakna and Gorgol but production should recover from last year when large areas were flooded in the lower Senegal river valley.

Pastures are good to excellent countrywide but are starting to dry up. Grasshopper attacks have been reported but mainly on pastures. Treatments have been undertaken against grain eating birds, notably in Trarza. Low numbers Desert Locusts were present and breeding during October in parts of Trarza, Brakna, Tagant, and Inchiri. By the end of the month, several dense patches of hoppers were found in southern Adrar and bands were reported from Trarza. Ground teams initiated control operations. Hoppers will continue to form groups and small bands during November primarily in Trarza and southern Adrar but this could extend to parts of Brakna, Tagant and Inchiri and small swarms are likely to form. Once vegetation starts to dry out, they are likely to move northwards into Inchiri, Adrar and Tiris-Zemmour. Several swarms which appeared recently in Mali may also move into northern Mauritania.

A joint FAO/CILSS Crop Assessment Mission in mid-October estimated the 2000 cereal production at 170 000 tonnes, which is 12 percent below last year's level and 3 percent below the average of the last five years.

The food situation improved in rural areas following a favourable harvest in rainfed areas in 1999. Markets are well supplied. However, some populations remain vulnerable, notably in some areas of Aftout and Affolé, Tagant, southern Assaba and the two Hodhs.

NIGER (6 November)

Widespread and regular rains during the first half of the rainy season were followed by significant decreases in late August and early September. However, precipitation improved in mid-September and remained normal to above normal in late September. The dry spell severely affected crops notably in Diffa, Tahoua and Tillabery departments. Infestations of grasshoppers have been reported in various areas, notably in Diffa, Dosso, Maradi and Tahoua departments. Treatments against grasshoppers and grain eating birds have been undertaken. Low numbers of Desert Locusts were present during September near In Abanrherit, in Tamesna.

A joint FAO/CILSS Crop Assessment Mission in mid-October estimated the 2000 cereal production at 2 319 000 tonnes, which is 19 percent below 1999 level and about 3 percent below the average of the last five years. Following two bumper harvests in 1998 and 1999, farmers could replenish their stocks and the national security stock has been partly reconstituted. However, prices are likely to increase significantly and the food supply situation will tighten following poor harvests in some areas.

NIGERIA (6 November)

Following widespread and regular rains since early July, precipitation decreased in the north in September and ceased in mid-October. Strong rains were still registered in the south in October

benefiting the second maize crop. Coarse grains are being harvested in the north. Reflecting generally favourable growing conditions during the rainy season, an average to above-average harvest is anticipated.

The overall food supply situation is satisfactory. Some population, however, remain vulnerable following flooding in Sokoto area in the north-west.

SENEGAL (6 November)

Following abundant rains in late July and early August which caused localized flooding, precipitation decreased in mid-August. Rains picked up and remained widespread over the entire country in September and early October. Well above normal late rains were registered during the second dekad of October. Cumulative rainfall is generally above normal. Reflecting these good rains, crop conditions remained generally satisfactory. Pastures are abundant. Grasshopper attacks have been reported in the north and centre-north and treatments have been undertaken.

A joint FAO/CILSS Crop Assessment Mission in October estimated the 2000 cereal production at 1 041 000 tonnes which is about 10 percent above average. Following two successive bumper harvests, the overall food situation is satisfactory. Markets are well supplied. The price of millet and sorghum decreased following harvest while the price of rice remains stable.

SIERRA LEONE* (6 November)

Following below-normal rains from late July to mid-August, precipitation improved in late August, decreased in early September but again improved in mid and late September. In October, below-normal rains were recorded during the first dekad, but became particularly abundant countrywide during the second and third dekads, benefiting rice crops, the main staple. However, a reduced harvest is anticipated as planted areas are likely to be significantly below last year's level due to a resurgence of civil strife in early May, the critical planting period. Due to insecurity, input distribution and relief operations were suspended or seriously disrupted, notably in the north. The security situation improved from June/July but remains tense and fighting along the border with Guinea and Liberia recently intensified. The villages of Kaseri, Tumbu and Kichum were particularly affected, resulting in new waves of population displacement. Attacks were reported in Batkanu, North East of Port Loko, and in villages North East of Yele. Villages along the border and refugee camps in Guinea remained inaccessible to humanitarian agencies due to insecurity. A new ceasefire, starting on 10 November, has recently been agreed by Government and Revolutionary United Front and should allow the United Nations Mission in Sierra Leone to deploy freely countrywide and the disarmament process, launched by the Lome agreement in July 1999 but halted by fighting in May 2000, to resume

With the rainy season, the food supply situation has deteriorated as many areas are inaccessible due to transport problems. In addition to the Internally Displaced Persons already registered, new IDPs have been registered in the south and the west following the upsurge of fighting in May and more recently in October. About half a million persons had been displaced and are being hosted by local communities in government controlled areas, while it is estimated that 1 million persons have been affected by the war in rebel controlled areas. More than 400 000 Sierra Leonean refugees remain in neighbouring West African countries, mostly in Guinea and Liberia. Despite the hostilities, WFP and NGOs continue food distributions. More than 22 000 returning refugees from Guinea and people who fled fighting in Kambia District returned home. Some are receiving food aid in Lungi, north of Freetown. The country will continue to be dependent on external food aid in 2001.

TOGO (6 November)

Following generally widespread precipitation during the rainy season, except in mid-August, rains ceased in late October over the northern half of the country. In the south, the second maize crop is developing satisfactorily. In the north, coarse grains are being harvested.

Following a record cereal harvest in 1999, the overall food supply situation is satisfactory. However, people affected by floods in various areas remain vulnerable.

CENTRAL AFRICA

CAMEROON (6 November)

Following generally abundant and widespread rains, precipitation ceased over the northern half of the country from early October but remained by contrast well abundant over the southern half. Coarse grains have been harvested in the north. The maize crop is developing satisfactorily in the south.

The overall food supply situation is satisfactory. 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 (6 November)

Following generally widespread and abundant rains during the rainy season, precipitation started to decrease in mid-October from the north towards the south. Harvesting of coarse grains is underway and prospects are favourable.

Following successive good harvests, 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* (8 November)

The food supply situation continues to deteriorate with the persistent civil war that has disrupted all economic and agricultural activities and displaced some 1.8 million people.

In reaction to this mounting economic and food security crisis, the Government of DRC requested FAO to send a mission to assess the food situation in the capital city, Kinshasa, and the surrounding provinces of Bas-Congo and Bandundu, which supply a significant proportion of the city's food requirements. An assessment of the situation for the whole country could not be undertaken due to the on-going war.

The FAO Mission visited the country from 20 September to 10 October 2000. From an analysis of the available data on domestic food supply and requirements, the Mission estimated Kinshasa's food deficit in 2000 at 1 million tonnes compared to 954 000 tonnes in 1999. Food aid currently being provided targets the most vulnerable groups such as children and the war-displaced people, while the hungry poor must fend for themselves. Coping mechanisms such as eating less food, having fewer meals and growing vegetables in household compounds have been stretched to the limit. 70 percent of the population, which is currently estimated at between 6-7 million, cannot afford US\$1 a day for food. Chronic malnutrition affects 18 percent of children in the inner city and over 30 percent in the outskirts where war-displaced people have been settling.

The main factors constraining food supply to Kinshasa include the extreme state of disrepair of the road infrastructure, particularly the Kinshasa-Matadi and Kinshasa-Kikwit

roads, as well as feeder roads; police/military harassment of shippers, traders and farmers; the cut-off of food supply from Equateur and Eastern Provinces due to the ongoing war; the scarcity of fuel due to a shortage of foreign exchange; and the overvalued official exchange rate which is pushing business transactions to the parallel market.

The Mission recommended that the Government move to enforce its directives against police/military harassment and illegal levies at road check points, ports and market places. Secondly, it should unify the official and parallel exchange rates by devaluation of the Congolese franc. This should result in increases in tax revenues and supply of hard currency in the banking system, and hence the supply of currently scarce imported commodities such as fuel.

While revamping the whole transport infrastructure is a long term endeavour, donors should assist the Government to urgently repair critical sections of main roads leading to Kinshasa, with priority given to the Bangu-Tumba section (109 km) on the Matadi road, and the Mosango-Masimanimba and Kwango-Kenge sections totalling 80 km on the Kikwit road. This will be a major step towards restoring the normal flow of foodstuffs to the capital. In addition, assistance to provincial authorities and local communities for feeder road maintenance should be substantially increased.

The international community should also urge the Government and rebel groups in the ongoing conflict to establish humanitarian corridors, which would allow a resumption of food and other trade between Kinshasa and the eastern and northern provinces. For Kinshasa, the establishment of such a corridor with Equateur Province would have immediate beneficial effects on food supply as considerable stocks of cassava, maize and palm oil are reported to be available in that province.

CONGO, REP OF* (6 November)

Abundant and widespread rains in October benefited crops, except in the coastal areas. Following the December 1999 ceasefire between the government and opposition parties, the security situation improved and all areas are now accessible to humanitarian assistance, except for those in the north hosting DRC refugees. The bulk of the estimated 810 000 people displaced by the war have returned to their homes. The overall food supply situation improved significantly, notably in urban areas. However, the agriculture sector has yet to recover.

There are about 100 000 refugees from the Equateur province in DRC in northern areas, notably in Betou, near the border with the Central African Republic. There are also 5 000 Rwandan refugees and 8 000 Angolan refugees. WFP is providing food to some 120 000 persons in Brazzaville, Pointe Noire and other main towns. WFP recently launched a new Emergency Operation to assist 50 000 refugees from the DRC over a period of 6 months.

EQUATORIAL GUINEA (6 November)

Following mostly seasonably dry weather in July and August, rains resumed in September and became well above normal in October. 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 (6 November)

Following mostly seasonably dry weather in July and August, rains resumed in early September and became abundant and widespread in October. 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* (8 November)

Good rains from the second half of October, which followed five months with virtually no rains in most growing regions, improved soil conditions for sowing of the 2001 crops season and provided relief to early planted and perennial crops. However, the rains may have arrived too late to avoid reductions in plantings, which normally are completed by the end of October. Shortages of seeds, following a succession of reduced harvests, are also negatively affecting field operations.

The food supply is tight following a sharply reduced pulses and cereal harvest of the 2000 B season. International food assistance is being distributed to a target population of 700 000 people, including those affected by a poor harvest, the displaced persons and the most vulnerable population. The outturn of the current season will be crucial to the food supply in the country in the first half of 2001.

ERITREA* (6 November)

Despite favorable rains in September and October in some regions of the country, mainly Debub and Gash Barka, prospects for 2000 main season cereal and pulse crops for harvest from November are bleak, due mainly to the displacement of hundreds of thousands of farmers by war with neighboring Ethiopia. In addition, official government meteorological sources indicated that there was a decrease in the spatial distribution of the rainfall throughout the country during the rainy season. This was aggravated by the unseasonable rainfall during early November, which has had a potential negative effect on the current harvest. Gash Barka and Debub administrative zones (Zobas), which are the country's main grain producing areas, normally supplying 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. 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.

The food situation of more than 1.5 million people displaced/affected by war gives cause for serious concern. The failure of rainy seasons in Anseba, Northern Red Sea and Southern Red Sea administrative zones has also severely affected nearly 340 000 people.

In October, WFP distributed a total of 15 871 tonnes of food to 808 822 war and drought affected people. In June 2000, FAO and WFP jointly approved an Emergency Operation, EMOP6044.01 "Food Assistance to war affected populations in Eritrea" for a total of 151 080 tonnes of food for the period 1 May 2000 to 30 April 2001. This complemented an Emergency Operation, EMOP 6227.00 "Assistance to victims of crop failure and drought in Eritrea" for a total of 19 390 tonnes of food for the period 1 April to 31 December 2000 approved jointly by FAO and WFP on 10 April 2000.

ETHIOPIA* (6 November)

Good rains in September and October in several parts of the country have helped maturing crops in important cereal producing areas of central, northern and western parts of the country. However, cereal production in eastern and southern parts has been affected by continued drought conditions. The 2000 secondary "Belg" crop, normally harvested from June, has also 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. An FAO/WFP Crop and Food Supply Assessment Mission is planned to visit the country from mid-November to assess the "Meher" production and estimate food assistance requirements in 2001.

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 836 000 tonnes has been revised upwards to 1.2 million tonnes. Total pledges by mid-November amounted to 1.32 million tonnes of which 794 000 tonnes have been delivered.

KENYA (3 November)

Harvesting of the 2000 main "long rains" cereal crops is complete in the main growing areas of the Rift Valley. The main rainy season (March-May), which normally accounts for 80 percent of total annual food production, has largely failed due to a severe drought. As a result, the country will need to import an estimated 1.4 million tonnes of cereals in 2000/01 marketing year (October-September) to maintain normal consumption requirements. Nearly 3.3 million people, mostly pastoralists in the northern and eastern parts of the country, need emergency food assistance. The severe scarcity of water and pasture has resulted in the loss of large numbers of their livestock. With limited foreign exchange resources, the country needs substantial international assistance to cope with the emergency.

