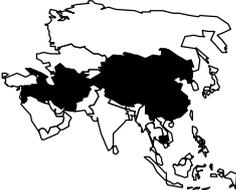


FOODCROPS AND SHORTAGES

No.3

June 2001

	<p>AFRICA: In eastern Africa, food supply prospects have improved with favourable rains over most of the region and good secondary season harvests in parts. However, food supply difficulties caused by recent drought or civil strife persist in parts. In Southern Africa, cereal production is sharply down from last year, mainly due to dry weather and reduced plantings. In the Sahel, the rainy season has just started and planting is in progress. Agricultural activities continue to be hampered by civil strife in Guinea, Liberia and Sierra Leone.</p>
	<p>ASIA: Several countries have been hit by adverse weather, posing a serious threat to their food security. In Afghanistan, the third consecutive year of drought has intensified the severe food crisis, pushing millions into destitution. DPR Korea is experiencing a serious drought just after the coldest winter in decades, while Mongolia is recovering from two consecutive extremely harsh winters that killed millions of livestock. Parts of China, India and Pakistan are also experiencing drought. In the CIS countries affected by drought in 2000 some 4 million people continue to need food assistance to survive.</p>
	<p>LATIN AMERICA AND THE CARIBBEAN: In Central America and the Caribbean, some 800 000 people affected by past hurricanes and earthquakes are receiving international food assistance. In the Caribbean, the start of the rainy season in Cuba and Haiti has provided some relief from last year's drought. In South America, Bolivia and Peru suffered localized floods at the beginning of this year, but the current weather situation is favourable. A record 2001 maize crop in Brazil has transformed the country from a net importer to a net exporter of maize.</p>
	<p>EUROPE: The 2001 cereal area in the EC has declined and production will be down from last year's bumper level. Soil moisture conditions have generally improved in central and eastern European countries and better crops than last year are expected. In the CIS countries, early indications point to an increase in cereal production in 2001 in response to generally favourable weather conditions. Food assistance continues to be necessary for vulnerable populations in the Balkans, especially in the Federal republic of Yugoslavia, Chechnya and surrounding areas.</p>
	<p>NORTH AMERICA: Wheat output is expected to fall sharply in the United States in 2001 as area is down and lower yields are forecast. Aggregate output is now officially forecast to be 12 percent down from the previous year. Paddy production is expected to fall marginally from last year. Coarse grain area and production are also expected to fall. Wheat output in Canada is also expected to fall although coarse grain production could rise.</p>
	<p>OCEANIA: In Australia, recent widespread rains have greatly improved prospects for the winter grain crops after a prolonged dry spell during the main planting period. The recently completed rice harvest has yielded a record crop. In Papua New Guinea, two earthquakes in June damaged property and infrastructure, leaving many people homeless. In the Solomon Islands, the food situation remains tight, particularly for the internally displaced persons and the returnees.</p>



AFFECTED COUNTRIES ^{1/}

COUNTRIES FACING EXCEPTIONAL FOOD EMERGENCIES (Total: 33 countries)

<u>Country/Region</u>	<u>Reason for Emergency</u>	<u>Country/Region</u>	<u>Reason for Emergency</u>
AFRICA (17 countries)		ASIA (12 countries)	
Angola*	Civil strife, population displacement	Afghanistan*	Drought, civil strife
Burkina Faso	Drought	Armenia*	Drought, economic constraints
Burundi*	Civil strife and insecurity	Azerbaijan	Drought, economic constraints
Chad	Drought	Cambodia	Past floods
Congo, Dem. Rep.*	Civil strife, IDPs and refugees	Georgia*	Drought, economic constraints
Eritrea*	IDPs, returnees and drought	Iraq*	Sanctions, drought
Ethiopia*^{2/}	Drought, IDPs	Jordan	Drought
Guinea	Civil strife, population displacement	Korea, DPR*	Adverse weather, economic problems
Kenya	Drought	Mongolia*	Harsh winter, economic problems
Liberia*	Past civil strife, shortage of inputs	Tajikistan*	Water shortages, drought
Niger	Drought	Turkmenistan	Drought and water shortages
Rwanda*	Drought in parts	Uzbekistan	Drought and water shortages
Sierra Leone*	Civil strife, population displacement	LATIN AMERICA (2 countries)	
Somalia*	Drought, civil strife	Haiti*	Structural economic problems, vulnerable groups
Sudan*	Civil strife in the south, drought	El Salvador	Earthquakes
Tanzania	Food deficits in several regions	EUROPE (2 countries)	
Uganda	Civil strife in parts, drought	Russian Federation (Chechyna)	Civil strife, vulnerable groups
		F.Rep. Yugoslavia* (Serbia & Montenegro)	Vulnerable groups and refugees

COUNTRIES WITH UNFAVOURABLE PROSPECTS FOR CURRENT CROPS

<u>Country</u>	<u>Harvest date</u>	<u>Main contributory factors</u>
Afghanistan*	May/June	Adverse weather, civil strife
China (mainland)	May/June	Drought in the north
Iran, Islamic Rep. of	June./Aug.	Drought
Iraq*	May/June	Erratic rainfall, shortage of inputs
Jordan	May/June	Drought
Korea DPR*	June/July	Drought
Somalia*	Aug./Sept.	Civil strife, low rainfall
Sudan*	Nov./Dec.	Civil strife, low rainfall
Syria	May/July	Low rainfall
Tajikistan*	Jun./Aug.	Drought, shortage of seed, economic constraints
Turkmenistan	June/July	Drought, input shortages
Uzbekistan	June/Aug.	Drought, water shortages
F.Rep. Yugoslavia* (Serbia & Montenegro)	July/Oct.	Drought and shortage of inputs

^{1/} 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 poor crops or food shortages are marked with an asterisk (*). Definitions can be found on the Contents page.

^{2/} Country requiring external assistance for purchase and distribution of localized surpluses to deficit areas.

CROP AND FOOD SUPPLY SITUATION

OVERVIEW

In general, the food supply situation in most developing countries is somewhat better than it was at this time last year, although serious food difficulties persist for many. In the Horn of Africa, improved weather conditions have ameliorated somewhat the severe food problems caused by a prolonged and extensive drought that devastated crops and livestock last year. However, parts of Sudan are currently experiencing serious food supply difficulties due to drought and a flare-up in the long-running civil war. In southern Africa, a mid-season dry spell and excessive rains in parts have resulted in significant falls in harvests, although the impact varies among countries. Elsewhere, despite favourable weather conditions for food production, civil conflicts continue to disrupt agricultural production in Angola, Burundi, DR Congo, Guinea, Liberia and Sierra Leone.

In Asia, parts of China, India and Pakistan have been seriously affected by drought, but the impact is not significant at the national level as the countries have adequate food stocks to cover shortfalls. DPR Korea is currently experiencing what is said to be the worst spring drought in 80 years, which is likely to aggravate the already precarious food supply situation. In central Asia, Mongolia is recovering from two consecutive harsh winters that killed large numbers of livestock, while the CIS countries affected by drought last year (Armenia, Georgia, Tajikistan and Uzbekistan) have yet to fully recover. In the Near East, Afghanistan is in the grip of a food crisis caused by a succession of droughts exacerbated by the continuing civil conflict. Iraq, the Islamic Republic of Iran and Jordan have been experiencing drought conditions for nearly three years, with large numbers of small farmers, particularly livestock herders, rendered food insecure and in need of assistance.

In Latin America, El Salvador is showing signs of recovery from last year's dry spell and recent earthquakes, while Bolivia and Peru are recovering from the impact of floods early this year that caused some crop losses.

In Europe, crop growing conditions are generally favourable so far, with increased harvests in prospect, except in the Former Yugoslav Republic of Macedonia where the on-going civil conflict is disrupting agricultural activities.

In North America, wheat production in the United States is forecast to fall sharply after another significant decline in plantings. The area sown to coarse grains and rice is also forecast to decline this year. In Canada, the wheat area is also forecast down from last year, and total wheat production is forecast to decline by 12 percent.

SITUATION BY REGION

Africa

In **eastern Africa**, good secondary season harvests in parts have improved the food supply situation. However, the effects of the devastating droughts in the last two years and past or ongoing civil strife and conflicts continue to undermine the food security of large numbers of people. In Sudan, the food supply outlook is highly unfavourable in several parts and supplies are anticipated to tighten further in the coming months with the start of the lean season. Two consecutive years of reduced cereal harvests and depletion of stocks have led to sharp increases in cereal prices. The recent escalation of the civil war, particularly in Bahr El Ghazal, has displaced large numbers of people and is aggravating the situation. Consequently, the number of people in need of international assistance, estimated at some 2.97 million people, is expected to increase in the coming months. In Eritrea, the outlook for the 2001 agricultural season, which has just started, remains uncertain with the bulk of the displaced farmers so far unable to return to their farms and large tracts of land still inaccessible due to landmines. The slow response to the humanitarian appeal of 2001 is also a major concern with only a small fraction of the Government's appeal of about US\$224 million met so far. In Kenya, the food supply prospects improved in several central and western pastoral districts following abundant rains. However, eastern pastoral districts have yet to recover with only scanty rainfall received so far. In Ethiopia, favourable prospects for the current short rains "belg" crop preceded by a bumper main "meher" season harvest late last year, have significantly improved the food supply situation in the country. However, some 6.5 million people affected by successive droughts and the war with neighbouring Eritrea depend on

food assistance. Furthermore, depressed grain prices since late last year have adversely affected household incomes. In Somalia, below normal rains in May in some main cereal growing areas in the South have affected the 2001 main "gu" season crops. More rains are needed to prevent a reduction in yields. Pasture conditions remain good in most parts of the country. However, the effects of the livestock import ban by countries in the Arabian Peninsula and high inflation due to injection of newly printed Somali Shillings into the economy have eroded the purchasing power of large sections of the population. In Uganda and Tanzania, the overall food supply situation is adequate following favourable rainfall. In Burundi, despite an improved harvest last season, the food supply situation is difficult for 324 000 internally displaced people and for drought-affected persons in some areas. In Rwanda, food assistance is required for 267 000 people who have gathered a reduced harvest in southeastern parts due to poor rains.

In **southern Africa**, harvesting of the 2001 coarse grains is nearly complete. Output is estimated to be sharply reduced as a result of lower plantings and adverse weather. Preliminary estimates of maize production, which accounts for over 90 percent of the total coarse grains, indicate a crop of 13.7 million tonnes, 26 percent lower than in the previous year and well below average. In South Africa, maize production is forecast at 7.2 million tonnes, 3.7 million tonnes less than last year. Despite large carryover stocks, the country's exportable surplus for marketing year 2001/02 is not expected to cover import requirements in the sub-region. Recently completed FAO/WFP Crop and Food Supply Assessment Missions to Zimbabwe, Swaziland and Lesotho have confirmed earlier unfavourable production forecasts. In Zimbabwe, maize output is estimated over one-quarter below the level of 2000 reflecting lower plantings and reduced yields. The overall food supply situation is expected to be very tight as the country faces severe shortages of foreign exchange, which constrain commercial imports. At household level, food difficulties are anticipated in southern and eastern parts, where the cereal harvest was sharply reduced. In Lesotho, cereal production is forecast at 80 000 tonnes, about 55 percent below last year and 60 percent below the last five years average. As a result, cereal import requirement for 2001/02 (April/March) is estimated substantially higher than average. In Swaziland, cereal production is forecast at 73 000 tonnes, around last year's level but 66 percent of the last five years average. Import requirements have doubled from last year and the food supply position is anticipated to be tight. Sharply reduced coarse grains crops were also gathered in Zambia, Namibia and Botswana. In Malawi, maize output declined by over 18 percent from the bumper level of the previous year, when an exportable surplus was available. However, the country will remain self-sufficient in maize. By contrast, in Angola a recent FAO/WFP Crop and Food Supply Assessment Mission estimated this year's cereal production significantly above last year due to improved IDPs' access to land, increased agricultural inputs distribution and generally favourable weather. However, over 1.3 million internally displaced people are in need of emergency food aid. In Mozambique, recent official estimates point to an increase in this year's coarse grain output reflecting higher plantings and overall favourable weather, despite excessive rains in northern and central parts.