Prospects for the 2000/01 "short rains" cereal crops in the bi-modal areas of the Western, Central and Eastern provinces, for harvest in February/March, are uncertain despite some recent good rains.

In June 2000 UN agencies appealed for US \$146 million to assist Kenya. The response has been favourable, but more is needed.

RWANDA* (8 November)

Sowing of the 2001 A season, normally from September to October, is delayed due to below-average precipitation in September and first half of October. Widespread abundant rains in the second half of October improved soil conditions for planting and provided relief to early-planted crops, particularly in eastern and southern parts affected by prolonged dry weather. However, shortages of seeds due to the loss of crops planted early in September, as well as cassava cuts due to the failure of the third 2000 C season, are likely to reduce the area planted. The rains from mid-October also benefited perennial crops such as banana and coffee which have been seriously affected by lack of precipitation since the early cessation of the 2000 B season rains in May, as the C season short light rains from mid- July to mid-August failed this year.

In the areas worst affected by the prolonged dry weather, including districts of Butare Gitarama, Kaibungo and Umutara prefectures, as well as the Bugesera region of Kigali Rurale Prefecture, the recent rains were too late to avoid serious reductions in yields of banana, coffee and cassava, as well as the loss of large numbers of livestock. In some areas of the Umutara Prefecture, the losses of bovines are estimated at 25 percent of the total heads. Prices of livestock have declined sharply reflecting distress sellings. The food situation in these areas gives serious cause for concern. A local Ministry of Agriculture/FAO/WFP/FEWS/ EU assessment Mission in late October estimated at 267 000 the number of persons most affected by the dry weather and in need of food assistance for the next three months. This number represents 22 percent of the population in the affected districts. The mission also recommended the distribution of agriculture inputs to assist farmers to recover their production capacity and restock the lost animals. Overall, the Government has requested international emergency assistance for a value of US \$ 7 215.

SOMALIA* (6 November)

Harvest of the main season ("Gu") crops, recently completed, is satisfactory. The season's cereal production, estimated at 212 000 tonnes, is about 22 percent above the post-war (1993-1999) average. 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 their farms and facilitated farming activities. However, poor harvests are anticipated in some pockets of Gedo, Lower Juba and Middle Juba Regions due to erratic and insufficient rains.

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

Elsewhere, in north-western Somalia (Somaliland) the food situation is precarious 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, mainly camels, to Ethiopia and other regions is reported.

A UN Inter-Agency appeal was launched in July 2000 for about US\$15.6 million to assist some 750 000 vulnerable people in Somalia. Total pledges for the 2000/01 marketing year amounted to 24 000 tonnes, of which 19 000 delivered so far.

SUDAN* (6 November)

A recent FAO/WFP Crop and Food Supply Assessment Mission to southern Sudan estimated a deficit in cereal production, particularly in North Bahr el Ghazal, Bahr el Jebel, East Equatoria, Jonglei and Juba. However, some surplus production was noted in West Equatoria, Lakes and West Bahr el Ghazal.

In central and northern Sudan, harvesting of the 2000 main season cereal crops is about to start. Despite a late start to rainfall, overall harvest prospects have improved with prolonged rains. An FAO/WFP Crop and Food Supply Assessment Mission is planned to visit the northern parts of the country from mid-November to assess the 2000 main season cereal production and estimate overall commercial imports/exports and food aid requirements in 2001.

TANZANIA (6 November)

Planting of the 2001 main season cereal crops in the unimodal central and southern areas, as well as that of 2000/01 short season ("Vuli") crops in bi-modal northern areas, is underway. Generally below-normal rains in October have caused moisture stress, particularly for earlier planted crops.

The 2000 cereal crop, mainly maize, is estimated at about 3.5 million tonnes, nearly 20 percent below the previous five years average. The decline is attributed to drought conditions in several parts of the country. As a result, the cereal import requirement is currently forecast at 690 000 tonnes. However, the overall food supply situation has improved due to large maize imports which have led to marked declines in food prices. Despite reduced pasture, livestock conditions are reported to be good.

Food assistance is required for about 800 000 people identified as food insecure, mainly in the regions of Dodoma, Mara, Shinyanga, Singida, Tabora, Tanga and southern Mwanza, all of which have now suffered their third consecutive poor harvest.

UGANDA (6 November)

Harvesting of the 2000 main season cereal crop is complete. 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 due to recent beneficial rains.

Prospects for the 2000 second season food crops, to be harvested from next January, have improved with recent good rains.

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 also continues to be needed for nearly 112 000 people in Bundibugyo District, in the west, displaced by civil unrest.

SOUTHERN AFRICA

ANGOLA* (6 November)

Planting of maize is well advanced while that of sorghum and millet has started. Above-average rains in the second and third dekad of October in the main central cereal growing areas improved soil moisture for planting and benefited early-sowed crops. However, more rains are needed in northern parts, where precipitation in the past months has been erratic.

The persistent civil conflict and increasing movement of populations continues to disrupt agricultural activities. The number of internally displaced, estimated by the end of June at 2.5 million, has increased in recent weeks with the growing insecurity, particularly in Moxico, Bie and Malange provinces. Malnutrition is reported to be on the increase in the town of Kuito which has received 8 740 IDPs only in the month of October.

The 2000 cereal production was estimated at 504 000 tonnes, a decline of 6 percent from the previous year mainly as a result of insecurity and irregular rains during the growing season. Cereal import requirements in marketing 2001 (April/March) have increased to 753 000 tonnes, including 333 000 tonnes of emergency food aid. Pledges as of early November amounted to 154 400 tonnes, of which 53 000 tonnes had been delivered.

BOTSWANA (6 November)

Normal to above-normal rains in the third dekad of October, which were particularly abundant in maize growing areas, encouraged land preparation and early sowing of the 2001 coarse grain crop.

The 2000 coarse grain output is officially estimated at 21 000 tonnes, only 11 percent higher than the reduced level of the previous year. Despite an increase of 20 percent in the area planted, production was affected by excessive rains and floods during the growing season. Cereal imports in the year ending March 2001 are estimated at 250 000 tonnes, to be covered by commercial imports.

LESOTHO (6 November)

Harvesting of the 2000 wheat crop has started. Latest forecast point to a crop of 21 000 tonnes, substantially above the poor output of last year but still below average due to reduced plantings.

Above-average rains in the third dekad of October, following dry weather in previous weeks, improved soil moisture for planting of the 2001 coarse grains and benefited early sowed crops.

As a result of unfavourable weather, the 2000 coarse grain production declined 18 percent to a below-average level of 127 000 tonnes. Cereal import requirements in marketing year 2001 (April/March) are estimated at 190 000 tonnes of maize and 55 000 tonnes of wheat. The bulk of these imports is anticipated to be covered commercially

MADAGASCAR (6 November)

Above-normal rains in northern and central parts in the third dekad of October provided adequate soil moisture for planting of the main 2001 paddy crop. However, the southern maize growing areas remain dry. More rains are needed in these parts to avoid reduction in the area planted.

The 2000 cereal crop season was negatively affected by three cyclones during the growing season and severe drought in southern parts. Paddy output was estimated close to 2.2 million tonnes, 15 percent less than the good crop of 1999. Maize production declined 22 percent to 140 000 tonnes.

The overall food supply situation is tight reflecting the reduced 2000 harvest. Import requirements in marketing year 2001 (April/March) have increased considerably to 518 000 tonnes, most of which is expected to be covered commercially. The situation is particularly difficult in the vulnerable southern region, where 240 000 people who lost their crops to dry weather are estimated in need of food assistance. In this region, prices of basic staple maize, rice and cassava have increased sharply in the past months and are well above their levels of last year. Distress selling of livestock and movements of population in search of food and labour opportunities are reported in some districts.

MALAWI (6 November)

Planting of the 2001 maize crop is underway. Good and timely rains in the third decade of October, which followed light precipitation in previous weeks, benefited planting operations and early planted crops. Rains were particularly abundant in southern parts. Early prospects are favourable.

A bumper cereal harvest was obtained in 2000 reflecting good rains during the season and support to farmers through inputs distribution programmes. Maize production was estimated at 2.47 million tonnes, almost unchanged from the record level of the previous year. Following two consecutive above-average crops, the overall food supply is satisfactory. Export availabilities are estimated at 300 000 tonnes of maize. Prices of maize have declined and are one-third below their level of a year ago.

MOZAMBIQUE (8 November)

Above-average rains in the third dekad of October, particularly in the main central and northern growing areas, provided adequate soil moisture for planting of the 2001 cereal crops and benefited early-sowed crops. In southern provinces, where planting starts earlier, good rains in the second half of September and early October favoured field operations. The rains of the past months also benefited pastures and livestock conditions.

The overall food supply situation is satisfactory. In the main growing areas of the north and centre, prices remain stable and are below their level of a year ago. In southern areas affected by severe

floods earlier in the year, a good output of the secondary crop season and the rehabilitation of most roads, have improved significantly supply and marketing of food. **However, food assistance is still required until the next main harvest in April 2001 for some 172 000 food insecure people, including those most affected by the flood damage.**

NAMIBIA (6 November)

Normal to above-normal rains in the third dekad of October in eastern and northern parts favoured land preparation for planting of the 2001 coarse grain crops and benefited pastures conditions.

Harvest of the 2000 irrigated wheat is almost completed. The output is preliminary estimated at 4 000 tonnes, against 5 000 tonnes last year, as a result of a reduction in the area planted. By contrast, the 2000 coarse grain production increased sharply to 136 000 tonnes, comparing with a reduced level of 70 000 tonnes last year, reflecting abundant rains during the growing season. As a result of the 2000 bumper cereal crop, the food supply situation is satisfactory. Cereal import requirements in marketing year 2001 are estimated to be lower than last year at 60 000 tonnes of maize and 50 000 tonnes of wheat. These requirements are anticipated to be covered commercially.

SOUTH AFRICA (8 November)

Harvesting of the 2000 wheat crop is well advanced. Latest production forecast have been revised upwards to 1.9 million tonnes, 22 percent above the poor crop of last year. At this level, however, production is still below average mainly as a result of reduced plantings.

Planting of the 2000/01 maize crop is underway. Normal to above-normal rains in October, particularly in the maize belt, have favoured field operations so far. However, the area planted is expected to decline in response to low domestic prices. Early official forecast point to a decrease up to 25 percent from last year's level but this decline could be lower than anticipated reflecting increasing future prices.

Final official estimates indicate an above-average 2000 maize crop of 10.2 million tonnes, 42 higher than in the previous year. Despite severe floods in parts, abundant rains in the main growing areas resulted in increased yields. Export availability is estimated at about 2 million tonnes. Reflecting the bumper crop, prices of maize have declined to their lowest level since 1996.

Following an outbreak of foot-and-mouth disease, the Government has declared several quarantine zones in an attempt to control the expansion of the disease.

SWAZILAND (8 November)

Good rains in October provided adequate soil moisture for planting of the 2001 coarse grains crops, mainly maize, which is well advanced. Early prospects are favourable.

A late start of the rainy season, followed by excessive precipitation, resulted in a sharply reduced 2000 maize production. Latest estimated put the output at 72 000 tonnes, 36 percent lower than the previous year's level and below average. Import requirements of maize in marketing year 2000/01 increased substantially to 40 000 tonnes. In addition, the country has a structural deficit of 40 000 tonnes of wheat and minor quantities of rice. These requirements are expected to be covered on commercial basis. The overall food supply situation is expected to remain satisfactory in 2001. However, it is estimated that 14 000 people who gathered a reduced crop this year are in need of emergency food assistance until the next harvest.

ZAMBIA (6 November)

Harvesting of the minor wheat crop is under way. Latest forecast indicate an output of 90 000 tonnes, unchanged from last year's good level.

Rains in the third dekad of October, which were above average in central parts, favoured planting of the 2001 maize crop, and benefited early-sowed crops.

Reflecting abundant rains during the growing season, and despite severe localized floods, the 2000 cereal production increased 43 percent from last year to 1.5 million tonnes. The main maize crop is estimated at an above-average level of 1.3 million tonnes, which entirely covers domestic requirements. Following three years of reduced harvests and high import requirements, no imports of maize are expected in marketing year 2001 (May/April).

As a result of the bumper 2000 cereal harvest, the overall food supply is satisfactory. Markets are well supplied. Prices of maize and have declined since May and are below both the last year and average levels.

ZIMBABWE* (6 November)

Harvesting of the 2000 irrigated wheat crop is underway. Latest forecast points to a crop of 250 000 tonnes, one-quarter below the good level of last year. The decline in production reflects a reduction in the area planted due to agricultural disruption following the Government's programme to resettle over half the large-scale commercial farms, which entirely produce the wheat crop. However, despite the anticipated fall in production, import requirements in 2000/01 are likely to be lower than anticipated reflecting large carryover stocks due to increased imports in past months.

Planting of the 2001 main maize crop has started. Good and timely rains in the third dekad of October have provided adequate soil moisture for planting operations. However, prospects are gloomy reflecting an anticipated reduction in the area planted in the commercial sector, where farms designated for resettlement are facing difficulties in obtaining production loans from credit institutions. Planting reductions are also anticipated in the new settled farms due to lack of agricultural inputs and technical services. In general, a sharp increase in the price of fertilizers, seed and fuel will adversely affect the area planted. A reduced maize production in 2001 will result in large import requirements next year at the time the country experiences severe shortages of foreign exchange. The 2000 maize crop is officially estimated at 2.04 million tonnes, 34 percent higher than the reduced crop of last year and above the average level. This mainly reflects abundant rains during the growing season. As a result of the good harvest and large carryover stocks, no imports of maize are required in marketing year 2000/01 (May/April).

Despite an overall satisfactory food supply, the continued devaluation of the local currency couples with shortages of fuel has resulted in a sharp increase in prices of basic commodities. Prices of bread, sugar, cooking oil and maize meal further increased in October leading to food riots in the capital Harare and other cities in mid-October. Food access is becoming increasingly difficult for large sections of urban population, but also for those in rural areas who gathered a reduced harvest, as well as for about 220 000 agricultural workers who are losing their wages as a result of the resettlement of the commercial farms.

ASIA

AFGHANISTAN* (6 November)

A very serious food crisis has emerged in Afghanistan following two consecutive years of drought and the continuing civil conflict. The 2000 drought has decimated crops and livestock across the country, with more than 3 million people severely affected. In addition, intensified civil conflict, particularly in northern parts, has resulted in fresh waves of population displacement, aggravating the precarious food situation. Large-scale movement of people, particularly from remote districts in Ghor, Badghis and Faryab Provinces has already begun with destitute households now being accommodated in camps at the edge of Herat, the main urban centre in the west. Nearly 2 000 households are reported to be in

these camps with more expected in the coming months. In Dari Suf in southern Samangan, a number of starvation-related deaths have been reported.

An FAO/WFP Crop and Food Supply Assessment Mission which visited the country earlier this year warned of the emergence of a serious food crisis in the country due to severe drought and continuing economic problems. The Mission estimated total cereal production in 2000 at 1.82 million tonnes, about 44 percent below 1999 and 53 percent compared to 1998. Cereal import requirements in the 2000/01 (July/June) marketing year, estimated at a record 2.3 million tonnes, are more than double the 1999 estimated volume of 1.1 million tonnes. With commercial cereal imports anticipated at about 1 million tonnes, and pledged emergency food aid at 250 000 tonnes, there is a deficit of 1 million tonnes which needs to be covered by additional food aid. Low precipitation last winter and insufficient vegetation growth in most highland pastures in the western and southern regions during the spring have resulted in extremely high losses of livestock for the nomadic population. In many areas the selling off of livestock began with the drought last year. It is anticipated that households in most parts of the country will completely deplete their herds within the next few months, leaving families without breeding stock and draught animals, representing the loss of virtually all productive assets.

Millions of Afghans, both in rural and urban areas, have little access to food on the market as their purchasing power has been seriously eroded by severe crop and livestock losses and lack of employment opportunities within and outside agriculture. Since the beginning of the year, WFP has distributed some 110 000 tonnes of food to 2 million worst affected people, compared to 61 000 tonnes for the same period last year. At least 115 000 tonnes of food, valued at US\$ 54 million, are urgently needed to maintain the life-saving assistance, which includes running the bakeries in Kabul that feed 360 000 people every day.

Prospects for the winter cropping season, which normally starts in October/November, are not promising as the drought persists. Even if precipitation improves in the next few months, harvests will not be available until May/June 2001. But, if rains fail again the magnitude and dimensions of the food crisis would be enormous. In view of the rapidly deteriorating food supply situation, donors are urged to make additional pledges and to support speedy delivery and distribution of relief assistance, particularly during the coming harsh winter months. Urgent assistance is also required to provide seeds and feed for livestock. Of the nearly 300 000 tonnes of annual wheat seed required, there is currently a deficit of about 60 000 tonnes which means that an estimated 400 000 farmers will be missing the winter planting.

ARMENIA* (6 November)

Persistent hot and dry conditions this summer have resulted in a poor harvest, estimated at only 219 000 tonnes of grain, some 27 percent less than last year and below average. Crops in the Ararat valley, which had access to irrigation water, were satisfactory but elsewhere crops and pastures have been affected by drought, particularly in the northeast and in all upland areas. Output of potatoes, a major staple in upland rural areas could be reduced by more than half. Output of fodder crops and natural pastures for livestock grazing have 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.

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, both the cereal import requirement and the food aid requirement in 2000/01 will increase sharply. This is due to both lower cereal and potato production. 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 the reduced availability of other domestically produced food. Cereal imports are estimated at 515 000 tonnes, including 458 000 tonnes of wheat. Commercial imports are estimated at 370 000 tonnes in the current year, reflecting growing debt and severe budget constraints. Food aid needs are estimated at 145 000 tonnes, including 108 000 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 75 000 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. Under the ongoing Protracted Relief and Recovery Operation (PRRO) - 6120.01 covering the period 1 January 2000 to 30 June 2001, WFP provides assistance to a total of 170 000 vulnerable people. Out of that some 110 000 refugees and vulnerable persons are provided with relief food aid, while 60 000 are planned to be reached through community based food-for-work activities.

Under PRRO, WFP has expanded its FFW programme. While planned FFW participants account for approximately one-third of 170 000 target beneficiaries, their food allocation makes up two-thirds of the overall amount of WFP food aid for Armenia. FFW has substantially contributed to meeting the participants' immediate food needs, while at the same time improving their living conditions and longer-term food security.

WFP plans to provide targeted emergency food assistance to severely drought-affected regions in the northern parts of the country. The plan is to supply an estimated 297 000 subsistence farmers and other vulnerable households with 22 480 tonnes of iron-fortified wheat, vegetable oil and pulses from 1 November 2000 until 1 July 2001.

The combined outstanding tonnage of the planned EMOP and the ongoing PRRO amounts to more than 28 000 tonnes up to mid-2001 (22 480 tonnes of commodities under the EMOP and 8 000 under the PRRO).

AZERBAIJAN (6 November)

The outlook for the 2000 grain harvest has also been affected by the heatwave and dry conditions this summer. The bulk of cereals are sown in the winter. Indications are that spring planted crops, maize, cotton, fruit, vegetables and potatoes etc suffered from hot dry weather and shortages of irrigation water but that the winter wheat crop was satisfactory. While spring crop losses are officially put at about 25 percent, overall the aggregate cereal harvest is officially estimated at 1.4 million tonnes, higher than last year, reflecting a sharp increase in the area sown which partially offset drought losses. Other crops, including fodder, have been more seriously affected.

The bulk of the cereal import requirements 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 (6 November)

In late October storms and heavy rainfall again increased the risk of severe flooding, which are reported to have killed 20 people and left several hundred unaccounted for. Earlier, serious floods resulted in several hundred deaths and left thousands of people homeless

The Aus rice crop was affected somewhat by the earlier floods, as a result of which it remains uncertain whether the earlier forecast of 1.75 million tonnes will be met. The Aus crop is mainly planted in April/May for harvest around August. The main crop currently in the ground is the aman/monsoon paddy crop, which is normally planted in June/July for harvest from November. After completion of the Aman harvest the third of the country's rice crop the Boro crop is planted for harvest from April/May. Assuming favourable conditions for next year's Boro crop, milled rice production in 2000/01 is expected to be similar to 22.7 million tonnes in 1999/2000. Of this, around 45 percent each will come from the Aman and Boro crops and 10 percent from Aus rice. In 1999/2000, a combination of an increase in area planted, favourable weather and adequate input supplies, resulted in bumper rice (milled) production of 22.78 million tonnes, some 14 percent above the previous year.

The overall food situation remains satisfactory with adequate government food grain reserves. At the end of September there was a total of 1.17 million tonnes of grain in stocks including some 735 000 tonnes of rice and 439 000 tonnes of wheat in the Public Food Grain Distribution System.

CAMBODIA (6 November)

Following the worst flooding for decades the humanitarian and food supply situation still remains precarious. Some 184 people were killed and the overall damage is estimated at around US\$50 million. Recovery is likely to take considerable time as many areas still remain under water. Overall an estimated two million people were displaced by the floods. The worst affected areas for crops included Pursat - Kg. Speu - Kandal and Takeo, where several thousands hectares of rice fields were damaged or destroyed. Latest estimates indicate that 374 000 hectares of rice were damaged or destroyed. Emergency rehabilitation activities involving the distribution of rice seed is expected to restore about 70 000 hectares. As of the end of October, some 10 000 tonnes of rice seed had been distributed.

The country is normally prone to flooding during the rainy season during 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.

Harvesting of the main wet season rice crop should normally commence later this month. Although the target for 2000/01 was set at 4.2 million tonnes, it is unlikely that this will be met in view of the flood damage this year. 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.

In late September, the government requested additional emergency assistance to assist flood victims, whilst the United Nations launched an emergency appeal for US\$10.7 million at the beginning of October for 2.2 million of the worst affected people. To assess this year's rice harvest and review food supply prospects for the 2000/01 marketing year an FAO/WFP Crop and Food Supply Assessment Mission is planned to visit the country in early December.

CHINA (6 November)

At the end of October across northern parts of the country unseasonable rain enhanced soil moisture supplies for winter wheat but delayed harvesting of summer crops. Overall due to a reduction in area planted and serious drought this year, it is estimated that summer grain output dropped some 9 percent and the autumn grain output may drop by over 10 percent. As a result of the fall back in production the price of wheat and maize may increase further.

Overall paddy production in 2000/01 is currently forecast at around 189 million tonnes, some 10 million tonnes below 1999/2000. The current estimate is higher than the 186 million tonnes estimated earlier. Serious drought this year seriously affected summer grain production, particularly in important producing areas in the north. The estimate for 2000 wheat production remains at 101 million tonnes, compared to 103 million tonnes earlier. At this level production would be some 10 percent lower than average output during 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.

Overall grain output, including roots and tubers, is expected to be around 490 million tonnes this year, compared to 508 million tonnes last year.

CYPRUS (6 November)

Recent rains and cool weather have helped sowing of the 2001 wheat and barley crops. Aggregate cereal output in 2000 is estimated at 101 000 tonnes, some 20 percent below last year's crop but about average.

Imports of wheat in 2000/01 (May/April) are forecast at 95 000 tonnes, while aggregate imports of barley and maize are forecast at some 540 000 tonnes, unchanged from last year.

EAST TIMOR (6 November)

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. 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 utilisation 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. WFP continues to provide food assistance.

GEORGIA* (6 November)

Georgia faces a severe food crisis. Agricultural production in 2000 has fallen sharply because 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. By late October, some 115 000 tonnes of small grains had been harvested from 128 000 hectares, with yields of 0.9 tonnes a hectare compared to 2.3 t/ha last year. Grain production including maize in 2000 is provisionally estimated at 348 000 tonnes, including 93 000 (1999: 226 000) tonnes of wheat and 250 000 tonnes of coarse grains. At the forecast level, aggregate cereal output in 2000 would be only

44 percent of the estimated 1999 total cereal production and 52 percent of the average of the last five years.

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. 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.

With a minimum national cereal consumption requirement (including food, feed seed, losses) estimated at 1.09 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 76 000 tonnes. This leaves an uncovered deficit of 235 000 tonnes (124 000 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.

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 (6 November)

Although the overall monsoon rains were reported to be normal this year, the lack of monsoon rainfall in western and central parts will further affect food production, especially in the states of Gujarat, Rajasthan, central Madhya Pradesh and Maharashtra. The situation is more critical as the drought has occurred in the same parts of the country for the second year in succession. This has also affected water tables and water availability, which will also affect Rabi (winter) season planting. Last year, rainfall was some 16 percent below normal, whilst this year it is reported to have been 25 percent normal in affected parts. In Rajasthan, the drought has damaged over 50 percent of crop area. As crops fail, more and more people are migrating out to towns or having to resort to borrowing money.

The country has had to endure a succession of natural disasters this year including earlier drought and severe flooding in a number of states, which left many dead and thousands homeless. Recent reports indicate that summer (kharif) grain production will be around 102.7 million tonnes, some 1.2 million tonnes lower than expected due mainly due to heavy floods in West Bengal and Bihar and severe drought in Gujarat. Kharif rice (milled) production is expected to fall to around 74 million tonnes compared to 76.3 million tonnes last year. Production of kharif coarse cereals will also be lower than last year.

Following bumper harvests the overall grain situation remains satisfactory, with Government grain stocks on October 1 at 40 million tonnes (26.8 million tonnes of wheat and 13.2 million of rice). Around 22 million tonnes are the desired stock level. 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.

INDONESIA* (6 November)

Scattered rain in October over the main producing areas of western Java, increased moisture supplies for main season rice transplanting. However dry weather in east Java, reduced moisture supplies. To coincide with the north east monsoon, the main rice crop will be planted during the period November to January for harvest in April to June next year.