In **northern Africa**, harvesting of the sub-region's 2001 winter crops is underway. Aggregate cereal production is expected to reach 26 million tonnes, much above last year's drought-affected output and also above average. The wheat crop is anticipated to be close to 13 million tonnes, compared to about 10 million tonnes last year and just above the five-year average. However, the harvest situation varies across the sub-region. In Morocco, wheat production is expected to be more than double the drought-affected level of 2000, due to favourable weather conditions in northern and central areas. A below-average output is anticipated in southern growing regions as a result of inadequate rainfall and reduced plantings. In Algeria and Tunisia, although wheat harvest is expected to be above the 2000 crop which was adversely affected by drought, prolonged dry conditions in April/May this year during the grain filling stage may result in lower than expected yields and outputs in many areas. As a consequence, a below average wheat crop is forecast in Tunisia while in Algeria it is anticipated to be close to the five-year average. In Egypt, output of the irrigated wheat crop is expected to be only slightly below the 2000 above average level of 6.6 million tonnes, as a result of a small reduction in area planted this year. The sub-region's 2001 aggregate coarse grains crop is forecast at some 10 millions tonnes. This is above the previous year's drought-reduced crop but below the 5-year average, on account of inadequate rainfall over many areas.

In **western Africa**, the rainy season is now well established in the countries along the Gulf of Guinea. Abundant rains were registered in April and May in Côte d'Ivoire, Ghana and Nigeria. The first maize crop is developing satisfactorily in the south and the centre while coarse grains are emerging in the north. However, in Guinea and Sierra Leone, fighting in border areas affected agricultural and marketing activities and

caused population displacement. Relief programmes are also hampered and refugee camps have been relocated from the "Parrot's Beak" area in Guinea. In the Sahel, first rains permitted land preparation and early plantings in the south of Burkina Faso, Chad and Mali. Elsewhere, seasonably dry conditions prevail and plantings will start upon the onset of the rains in June and July.

In **central Africa**, growing conditions are favourable so far in Cameroon and Central African Republic. The security situation has improved and food production should increase in the Republic of Congo. The food and nutrition situation of an estimated 2 million internally displaced people in the Democratic Republic of Congo is extremely serious but insecurity continues to hinder provision of humanitarian assistance.

Asia

The main rice season is well advanced in countries around the Equatorial belt. Land preparation and planting of rice and coarse grains has started or is about to start with the arrival of monsoon rains. However, planting has been delayed or hampered by serious drought conditions in some countries. In DPR Korea, crop prospects have become unfavourable due to drought, which follows two consecutive years of harsh winters. In China, drought conditions in the northern part have adversely affected winter wheat planted in September/October. Below-average rainfall has led to water shortages for livestock and human consumption and drying up of water sources for irrigation. Planting of the early rice crop is drawing to a close in the south. In Thailand, Cambodia, Laos and Viet Nam, planting of the main wet season rice crop, which accounts for the bulk of aggregate paddy production, is underway. In the Indian sub-continent, planting of the main Kharif season rice and coarse grains will commence shortly with the arrival of the Southwest monsoon rains. South of the equator, harvesting of the main rice crop is near completion in Indonesia, whilst planting of the second, dry season crop, will commence shortly. Serious drought has devastated crops and livestock in several countries in west Asia, particularly in the Islamic Republic of Iran, Pakistan and western India. In the Islamic Republic of Iran, the recurrence of drought this year threatens domestic grain production, mostly in southern, eastern and central parts. In Pakistan, the drought has devastated the Baluchistan province and part of Sindh province, causing serious water and food shortages in the worst affected areas. The drought has decimated livestock and severely affected fruit and rainfed cereal production in Balochistan, parts of Sindh and Cholistan in Punjab. Livestock numbers in some districts have been reduced by up to 60 percent of their 1998 levels. In India, drought and the consequent shortage of water and animal feed have seriously affected several central and western states, including Rajasthan, Gujarat and Madhya Pradesh. The states Haryana and Punjab, the country's wheat basket, have also been affected. Elsewhere, the food situation of nomadic herders in Mongolia still remains precarious following two consecutive harsh winters which killed large numbers of livestock and destroyed the livelihood of pastoralists. The Democratic People's Republic of Korea is facing the worst spring drought in more than 80 years. Food supply difficulties are expected to persist, necessitating continued food assistance.

Three consecutive years of drought and below normal rains have severely reduced food output in several countries in the **Near East**, with particularly sharp falls in Afghanistan, Jordan, the Islamic Republic of Iran, Iraq and Syria. In Afghanistan, an exceptionally cold winter exacerbated the very serious food crisis that has emerged following two consecutive years of drought and continuing civil conflict. More than 3 million people depend on international food assistance. A joint FAO/WFP Crop and Food Supply Assessment Mission which visited the country in May 2001 has forecast 2001/02 cereal import requirement at an unprecedented level of about 2.2 million tonnes. In Iraq, two years of drought have seriously reduced food production, while in Jordan drought in three consecutive years and below-average rains have severely affected crops and livestock, leaving thousands of herders in need of assistance. Overall, the outlook is bleak for livestock producers in the region, as livestock mortality rates have increased due to a shortage of fodder and water. This will have serious repercussions particularly in countries where livestock and livestock products constitute an important export and/or provide a livelihood to large segments of the population.

In the eight CIS countries in Asia, spring grain planting is well underway in Kazakhstan, the major producer in the region. Both the aggregate area to be sown and the target output (11.7 million tonnes including 9.2 million tonnes of wheat) seem realistic forecasts at this early stage. Good snows this winter have provided ample soil moisture reserves.

Elsewhere in the region, harvesting of winter grains has started early in some countries in response to hot dry conditions since late April, notably in Tajikistan, Turkmenistan and Uzbekistan. In these countries, unseasonably hot weather since late April has favoured spring planting (cotton, potatoes, vegetables, etc) but has also increased irrigation requirements. Information on river flows until end-April indicates that they are even less than last year when drought caused serious losses to both irrigated and rainfed crops. In Uzbekistan, reports indicate that the area sown to rice and cotton has been reduced in response to water shortages in the Karkalpakstan Autonomous region where the availability of drinking water and employment remains grim. In view of the threat of water shortages current indications are that the grain harvest in Uzbekistan could be less than last year's 3.9 million tonnes while the food security situation in the downstream areas (notably the Karakalpakstan Autonomous region) could deteriorates further. The Government of Tajikistan has also issued a drought warning and the cereal harvest is expected to be less than last year's poor level, now estimated at some 400 000 tonnes. In Kyrgyzstan, the early outlook remains satisfactory. In Turkmenistan the harvest outlook could also be affected by water shortages.

In the Caucasus region, following the drought reduced crops of 2000, seed shortages have limited the areas that could be sown with winter wheat in several countries, notably Armenia and to a lesser extent Georgia. Growing conditions to date are by and large satisfactory due to good rains in the spring. However, soil moisture and irrigation reserves have not been replenished after last year's prolonged drought and the final outcome will depend crucially on regular rains for spring crops. In Armenia, indications are that the area sown to winter wheat has fallen to about two thirds of normal but spring grain plantings are planned to boost the aggregate area sown. Nevertheless the cereal harvest could be less than last year. By contrast, in Azerbaijan, the area sown to wheat has increased and spring grain plantings are also set to rise. Tentative projections, given normal weather until the completion of the harvests, is for aggregate wheat production in the region in 2001 to increase to 17.3 million tonnes (2000: 16.7 million tonnes) reflecting perhaps a further increases in output in Turkmenistan, and some recovery in Georgia. Spring coarse grains, (mainly maize) and rice are being planted now.

Latin America

It is the start of the rainy season in **Central America and the Caribbean**; harvesting of wheat is well advanced and planting of 2001 first season coarse grain crops is under way. The hurricane season also started at the end of May; Hurricane 'Adolph' reached force 4 on the Saffir-Simpson scale and moved off the coast of Mexico. The timely start of the rainy season and unchanged planting intentions from last year indicate that aggregate cereal output will increase, specially in Mexico, the largest cereal producer in the sub-region. The area planted with maize is also anticipated to remain unchanged in other Central American countries with the exception of Nicaragua, where low farm prices are expected to cause a reduction of 4 per cent in the area planted. El Salvador is showing signs of recovery from last year's dry spell and recent earthquakes, but the food situation in poor rural areas needs close monitoring until August/September, when the first season crop is harvested. In the Caribbean, rains in May in Cuba partially replenished water supplies, important for the forthcoming paddy crops.

Wheat planting in southern and central parts of **South America** is under way, and the harvest of coarse grain crops is almost complete. In MERCOSUR (Argentina, Brazil, Paraguay and Uruguay), wheat plantings are expected to increase due to the expectation of higher prices and a record soybean area planted (which is rotated with wheat). Maize harvest is well advanced and output is expected to increase by about 5.5 million tonnes thanks to a record crop in Brazil. In the Andean countries, Bolivia and Peru are recovering from floods which earlier in the year caused localized crop losses. The outlook for wheat and potato crops currently being planted is favourable due to the accumulated water in soils and reservoirs. In the remaining South American countries weather conditions are favourable for the normal development of the crops.

Europe

In **Europe**, conditions for the 2001 cereal crops remain mixed reflecting varied weather conditions across the region in the past two months. Northern parts were generally characterized by abundant rainfall while the southern Mediterranean areas were dry with hot temperatures. Central and eastern parts have mostly received satisfactory rainfall and conditions are generally better than last year when widespread drought affected these parts. Latest information confirms expectations of a decrease in the EC cereal crop in 2001,

with most of the reduction expected in wheat. Elsewhere in the region cereal crops are generally expected to increase somewhat from the 2000 levels.

In the CIS countries west of the Ural Mountains, (Belarus, Moldova, Russian Federation and Ukraine) early forecast is for an increase in the 2001 cereal production in response to mostly good growing conditions for winter crops and favourable conditions so far for spring planted crops. This could lead to an increase in the aggregate area sown to cereals in the order of 4 million hectares. Markedly better growing conditions this season in the Ukraine and Moldova to date point to a recovery from the poor levels of the past two years.

In the Russian Federation, the aggregate area sown to grains is estimated to have increased by over 2 million hectares to about 48 million hectares compared to 45.6 in 1999/2000 season. Winter crop area increased, and winterkill has affected 1.2 million hectares, similar to last year's level and spring grain planting is projected to rise by 1.4 million hectares. Yield projections are difficult to make for an area as large and varied as the Russian Federation but, given normal weather until the completion of the harvest, FAO projects that the 2001 grain (cereal and pulse) harvest could reach 74 million tonnes compared to the estimate of 71 million tonnes in 2000. At this early stage the 2001 wheat harvest is projected at 40 million tonnes (2000: 38 million tonnes) and coarse grains at 32 million tonnes, similar to last year's level.

In Ukraine, growing conditions are favourable to date for both winter and spring planted crops. Current conditions point to a harvested area of 13.4 million hectares (2000: 12.6 million hectares). The outlook is for a sharp recovery from the poor harvests of the past two years, (estimated at 27 and 23 million tonnes respectively). Early projections, provided normal weather prevails, are for the 2001 grain harvest to reach 31 million tonnes, including about 18 million tonnes (2000: 11 million tonnes) of wheat and 13 million tonnes (2000: 12 million tonnes) of coarse grains. In Belarus, weather conditions for the 2001 crops have also been beneficial overall and despite persistent economic problems, indications are that the 2001 grain harvest could reach 5 million tonnes, cleaned weight compared to an estimated 4.8 million tonnes in 2000. In Moldova, also, expectations are for an increase to an estimated 2.4 million tonnes (2000: 2.1 million tonnes) in response to better weather conditions to date.

In the Baltic countries, (Estonia, Latvia and Lithuania) the 2001 cereal harvest is likely to remain close to last year's good level, with aggregate wheat and coarse grain production estimated to remain stable at 1.5 and 2.6 million tonnes respectively.

In the Federal Republic of Yugoslavia, (Serbia and Montenegro), good rains since December helped to boost soil moisture for crop development but soil moisture reserves have not yet been fully recharged. Winter wheat condition is satisfactory throughout the country but spring crops, and in particular the maize crop, remain at risk of moisture stress in the absence of regular rains until September at least. Although official expectations of the 2001 cereal harvest are high, FAO tentatively forecasts the 2001 wheat harvest at 2 million tonnes (compared to 1.6-1.8 million tonnes last year) and the maize harvest to recover to around 5 million tonnes (from 3.1 million in 2000). In Croatia, the outlook is similarly uncertain with moisture reserves remaining tight, but again good spring rains have improved the outlook and the 2001 cereal crops are likely to recover from last year's low of 2.8 million tonnes. In Bosnia Herzegovina, wheat production is likely to remain at about 250 000 tonnes but maize output, given adequate rains this growing season could recover from last year's drought reduced level.

North America

In **North America**, wheat production in the United States is set to fall sharply after a further significant decline in plantings, particularly of winter wheat. Aggregate wheat output in 2001 is now officially forecast at 53.4 million tonnes, 12 percent down from the previous year. The overall area sown to coarse grains is also expected to decrease this year, and output is tentatively forecast to fall by about 3 percent to some 267 million tonnes, of which maize would account for about 243 million tonnes. Paddy production for 2001/02 is officially forecast to fall by about 3 percent from the previous year to 8.4 million tonnes. Also, in Canada, the wheat area for the 2001 harvest is estimated down from the previous year and the country's aggregate wheat output is now forecast at 23.7 million tonnes, 12 percent down from 2000. For coarse grains, latest indications continue to point to an increase in area and output.

Oceania

In **Oceania**, prospects for the winter cereal crops in Australia have improved significantly following the arrival of widespread rainfall after a prolonged dry spell during the main planting period. Latest indications suggest that wheat output could still rise from last year's below average level but not by as much as earlier anticipated. The recently completed rice harvest has yielded a record crop reflecting favourable conditions during its growing season. The two earthquakes that hit Papua New Guinea in June have reportedly caused damage to property and infrastructure, leaving some 200 people homeless. However, damage to crops has been limited. The food situation in the Solomon Islands continues to be tight, particularly for the internally displaced persons and the new returnees. In Vanuatu, cyclone season has been generally calm this year and limited crop damage is reported from the cyclone in early April.

COUNTRY REPORTS ^{1/}

AFRICA

NORTHERN AFRICA

ALGERIA (4 June)

Harvesting of the 2001 winter crops is underway and a recovery is in prospect from the poor crop of 2000. Wheat output is expected to be double the drought-reduced level of 2000, but prolonged dry conditions in March/April during the grain filling stage may result in lower than expected yields and outputs in several areas. Aggregate cereal production this year is anticipated to be about 2 million tonnes, which is much above last year's crop but below the average of the last five years. As a consequence, imports of cereals, mostly wheat, are forecast at about 7 million tonnes in the marketing year 2001/02 (July/June).

EGYPT (18 June)

Following generally good growing conditions for the 2001 largely irrigated wheat and barley crops, aggregate cereal production is expected to be above average and only slightly below last year's good harvest of about 19 million tonnes. The wheat crop is tentatively forecast at about 6.3 million tonnes, which is above average but some 4 percent below the 2000 level, as a result of a small reduction in area planted. Maize harvest is expected to be similar to last year's average level of 6.2 million tonnes. Planting of the 2001 paddy crop is underway under normal weather conditions. The 2000 paddy harvest stands at about 6 million tonnes, some 3 percent over the previous year's above average level. Imports of wheat in 2001/02 (July/June) are forecast at about 6.8 million tonnes, while coarse grain imports are projected at 4 million tonnes.

MOROCCO (18 June)

The 2001 production of wheat and sorghum being harvested is expected to exceed 4.6 million tonnes, more than double the drought-affected level of 2000, on account of favourable conditions in northern and central areas. However, this is below the average of the past five years, as a much reduced output is anticipated in the southern regions as a result of inadequate rainfall and reduced plantings. The wheat crop is officially forecast at about 3.4 million tonnes, more than twice last year's drought-reduced level. The barley crop, which was also affected by drought in 2000, is also forecast to be more than double the previous year output of about 500 000 million tonnes. Imports of wheat in 2001/02 (July/June) are forecast at about 3 million tonnes, while coarse grain imports are projected at about 1.5 million tonnes.

TUNISIA (18 June)

Harvesting of the 2001 winter crops is underway. Aggregate cereal output is anticipated to be close to 1.2 million tonnes against an average of 1.7 million tonnes. Although growing conditions have been generally favourable for winter grains in the northern region, a prolonged dry spell in the centre and the south adversely affected yields and output in these areas. Preliminary estimates of wheat production point to an output close to 900 000 tonnes, which is slightly above last year's drought-reduced level and below average. Barley output is also expected to rise from 241 000 tonnes to about 325 000 tonnes, but to remain below average. Imports of cereals in 2001/02 (July/June), mostly wheat, maize and barley are forecast at some 1.7 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 (11 June)

The first rains started in mid-March in the south, allowing planting of the first maize crop. Rains covered the entire country from mid-April and remained widespread and above average during May, benefiting planting and emergence of millet and sorghum crops in the north. They decreased somewhat in early June.

Following well above average cereal harvest in 2000, the overall food supply situation is satisfactory. Markets are well supplied and prices of cereals remain generally stable. Cereal imports for domestic use and re-exports during the 2001 marketing year are estimated at 143 000 tonnes and food aid requirements at 11 000 tonnes.

BURKINA FASO (18 June)

The rainy season has started on time in the south and the centre. First showers were recorded in late March in the south-east but significant rains came during the second decade of April in the south-west and the centre-south. Precipitation decreased in late April but improved and became widespread in May. However, the north remained dry. Land preparation and planting of millet and sorghum is now underway in the south, west and centre. The availability of seeds may be limited in some areas following poor harvests in several provinces last year. No pest activity is reported.

Off-season crops have been harvested. Final 2000 production figures and the 2000/01 cereal balance sheet were revised in late April by the government, and the aggregate output of cereals is now estimated at 2 286 300 tonnes, which is 15 percent below the 1999 level and 6 percent below the last five years average.

Following this reduced crop, the overall food supply situation is tight in several deficit areas, notably in the north, the centre and the east. The return of Burkinabé from Côte d'Ivoire to their villages has also put additional pressure on food supply. Prices of cereals increased sharply in the north, east and centre in February and March. However, in April and May, prices eased slightly in the north but remained much higher than at this time last year. The Government plans to distribute 34 000 tonnes of food aid to 527 000 vulnerable people in 25 affected provinces, of which 18 000 tonnes will be taken from the National Security Stock.

CAPE VERDE (4 June)

Seasonably dry conditions prevail. Planting of maize normally starts in July with the onset of the rains on the main islands. Following two successive good harvests in 1999 and 2000, the availability of seeds is adequate.

The overall food supply situation is satisfactory. However, domestic 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 and food aid for the coming months, markets should remain well supplied with stable prices. The cereal import requirement for the 2000/01 marketing year (November/October) is estimated at 88 000 tonnes and the food aid requirement at 53 000 tonnes.

CHAD (4 June)

Above-normal first rains were registered in early April in the extreme south, reaching the south-west in late April/early May, while no rains were registered in the south-east. During the second dekad of May, precipitation increased in the south and Sudanian zone, but decreased significantly during the third dekad. Satellite imagery does not indicate improved rains during the first dekad of June. As a result, planting of coarse grains is delayed in the south-east and resowing is likely to be needed. Land preparation is starting in the Sahelian zone.

Following a below average harvest in 2000, the food supply situation is tight in the chronically deficit areas of the Sahelian zone. Unusual population movements were reported from several cantons of Lac Department to major urban centres, southern Chad or the Lake Chad area. In the Sudanian Zone, the food situation is also tight in the rice producing areas in Tandjilé and parts of Kabia, notably in Mayo Beneye area. Prices of millet have increased sharply. A locally-organized joint CILSS/FAO/WFP/FEWS-NET assessment of the food supply situation in the at-risk zones in January estimated the at-risk population at 800 000 persons for whom about 40 000 tonnes of cereals are needed. An additional 700 000 people are considered moderately vulnerable. The sale of 20 000 tonnes of cereals at subsidised prices has been recommended. A WFP Emergency Operation is underway to provide 27 000 tonnes of food aid to 375 000 beneficiaries in eight departments of the Sahelian zone.

COTE D'IVOIRE (11 June)

Following the start of rains in late February, planting of the first maize crop is underway. Abundant precipitation covered the entire country during April and May, benefiting planting and emergence of millet and sorghum crops in the north.

Following an above-average cereal harvest in 2000, the overall food supply situation is satisfactory. Some 110 000 Liberian refugees and 2 000 Sierra Leoneans remain in the west.

THE GAMBIA (18 June)

First rains have been registered in the east and parts of the centre in early June where they permitted land preparation and first early plantings. However, the weather remained mostly dry in mid-June. Planting will progress to the centre and the west in the weeks ahead following the onset of the rains. Following a record harvest in 2000, seed availability is adequate for cereals.

With two successive bumper crops in 1999 and 2000, the overall food supply situation is satisfactory. Markets are well supplied. Prices of cereals remained low and stable. However, the Central River Division (CRD) North gathered poor crops due to blister beetles and striga infestations in early millet fields. About 250 tonnes of cereals are needed for about 9 300 affected persons. More than 2 000 people fled to The Gambia from Casamance in southern Senegal, following heavy fighting between the Senegalese army and rebel fighters. WFP will provide food in the border villages or in the Kanilai transit camp.

GHANA (11 June)

First rains in the south in late February/early March permitted planting of the first maize crop. Precipitation was well above average from mid-March to mid-April. Rains decreased in late April and early May but improved in mid and late May. They remained below average in early June, except in the north. Planting of coarse grains is underway in the north.

Reflecting poor harvests in several regions in 2000, the food supply situation is tight in some areas. The government announced its plans to halve its rice imports in 2001 by developing more than one million hectares of inland valleys for rice production. About 10 000 Liberian and up to 2 500 Sierra Leoneans refugees remain in the country.

GUINEA (11 June)

First rains were registered in the south in late March, and subsequently covered the entire country in May, allowing land preparation and first plantings. Reflecting a good harvest in 1999 and a record crop in 2000, the overall food supply situation is satisfactory and markets are generally well supplied, except in the south-east where rebel incursions from Sierra Leone have severely affected agriculture and marketing activities.

There are more than 400 000 refugees from Liberia and Sierra Leone and about 150 000 IDPs in the country. About 57 000 Sierra Leonean and Liberian refugees have been relocated from the Parrot's Beak, a stretch of Guinean territory which has been and is likely to remain the scene of military operations by various armed groups. New refugee camps have been established in the Dabola and Albadaria prefectures to relocate refugees.

At the same time, the voluntary repatriation of those who wish to return to Sierra Leone is facilitated. A transit camp has been established in Conakry to organise repatriation of refugees by boat to Freetown where reception facilities are available. Since September 2000, more than 55 000 Sierra Leoneans have returned from Guinea.

GUINEA-BISSAU (18 June)

First rains were registered in mid-May in the east but the weather remained mostly dry in late May. Abundant precipitation covered almost the entire country in early and mid-June. Land preparation and plantings of coarse grains and rainfed rice are underway in the east and the north. Planting of rice in seedbeds has also started. Transplanting will take place in July/August after desalination of swamp rice fields by more rains.

The pest situation is calm. Insect attacks have been reported on Bolama Island. Seed availability problems are likely in some areas, notably for groundnut.

The overall food supply situation is satisfactory. Markets remain generally well supplied countrywide. However, some population groups with low purchase power are facing food difficulties, notably in urban areas and in Pirada, Fulacunda, Tite, S. Domingos and Ingoré areas, due to insecurity in border areas with Senegal.

LIBERIA* (11 June)

Planting of rice, the staple crop, is underway. Precipitation has been generally widespread and abundant since mid-April. With the exception of Lofa County, relative peace in most areas has exerted a positive influence on farming activities. The cultivated area and rice production should increase if climatic conditions are favourable. Input distribution has been undertaken by several NGOs in various areas. However, transport infrastructure is very poor, and hampers distributions as well as the marketing of local produce. Post-harvest losses are also reported to be high.