The estimate for paddy production for the 2000 calendar has been revised up from around 50.5 million tonnes earlier, to 52 million tonnes, some 2 percent above last year and some 4 percent above the five year average. Higher production is attributed to a long wet season and only minor incidences of pests and disease. The area harvested remained around an average 11.6 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 overall food situation in the country continues to stabilise, 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. The country is also likely to receive a substantial aid package in support of economy recovery.

Despite a satisfactory situation overall, concerns remain for food security in parts of the country affected by civil unrest.

IRAN, ISLAMIC REPUBLIC OF (6 November)

In the last dekad of October light rain over the north west and locally heavy rain over the Caspian coast was received, which may have benefited wheat planting which should now be underway.

Successive droughts in 1999 and this year have seriously affected 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 was the worst since 1964 and 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, livestock and crops. The estimate of 2000 wheat production has been revised down to 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 27 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 essential for livestock, is also planted from September onward for harvest in March.

In the livestock sector, serious concerns persist as the situation is expected to worsen early next year, as the breeding herd will not recover, even if adequate rains are received. An estimated 800 000 animals died of starvation and disease. The tremendous pressure on water and other resources in rural areas is having a serious impact on vulnerable groups, 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 a drought year. The fall in wheat production this year 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. As serious drought has also affected neighbouring Afghanistan, there is still risk of increased numbers of refugees into the country.

IRAQ* (6 November)

Planting of the winter crops, which normally starts in the second half of October, is underway. However, production is likely to be constrained by the serious shortages of essential agricultural inputs. Two consecutive years of severe drought and inadequate

availability of essential agricultural inputs have seriously affected crop and livestock production. 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 for livestock. Cereal yields were reduced to all time low levels. As a result, total cereal production in 2000, estimated at some 796 000 tonnes, is about 47 percent below 1999 and 64 percent below the average of the past 5 years.

Cereal imports under the SCR 986 oil-for-food deal have led to significant improvements in the food supply situation. However, long delays in the flow of food imports continue to be reported. Also, despite significant increases in the food ration since SCR 986, child malnutrition rates in the centre/south of the country do not appear to have improved significantly and nutritional problems remain serious and widespread. The existing food rations do not provide a nutritionally adequate and varied diet. In spite of the fact that the ration is reasonably adequate in energy and total protein, it is lacking in vegetables, fruit, and animal products and is therefore deficient in micronutrients.

ISRAEL (6 November)

Planting of the year 2001 wheat and barley crops, to be harvested during April/May next year, is underway. Production of the wheat crop in 2000 was estimated at 50 000 tonnes, about 58 percent below average, due to the severe drought that affected several countries in the Near East. Imports of cereals in 2000/01 (July/June) are forecast at some 2.9 million tonnes.

JAPAN (6 November)

Moderate to heavy rain in the last dekad of October across southern parts slowed rice harvesting somewhat. Wide-spread rain earlier also hampered rice maturation. The rice crop in Japan is normally planted around June /July for harvest in October/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 (6 November)

Sowing of the 2001 wheat and barley crops, for harvest in May/June next year, is underway. Two consecutive years of severe drought have seriously damaged cereal and horticultural crops. In 2000, aggregate output of wheat and barley, estimated at 42 000 tonnes, was more than double last year's output, but still about 58 percent below average. The livestock sector was also affected and many sheep farms were seriously affected.

KAZAKHSTAN (6 November)

The harvest is virtually over and snow has set in. By 11 October, some 12.85 million tonnes of grain had been harvested from 12.2 million hectares (excluding rice. 78 000 hectares sown). This points to a cleaned weight total grain harvest of 11.7 million tonnes, less than last year's bumper 14.3 million tonnes but about average. In northern Kazakhstan, dry conditions from mid June to end July adversely affected crop yields. Wheat production is estimated to fall to 9.5 million tonnes from 11.2 in 1999 and coarse grain output is put at around 2 million tonnes (1999:2.8m.t)

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 of the order of 5 million tonnes. Russian import demand is less but other drought-affected countries in

the region have higher import needs. Some 350 000 tonnes have already been contracted each by Tajikistan and Belarus.

KOREA, DEMOCRATIC PEOPLE'S REPUBLIC OF* (6 November)

After two relatively stable agricultural years in 1998 and 1999, which saw moderate recovery in domestic food production following earlier disasters in 1995, 1996 and 1997, food production in 2000 has again slumped. This has been due to a combination of drought, at critical stages in the crop cycle, particularly planting, and the cumulative effect of underlying problems in agriculture which continue to constrain production heavily. Most important of these constraints has been the lack of electricity and fuel, which has greatly hindered irrigation and water delivery systems, resulting in lack of water in reservoirs and in the field at important times during the season. As a result of these factors there has been a sizeable reduction in rice and maize productivity and production.

This year's drought also affected neighbouring China and a number of other countries in central and south Asia and the Middle East. The knock-on effects, however, are perhaps more ominous in DPR Korea as the country can essentially produce food during only one season in the year (June- Oct.), has chronic input problems in the agricultural sector and is already in the midst of serious and persistent food shortages. Consequently, with no real possibility of enhancing food supplies significantly through domestic production till the next harvest in September/October 2001 and limited resources to import food commercially, the country appears to have little alternative other than to rely heavily on food assistance during the next 12 months, as it has done for the last five years.

A recent FAO/WFP Crop and Food Supply Assessment Mission, which visited the country in mid October, assessed that average rainfall during the 2000 season was well below average and only reached some 40 percent of norm during the critical months of June and July. In August there was some recovery in precipitation though the levels still remained almost 20 percent below average. The lack of rainfall and irrigation water at critical junctures in the season, resulted most seriously in delays in planting main season rice and maize; a sizeable reduction in the area under rice from 580 000 to 535 000 hectares, due to crop substitution and, hence, a notable fall in yields and output.

Based on the information provided and its assessment, the mission estimates 2000 paddy production at 1.69 million tonnes, around 31 percent or 734 000 tonnes lower than the FAO/WFP estimate of production in 1999. Maize production is estimated to have fallen to around 1 million tonnes, some 235 000 tonnes lower than the mission estimate of production last year. As a result of crop substitution of 45 000 hectares from rice to other crops, 65 000 tonnes of other cereals (sorghum and millet) were also produced this year, up from around 20 000 tonnes in 1999. In addition to this year's main cereal harvest, food supply prospects in 2000/01 will also depend considerably on the output of next year's potato and double crop barley and wheat crops. Although only a tentative forecast at this stage, based on target areas, production of these crops is forecast at 1.87 million tonnes of potato (470 000 tonnes cereal equivalent) and 246 000 tonnes of wheat and barley.

Overall domestic grain availability, in cereal equivalent, for the next marketing year, therefore, is forecast at 2.92 million tonnes. Against this, grain demand for food and other utilisation needs for 2000/01 is estimated at 4.79 million tonnes, leaving an import requirement of around 1.87 million tonnes. Commercial imports are anticipated to cover 200 000 tonnes. A further 700 000 tonnes of the import requirement is covered by planned food aid through WFP, whilst 500 000 more is expected as bilateral concessional imports. Taking these into account, the uncovered import requirement, therefore, is estimated at 465 000 tonnes, with which the country still needs assistance to meet minimum food needs.

The overall import requirement is the largest since 1997, though in contrast this year the country does have a substantial amount of food aid pledged already in the pipeline. In addition, the donor base, which had remained rather narrow hitherto, has broadened with an expected 500 000 tonnes from Japan, whilst the Republic of Korea will provide 500 000 tonnes in confessional imports and 100 000 in food assistance. Without these substantial contributions, there is little doubt that the overall food supply situation over the next year, would have been extremely serious.

The mission also found that although the importance of the Public Distribution System in ensuring food supplies through out the year has declined considerably in the last few years, that of markets and supplies from other channels has increased. This in turn has led to growing disparities between various population groups, especially in economic and physical access to food, which has become more competitive, mainly to the disadvantage of the urban population. Based on available information, the indications are that the urban population have between 20 and 25 percent less cereal available per caput compared to individuals in rural areas. In addition, household food access is also becoming increasingly dependent on the level of goods it has that can be bartered, on petty trade and work on co-operative farms which is now remunerated with food allocations following a system of work points.

KOREA, REPUBLIC OF (6 November)

Light moderate rain in the last dekad of October, could have hampered rice harvesting somewhat. The Government target for paddy production in 2000 has been set at 7 million tonnes, around average though some 3 percent lower than output of 7.18 million tonnes 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 (milled) 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 (6 November)

Contrary to earlier indications, official reports are casting doubt on the achievement of the grain production targets as drought has affected crops on 89 000 hectares and heavy rains and snowfalls in late September/early October have interrupted harvesting. By 13 Oct some 1.5 million tonnes of grain had been harvested, reportedly 23 000 tonnes more than at the corresponding time last year. Satellite imagery confirms that the country has suffered less than neighbouring countries from the ongoing drought, but 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.

FAO tentatively forecasts the grain harvest to remain at 1.63 million tonnes, somewhat below target (1.7 million tonnes). The overall food supply situation is expected to remain satisfactory but a large part of the population is very poor. Cereal exports to neighbouring Uzbekistan and Tajikistan in the past have been considerable, but have declined in recent months. The country also imports wheat in part due to the demand for quality wheat, to supplement the State Security Reserve (via food aid deliveries), and to poor internal communications.

LAOS* (6 November)

As part of a wider phenomenon, which affected neighbouring countries in the region, floods also damaged various areas of Laos. Overall, seven central and southern provinces were flooded in August resulting in serious damage to crops and, to a lesser extent, livestock and fishery. Paddy in some areas remained submerged for up to three weeks. The worst affected provinces were Khammouane, Savannakhet, Saravane and Champasack¹.

Rice is the country's principal crop accounting for 85 percent of total cropped area. Other crops grown include maize (second largest in acreage), sugarcane and groundnut. Most of the rice is produced in the wet season (June to November), largely under rain fed conditions and in the central and southern provinces along the Mekong River Valley, where annual rainfall ranges from 1500 mm to 2200 mm. 70 percent of which is received between May and October. August and September are generally the wettest months, when heavy rains result in serious flooding, causing significant crop losses. Farmers in Laos do not generally apply any fertilizers to rice under rain fed conditions during the wet season. Since rice is largely grown under rain-fed conditions during the wet season when floods and droughts are common, production is susceptible to climatic variability as this year. Serious floods in 1995 and 1996 resulted in substantial rice deficits. This year the Ministry of Agriculture and Forestry estimated that over 42 000 hectares of paddy were totally destroyed by the floods

In view of the flood damage, the outcome of this year's paddy crop, earlier forecast at around 2.2 million tonnes, now remains uncertain. Last year the country produced a record paddy crop of around 2.1 million tonnes. An FAO/WFP Crop and Food Supply Assessment Mission is planned to visit the country in January 2001 to assess the harvest and food supply prospects.

LEBANON (6 November)

The planting of the wheat and barley crops is underway. However, domestic cereal production usually covers only about 10 percent of the consumption requirements. Aggregate production of wheat and barley crops in 2000 is estimated at 61 000 tonnes, about the same as last year. Imports of wheat in 2000/01 (July/June) are forecast at some 0.51 million tonnes, similar to last year.

MALAYSIA (6 November)

Widespread rainfall in late October increased moisture supplies for oil palm in various parts of the country. Normally the country 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. 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* (6 November)

The combination of natural disasters and economic problems due to transition continue to have a serious affect on food supply prospects in the country. There are concerns that

following the worst winter in 30 years last year, this year's winter could also be severe. This year's winter has already begun with strong winds and snowstorms forecast for November. Snowfall in Uvs, Zavkhan, Bayankhongor, Overkhangai and Dundgobi is anticipated to be high, whilst colder temperatures are being forecast for the end of winter and beginning of spring (March) which coincide with the start of the lambing season.

Lack of rain and drought during the critical summer months, during which the country's main staple wheat is produced, may adversely impact grain and fodder production. It is estimated that up to 60 percent of the pasture areas could not regenerate as a result. 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 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 contributing a major source of foreign exchange. The heavy loss of livestock and the consequent reduction in meat supplies, have also meant that there has been 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 the meat shortage, there is also a 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 alternative earning potential. 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. Recent studies by Save the Children Fund and ADRA report high levels of chronic malnutrition in a number of nomadic areas, with many families living in extreme poverty with almost no resources.

MYANMAR (6 November)

Harvesting of the main (monsoon) rice crop should be well advanced and near completion. 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. Current forecast is that paddy production in the 2000/01 marketing year will be similar to the 19.8 million tonnes produced in 1999.

NEPAL (6 November)

Earlier in the year, 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 and food supplies were affected in remote areas. The current forecast indicates that paddy production this year will around average at 3.7 million tonnes.

Reports indicate that the government may assist farmers affected by falling agricultural prices, by introducing fixed support prices. This year the price of paddy has fallen sharply compared to last year, due to imports from India. The cost of production has also risen as various subsidies have been removed on inputs, like fertilizers and irrigation

PAKISTAN (6 November)

Following around a 4 percent reduction in area planted and lower yields this year, paddy production is forecast at around 7 million tonnes, some 8 percent lower than last year. Output, however, will remain some 5 percent above average of the past five years. 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, due to severe drought earlier at the beginning of the crop season,

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. The use of certified seed also increased contributing to higher 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 may export wheat rather than import as in past years.