It is estimated that there are a total of about 80 000 Sierra Leonean refugees and 360 000 Liberian returnees, mainly in Lofa county, one of Liberia's main rice producing areas, where rebel incursions have disrupted farming and displaced thousands of people.

The cereal import requirement in 2001 is estimated at 200 000 tonnes, with commercial imports at 160 000 tonnes and 40 000 tonnes needed as food aid. WFP is seeking a total of 21 000 tonnes of cereals and pulses and 3 800 tonnes of other commodities to meet the food needs of about 145 000 refugees and other war affected people, as well as 140 000 children attending primary schools during the year 2001. The Government has lifted the travel restriction imposed on 30 April on UN staff which seriously affected WFP's operations. Bi-monthly food distribution are undertaken to all registered IDPs in Bong and Grand Cape Mount Counties, in collaboration with the National Red Cross Society and ACF. More IDPs

are arriving in these counties from Lofa County with the relaxation of restrictions on crossing the Lofa Bridge.

MALI (18 June)

The first significant rains were registered in the extreme south in mid-April. They progressed northwards and were above normal during the first and second dekads of May but they decreased during the third dekad. Precipitation was generally adequate in early and mid-June. Land preparation is underway and first plantings of millet and sorghum have started in the south. They will progress northwards with the onset of the rains.

As recommended by the National Early Warning System, distribution of seeds has been undertaken in various areas. The pest situation is calm. Low numbers of Desert Locusts are likely to be present and will persist in a few areas of Timetrine and the Adrar des Iforas. Limited breeding could start in these areas if rainfall occurs.

Following an average harvest and two successive bumper crops in 1998 and 1999, farmers' stocks are still available for the lean season. The national security stock is also at its recommended level of 35 000 tonnes (plus 25 000 tonnes in the form of "financial" security stock). Therefore, the overall food situation is satisfactory. However, cereal prices increased significantly in April. In Ségou region, the average price of millet in mid-April was 26 percent higher than in March, 56 percent higher than the price in April last year and 30 percent higher than the previous five-year average price. The SAP (national early warning system) classified almost 400 000 persons as at risk of "food difficulties" in the "cercles" of Douentza, Mopti, Bandiagara and Youvarou in Mopti region; Niafunké and Gourma-Rharous in Tombouctou region; Gao, Ansongo, Bourem and Ménaka in Gao region and Kidal and Abéïbara in Kidal region. It recommended the distribution of 10 790 tonnes of millet and sorghum to these populations for 3 months.

MAURITANIA (18 June)

Seasonably dry conditions prevail. Planting will start following the onset of the rains in late June or July. Dry plantings may already have started in some areas in the extreme south and the south-east.

Seed availability is generally adequate following good rainfed crop harvests in 2000 in most areas. Desert Locusts have been observed mid-April north of Aïoun. They may move towards the summer breeding areas in the south where they are expected to mature and lay with the onset of the rainy season.

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The food situation improved in rural areas following a good rainfed crops harvest in 2000. Although markets are generally well supplied, sorghum prices have increased sharply in Brakna, Gorgol and Trarza following poor recession crops. Several populations remain vulnerable, notably in various areas of Trarza, Brakna and western Gorgol, where imports of cereals from Mali decreased. The Government launched an appeal for 25 000 tonnes of emergency food aid.

NIGER (18 June)

Generally, seasonably dry conditions prevail. Scattered showers may have been received in the extreme south but plantings will start in the weeks ahead following the onset of the rains. Seeds availability is generally adequate as 2 000 tonnes of seeds have been distributed in the areas affected by poor crops in 2000.

Following a below-average crop in 2000, estimated at 2 143 000 tonnes, which was 25 percent below the 1999 level and about 10 percent below the average of the previous five years, the

food supply situation is tight in the traditionally food deficit areas. Prices of cereals increased significantly in March and April, and have remained higher than average. The most at-risk zones are in Tchirozérine, Mainé-Sorea, N'Guigmi, Filingué and Ouallam arrondissements. The Government launched an appeal for international food assistance and seeds for the next growing season. The government and donors have bought cereals for sale at subsidized prices in the areas that experienced production shortfalls. The cereals, mainly millet and sorghum, are being sold at 10 000 F.CFA (about US \$14) per 100-kg bag instead of the market price of 18 000 to 20 000 F.CFA. More than 1 billion F.CFA francs has been made available from the National Food Security Fund and the Donor Common Fund to buy cereals. In addition, 2 000 tonnes of seeds have been distributed in the affected areas. Financial assistance has also been given for off-season irrigated crops.

NIGERIA (11 June)

Rains started in the south-east in early March and progressed to the south-west in mid-March, allowing land preparation and plantings of the first maize crop. Precipitation was generally above average in April and May. Rains reached northern areas in late April/early May where they permitted planting of coarse grains. The Government has re-introduced the 25 percent subsidy on fertilizers.

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

SENEGAL (18 June)

Seasonably dry conditions prevail in most parts. Early limited rains were registered in the extreme south-east in May. Rains improved significantly in the south-east in early June. Elsewhere seasonably dry conditions prevail. Rains will start and progress towards the centre and the north in June. Land preparation and plantings of coarse grains are underway in the south.

Seed availability is generally adequate following 2000 above average harvest. No significant pest activity has been reported.

The aggregate output of cereals in 2000 has been estimated at 1 073 000 tonnes which is about 14 percent above average. Renewed fighting in May in Casamance in southern Senegal may hamper agriculture activities at the critical planting period for paddy.

Following two successive good harvests in 1999 and 2000, the overall food supply situation is satisfactory. Markets are well supplied. The price of millet and sorghum seasonably increased, while the price of rice remained mostly stable.

SIERRA LEONE* (4 June)

Planting of the rice crop is underway with the onset of rains in mid-April. Rice production should increase this year reflecting increased planted areas by returning farmers and improved conditions for distribution of inputs.

As a result of low food production in 2000 and transport problems, the food supply situation will remain tight in 2001.

WFP plans to distribute more than 50 000 tonnes of food aid to an estimated 544 000 beneficiaries during 2001, including IDPs, recent returnees from Guinea and 200 000 beneficiaries of special programmes for vulnerable groups such as schooling and malnourished children. NGOs also plan to distribute around 37 000 tonnes during 2001. The Government has launched a resettlement programme in Freetown, Port Loko, Kenema and Pejehun districts, which have been declared safe. A Disarmament, Demobilisation and Reintegration Programme also started in May for ex-combatants who return their arms.

Between 58 000 and 60 000 Sierra Leonean refugees have recently returned following fighting in Guinea, 2 000 to 2 500 are returning to Sierra Leone each week.

TOGO (11 June)

Reflecting above-normal rains in May, the first maize crop is developing satisfactorily in the south and the centre. Coarse grains are emerging in the north. However, precipitation decreased in early June.

The overall food supply situation is satisfactory. However, some populations affected by floods in various areas remain vulnerable.

CENTRAL AFRICA

CAMEROON (11 June)

Rains started in the south in March. They became particularly abundant in the south and the centre in mid-April and reached the extreme north in May, permitting land preparation and first plantings. Precipitation decreased in the south in early June.

The overall food supply situation is satisfactory except in the extreme north. A joint FAO/WFP assessment mission in late May estimated food aid needs at 19 000 tonnes for 80 000 families affected by poor crops due to drought, flooding or pest attacks in the north and extreme north provinces. Cereal imports for domestic use and re-export during the 2001 marketing year are estimated at 300 000 tonnes, mostly wheat and rice.

CENTRAL AFRICAN REPUBLIC (11 June)

Precipitation was abundant in April, notably during the first dekad. Rains were well below average in early May but improved from mid-May, notably in the eastern half of the country. They remained widespread and abundant in early June.

Following successive good harvests, the food supply situation remains satisfactory. However, population movements from the capital have been reported following a coup attempt in late May. The cereal import requirement for the 2001 marketing year is estimated at 33 000 tonnes, mainly wheat.

CONGO, DEMOCRATIC REPUBLIC OF* (11 June)

The food supply situation continues to deteriorate due to persistent insecurity. Intensified fighting, particularly in eastern parts, has further disrupted all economic and agricultural activities and resulted in fresh waves of population displacements. The number of IDPs whose food and nutritional situation is critical is currently estimated at 2 million. Recent surveys conducted by non-governmental organisations indicated that up to 21 percent of the population is suffering from severe malnutrition in the eastern province of North-Kivu. The situation could deteriorate with an expected cassava crop failure in eastern parts due to pests and diseases. The food situation is also difficult in the main cities of the country, mainly Kinshasa with a population of 6-7 million. An FAO Mission last October estimated Kinshasa's food deficit in 2000 at 1 million tonnes. In general, factors constraining food supply to Kinshasa and other cities include the extreme state of disrepair of the road infrastructure; police/military harassment of shippers, traders and farmers; the cut-off of food supply from Equateur and Eastern Provinces; and the scarcity of fuel due to a shortage of foreign exchange.

Humanitarian assistance remains constrained by persistent insecurity and very poor road conditions. WFP plans to increase its distributions of food aid to cover 1.2 million people,

including some 70 000 Angolan refugees, and has recently appealed for US\$112 million for the relief operations.

CONGO, REP OF (11 June)

After below-average rains in January and February, precipitation increased in early March and became particularly abundant from mid-March to mid-April. However, it decreased in May but remained generally widespread, except in the south.

The overall food supply situation has improved. All areas are now accessible to humanitarian agencies. The bulk of the estimated 810 000 people displaced by the civil war have returned to their homes. There are about 100 000 refugees from the Equateur province of DRC in northern areas, notably in Betou, near the border with the Central African Republic. There are also 7 000 Rwandan/Burundian refugees and 18 000 Angolan refugees. WFP launched a new Emergency Operation to assist 50 000 refugees from the DRC over a period of 6 months. It is also providing food to some 120 000 persons in Brazzaville, Pointe Noire and other main towns.

EQUATORIAL GUINEA (11 June)

Abundant rains were registered during the second dekad of April. Precipitation remained widespread in May. The staple crops are sweet potatoes, cassava and plantains. The cereal import requirement for the 2001 marketing year is estimated at 10 000 tonnes of rice and wheat.

GABON (11 June)

Precipitation was very abundant from mid-March to mid-April. Though it decreased in late April, it remained regular in May. The main foodcrops are cassava and plantains but some maize is also produced (around 25 000 tonnes). The country imports commercially the bulk of its cereal requirement, estimated at around 87 000 tonnes in 2001.

**EASTERN
AFRICA**

BURUNDI* (5 June)

The output of the 2001 A season crops is estimated to be satisfactory. A locally organized FAO/WFP/UNICEF assessment estimated food production at 85 000 tonnes of cereals, 68 000 tonnes of pulses, 483 000 tonnes of roots and tubers and 465 000 tonnes of bananas and plantains, which is 15 percent, 10 percent, 4 percent and 1 percent respectively higher than in the 2000 A season. However, outputs remain below the pre-crisis (1988-1993) average levels, due to insecurity and disruption of agricultural production since 1994. The area planted increased significantly this season reflecting a relatively better security situation in western parts, particularly in the provinces of Bubanza and Cibitoke, and the closure of regroupment camps in Bujumbura Rural Province, which allowed farmers to return to their fields. Another factor which contributed to higher plantings this season was the timely seed distributions by the Government and international agencies, mainly in the Kirundo and Muyinga provinces, the worst affected by drought during the 2000 A season.

Despite a late start of the rainy season, precipitation was abundant and well distributed from October to November, benefiting crop development. However, excessive rains in parts resulted in floods and crop losses and, in general, reduced yields, particularly for beans. Yields of bananas and plantains are expected to increase only from March/April as trees were seriously affected by previous prolonged dry weather. The small 2000 C season in the marshlands, from mid-June to September, was poor due to dry weather in previous months. The food output was estimated 4 percent below the level of the 1999 C season.