PHILIPPINES (6 November)

Typhoons at the end of October and early November, brought high winds and heavy rains which resulted in localised flooding, possibly damaging mature rice. A number of people were killed, hundreds displaced and there was also extensive property damage.

Harvesting of main season rice is well advanced. Although in August, reports predicted that dry spells and drought in the last quarter of 2000, may adversely affect development and output of main season rice and maize, current indications from the Ministry of Agriculture are that this (calendar) year's production of paddy is likely to be close to a record 12.58 million tonnes, up 6.7 percent from last year's harvest. Maize production is likely to be around 4.5 million tonnes, some 2 percent lower than 1999. The increased availability of water in traditional maize producing areas led farmers to switch from maize to rice, which accounted for the reduction in maize production,

SAUDI ARABIA (6 November)

The wheat crop for harvest in April/May next year is now being planted. Production of wheat in 2000 is estimated at 1.5 million tonnes, about 9 percent below the previous five years' average, but similar to last year. Low number of adult desert locusts are likely to be present near Jizan where numbers could gradually increase as a result of recent rainfall. Import of cereals in 2000/01 (July/June) is currently forecast at about 7.1 million tonnes, slightly above last year.

SRI LANKA (6 November)

Planting of the main season Maha crop is underway to coincide with the arrival of the north east monsoon. The main crop accounts for two thirds of annual production the rest coming from the dry season (Yala) crop. 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 - 900 000 tonnes of wheat are imported annually to meet demand for bread and other wheat based products.

SYRIA (6 November)

Recent light showers in parts of the country prompted planting of winter grains. Sowing of the 2001 wheat and barley crops is expected to continue until mid-January next year. Crop and livestock production in 2000 has recovered from the drought reduced harvest in 1999. The 2000 wheat production, estimated at 3.6 million tonnes, is about 31 percent above last year's crop and about average. Barley production, which is almost entirely rainfed, is estimated at 800 000 tonnes, double last year's crop, but still about 28 percent below the previous five-year average.

TAJIKISTAN* (6 November)

A severe drought has 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. Both the winter and spring rainfed wheat crop, harvested during June-July, has almost totally failed in most places as a result of drought. The irrigated wheat and other crops have also been affected, often severely as water levels in rivers and canals have been low. The problem was compounded by the poor condition of the irrigation systems due to lack of maintenance and the use of poor quality seed. The impact of drought this year has been particularly severe, as it has hit when agriculture has already been in decline because of persistent economic problems.

The cereal import requirement in the 2000/01 marketing year (July/June) is estimated at 794 000 tonnes. After taking into account a projected commercial import of 403 000 tonnes and the pledged food aid of 96 000 tonnes, the uncovered food aid requirements remains at 295 000 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 the provision of seed for next year's production.

The drought has virtually destroyed an extremely limited coping capacity of the majority of the population, after many years of economic hardship. Given that an estimated 85 percent of the population is poor, the steep drop in cereal production this year spells very bleak prospects for food security. Many households are already in dire conditions and the situation will worsen for increasing numbers in winter and spring as they exhaust whatever food stocks they have, as well as other means of coping. An estimated 3 million people fall in this category, with about 2 million facing a desperate situation. Thus, with access to subsistence food 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. The evolving critical food supply, production and access situations 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 (6 November)

In the last dekad of October, heavy showers slowed rice maturation and harvesting in central parts of the country. The main rice crop is planted between June and August for harvest from October onwards. Earlier large rice areas were affected by serious floods. A combination of floods and unattractive rice prices may result in a slight decline in paddy production in 2000/01. Latest reports indicate that the current paddy crop is likely to be around 18.91 million tonnes, down some 0.34 percent on last year's crop of 18.98 million tonnes. The second paddy crop, harvested in May/June next year normally produces around 4.3 million tonnes.

The target for rice exports in 2000 is 6 million tonnes. A similar target has been set for 2001. In the period January 1 to October 1, the country exported some 4.38 million tonnes, down some 7.3 percent during the same period to last year. In 1999 the country exported a record 6.71 million tonnes.

TURKEY (6 November)

Sowing of the 2001 wheat crop is underway. The 2000 wheat production 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 (6 November)

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 private responsibility for production under leasehold and has been achieved despite shortages of irrigation water in most neighbouring countries. Substantial resources are reported to have been allocated to farmers to expand rice production. 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 (6 November)

An FAO/WFP mission which visited the country in October found that lower harvests of both wheat and cotton are to be expected as a result of a shortage of irrigation water following a mild winter and poor management of water resources. The drought has had catastrophic impacts on agriculture in the down river regions of the Amu Darya, the Autonomous Region of Karakalpakstan (KK) and Khorizem, but particularly the former.

In KK, the 2000 wheat harvest (which was planted in September/October 1999 and escaped the water shortage as of last spring), was good, (95 000 tonnes) but spring crop production has been reduced by between 35-90 percent depending on type of crop. In particular, potato production failed, rice, maize and other spring grain production is down by about 80-90 percent, while most other crops (cotton, fruit, fodder) is down by a half to a third. Crops on both the public farms and on the household plots, vital for survival, have been affected.

In Khorizem, the shortage of irrigation water also caused crop losses but to a lesser degree than in KK. Indications are that the 2000 wheat harvest is about average, but that output of

rice is likely to be halved due to reductions in the areas sown and in yields while output of cotton is likely to contract by about 25 percent.

At the country level, winter cereals suffered less from the water shortages along the Amu Darya River in the summer than, for example cotton, but rainfed cereals were affected. Aggregate wheat production in 2000 is officially reported to be 3.4 million tonnes, with 3.1 million tonnes from the public sector and 300 000 tonnes from the household plots. Coupled with lower rice and spring coarse grain output, the 2000 grain harvest is likely to remain below 4 million tonnes, at least 10 percent less than last year. Preliminary indications are that output of cotton, a major export crop with which imports of wheat and machinery are financed, is likely to fall to around 3 million tonnes, compared to 3.6 million tonnes last year. Higher world prices for this commodity will help to offset the smaller quantity.

Imports of foodstuffs have declined in recent years in part due to a sharp increase in cereal production (notably wheat), and in part, because imports have been kept low to maximize funds available for the creation of import substituting industries. Nevertheless, the import requirement for wheat in 2000 is expected to increase to 800 000 tonnes and larger volumes than normal will have to be transferred to drought affected populations. Aggregate output of rice is expected to fall sharply. The bulk of cereal imports will be mobilized commercially but the government has requested (and received) 38 200 tonnes of durum wheat for pasta production. Budget constraints may reduce the capacity of the government to make adequate provision for the affected populations. Social security payments are made regularly but, due to financial constraints, are inadequate to cover needs.

Affected populations in KK need assistance. The shortage of irrigation water has affected food security by a) reducing physical availability of food, b) reducing income and purchasing power c) reducing already limited employment opportunities and d) increasing the proportion of food needs that will have to be met through market purchases. Household food stocks are very low. Household income is low and will be even lower in the coming year. In rural areas, there are few alternative sources of employment other than agriculture. There is a large shortfall in cereals in addition to the shortfall in other crops and in milk and egg production, compounded by reduced purchasing power. This means that demand for cheaper products, notably cereals (wheat, white sorghum and rice) will increase. It is doubtful that commercial imports (from other regions) can fill the gap, given the fall in earnings and purchasing power.

VIET NAM (6 November)

In the last week on October, mostly dry weather in northern parts favoured rice harvesting of the 10th month rice crop which accounts for around 25 percent of aggregate production. The 10th month crop is normally planted around July/August in the north (slightly later in the south) and harvested from November onwards.

Official reports indicate that serious floods this year in eight provinces in the Mekong Delta could take until late January to recede, which will delay planting of the main rice crop in parts. The main winter/spring crop which accounts for half of national production annually is normally planted from November/December onwards, depending on location, for harvest in May/June the following year. Areas around the Mekong Delta usually produce around 16 million tonnes of paddy annually, accounting for around 55 percent of total output. Notwithstanding the damage by the floods, official estimates indicate that paddy production in 1999/2000 would be around 32.7 million tonnes, up around 5 percent on the previous year.

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 10 months of the year, rice exports were estimated at 3.08 million tonnes.

YEMEN (6 November)

The output of the main sorghum crop, now being harvested, is forecast at 380 000 tonnes, some 8 percent lower than the average for the previous five years. Conditions are favourable for breeding of desert locust in Jizan and the Red Sea Coastal Plains where moderate rains were observed during October.

CENTRAL
AMERICA
(including the
Caribbean)

BELIZE (6 November)

Torrential rains and heavy flooding from Hurricane "Keith", in late September, particularly in the northern and central parts of the country, have resulted in severe damage to housing and infrastructure, as well as to the agricultural and fishery sectors. Thousands of farmers have been left homeless and their farming plots and wares destroyed. It is reported that the food situation of many of the affected rural families is under threat. Important damage has also been incurred to the banana and sugar export sector as well as to booming tourist resorts. Emergency food assistance is being distributed by international relief agencies, while technical rehabilitation plans are being formulated by the government for eventual collaboration and assistance from the international community.

COSTA RICA (6 November)

Harvesting of the 2000/01 second season maize and paddy crops is about to start. Early forecasts point out to average maize outputs from the first and second season crops. Paddy production in year 2000 is provisionally estimated at an above-average 330 000 tonnes.

Maize imports, mostly yellow, in marketing year 2000/01 (July/June) are expected to be about 300 000 tonnes, similar to the previous year's relatively high level, reflecting the consistent demand from the animal feed industry. Rice imports in year 2001 (January/December) are forecast to be about 90 000 tonnes, close to this year's imports level and reflecting the strong domestic demand for this important food staple.

CUBA (6 November)

Normal to abundant rains in recent weeks are reported all over the country, although some moisture deficits are still registered, because of a precedent long dry spell, in the central province of Sancti Spiritus and some of the extreme eastern provinces. The rains have benefited the developing cereal and other minor food crops and average outputs are anticipated. Production of paddy is expected to be slightly above average.

Wheat imports in marketing year 2000/01 (July/June) are expected to be similar to the previous year's level of 900 000 tonnes. Yellow maize imports (July/June) are also expected to be closely similar to those of the previous year which amounted to about 270 000 tonnes.

Paddy imports in marketing year 2001 (January/December) are still forecast to be about 400 000 tonnes, similar to marketing year 2000, despite improvement in this year's production.

DOMINICAN REPUBLIC (6 November)

Normal rains are reported although some heavy rains in the northern parts of the country in September have affected cereal and minor foodcrops. Planting of the 2000/01 second season

coarse grain crops has been completed for harvesting from January, while that of the second season paddy crop has also been finished for harvesting from December. Early forecasts indicated that average outputs should be gathered.

Wheat imports in marketing year 2000/01 (July/June) should increase from the previous year's some 280 000 tonnes to about 305 000 tonnes, while maize imports, mostly yellow, are expected to remain close to the high level of 700 000 tonnes imported last year, thus reflecting the strong demand from the poultry feeding industry. Rice imports in year 2001 (January/December) are early forecast at about 70 000 tonnes.

EL SALVADOR (6 November)

Normal rains have resumed following an unusually long July dry spell ("canicula") which severely affected crops in several growing areas. Sowing of the 2000/01 second season (main) sorghum crop is underway while maize plantings from the second season crop continue to grow under favourable conditions. Early production forecasts indicate that some 570 000 tonnes of maize should be collected, which compares to 650 000 tonnes the year before and the last 5-year average of 596 000 tonnes. This is primarily the result of the adverse dry weather which affected the first season crops. By contrast, production of sorghum is expected to be above average because of increased second season crop plantings. Planting of the second season bean crop is completed and aggregate output (both crops) is provisionally forecast to be an average 68 000 tonnes. An average paddy output is also anticipated. 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 forecast to be about 180 000 tonnes, similar to the previous year. Maize imports should increase from 175 000 tonnes to about 245 000 tonnes to compensate for the losses in production. Rice imports in 2001 (January/December) should be similar to this year's some 20 000 tonnes.

GUATEMALA (6 November)

Torrential rains and flooding due to Hurricane "Keith" have affected food and cash crops in the southern coastal areas, particularly in Santa Rosa, Escuintla, Suchitepequez, Rehahuleu and San Marcos. A detailed assessment of damage has not been made yet, but damage is reported to crops such as bananas and sesame, as well as to livestock. Important localized losses are reported, in some cases reaching 80 per cent of expected crops. Damage has been inflicted to the 2000/01 second season maize crop, which had just been planted, and to the remaining first season crop areas that had not been harvested. Aggregate maize production (both crops) is expected to decline but a slightly below-average output should still be gathered. Some food assistance continues to be distributed through reconstruction projects (food for work) following the passage of hurricane "Mitch" in late 1998.