The tight food situation has eased with the arrival of the new harvest. Nevertheless, following several consecutive below average harvests, persistent insecurity and population displacements, as well as a recent malaria epidemic, the food and nutrition situation of vulnerable groups remains precarious. In particular, the situation is difficult for 324 000 internally displaced people and for drought affected persons in the provinces of Karuzi, Gitega, Kayanza and Muyinga. A recent nutrition survey in 7 provinces of the country indicated a 10 percent rate of acute global malnutrition. Similarly, a recent report by MSF indicated that the number of malnourished children admitted to its therapeutic feeding centres in Karuzi province had doubled in January 2001. Emergency food aid continues to be necessary for the vulnerable sections of the population.

ERITREA* (18 June)

Planting of the 2001 cereal and pulse crops has just started. The main rains are expected to start from late June. Spring (short) rains from March to May were inadequate in many areas. These short rains are beneficial for early preparation of land and replenishment of pasture. The overall outlook for the current agricultural season remains uncertain with only part of the war displaced farming population being able to return so far and large tracts of land still inaccessible due to landmines. Overall, over one million people are estimated to have been displaced. By mid-May only 16 000 internally displaced persons (IDPs) had been resettled.

The food situation remains tight as a result of the war with Ethiopia and last year's drought. The 2000 cereal crop was sharply reduced due to the displacement of hundreds of thousands of farmers from the agriculturally rich regions of Gash Barka and Debub, which account for more than 70 percent of cereal production.

Two Emergency Operations were jointly approved in April and May 2001 by FAO and WFP for emergency food assistance to about 1.8 million people affected by war and drought, worth a total sum of US\$77 million for a period of 10 months (May 2001 to February 2002). The slow response to the Government's appeal in February 2001 is a major concern with only a small fraction of the appeal of about US\$224 million to assist nearly 2 million people for a period of twelve months received so far.

Food aid pledges for 2001 amount to 55 000 tonnes but no deliveries have been made as yet.

ETHIOPIA* (18 June)

Abundant rains in the first two dekads of May benefited the 2001 "belg" crops to be harvested from June. Despite a dry spell in late March and first dekad of April, subsequent good rains have allowed a recovery of the crops. The "belg" production accounts for some 7 to 10 percent of the aggregate cereal production of the country, but it is important in several areas, where it provides the bulk of the annual food supplies. Overall prospects for the harvest are favourable and output is anticipated to recover substantially from last year's poor "belg" crop. However, an army-worm outbreak recently reported in eastern parts of the country may impact negatively on the outcome of the season.

In the pastoral areas, the current main season rainfall was late by about a month but was widespread and abundant from late April. The impact of the late onset of rains could be significant given the short span of the season and the recent severe droughts. Recent nutritional surveys have shown high levels of global acute malnutrition, indicating continuing food shortages.

As a result of last year's bumper "meher" cereal and pulse crop, the overall food supply situation in the country is stable. However, the sharp decline in grain prices has severely affected household income in rural areas and may negatively impact on farmers' production decisions this year. The Government and donors have made some attempts to support local markets through purchases of grain, but with limited funding available the efforts have not

been successful so far. Some 6.5 million people, affected by a severe drought in the last two years and the war with neighbouring Eritrea, depend on food assistance.

An Emergency Operations (EMOP) worth about US\$90 million was jointly approved in March 2001 by FAO and WFP for relief food assistance to 2.5 million small-scale farmers and drought-affected pastoralists, for a period of 10 months (April 2001 to January 2002). A revised EMOP was also approved jointly in April 2001 for 323 000 internally displaced people due to the war, worth a total of about US\$55 million until end of July 2001.

Food aid pledges by the end of May amounted to 585 000 tonnes, of which 215 000 tonnes have been delivered.

KENYA (18 June)

Prospects for the 2001 main season cereal crops are favourable. Abundant precipitation in April and May favoured planting and benefited early planted crops. Production is expected to be normal and higher than last year when a severe drought decimated crops. However, an army-worm outbreak reported in some key grain producing areas may threaten the outcome of this year's main season. Rains in June will also be crucial for this season's harvest.

The overall food supply situation has improved considerably following favourable short-rains harvests and improved pasture in several central and western pastoral districts following abundant rains. However, eastern pastoral districts have yet to recover with only scanty rainfall received so far.

The severe drought in 1999/2000 seriously undermined the food security of 4.4 million people, particularly in pastoral areas, and resulted in a massive relief operation. Notable improvement in rates of child malnutrition were reported illustrating the impact of emergency interventions. However, emergency food assistance will still be required, at least until the main season harvest towards the end of the year.

A revised Emergency Operation (EMOP) was jointly approved in January 2001 by FAO and WFP for food assistance to the 4.4 million drought affected people. Under the EMOP, an estimated 548 000 tonnes for the period June 2000 to July 2001 are required, of which about 78 percent has been pledged so far. However, delays in shipments were reported to have caused problems since January 2001.

RWANDA* (5 June)

Preliminary indications of the recently harvested 2001 A season crop point to a food output around or slightly lower than the good level of last year. Despite a delay to the start of the rainy season, precipitation was abundant and well distributed from mid-October to December. Although excessive rains in November resulted in floods and crop losses, mainly in Gisenyi and Butare Prefectures, they generally benefited plantings and yields, particularly of cereals and pulses. Production of roots and tubers and banana and plantains was less satisfactory reflecting shortages of planting material and prolonged dry weather. Also despite the overall positive picture, a poor harvest was gathered in the Bugasera region of Kigali Rural Province, due to seed shortages following successive reduced crops. A locally-organized Government/FAO/WFP/EU Mission has assessed this season's food production but its findings are not yet available.

The tight food supply situation has eased with the new harvest. Prices of maize, beans and Irish potatoes have decreased from their levels of a year ago. However, despite the overall improvement in the food situation, emergency food assistance is anticipated to be needed until the next harvest for people in the Bugesera region, particularly in Kanzenze and Gashora districts. WFP plans to distribute 13 000 tonnes of emergency food assistance for three months to 267 000 drought-affected people in southeast Rwanda. While stringent controls

have contained the outbreak of food-and-mouth disease in Umutara, marketing restrictions are causing economic difficulties for pastoralist households.

SOMALIA* (18 June)

Below-normal rains during May in the main growing areas in the south have reduced soil moisture for recently planted maize and sorghum crops of the 2001 main "gu" season. More rains are needed to avoid a reduction in yields. Recent reports indicate that in the major cereal producing regions of Bay and Bakool, crops were wilting and more damage was caused by pests, mainly armyworms. Despite the good harvests in the last two cropping seasons, severe food difficulties may emerge reflecting slow household recovery from the earlier succession of droughts and long-term effects of years of insecurity. Moreover, further injections of new currency into the market with the attendant depreciation of the Somali Shilling have caused a sharp increase in prices of food items eroding the purchasing power of large sections of the population.

Elsewhere, in north-western Somalia (Somaliland) and north-eastern Somalia (Puntland), pasture and livestock conditions have improved with recent rains. However, the ban of livestock imports from eastern Africa by countries along the Arabian Peninsula due to a Rift Valley fever has caused substantial loss of income and has affected the livelihoods of a large number of pastoral households. The United Arab Emirates (UAE) has recently lifted the livestock ban which strengthened the Somali Shilling. However, the UAE accounts for only 2 percent of the total Somali livestock exports to countries along the Arabian Peninsula and the food security impact of lifting the ban is expected to be limited.

A UN inter-agency appeal was launched in March 2001 for US \$130 million, to support livelihoods and assist the country's recovery.

SUDAN* (18 June)

Harvesting of the 2000/01 wheat crop, all irrigated and grown along the Nile River in northern Sudan, is complete. A recent FAO/GIEWS Crop Assessment Mission estimated the 2000/01 national output of wheat at 299 000 tonnes, some 40 percent above the previous year's reduced crop but 30 percent below the average of the previous five years. The liberalisation of wheat production and the removal of Government support programmes that had encouraged high levels of production earlier in the 1990's, prompted many farmers to drastically reduce wheat cultivation in the last two years and switch to more lucrative cash crops such as vegetables and oil seeds. In 2001, farmers were encouraged by the high level of wheat prices at planting time and satisfactory yield levels were achieved due to cooler than average temperatures, improved supply of irrigation water, adequate input supply and low incidence of pests and diseases.

The final estimates of sorghum and millet production for 2000/01 have been revised down by the Mission to 2.49 million tonnes and 483 000 tonnes respectively compared to 2.67 million tonnes and 496 000 tonnes estimated by the FAO/WFP mission late last year, mainly due to lower yields and pest damage. As a result, the aggregate cereal production in 2000/01 is estimated at 3.33 million tonnes, including small quantities of maize and rice. This represents an increase of some 7 percent over last year's well below average crop but a drop of about 21 percent compared to the average of the previous five years. The revised cereal import requirement in the 2000/01 marketing year (November/October) is estimated at 1.44 million tonnes. Commercial imports are estimated at about 1.2 million tonnes, about the same as last year's actual imports. Latest estimates of emergency food aid, in pipeline and under mobilisation, amount to 55 000 tonnes, leaving an uncovered gap of about 145 000 tonnes.

Lower harvests for two consecutive years coupled with virtual depletion of stocks have led to a sharp rise in cereal prices. In March and April 2001 sorghum prices averaged SP45 000 compared to SP15 000 for the same period in 1999 and SP30 000 in 2000. Such an increase

has reduced access to food for the poorer segments of the population. The purchasing power of large numbers of people, particularly pastoralists, has been seriously eroded. With coping mechanisms stretched to the limit, farmers and other vulnerable groups have migrated in search of work and food. The number of people joining WFP's "Food for Work" programmes has increased dramatically.

Government efforts to mitigate food shortages by lifting customs duties on food imports and financing grain purchases through the recently instituted Strategic Commodity Stock Authority have, to some extent, helped stabilise cereal markets. However, with the lean season just starting and only a fraction of the appeal for international food assistance pledged so far, the situation is likely to worsen in the coming months. The population most affected by last year's drought are mainly located in greater Darfur and Kordofan, Bahr el Ghazal, Bahr el Jebel, East Equatoria, Jonglei, Red Sea and Butana province in Gezira State. Latest estimates put the number of people in need of urgent food assistance in Sudan at some 2.97 million affected by both drought and/or civil war. Early prospects for the 2001 main season food crops, for harvest from September, are not encouraging. The below average rainfall forecast in the main rainy season (June-September) over most of the country, and the fresh waves of population displacements due to recent intensification of civil conflict in Bahr El Ghazal, are expected to severely affect agricultural production.

TANZANIA (18 June)

Normal to above normal rains in January and February in most parts of the country benefited crops of the main "long rains" season in unimodal central and southern areas. Drier conditions in March may have caused stress to crops at the critical grain filling stages in parts of central regions but have also helped in reducing excessive moisture in flooded areas in southern and western parts of the country. A recovery in this year's output from the reduced level of 2000 is anticipated.

In bi-modal rainfall areas of the north and north-east, despite a late start, good rains since April benefited the crops of the "Masika" season. The outlook for the harvest is satisfactory. However, crops in some regions were reported to have been affected by pests, including *Quelea Quelea* birds and Armyworm. Pastures and livestock are reported in good condition reflecting generally abundant rains.

The overall food supply situation is satisfactory. However, the food situation remains precarious in parts due to past successive crop failures.

UGANDA (18 June)

Despite reports of army-worm invasion in some districts, prospects for the 2001 first season foodcrops, to be harvested from June, remain favourable following normal rains. The first rainy season was fully established by mid-March in most southern parts of the country providing adequate moisture for growing crops. Crops are reported in good condition in most parts of the country. In north-eastern and eastern districts, affected by successive poor harvests and insecurity, abundant rains and improved security benefited crops and pasture.

Overall food supply conditions are satisfactory. Prices of beans and maize remain stable. However, food shortages are reported in parts of Katakwi, Kotido and Moroto Districts. The displaced population in Bundibugyo, Gulu and Kitgum Districts are reported to have adequate own production and assistance through WFP feeding programs.

SOUTHERN AFRICA

ANGOLA* (8 June)

An FAO/WFP Crop and Food Supply Assessment Mission visited Angola from 5 - 27 May 2001 to estimate crop production from the 2000/01 season, as well as the cereal import requirements and food aid in the 2001/02 marketing year (April/March). The Mission made field visits to 8 out of the 18 provinces. Plans had been made to visit 10 provinces, but the security situation was very fluid and the plans had to be changed at the last minute.

The Mission found that the security situation has improved, as the Government has military control over all provincial and most municipal centres, with an expansion of the secure areas around these centres. However, UNITA is still mounting guerrilla attacks in many areas, thereby restricting operations by the Government, aid agencies and NGOs to the areas immediately surrounding the administrative centres. Most food aid and essential commodities have still to be transported by air from Luanda. Insecurity and poor road conditions continue to disrupt marketing activities. Although very few IDPs have been able to return to their original homes, there has been good progress in allocating land to IDPs within the secure areas. Some 218 000 IDPs and returnees have been recorded as being active in farming during the 2000/01 season. New IDPs are still arriving and the current estimate of the total number (old and new) is reported to be 2.7 million compared to 2.6 million last year. About 1.34 million are still in need of food aid.

The area planted to coarse grains in the 2000/01 season is estimated at 995 000 hectares, an increase of 13 percent from 1999/00. Output is estimated at 577 000 tonnes, against 500 000 tonnes last year. The increase in production is largely attributed to higher sowings, as a result of improved security conditions at planting time; allocation of land to IDPs; improved agricultural input distribution and natural increase of population. In spite of a severe mid-season dry spell in northern areas, weather conditions were generally favourable in the main cereal growing areas of the centre and south. Maize harvest is estimated at 429 000 tonnes, 9 percent above last year's level, with larger plantings partially offset by crop losses in the northern provinces. Millet and sorghum production is estimated, at 148 000 tonnes, up by nearly 30 percent on last year. This reflects a sharp increase in the area planted and the effect of good rains in the south. The bean crop is estimated at 71 000 tonnes, down 10 percent from last year, also as a result of dry spells in the north. Cassava estimate for 2000/01 is 5.3 million tonnes compared to 4.4 million tonnes in the previous year.

Reflecting the improved production, the food deficit in marketing year 2001/02 (April/March) has decreased to 581 000 tonnes of cereals. This includes 48 000 tonnes of maize, 107 tonnes of rice and 250 000 tonnes of wheat. Commercial imports are forecast at 405 000 tonnes of cereals, leaving 176 000 tonnes to be covered by food aid. By the end of May food aid pledges amounted to 33 000 tonnes.

BOTSWANA (5 June)

Preliminary estimates of the recently harvested 2001 coarse grains indicate an output of 9 000 tonnes, 57 percent down on last year. Maize production, estimated at only 2 000 tonnes, is 78 percent lower than in 2000. Sorghum and millet are forecast to decline by 42 percent to 7 000 tonnes. The sharp decline in production reflects a prolonged dry spell from late December to early February, coupled with high temperatures. Total crop failure has been reported in some areas.

As a result of the poor harvest and low carry-over stocks, the cereal import requirement for the 2001/02 marketing year (April/March) has increased to 258 000 tonnes, including 66 000 tonnes of wheat. While these requirements are expected to be covered on commercial basis, the food situation is anticipated to be very tight for poor households that gathered a reduced harvest.

LESOTHO (8 June)

An FAO/ WFP Crop and Supply Assessment Mission visited the country from 5 to 16 May 2001, to review prospects for the 2000/01 crops and the overall food supply situation, and to estimate the cereal import requirements, including food aid, for the 2001/02 marketing year.

The Mission estimated that the total cropped area had not changed from normal years. However at the beginning of January 2001 a cold front passed over Lesotho causing frost that severely affected crops at their critical development stages. It was immediately followed by a prolonged dry spell, a heat wave and a hailstorm in parts, all of which further damaged crops and resulted in poor crop yields. Frost damage was particularly severe in the mountain districts where many households suffered total crop loss. As a result of these adverse effects, the Mission forecast the 2000/01 cereal production at 80 000 tonnes, which is about 55 percent below last year and 60 percent below the average of the last five years. Maize production is estimated at 58 000 tonnes, wheat at 5 000 tonnes and sorghum at 11 000 tonnes. Other crops such as beans and peas were also observed on most farmers' fields, and contribute to the diet of families and cash incomes when grown in larger quantities.

For the 2001/02 marketing year (April-March), domestic cereal supply, estimated at 112 000 tonnes, falls far short of national consumption requirements. The cereal import requirement was estimated at 329 000 tonnes, which is expected to be covered by commercial imports. Even in normal years, Lesotho's cereal production covers about 50 percent of its domestic consumption requirements. The one-to-one convertibility of the local currency with the South African Rand means that availability of foreign exchange is not a major constraint to commercial imports from South Africa.

The Mission estimated that there was no need for large-scale food assistance. At the household level, while most families will face larger than usual food deficits in marketing year 2001/02 (nearly all rural households in Lesotho buy food between harvests), they have adequate coping means to get them through to the next harvest, provided food prices remain stable. The means include sale of livestock (over 80 percent of rural households own cattle, goats and sheep) remittances from family members working in South Africa and towns in Lesotho, as well as local wage labour and informal sector income earning activities. However, there is a relatively small proportion of rural households (probably 10-15 percent) in the most affected districts (Mokhotlong, Thaba-Tseka, Mphahlele and Quthing) who have lost their crops but have neither livestock nor off-farm income with which to access food on the market. This is the group most at risk. The group will also not have seed for planting in the next cropping season starting in September 2001.

The Mission recommended that a rapid survey be undertaken in the four worst affected districts to identify, quantify and precisely target these households for food and seed assistance. It recommended that the survey be jointly undertaken by Government of Lesotho/WFP/FAO's Special Relief Operation Service (TCOR).

MADAGASCAR (5 June)

Below-average rains in northern and central parts during February and first dekad of March, which followed abundant rains in previous months, affected growing conditions for the 2001 paddy crop. The overall prospects for the paddy harvest, starting from April, are uncertain; yield reductions are anticipated in parts. By contrast, in the southern maize growing areas abundant precipitation since the second dekad of February improved prospects for the maize crop which had been affected by dry weather. However, the rains may have arrived too late to prevent yield reductions and the harvest could be reduced for the second consecutive year. Last year, the southern areas were affected by a severe drought that caused a one-quarter decline in the maize output.

MALAWI (5 June)

Latest preliminary estimate of the recently harvested 2001 maize crop has been revised downwards to 2.047 million tonnes, a decline of 18 percent from the bumper crop of last year but still at the

average level of the past five years. A mid-season dry spell in southern and central parts and subsequent excessive rains in 13 of the country's 27 districts adversely affected cereal production. Severe floods in these districts affected 346 000 people and resulted in the loss of 50 000 hectares of foodcrops. WFP has targeted 275 000 people for emergency food assistance.

Despite the decline in production, the maize harvest is anticipated to be sufficient to satisfy domestic requirements in marketing year 2001/02 (April/March).

MOZAMBIQUE (8 June)

Harvesting of the 2001 cereal crops is complete. An estimate of production is still not available. However, preliminary indications point to a maize output around or slightly above last year's good crop of 1 million tonnes. This reflects an increase of 10 percent in the area planted and generally favourable rains in the main growing areas, despite localized floods.

Torrential rains in January and February, as well as high levels of the Zambezi River, resulted in severe floods in central provinces of Zambesia, Sofala, Manica and Tete. About 77 000 hectares of foodcrops were lost to the floods. Outside the flooded areas, the excessive rains are likely to have resulted in yield reductions. In main growing northern provinces, abundant and well distributed rains favoured cereal crop development and a good output is expected. By contrast, in southern provinces of Maputo, Gaza and Inhambane, a prolonged mid-season dry spell in January severely reduced yields of maize and bean crops. In these provinces, which were the worst affected by floods last year, food production is anticipated to be poor for the second consecutive year.

Overall, a satisfactory 2001 cereal production is expected. Cassava production is also anticipated to be good. Reflecting the arrival of the new harvest onto the markets, maize prices have declined in the main markets, and are below their level of a year ago.

NAMIBIA (5 June)

A delay in the start of the rainy season, coupled with severe dry weather in January and first dekad of February in the major cereal growing areas of the north, resulted in planting reductions and poor yields. Maize production in 2001 is tentatively estimated at 45 percent below the satisfactory harvest of last year at 27 000 tonnes. Production is also 10 percent lower than the average of the past five years. Estimates of the sorghum/millet harvest, accounting for two-thirds of the total cereal production, are not yet available, but the output is expected to decline from the below-normal level of last year.

As a result of the sharply reduced maize harvest, imports of coarse grains in marketing year 2001/02 (April/March) are projected at 80 000 tonnes, compared to 60 000 tonnes in the previous year. In addition, the country needs to import 45 000 tonnes of wheat, the crop for which it has a structural deficit. Although all import requirements are expected to be covered on commercial basis, the food supply situation is anticipated to be very tight for small farmers who experienced crop failure this season.

SOUTH AFRICA (8 June)

Harvesting of the 2001 coarse grains, mainly maize, is underway. Latest production forecasts indicate a maize output of 7.3 million tonnes. At this level, production is one-third below the bumper crop of last year and well below the average of the past five years. The reduced harvest reflects a decrease of 17 percent in the area sown, due to low domestic prices at planting time, as well as unfavourable weather during the season. Poor rains and high temperatures in January and early February, particularly in the main western growing areas, stressed the developing maize crop. Subsequent abundant rains arrived too late to prevent sharp yield reductions.

Despite the sharp decline in production, the country still has an exportable surplus of about 500 000 tonnes of maize, as a result of large carry-over stocks estimated at 2.6 million tonnes.

SWAZILAND (8 June)

An FAO/WFP Crop and Supply Assessment Mission visited Swaziland from 16 to 28 May 2001, to review harvest prospects and the overall food supply situation, and to estimate cereal import requirements, including food aid, if any, for the 2001/02 marketing year.

The Mission forecast the 2000/01 maize production at 73 000 tonnes, which is about 66 percent of the last five years average. Swaziland does not produce other cereal crops, except for a few hundred tonnes of sorghum. Other crops like sweet potato, beans and cowpeas are produced but in small and declining quantities. Field observations by the Mission indicated that production of these crops has also been lower than average.

The reduction in maize production was particularly serious in the Middle and Lowerveld where late planted crops were affected at the critical flowering /tasseling stage. The early-planted crops escaped the drought and generally produced good yields. For the 2001/02 marketing year (April-March), domestic cereal supply, estimated at 85 000 tonnes, falls far short of national consumption requirements. With a mid-marketing year population estimate of 1 034 000, cereal import requirement was estimated at 123 000 tonnes. The Mission estimated that the requirement will be fully covered by commercial imports. Even in normal years, Swaziland's cereal production covers only 60 percent of its domestic consumption requirements. The one-to-one convertibility of the local currency with the South African Rand means that availability of foreign exchange is not a major constraint to commercial imports from South Africa.

Nonetheless, because of reduced production, food shortages may be experienced by the most affected households and other vulnerable population groups, which will need food assistance. A needs assessment is currently being conducted jointly by the Disaster Management Task Force and NGOs in drought affected areas. This exercise will be important in targeting more precisely the vulnerable groups that should be assisted.

ZAMBIA (5 June)

Harvesting of the 2001 coarse grains, mainly maize, is well advanced. Prospects deteriorated with excessive rains in February and March over most parts of the country, which negatively affected yields and resulted in localized floods, particularly along the Zambezi and Luangwa Rivers. By contrast, in the Southern and Western Provinces, prolonged dry weather in January stressed developing maize crop and reduced yields.

Overall, this year's maize production is forecast at 1.1 million tonnes, 16 percent below the good crop of 2000 but still around the average of the past five years. After being self-sufficient in maize in 2000/01 (April/March) the country may face an import requirement of about 220 000 tonnes of maize in marketing year 2001/02.

ZIMBABWE* (1 June)

An FAO/WFP Crop and Food Supply Assessment Mission visited Zimbabwe from 25 April to 11 May 2001 to estimate the production of the main season cereal and pulse crops, forecast the 2001/02 winter season production and assess food import requirements.