Wheat imports in marketing year 2000/01 (November/October) are forecast to increase from the previous year's 380 000 tonnes to about 390 000 tonnes. Maize imports are likely to increase from last year's 550 000 tonnes to compensate for the losses incurred in production.

Rice imports in marketing year 2001 (January/December) are anticipated to be closely similar to this year's some 30 000 tonnes.

HAITI* (6 November)

Planting of the 2000/01 second season sorghum crop has been recently completed while harvesting of the 2000 second season paddy crop is about to start. Despite improvements in weather conditions, the outlook is poor for the year as crops were severely affected by a

prolonged dry spell during planting and throughout the developing period in the first part of the year. Aggregate maize output is provisionally estimated at a low 150 000 tonnes while sorghum is tentatively forecast at a below-average 60 000 to 65 000 tonnes. Production from the irrigated paddy crop, the bulk of domestic production, is also expected to decline from last year as reservoir levels in the main producing area of the Artibonite were reported at below-average levels throughout the year because of the drought. Food assistance from the international community continues to be distributed through development projects to some sectors of the population.

Wheat imports in marketing year 2000/01 (June/July) are expected to be about 330 000 tonnes, similar to the previous year. Commercial maize imports are tentatively forecast to increase from 70 000 tonnes to some 95 000 tonnes. Rice imports in 2001 (January/December) are tentatively forecast at 170 000 tonnes. Food aid pledges amount to 67 000 tonnes, of which 16 000 have been delivered.

HONDURAS (26 November)

Following an unusually long summer dry spell ("canicula"), with consequent serious damage on the first season crops, the country has been hit by heavy rains and flooding caused by the passage of Hurricane "Keith". It is reported that the capital of Tegucigalpa and neighbouring areas have been particularly affected by the rains. Planting of the 2000/01 second season coarse grain crops has been disrupted as a consequence of the phenomenon. Aggregate maize production for the year, the main cereal, is tentatively forecast to decline from the previous year's below-average 533 000 tonnes to some 500 000 tonnes or even lower. A low paddy output is also anticipated. By contrast, production of beans, an important staple in the population diet, is so far forecast to be about average. Food assistance from the international community is being distributed to drought affected rural families. Some 86 000 people are being currently assisted. Food aid is continues to be delivered to Hurricane "Mitch" affected population.

Wheat imports in marketing year 2000/01 (July/June) are expected to increase from the previous year's 205 000 tonnes to some 210 000 tonnes, while maize imports should increase from 250 000 tonnes to about 280 000 tonnes to compensate for the loss in production. Rice imports in marketing year 2001 (January/December) are tentatively forecast at about 100 000 tonnes.

MEXICO (6 November)

Planting of the 2000/01 irrigated wheat crop has only started in the northwest main growing areas. Water reservoir levels are considered adequate following recent storms rains and accumulated moisture from previous rainfall. Harvesting of the main 2000 maize crop (spring/summer plantings) has only started. under generally dry weather. The crops in the important maize growing areas of the central and southern belts were spared of the negative impact of the various storm rains in the last weeks and about 15.3 million tonnes are tentatively forecast. Aggregate output in 2000 (fall/winter and spring/summer crops) should be about an average 18.5 million tonnes. The outlook is also good for the sorghum crop which has benefited from Hurricane "Keith" tail-end rains particularly in the north-eastern provinces Overall, some 6.3 million tonnes of sorghum are expected to be gathered which compares to the last 5-year average of 5.9 million tonnes. No significant damage to other crops is reported.

NICARAGUA (6 November)

Planting of the 2000/01 second season coarse grain and bean crops has only been completed. Some of the small farmers' crops, particularly those grown in the western departments of Chinandega and León, were affected by the heavy rains and flooding caused by Hurricane "Keith". Maize output, the main cereal, for the year is provisionally forecast at

a below-average level, as the first season crops had already been affected by an unusually long summer dry spell ("canicula"). Production of beans, an important staple in the population's diet, is also forecast to be below average. Food assistance from the international community is presently being distributed to the drought affected rural population. Some 94 000 people are being assisted. Food assistance also continues to be delivered to Hurricane "Mitch" victims.

Wheat imports in marketing year 2000/01 (July/June) are forecast to be about 100 000 tonnes, similar to the previous year. Maize imports are expected to increase from some 75 000 tonnes to about 85 000 tonnes to compensate principally for the drought induced losses in production.

SOUTH AMERICA

ARGENTINA (6 November)

Light to moderate recent rains in the main wheat producing central areas, particularly in the south of Buenos Aires province, benefited the developing 2000/01 crop which is about to be harvested. Although some rain is still needed in the north, however, early production forecasts indicate that output should be about an above-average 14.5 million tonnes, provided favourable weather conditions persist. Planting of the 2000/01 maize crop continues although some delay is being reported due to heavy rains in some parts, particularly in the provinces of Buenos Aires and Cordoba. By late mid-October, about 43 per cent of intended plantings had been sown which compares to 54 per cent by the same time the year before. Planting of the 2000/01 paddy crop started in early October in the northern areas where moderate to abundant rains are recently reported.

BOLIVIA (6 November)

Fieldwork is reported in the high plains in preparation for planting of the 2000/01 coarse grain and potato crops, while some early planting is reported in the valleys. Planting of the 2000/01 wheat crop has started in the main producing eastern Department of Santa Cruz, where a recovery in production is expected from the 1999/2000 weather affected crop.

Wheat imports in marketing year 2000/01 (July/June) is forecast to increase from the previous year's 260 000 tonnes to 325 000 tonnes in order to compensate for the low production level reached in 2000.

BRAZIL (6 November)

Harvesting of the 2000 wheat crop continues in the large growing southern states. The crop has been severely affected, particularly in the main producing state of Parana, where a sharp decline from average production is reported due to extremely adverse weather at planting and development, including severe frosts in July. Harvesting has only started in the second largest producing state of Rio Grande do Sul and prospects are also poor, as a result of the persistent bad weather conditions which have made conditions liable to fungal disease. Wheat output is tentatively forecast at a low 1.9 million tonnes. Imports in marketing year 2000/01 (October/September) are expected to increase considerably to compensate for the loss in production. Planting of the 2000/01 maize crop continues in the southern states while it has only started in the central producing state of Mato Grosso and central-southern Mato Grosso do Sul, where light to moderate rains have favoured an early planting. The area planted to maize is expected to be closely similar to the previous year's average plantings.

CHILE (6 November)

Growing conditions of the 2000/01 wheat crop, for harvesting from December, are reported normal, while planting of the 2000/01 maize is underway. The intended area planted to maize is provisionally forecast to increase from 1999/00 low level of some 69 000 has.

Wheat imports in marketing year 2000/01 (December/November) are tentatively forecast at about 750 000 tonnes, similar to the previous year, while those of maize (February/January) should be about 1.1 million tonnes.

COLOMBIA (6 November)

Planting of the 2000/01 second season cereal crops continues under favourable conditions and early maize production forecasts (first and second crops) point to an average output, while sorghum output is anticipated to be below average. By contrast, production of paddy is expected to be slightly above average.

Wheat imports in marketing year 2001 (January/December) are expected to be similar to this year's some 1.2 million tonnes. Maize imports, principally for the animal feed industry, should also be close to this year's 1.7 million tonnes. Imports of rice are forecast to be about 350 000 tonnes.

ECUADOR (6 November)

Harvesting of the 2000 second season maize (white) has started under generally dry weather. Early production forecasts indicate that aggregate maize output (white and yellow) for the whole year should be a slightly above-average 570 000 tonnes, which compares to last year's weather affected crop of 512 000 tonnes and to the last 5-year average of about 550 000 tonnes. Harvesting of the second season paddy crop has also started. Output for the year should be below average mainly as a consequence of the financial constraints to the agricultural sector in general.

Wheat imports in marketing year 2000/01 (July/June) are expected to be close to the previous year's volume of some 490 000 tonnes, while maize imports should decline from 170 000 tonnes to about 110 000 tonnes.

PERU (6 November)

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 yellow maize crop has also been virtually completed and output collected in the period January/August is estimated at about 637 500 tonnes which compares to 554 700 during the same period the year before. White maize collected during January/August amounts to 273 2000 compared to 236 000 during January/August the year before. Maize output in year 2000 is forecast to considerably exceed the above-average level reached in 1999. About 1.1 million tonnes are expected to be collected. Production of paddy should decline from 1999 record but should still remain at an above-average level.

Wheat imports in marketing year 2001 (January/December) are forecast to increase from the previous year's volume of 1 250 000 tonnes to some 1 300 000 tonnes, while maize imports should stay close to the volume of 650 000 tonnes imported in 2000 (January/December). Rice imports are also forecast to be similar to 2000 marketing year (January/December) level of 350 000 tonnes.

URUGUAY (6 November)

Harvesting of the 2000 wheat crop is about to start and output is forecast to improve from the 1999 drought affected crop. Planting of the 2000/01 maize crop has started and enlarged plantings are anticipated from the previous year's below-average level. Planting of the important paddy crop has started and the area planted is provisionally forecast to be close to the previous year's slightly above-average level.

VENEZUELA (6 November)

Harvesting of the 2000/01 first season (main) cereal crops, as well as that of other staple foodcrops, is well advanced. Average maize and paddy outputs are provisionally forecast. By contrast, production of sorghum is expected to be below average.

EUROPE

EC (10 November)

FAO's latest forecast puts aggregate 2000 cereal production in the EC at almost 216 million tonnes, 6 percent up from last year and 6 percent above the average of the past five years. The increase results from the combined effect of an overall larger cereal area and higher average yields for this year's crop. Wheat output is now estimated at about 105 million tonnes, slightly down from that reported in September but still some 7 percent up on last year. The forecast for aggregate coarse grain production has been adjusted upward slightly since the last report to some 108 million tonnes, which would be about 5 percent above the 1999 output. Output of barley is seen to increase 6 percent to almost 52 million tonnes and that of oats by 12 percent to 6.7 million tonnes. The maize crop is forecast to reach almost 38.5 million tonnes, 3 percent up from 1999. The paddy crop harvest has been completed in Spain, where production is estimated to have fallen by 10 percent compared to last year. In Italy, flood problems affected the northern producing regions in mid-October, when about 15 percent of the crop were still to be harvested. Earlier forecasts for this country had already pointed to a poor quality crop, following an abnormally cool July. Overall output for the EC is currently forecast to decline by 105 000 tonnes from 2.6 million tonnes in 1999. However, this does not yet take into consideration the recent losses incurred in Italy.

Prospects for the winter grain crops already in the ground or now being planted throughout the Community are uncertain. Planting operations have generally been hampered in late September and October by widespread rainfall. In particular, Italy's major cereal producing region in the north of the country has been severely hit by torrential rains and flooding, which will jeopardize this year's winter crop planting. The exception to the overall wet pattern throughout the Community is the Iberian Peninsula, where more rainfall is needed to favour planting of the winter wheat and barley crops.

ALBANIA (10 November)

Aggregate cereal production is expected to be about average this year at between 550 000 to 600 000 tonnes. Of this, a normal wheat crop of about 300 000 to 350 000 tonnes is expected. Wheat import requirement is expected to fall somewhat from the previous year's volume, when output was more severely affected by adverse weather, to about 300 000 tonnes.

BELARUS (6 November)

Official reports point to a bunker weight grain harvest of about 5.5 million tonnes. Satellite imagery confirms official forecasts for a better 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 4.7 million tonnes cleaned weight at most.

In 2000/01, the country will need to import cereals for human consumption and has already contracted some 350 000 tonnes from Kazakhstan.

BOSNIA-HERZEGOVINA* (6 November)

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 increased but yields are 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 290 000 tonnes imported in 1999/2000.

BULGARIA (10 November)

In Bulgaria, this year's wheat and barley crops are estimated to be close to last year's levels at 3.1 million tonnes and about 700 000 tonnes respectively. However, the summer maize crop was devastated by drought and latest reports put maize output at about 800 000 tonnes, compared to an average level of about 1.5 million tonnes in the past five years. Some rainfall in southeastern parts of the country in early October was welcome for autumn grain planting after previously dry conditions. Early indications suggest that Bulgarian farmers may try to plant more winter wheat this year but the final outcome will depend on weather conditions in late October and early November.

CROATIA (10 November)

The 2000 wheat harvest, officially reported at 1.08 million tonnes, is better than expected after the hot dry weather experienced in May 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 now expected to be only 0.8 million tonnes, not even 40 percent of last year's bumper crop.

Aggregate cereal production in 2000 is likely to fall by nearly 30 percent to 2.1 million tonnes. Output of other foodcrops has also been affected by the drought. Thus, output of sugarbeet is down by nearly a third, that of sunflower by 11 percent and potato output is down by 30 percent. Production of fruit, grapes, pastures and fodder crops are also affected.

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

CZECH REPUBLIC (10 November)

In the Czech Republic, cereal output this year is estimated to be down by about 7 percent on 1999 at about 6.5 million tonnes. Wheat and barley account for the bulk of the country's cereal crop, which were relatively less affected by drought conditions earlier in the year than other crops.

ESTONIA (30 November)

Official reports indicate that the 2000 grain harvest is good and could reach a bumper 650 000 tonnes bunker weight, (or about 600 000 tonnes cleaned weight) from 330 000 hectares. Feed prices are expected to fall in response to the good harvest, some 25 percent more than last year, and reduced livestock production in the first half year of 2000.

FORMER YUGOSLAV REPUBLIC OF MACEDONIA (10 November)

In the Former Yugoslav Republic of Macedonia, after earlier favourable conditions, drought 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 (10 November)

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 3.7 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 more severely affected 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.

To ease expected shortages of animal feed in the current marketing year, the Government intends to introduce duty-free quotas for oats and barley imports of 100 000 tonnes and 20 000 tonnes respectively, and is considering removing import duties from maize also. Exports of maize are already being controlled and may be halted completely in the near future.

LATVIA (6 November)

Satellite imagery indicates growing conditions, which were overall significantly better than last year, despite hot and dry weather in May/June. Good rains in July/August provided ample moisture supplies. The areas sown to winter crops increased and overwintering conditions were good. The 2000 cereal output is tentatively forecast at nearly 0.9 million tonnes, about average and almost 0.1 million tonnes more than last year. 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 (6 November)

The outlook for 2000 grain harvest is satisfactory. Satellite imagery indicates crop condition that is significantly better than last year with the excessive rainfall in July helping to offset moisture shortages in 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 to an about average 2.4 million tonnes from last year's poor level of 2.1 million tonnes, and to include nearly 0.9 million tonnes of wheat.

MOLDOVA (6 November)

Untimely frosts and persistent dry conditions from April to late July have compromised the 2000 grain harvest and affected 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 outcome of the maize harvest is still uncertain but 40-50 percent of the crop was damaged in the worst affected areas (Cahul, Tighina, Gaugazia and to a lesser extent Taraclia and Lapusna). The aggregate 2000 cereal 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 (10 November)

In Poland, cereal output has fallen sharply in 2000 to about 22 million tonnes, the lowest level since 1994, and about 15 percent below the average of the past five years. Outputs of wheat and all the main small coarse grain crops were affected by a combination of spring drought and damaging heavy rains during the main harvesting period. However, the maize crop benefited from the heavy summer rains and is estimated to have reached a bumper level of 900 000 tonnes, more than double the average of the past five years.

ROMANIA (10 November)

In Romania, latest official estimates put the 2000 wheat output at about 4.3 million tonnes, 9 percent down from 1999 and about 20 percent below the average of the past five years. Moreover, the quality of the crop is reported to be considerably poorer than normal reflecting the severe

drought throughout the spring and summer. The maize crop has been hit harder by the drought, and much harder than earlier expected after dry conditions continued practically throughout the whole of the growing period. It is reported that in many areas crops have been completely wiped out and as of early November the crop was estimated at just 4 million tonnes, compared to the five-year average of over 10 million tonnes.

As a result of the poor harvest, a tight cereal supply situation is in prospect in the coming months and significant imports could be required before the end of the current 2000/01 (July/June) marketing year, in stark contrast to previous years when Romania has been a net cereal exporter. At this early stage it is difficult to forecast the size of country's likely import requirements, largely because of uncertainties surrounding the amount and quality of wheat and maize stocks in the hands of the small-scale farming sector. However, it is likely that at least some imports of high-quality wheat will be needed for blending for bread making and significant amounts of maize will be needed for animal feed. In late October the Government announced that it will allow a total of 500 000 tonnes of maize for animal feed purposes to be imported exempt of customs taxes up until June 30 2001.

As of early November, it was reported that winter wheat planting had been completed on about 1.7 million hectares and that of barley on about 250 000 hectares, close to the expected areas, and just below the estimates for last year. However, although the bulk of autumn sowing was on time, prospects for the crops are uncertain because it is reported that the quality of seeds used this year was generally poorer than normal and soil moisture conditions remain unfavourable for germination and establishment of crops. If strong stands are not established before dormancy then crops would be more susceptible to winter perils.

RUSSIAN FEDERATION (6 November)

The 2000 grain harvest is significantly better than last year. FAO's estimate of output is 71 million tonnes, some 11 million tonnes more than estimated output in 1999, and about average. FAO's estimate is about 10 percent higher than the official forecast of 65-66 million tonnes, due to underreporting of output as most services in the agricultural sector are paid for in kind. Output of wheat is estimated by FAO at 40 million tonnes (some 10 percent above the official forecast) and the proportion of quality wheat is higher than last year. Output of coarse grains is estimated by FAO at 30 million tonnes compared to 25 million tonnes last year.

Planting of winter cereals (mainly wheat and rye) for harvest next year is virtually complete. Winter crops have been planted on 14.3 million hectares compared to the target of 14.6 million hectares.

Indications are that the 2000 harvest is adequate to cover domestic food and feed needs and allow some small replenishment of stocks. Provided the harvest forecast materializes, cereal imports in 2000/01 could be only half of the nearly 8 million tonnes imported in 1999/2000.

Food insecurity is primarily a problem of access rather than availability as income distribution is very uneven. Fifty percent of the population live below the poverty line of US\$4.30/person/day. Specific causes of poverty include arrears in the payment of pensions, salaries and wages.

The 1999 conflict in Chechnya caused a massive displacement of the population, with 160 000 displaced outside to Ingushetia. In addition, an estimated 170 000 persons remain displaced inside Chechnya. WFP and partner NGOs are providing basic and complementary food assistance to practically all internally displaced persons (IDPs) in Ingushetia. Mass hunger has been avoided, but IDPs remain heavily dependent on humanitarian aid. On the other hand, deliveries of food in Chechnya have been minimal due to problems of security and resources. A WFP mission in September 2000 found that the population in Grozny was

not meeting its minimal food requirements, unable to build reserves for the winter and surviving through various coping mechanisms.

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.

SLOVAK REPUBLIC (10 November)

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 (10 November)

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 (6 November)

With harvesting of grains other than maize nearing completion, forecasts of the third poor cereal harvest in succession are being confirmed. Average yields per hectare as reported by the government are about 8 percent less than last year. Only the outcome of the maize harvest is in doubt. Until the harvest of maize is completed, FAO tentatively forecast the 2000 grain production (including an estimated 3.5 million tonnes of maize) at 25 million tonnes. This estimate is some 10 percent higher than current official yield indication might indicate to allow for underreporting. The poor result reflects growing problems with credit and credit worthiness and therefore the mobilization by farms of inputs. Persistent government interference in the grain market this season has created a lot of uncertainty and over years has been disadvantageous to producers and traders, reducing incentives to report output and to trade legally.

In the early months of the 2000/01 marketing year, the country has been a net importer of cereals, in part as the customs authorities have halted all processing of grain exports. The country remained a net exporter of 2.4 million tonnes of cereals (mainly wheat and barley) in 1999/2000. Officially registered imports of wheat reached almost 464 000 tonnes in 1999/2000 and could exceed this amount in the current marketing year.

Official plans call for the area sown to winter crops to increase to 8.4 million hectares and to include 7.1 million hectares of wheat, as well as 0.8 and 0.5 million hectares of rye and barley respectively. By 30 September, some 6.3 million hectares had been sown to winter crops including 5.2 million hectares to wheat. Conditions at sowing and the availability of inputs were better than last year, but the latter remain far from optimal.

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

Official reports confirm the FAO/WFP Crop and Food Supply Assessment Mission's forecast for a drought reduced maize harvest this year. Final data has not yet been released but maize output is officially forecast to fall by 40 percent to about 3.6 million tonnes (1999: 6.1 million tonnes), somewhat higher than the mission's forecast of 3 million tonnes. The yield potential of other spring crops such as sugar beet and soya has also been severely compromised. The Mission estimated the 2000 wheat harvest at between 1.7 million tonnes (low scenario) to 1.8 million tonnes (best case) compared to 2 million tonnes in 1999. The

agricultural sector in the country has been generally in decline since the early 1990s, 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, and low prices have combined to reduce the areas sown and average yields of both winter and spring crops.

Since October, the population has suffered serious shortages of energy and sharp price increases for basic foods which raised the rate of inflation to 27 percent in the month of October alone. The subsidized price of bread was raised by 66 percent in July. The prices of some basic foodstuffs, e.g. milk, bread, sugar, vegetable oil, is controlled and subsidized but the availability of supplies at controlled prices is limited. The country exports agri-food products to help cover its fuel and essential import bill but the export availability in 2000/01 is reduced. In fact, in response to a shortage of livestock feed, necessitating a sharp cut back in livestock numbers, there is pressure to ban all exports of maize.

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 (10 November)

In Canada, by mid-October, the wheat harvest was reported to be virtually complete. The duration of the harvest has been somewhat longer than normal this year due to wet weather across the major growing areas during most of September. Aggregate wheat production in 2000 is now officially forecast at nearly 26 million tonnes, 4 percent lower than last year and just below the five-year average. The latest forecast of aggregate coarse grain production in 2000 has been revised downward since the last report to some 25 million tonnes, almost 6 percent down from last year and 5 percent below the five-year average.

UNITED STATES (10 November)

The November USDA crop report put the 2000 aggregate wheat (winter and spring) output at 60.5 million tonnes, 3.5 percent down from 1999 and about 5 percent below the average of the past five years. As of 6 November, planting of the winter wheat crop for harvest in 2001 was reported to be 85 percent complete, about 7-8 percent behind the previous year's pace and the five-year average. The delay is mostly a result of adverse dry soil conditions in the central and southern regions, which account for the bulk of the county's hard winter wheat production. More moisture is needed soon for germination. If plants are not strongly established before the onset of dormancy then the crop could be more susceptible to winter kill.

The outlook for the coarse grain crops, still being harvested in some parts, has deteriorated somewhat since the last report in September due largely to drought-related losses in some central and southern regions. The USDA's November forecast put aggregate coarse grain production at about 278 million tonnes, well down from earlier expectations but still about 5 percent above last year's output. Of the total, maize is expected to account for about 255 million tonnes, compared to 240 million tonnes in 1999. By 6 November it was reported that, 92 percent of the maize crop had been harvested, about the same as last year but ahead of the five-year average.

Paddy harvesting is still proceeding in California but is almost over in the southern states. Since the last report, the forecast of output in 2000 has been adjusted downward to 8.7 million tonnes, 7 percent less than the revised 1999 output. Latest information indicates that the area under rice has declined by 12 percent from 1.4 million hectares in 1999.

OCEANIA

AUSTRALIA (10 November)

In Australia, prospects for this year's wheat and small coarse grains crops have deteriorated following persisting hot and dry weather in the last two months. The harvest is already underway in some parts and early reports indicate that, as a result of the drought, grain size and quality is below earlier expectations and below normal. The most recent official forecast dates from early September when ABARE forecast 2000 wheat output at 22.2 million tonnes. However, since that forecast was issued, crops in the north and west have been hit by hot and dry weather, which has adversely affected yields. FAO now forecast wheat output in 2000 at 20 million tonnes, which would be 17 percent down from 1999 and below the average of the past five years. However, despite the drought, production of barley, the main coarse grain crop, could still increase somewhat from last year following a sharp expansion in the area planted.

Preparations for the 2001 paddy season have started. According to ABARE, paddy output next season could reach 1.4 million tonnes, substantially above the 1.1 million tonnes harvested this season. This increase would rely on a 19 percent expansion in plantings, to 159 000 hectares, and on a 7 percent increase in yields, to 8.8 tonnes per hectare. The outcome, however, will depend on the availability of irrigation water in New South Wales, where production is concentrated.

FIJI (7 November)

With a total population of about 800 000 people, Fiji is relatively well endowed with natural resources (gold, arable land and marine resources). The major crops are sugar, coconut, ginger and fruits (mangoes and papaya) which, in recent years, have shown an increasing trend in terms of both production and export. Overall, the food supply situation in the country is good but serious nutritional problems persist in several areas. Concerns over the country's economic and political situations have increased in recent months, largely because of sensitive issues of land tenure and leasing systems. The country remains also very vulnerable to climatic events, particularly drought and cyclones which, in recent years have had devastating consequences for both humans and crops.

SOLOMON ISLANDS (7 November)

The peace agreement signed on 15 October is expected to end 2 years of civil strife in the island. The peace monitoring operations expected to be in full operation by early December will also provide opportunities to reach the displaced and vulnerable people in need of food assistance.

VANUATU (7 November)

The country's economy is based primarily on subsistence or small-scale agriculture, which provides a living for 70 percent of the population. Fishing, offshore financial services, and tourism, with about 50 000 visitors in 1997 are other mainstays of the economy. A major concern is the country's vulnerability to natural disasters, including an active volcano, recurrent earthquakes, tidal waves, cyclones and landslides. These invariably result in losses of lives, infrastructure, and crops, and require humanitarian assistance often beyond the means of national authorities.