The Mission found that similar to the pattern of the previous year, the 2000/01 rainy season was generally favourable for the northern provinces of the country which normally produce nearly 70 percent of the national cereal harvest. But, rains were late and below normal in the southern and eastern areas of the country. There was a dry spell during January in most parts of the country followed by widespread incessant rains in February and March, which resulted in localised flooding.

The area under grain crops in the 2000/01 main season decreased by 15 percent compared to the previous year. The area planted to maize in the large scale commercial farming sector was reduced by more than half primarily due to land acquisition activities. The smallholder sector, including the

resettled areas did not make up for this reduction in maize plantings. Some of the decrease in total maize area was compensated by an increase in the area under soybeans, groundnuts, sunflower and paprika.

The Mission estimated a national cereal harvest of 1.57 million tonnes in the 2000/01 main cropping season, compared to 2.15 million tonnes in 1999/00, a reduction of 27 percent. Maize production, which accounts for over 90 percent of the total grain production, was estimated at 1.47 million tonnes.

Livestock condition was generally good in the large-scale commercial sector while in the smallholder sector it ranged from fair to good. However, animal deaths due to tick borne diseases were reported in some communal areas. Pastures and water availability conditions were generally good in most provinces.

Based on the forecast production, the import requirement is estimated at 579 000 tonnes. Given the substantial decline in gold production and the tobacco harvest, and much of the expected foreign currency earnings being pre-committed for fuel, other energy imports and the international debt servicing, Government's ability to import maize is extremely limited. Even if the wheat and rice deficit of 132 000 tonnes were to be met by commercial imports by private traders primarily by raising foreign currency in the parallel market, there remains a net deficit of about 447 000 tonnes of maize to be covered by imports or by drawing down on stocks. Given the current economic conditions and food insecurity in several parts of the country, a major draw down of stocks may not be advisable. The country needs to hold adequate cereal stocks to maintain stable and adequate supply necessary to prevent any price escalations and to keep prices at affordable levels for both rural and urban populations.

Free food aid distribution is not appropriate. Bilateral programme food aid may be considered as an option to help ensure an adequate grain supply at affordable prices in the deficit areas, both rural and urban.

ASIA

AFGHANISTAN* (12 June)

The country is gripped by a grave food crisis, following the third successive year of below average crop production due to drought, continuing civil conflict and a harsh winter. An FAO/WFP Crop and Food Supply Assessment Mission which visited the country in May 2001 issued its report on 8 June.

The Mission found that rainfed crops (wheat and barley) had almost totally failed, except in a few pockets in different regions. The rainfed wheat production in 2001 was estimated to be about 40 percent less than even last year's extremely low output. The 2001 irrigated cereal production was also, like that of 2000, severely affected by drought. However, given slightly better rainfall in some areas and transfer of land and irrigation water from poppy to wheat, the irrigated wheat production in 2001 is estimated about 14 percent more than in 2000, but still about 24 percent less than in 1999. The production of secondary crops (rice, maize, barley) was estimated to be about 24 percent more than last year's extremely low output, but remains some 42 percent less than in 1999. The Mission thus estimated the 2001 total cereal production at 2.03 million tonnes - about 12 percent larger compared to 2000 but smaller by 37 percent compared to 1999. As a result, the cereal import requirement in the 2001/02 marketing year (July/June) was estimated at about 2.2 million tonnes, slightly less than last year's record high level of 2.3 million tonnes, but about double the volume of 1.1 million tonnes in 1999.

Due to loss of revenue receipts of the Taliban Authorities as a result of abandonment of poppy cultivation this year and intensifying economic problems affecting both traders and

consumers, Afghanistan's commercial import capacity has further declined this year compared to last year. Nevertheless, a generous estimate of commercial cereal imports of some 760 000 tonnes, about 25 percent lower than the estimate for last year, is made, which still leaves a gap of 1.4 million tonnes. WFP estimates emergency food aid needs at 386 000 tonnes, leaving an uncovered gap of over 1 million tonnes. A shortfall of this magnitude, coupled with seriously deteriorating purchasing power of the population, if unmet, could have disastrous consequences.

Millions of Afghans of all categories - sedentary, transhumant and nomad - have little or no access to food through markets due to purchasing power problems, and their access to food through self production has been severely undermined by drought, as well as by the deteriorating irrigation infrastructure and capacity of the farmers to access necessary inputs. Their purchasing power has been seriously eroded by the lack of employment opportunities within and outside agriculture; abandonment of poppy cultivation and decline in other cash crop production such as onions, potatoes, almonds and apricots; and dwindling numbers of livestock along with low livestock prices. A further factor pushing the rural poor into a vicious impoverishment process is rural indebtedness. Rural borrowing from those few who continue to be resourceful entails very high interest rates. The Mission came across examples of 50 percent interest payable in two months. The repayment of the principal and interest increasingly pauperizes the borrowers from year to year, eventually turning them into destitutes.

The overall situation is very grave, with starvation facing of millions of Afghans, most of whom have exhausted most of their coping mechanisms so that the only remaining option for them is to leave home and join the ranks of IDPs or refugees. This alarming situation will continue to deteriorate further as the 2001/02 marketing year progresses. Through its countrywide travel, the Mission found mounting evidence of the prevalence of a large number of pre-famine indicators such as substantially reduced food intakes, collapse of the purchasing power, decimating livestock, large-scale depletion of personal assets, soaring food grain prices, rapidly increasing numbers of destitutes, and ever swelling ranks of IDPs and refugees. The issue of "life saving" in Afghanistan is going to be even more crucial this year than it was last year.

ARMENIA* (24 May)

The outlook for the 2001 cereal harvest has improved with above-average rains in April and May, which helped replenish soil moisture and irrigation reserves. However, cumulative rains for the 2000/01 growing season remain below normal in several locations and regular rain in the coming month remains crucial if a good cereal harvest is to be achieved. Satellite imagery indicates that overall biomass development is markedly better than at the corresponding time last year. Early indications remain that the shortage of seed after the drought-reduced 2000 grain harvest (225 000 tonnes) has resulted in about 34 percent reduction in the area sown to winter wheat to 65 000 hectares. It is hoped to increase the areas sown to spring cereals to 108 000 hectares, while the total spring crop target is 197 000 hectares including 33 million hectares to potatoes (2000: 34 million hectares) and 21 000 ha to vegetables.

Despite the reduced winter wheat plantings, the 2001 grain (cereal and pulse) harvest could exceed the 220 000 tonnes projected earlier by FAO. However in view of the deficit in winter precipitation, the final outcome, and the food security situation next year, will depend crucially on regular rains throughout the growing season, not only for grains but also other basic crops. Indications are that the country could import up to 400 000 tonnes of cereals in 2000/01 and a similar amount is likely to be needed also in 2001/02.

Survey data indicate that up to 68 percent of the population is destitute, poor or close to the poverty line and that 55 percent of the population is either poor or destitute. Poor households are defined as having a per capita level of consumption below the poverty line (a minimum basket of food and consumer goods), and destitute households as having a per capita level

of consumption below the food line (a minimum basket of food goods), with the two lines set at 11 735 drams (US\$21.5) and 7 194 drams per month. Some 32 percent of the population live in poverty and almost 23 percent are destitute; the corresponding figures for households are 30 percent and 19 percent respectively. Moreover, some households are regarded as potentially poor, as their incomes are in the range 12 000-12 500 drams, only narrowly exceeding the poverty line. As a result, up to 68 percent of the population could need some form of poverty-related social protection. The survey also revealed that the real level of unemployment is 27.3 percent, well above the official estimate of 10.0-11.5 percent. The average monthly salary is 20 157 drams, or less than twice the poverty level, and some 17 percent of the workforce earn too little to secure an income above the food line. However, wages are not the main source of monetary income: they comprise only 24.6 percent of incomes, whereas sales of agricultural production account for 32.1 percent, revenues from self-employment for 10.6 percent, and state pensions and allowances for 9.3 percent. Some 19.3 percent of incomes are transfers from relatives, including 12.8 percent from remittances (this item alone is more significant than state pensions and allowances). Only 0.1 percent of incomes are related to property (i.e., leases, interest, dividends etc), highlighting the limited impact of privatisation on earning patterns. There is a high degree of income inequality. The income level among the wealthiest 20 percent of the population is 32.2 times that of the poorest 20 percent. The survey also confirmed that at least 620 000 Armenians (and possibly up to 1 million), out of an official population of 3.8 million, are currently abroad seeking alternative sources of income. Most of those abroad are of working age, and two-thirds are men.

Debilitating political, economic and social problems over the past decade have resulted in widespread un- and under-employment and food insecurity. The levels of chronic malnutrition among children of 3-59 months range between 14 and 32 percent with an average of 22 percent. These levels are considered moderate but show an increasing trend in the levels of malnutrition in the last two years. WFP has extended its emergency food assistance to drought victims until the end of December 2001 and plans to continue food assistance to nearly 300 000 subsistence farmers. This Emergency Operation (EMOP) will be fully integrated with the upcoming Protracted Relief and Recovery Operation (PRRO), effective from July 2001, providing some 60 000 tonnes of food supplies to about 280 000 drought affected population. WFP, by mid 2003, would have distributed more than 68 000 tonnes of food commodities under the EMOP and PRRO.

AZERBAIJAN (24 May)

Low irrigation water reserves following last year's drought and below normal precipitation in the river catchment areas this winter means that the outlook for the 2001 cereal harvest remains somewhat uncertain. However, rainfall in the spring has been good and satellite imagery indicate that biomass development is better than at the corresponding time last year in the river valleys but less in the coastal areas. In 2000, cereal production increased by a third as a result of the increased area sown to winter wheat and better yields, as this crop, harvested in June/July was less affected by the drought. Emergency works carried out this winter (deepening irrigation canals, etc.) could help to maintain production levels of profitable crops. In view of the further increase in the area sown to winter grains (to 650 000 hectares including 523 000 hectares of wheat), and the planned increase in spring grain plantings bringing the aggregate area sown to grains to 712 000 hectares, the 2001 cereal harvest could increase further to about 1.6 million tonnes compared to 1.5 million in 2000, assuming normal growing conditions until the completion of the harvest.

Despite the anticipated good crop following a well above average harvest in 2000, the cereal import requirement is expected to remain fairly stable at around 700 000 tonnes, in part as urban areas are predominantly supplied by imports. In addition, grain requirement for livestock is likely to rise (in line with cattle numbers) and because farmers face import competition in the foodgrain market. The bulk of the cereal import requirements 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 committed for the life of the project amounts to 47 880 tonnes of food aid.

BANGLADESH (18 May)

Severe tropical storms and tornadoes in late April through May resulted in a number of deaths and extensive damage to property and infrastructure. No damage to paddy crop has been reported.

Pre-monsoon showers in April increased soil moisture for the planting of the aus crop, the smallest of the country's three rice crops. The boro crop is being harvested. Assuming average yields, the 2000/01 target for the boro crop was set at 11.2 million tonnes (milled rice), about 200 000 tonnes more than the year before, bringing the aggregate paddy output to 35.6 million tonnes, 100 000 tonnes higher than last year's record crop. Government cereal stocks as of end-May amounted to 1 million tonnes, 9 percent lower than that at the corresponding level last year.

CAMBODIA (25 May)

Good weather conditions favoured harvesting of the secondary dry season paddy, which is now drawing to a close. The output of this crop is expected to exceed the 735 000 tonnes projected earlier this year due to increased plantings. Recent reports indicate that area planted to dry season paddy has increased this year to around 260 000 hectares, 4 percent higher than last year and some 50 000 hectares more than the average of the previous 10 years. Planting of the main wet season paddy is expected to start with the arrival of the monsoon rains in June. The main crop accounts for about 80 percent of the total rice crop with the rest coming from the second dry rice production. Assuming normal growing conditions, early indications point to a favourable outlook for the 2001 aggregate paddy crop.

Despite the overall satisfactory food supply situation, the impact of the serious flooding last September is still being felt in the affected communities where food assistance is still required.