**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	28 340.0	27 609.0	2 792.3	24 816.7
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	5 763.9	1 970.7	3 793.2
Burundi	Jan./Dec.	65.5	4.5	70.0	106.0	24.4	16.9	7.5
Comoros	Jan./Dec.	45.8	0.2	46.0	46.0	9.4	0.0	9.4
Djibouti	Jan./Dec.	116.1	9.1	125.2	108.0	22.8	4.2	18.6
Eritrea	Jan./Dec.	87.2	23.8	111.0	190.0	272.0	174.8	97.2
Ethiopia 2/	Jan./Dec.	20.8	623.5	644.3	1 200.0	1 439.7	1 322.1	117.6
Kenya	Oct./Sept.	709.7	103.0	812.7	1 800.0	1 800.0	91.0	1 709.0
Rwanda	Jan./Dec.	40.1	181.9	222.0	175.0	151.0	146.9	4.1
Somalia	Aug./July	277.7	42.5	320.2	310.0	310.0	38.9	271.1
Sudan	Nov./Oct.	697.4	218.6	916.0	1 019.0	1 032.8	127.1	905.7
Tanzania	June/May	292.9	50.1	343.0	450.0	701.8	48.8	653.0
Southern Africa		1 363.0	460.5	1 823.5	1 894.0	1 937.0	306.6	1 630.4
Angola	April/March	353.8	151.1	504.9	505.0	530.5	140.9	389.6
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	230.1	16.0	214.1
Malawi	April/March	144.8	46.2	191.0	122.0	129.5	67.9	61.6
Mozambique	April/March	105.0	191.1	296.1	293.0	301.9	73.6	228.3
Swaziland	May/April	65.0	10.0	75.0	73.0	73.0	0.0	73.0
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	6 049.0	5 264.0	391.6	4 872.4
Coastal countries		4 819.7	192.6	5 012.3	4 199.0	3 222.8	231.8	2 991.0
Benin	Jan./Dec.	110.4	9.3	119.7	115.0	65.1	6.0	59.1
Cote d'Ivoire	Jan./Dec.	820.6	37.1	857.7	1 000.0	929.1	17.7	911.4
Ghana	Jan./Dec.	451.6	23.3	474.9	485.0	353.4	84.1	269.3
Guinea	Jan./Dec.	347.4	29.4	376.8	350.0	68.1	4.5	63.6
Liberia	Jan./Dec.	137.9	64.0	201.9	200.0	93.1	87.2	5.9
Nigeria	Jan./Dec.	2 563.8	0.0	2 563.8	1 650.0	1 612.3	0.3	1 612.0
Sierra Leone	Jan./Dec.	264.5	25.5	290.0	329.0	49.0	28.0	21.0
Togo	Jan./Dec.	123.5	4.0	127.5	70.0	52.7	4.0	48.7
Sahelian countries		1 780.6	223.5	2 004.1	1 850.0	2 041.2	159.8	1 881.4
Burkina faso	Nov./Oct.	191.6	37.3	228.9	155.0	145.5	27.8	117.7
Cape Verde	Nov./Oct.	30.3	65.1	95.4	75.0	72.3	42.0	30.3
Chad	Nov./Oct.	60.0	15.9	75.9	67.0	48.4	10.4	38.0
Gambia	Nov./Oct.	123.3	3.8	127.1	114.0	119.9	4.6	115.3
Guinea Bissau	Nov./Oct.	64.0	11.6	75.6	99.0	55.7	7.1	48.6
Mali	Nov./Oct.	116.2	5.6	121.8	100.0	106.8	2.6	104.2
Mauritania	Nov./Oct.	214.3	27.8	242.1	260.0	296.7	20.7	276.0
Niger	Nov./Oct.	306.7	35.6	342.3	220.0	432.2	9.8	422.4
Senegal	Nov./Oct.	674.2	20.8	695.0	760.0	763.7	34.8	728.9
Central Africa		647.1	32.3	679.4	718.0	369.1	50.1	319.0
Cameroon	Jan./Dec.	267.2	2.6	269.8	280.0	130.3	7.8	122.5
Cent.Afr.Rep.	Jan./Dec.	29.8	1.2	31.0	29.0	8.3	0.6	7.7
Congo, Dem.Rep.	Jan./Dec.	234.6	15.4	250.0	250.0	95.0	22.6	72.4
Congo, Rep.	Jan./Dec.	93.0	12.0	105.0	140.0	124.2	14.2	110.0
Eq. Guinea	Jan./Dec.	14.0	0.0	14.0	9.0	4.9	0.9	4.0
Sao Tome	Jan./Dec.	8.5	1.1	9.6	10.0	6.4	4.0	2.4

**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
ASIA		32 965.5	4 597.5	37 563.0	37 414.0	35 883.4	3 545.1	32 338.3
Afghanistan	July/June	668.4	77.2	745.6	1 127.0	1 266.8	137.5	1 129.3
Armenia	July/June	271.0	20.0	291.0	419.0	419.0	12.0	407.0
Azerbaijan	July/June	712.0	26.0	738.0	779.0	779.0	34.0	745.0
Bangladesh	July/June	2 897.0	1 313.1	4 210.1	2 171.0	2 171.0	1 017.0	1 154.0
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	51.7	32.8	18.9
China 3/	July/June	8 240.1	259.9	8 500.0	10 200.0	10 200.0	192.0	10 008.0
Georgia	July/June	507.0	98.0	605.0	568.0	568.0	70.0	498.0
India	April/March	1 427.4	262.6	1 690.0	2 088.0	2 093.1	259.1	1 834.0
Indonesia	April/March	6 172.3	1 127.7	7 300.0	6 465.0	6 518.0	508.3	6 009.7
Korea, D.P.R.	Nov./Oct.	1 027.3	728.7	1 756.0	1 855.0	1 856.0	539.7	1 316.3
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	3.0	2.7	0.3
Maldives	Jan./Dec.	36.1	4.9	41.0	36.0	3.9	2.7	1.2
Mongolia	Oct./Sept.	132.7	60.3	193.0	203.0	203.0	0.0	203.0
Nepal	July/June	50.0	24.7	74.7	118.0	114.0	6.3	107.7
Pakistan 4/	May/April	2 725.9	195.5	2 921.4	2 021.0	2 021.2	267.2	1 754.0
Philippines	July/June	3 451.5	2.5	3 454.0	3 900.0	3 890.3	50.0	3 840.3
Sri Lanka	Jan./Dec.	1 183.5	115.5	1 299.0	1 168.0	941.3	54.1	887.2
Tajikistan	July/June	323.0	80.0	403.0	610.0	610.0	69.0	541.0
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	1 235.1	204.7	1 030.4
CENTRAL AMERICA		2 514.9	369.7	2 884.6	3 001.0	3 153.9	424.5	2 729.4
Cuba 5/	July/June	1 567.9	27.9	1 595.8	1 571.0	1 712.9	50.6	1 662.3
Haiti	July/June	380.2	119.2	499.4	571.0	580.6	160.7	419.9
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	273.8	103.0	170.8
OCEANIA		423.0	8.0	431.0	381.0	28.6	0.6	28.0
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	28.6	0.6	28.0
Samoa	Jan./Dec.	17.0	0.0	17.0	17.0	0.0	0.0	0.0
Solomon Isl.	Jan./Dec.	26.0	0.0	26.0	26.0	0.0	0.0	0.0
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	855.0	855.0	174.0	681.0
Albania	July/June	268.9	26.1	295.0	403.0	403.0	19.1	383.9
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		62 842.3	7 285.4	70 127.7	69 991.0	67 529.9	6 936.5	60 593.4

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		21 252.3	845.5	22 097.8	24 728.0	6 948.4	697.5	6 250.9
Northern Africa		14 201.7	73.3	14 275.0	16 325.0	6 261.7	223.8	6 037.9
Egypt	July/June	9 755.9	64.1	9 820.0	11 010.0	4 785.2	3.9	4 781.3
Morocco	July/June	4 445.8	9.2	4 455.0	5 315.0	1 476.5	219.9	1 256.6
Eastern Africa		3 538.8	305.8	3 844.6	4 179.0	186.1	125.8	60.3
Kenya	Oct./Sept.	1 709.0	91.0	1 800.0	2 164.0	84.4	74.4	10.0
Somalia	Aug./July	271.1	38.9	310.0	330.0	24.1	24.1	0.0
Sudan	Nov./Oct.	905.7	127.1	1 032.8	995.0	26.0	26.0	0.0
Tanzania	June/May	653.0	48.8	701.8	690.0	51.6	1.3	50.3
Southern Africa		1 630.4	306.6	1 937.0	2 144.0	459.9	307.2	152.7
Angola	April/March	389.6	140.9	530.5	753.0	223.0	154.4	68.6
Lesotho	April/March	235.0	3.0	238.0	248.0	2.2	2.2	0.0
Madagascar	April/March	214.1	16.0	230.1	518.0	33.2	11.0	22.2
Malawi	April/March	61.6	67.9	129.5	60.0	16.2	15.6	0.6
Mozambique	April/March	228.3	73.6	301.9	413.0	172.7	122.7	50.0
Swaziland	May/April	73.0	0.0	73.0	88.0	10.9	0.0	10.9
Zambia	May/April	428.8	5.2	434.0	64.0	1.7	1.3	0.4
Western Africa		1 881.4	159.8	2 041.2	2 080.0	40.7	40.7	0.0
Sahelian countries		1 881.4	159.8	2 041.2	2 080.0	40.7	40.7	0.0
Burkina Faso	Nov./Oct.	117.7	27.8	145.5	200.0	0.0	0.0	0.0
Cape Verde	Nov./Oct.	30.3	42.0	72.3	80.0	6.7	6.7	0.0
Chad	Nov./Oct.	38.0	10.4	48.4	80.0	0.0	0.0	0.0
Gambia	Nov./Oct.	115.3	4.6	119.9	110.0	0.0	0.0	0.0
Guinea Bissau	Nov./Oct.	48.6	7.1	55.7	90.0	0.0	0.0	0.0
Mali	Nov./Oct.	104.2	2.6	106.8	120.0	0.0	0.0	0.0
Mauritania	Nov./Oct.	276.0	20.7	296.7	300.0	22.5	22.5	0.0
Niger	Nov./Oct.	422.4	9.8	432.2	350.0	11.5	11.5	0.0
Senegal	Nov./Oct.	728.9	34.8	763.7	750.0	0.0	0.0	0.0
ASIA		30 400.3	3 248.1	33 648.4	33 439.0	7 808.2	1 842.8	5 965.4
Afghanistan	July/June	1 129.3	137.5	1 266.8	1 325.0	60.3	60.3	0.0
Armenia	July/June	407.0	12.0	419.0	515.0	132.8	70.0	62.8
Azerbaijan	July/June	745.0	34.0	779.0	800.0	110.0	6.0	104.0
Bangladesh	July/June	1 154.0	1 017.0	2 171.0	2 000.0	532.2	62.2	470.0
Bhutan	July/June	22.0	0.0	22.0	22.0	0.0	0.0	0.0
China 3/	July/June	10 008.0	192.0	10 200.0	13 000.0	2 305.8	0.0	2 305.8
Georgia	July/June	498.0	70.0	568.0	748.0	76.0	76.0	0.0
India	April/March	1 834.0	259.1	2 093.1	258.0	245.3	150.6	94.7
Indonesia	April/March	6 009.7	508.3	6 518.0	7 000.0	1 812.8	362.4	1 450.4
Korea, D.P.R.	Nov./Oct.	1 316.3	539.7	1 856.0	1 870.0	500.3	500.3	0.0
Kyrgyz Republic	July/June	190.0	79.0	269.0	125.0	61.0	61.0	0.0
Mongolia	Oct./Sept.	203.0	0.0	203.0	203.0	40.0	40.0	0.0
Nepal	July/June	107.7	6.3	114.0	79.0	0.0	0.0	0.0
Pakistan 4/	May/April	1 754.0	267.2	2 021.2	290.0	105.4	105.4	0.0
Philippines	July/June	3 840.3	50.0	3 890.3	3 600.0	1 688.7	211.0	1 477.7
Tajikistan	July/June	541.0	69.0	610.0	794.0	96.0	96.0	0.0
Turkmenistan	July/June	7.0	7.0	14.0	10.0	3.4	3.4	0.0
Uzbekistan	July/June	634.0	0.0	634.0	800.0	38.2	38.2	0.0
CENTRAL AMERICA		2 729.4	424.5	3 153.9	3 061.0	701.3	137.3	564.0
Cuba	July/June	1 662.3	50.6	1 712.9	1 567.0	226.3	0.0	226.3
Haiti	July/June	419.9	160.7	580.6	590.0	140.4	67.3	73.1
Honduras	July/June	476.4	110.2	586.6	622.0	209.6	42.5	167.1
Nicaragua	July/June	170.8	103.0	273.8	282.0	125.0	27.5	97.5
EUROPE		681.0	174.0	855.0	689.0	85.4	85.4	0.0
Albania	July/June	383.9	19.1	403.0	319.0	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		55 063.0	4 692.1	59 755.1	61 917.0	15 543.3	2 763.0	12 780.3

SOURCE: FAO

for footnotes, please see page 52.