CHINA (19 June)

Extreme weather is bringing drought to the northern and floods to the southern parts of China. In the North, Northeast, part of the Northwest and Southwest areas, north Xinjiang, Shandong Peninsula, Hubei Province and north of Jiangsu Province, precipitation has reportedly been reduced by 50 percent to 90 percent below the normal level since February this year. Drought conditions also affect Beijing, Tianjin, Chongqing, Hebei, Shangxi, Liaoning, Heilongjiang, Henan, Shandong, Jiangsu, Sichuan, Guizhou, Yunnan, Gansu, Sha'anxi, Qinghai, Inner Mongolia Province, Ningxia and Xinjiang. According to official sources, more than 20 million hectares of crops are affected. Harvest is expected to be reduced on 13 million hectares while some 800 000 hectares may not produce a harvest at all. In addition, 4 million hectares of land are left unplanted due to water shortage. It is also reported that 20 million people and 15 million drought animals are lacking water supply, which remains a critical problem in cities in the southern part of the North and Northeast and Shandong Peninsula. Locusts are reported to have appeared in some areas threatening crops that survive to maturity. Summer crop yields reduction is confirmed in Sichuan, Chongqing, Henan and Jiangsu. The drought is reported to have affected large winter wheat areas. Several days of heavy rains in mid-June brought relief to some areas affected by the drought and farmers have reportedly started replanting damaged crops although meteorologists warned that dry conditions could persist.

In contrast to the parched northern provinces, floods in the south in early June severely hit Guangdong, Guangxi, Hunan, Hubei, Sichuan and other provinces. Official sources reported that in addition to directly affect 17 million people of the 27 million people located in the flood areas, flooding killed hundreds of others, caused the evacuation of about 140 000 persons

and damaged property. It is estimated that some 1.7 million hectares of crops are affected and harvest could be reduced on 1.2 million hectares. The impact of floods on planting of the late and harvesting of the early rice crops which account together for about 43 percent of the aggregate rice output and are currently underway in the south is not yet known. More localized landslides and floods, intensified by seasonal rains in mid-June, have killed at least 100 people in other southern provinces.

CYPRUS (25 May)

Prospects for the 2001 wheat and barley crops, being harvested, is anticipated to be about average. The aggregate area sown was about 61 000 hectares, similar to the previous year. Production of cereals in 2000, mainly barley, is estimated at 101 000 tonnes, about 1 percent below the average for the previous five years.

Imports of wheat in 2000/01 (May/April) are forecast at 100 000 tonnes, while aggregate imports of barley and maize are forecast at some 540 000 tonnes, unchanged from last year.

EAST TIMOR (23 May)

Harvesting of maize is complete, while that of wet rice crop planted from November onwards has started. In southern areas, the secondary rice and maize crops are being planted for harvest in September/October. Crop prospects are relatively favourable due to adequate rainfall, increased seed availability and acreage. Livestock has reportedly increased significantly since 1999 when large numbers were killed during the violence. Despite improvements in the overall food supply situation, the unstable economic and political situation, poor marketing system and inadequate agricultural infrastructure continue to hinder the development of the agricultural sector.

GEORGIA* (31 May)

The outlook for the 2001 harvest has improved with good rains in the spring. Satellite imagery indicates satisfactory crop development, which however, is less dense than last year in the northern areas from South Ossetia through Shida Kartli, Mtianeti to Khaketi. This could be due to reduced or late winter wheat plantings. As precipitation during the winter months has again been well below average, the final outcome of the harvest will depend crucially on regular rainfall in the coming months. There are indications that the area sown to winter wheat may not have fallen as sharply as originally reported. However, plantings were delayed in many areas and many farmers used whatever seed they could mobilize. It is hoped to mobilize enough seed to increase the area sown in the spring to potatoes and maize, to offset any potential reduction in wheat output.

Weather permitting, the 2001 wheat harvest is projected to recover from last year's drought reduced level of 89 000 tonnes to about 200 000 tonnes. Similarly, production of the major maize crop could rise by a third, resulting in aggregate grain production of some 58 percent more than last year's 0.6 million tonnes. However, aggregate grain production would still be somewhat below the 5-year average.

The importance of informal trade makes it very difficult to monitor the actual level of cereal consumption. Given a national cereal consumption requirement (including food, feed seed, losses) of 1.1 million tonnes in 2001//2002, Georgia's cereal import requirement is estimated at about 500 000 tonnes, mostly wheat. The volume of actual imports is difficult to assess but indications are that the country imported more than this in 2000/01. Against the estimated food aid requirement for the 2000/01 marketing year of 311 000 tonnes, only 810 000 tonnes have been registered to date.

WFP appealed last year for almost 66 000 tonnes to cover the basic needs of 696 000 most vulnerable drought-affected victims until the next main harvest, for a period of eight months (November-June). Response to this appeal has been slow and limited; the first commodity consignments only reached Georgia in January. The first round of distributions started late in

February. Due to the lack of resources only half of the original ration was distributed during that round. A total of 516 750 beneficiaries (number revised following the recommendations of a Household Food Economy Survey undertaken in November 2000) received 6 802 tonnes of mixed food (6 199 tonnes wheat flour, 305 tonnes vegetable oil, 298 tonnes beans). Since the beginning of May a second round of distribution is underway. To date 327 329 beneficiaries received 4 139 tonnes of food. By mid-June pledges covered 65 percent of the total amount requested (42 500 tonnes against 66 000 tonnes in the appeal).

INDIA (16 May)

Harvesting of wheat crop is underway and planting of coarse grains and Kharif rice for harvest in September/November has also begun. According to India Meteorological Department, the southwest monsoon rainfall for 2001 is likely to be normal. The cumulative rainfall for the period March 1 to May 16, 2001 has reportedly been normal in Rajasthan, Madhya Pradesh, Chattisgarh, and Orissa. However, rainfall over Gujarat region and Saurashtra and Kutch remained highly deficient. Under normal conditions, the monsoon season starts in early June and continues through September.

The rainfall deficiency in the States of Rajasthan, Gujarat and Madhya Pradesh reduced area planted for wheat, pulses and oilseeds. Unfavourable weather conditions are reported to have affected harvest in Haryana and Punjab, the country's wheat basket. As a result, the 2001/02 wheat output has been lowered to 68.5 million tonnes, down 7 million tonnes from last year's record crop.

The high level of foodgrain stocks is straining storage facilities and some exports of wheat and rice have reportedly been authorized by the Government to relieve pressure on storage space.

INDONESIA* (28 May)

Seasonal rainfall benefited planting and development of the dry season crop already started in May. The secondary rice crop is being planted in Sulawesi and is about to start in Sumatra for harvest in July/October. The 2001 paddy output is expected to reach 50 million tonnes, from the 51.1 million tonnes produced last year.

The overall food situation in the country continues to stabilise, following the economic crisis in 1997/98, which was also compounded by a poor agricultural year due to El Niño related drought. As a result of good domestic production and ample stocks, Indonesia, the world leading rice importer, has announced that it would not import rice in 2001. However, concerns remain for the food and humanitarian situation in parts of the country affected by violent and prolonged civil disturbances.

IRAN, ISLAMIC REPUBLIC OF (18 May)

The effect of three successive years of drought has seriously affected agriculture and livestock production. Last year's drought was the worst since 1964 and affected an estimated 37 million people or over 50 percent of the population. Consequently the 2000 wheat production fell to around 8 million tonnes, some 700 000 tonnes lower than the already drought reduced crop in 1999 and almost 2 million tonnes below the average of last five year. As a result of the shortfall in crop output, imports are likely to be appreciably higher this year. In addition to cereals, the outlook is also bleak for livestock production, on which large segments of the population depend. It is expected that the drought will have a serious impact on vulnerable sectors of the population, particularly in rural areas, which have limited alternative sources of income.

An FAO mission that visited the country in late April confirmed a continuation of drought conditions in most areas. The winter-spring rainfall was significantly inadequate and 20 of the 28 provinces experienced precipitation shortfalls. Rainfall measurements in Bandar Turkman, Kurduhui, Guimishan and Banawa were 60-70 percent of that in the previous year, which was a severe drought year. The wheat and barley crop grown in December 2000-January 2001 were patchy and stunted in rainfed areas and in the fields where deepwell irrigation was

insufficient. In some fields in Ghomishan and Banawar, three consecutive drought years in 1999-2001 have aggravated the salt intrusion problem with crops suffering both water inadequacy and salt-induced stress. On several farms, the Mission saw sheep grazing the abandoned crops.

Following a third consecutive year of drought, rivers including the Gorgon Rud (observed by the Mission) were drying up, reservoir levels were low and already low water tables were falling further in the worst-hit areas (the east, south and parts of the north). In Gulistan Province, about 45,000 ha of the 65,000 ha of wheat and barley planted last December/January had been affected by the drought.

The mission also indicated that cereal production in 2001 would be even lower than the ten-year low of 11.8 million tonnes (milled basis) last year. At the same time, the national herd of livestock will be further downsized owing to the declining area and quality of pastures as well as the scarcity of feedgrains, fodder and crop residues.

IRAQ* (25 May)

Prospects for the 2001 cereal harvest remain bleak due to the effects of two consecutive years of severe drought and inadequate availability of essential agricultural inputs. An FAO/WFP/WHO Food Supply and Nutrition Assessment Mission in May 2000 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, was about 47 percent below 1999 and 64 percent below the average of the previous 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; it is lacking in vegetables, fruit, and animal products and is therefore deficient in micro-nutrients.

ISRAEL (25 May)

The prospects for the 2001 wheat and barley crops being harvested are favourable, reflecting beneficial rains during the growing season. Domestic production of wheat in normal years covers less than one-fifth of total requirement, the rest being imported commercially.

Production of the wheat crop in 2000 was estimated at 80 000 tonnes, more than double the previous year's drought affected crop, but below average. Imports of cereals in 2000/01 (July/June) are forecast at some 2.9 million tonnes.

JAPAN (26 May)

Planting of the 2001 rice crop started in May under normal weather conditions, for harvest in October. A decline in rice output is anticipated as planted area continues to drop due to an ongoing rice production adjustment program by the Government.

JORDAN (25 May)

Harvesting of the 2001 wheat and barley crops is underway. Prospects are poor due to a prolonged drought that delayed sowing and unusually high temperatures, about 10 degrees C above average. Recent forecasts indicate an aggregate wheat and barley output of about 45 000 tonnes, nearly similar to last year's well below average crop and about 40 percent

below the average for the previous five years. This is the third consecutive year of below average cereal production due to drought. The livestock sector was also severely affected, with sheep farmers the hardest hit.

KAZAKHSTAN (31 May)

Spring planting is well advanced and proceeding at a faster rate than last year. Good snowfall this winter has provided ample soil moisture reserves. Provided favourable weather conditions prevail in most parts, the country is likely to meet its targeted grain production of 11.7 million tonnes (2000: 11.6 million tonnes), including 9.2 million tonnes of wheat. Limited control action against locust infestations, which threatened crops in the preceding two years, have been taken.

Spring cereals this year are expected to be grown on 11.5 million hectares, producing some 11.2 million tonnes, similar to last year's level. Provided the forecasts for 2001 materialise, cereal exports of about 4.7 million tonnes, mainly wheat (4.2 million tonnes), and some barley, are likely in 2001/02. This is close to exports in the current marketing year drawing to a close.

KOREA, DEMOCRATIC PEOPLE'S REPUBLIC OF* (25 May)

Following the coldest winter in decades, the country is facing a serious spring drought. Serious concerns are mounting over this year's crop prospects and food supply outlook.

An Inter-agency field visit to the main producing North Hwanghae province confirmed considerable damage to rainfed double crops although irrigated crops were found to be in good condition. Lowland rain-fed potato plants were underdeveloped and about one-third of the fields showed signs of severe water stress. While transplanting of rice in irrigated paddy fields was normal, a lack of rainfall has seriously delayed transplanting of maize. It was also reported that water tables were lower, wells were drying and domestic water supplies were affected. An FAO/WFP Crop and Food Supply Assessment Mission is scheduled to visit the country between June 23 and July 3, 2001 to review the food supply situation and assess the early crop prospects.

The November 2000 FAO/WFP Crop and Food Supply Assessment Mission estimated the cereal import requirement at 1.87 million tonnes, of which commercial imports were anticipated to cover 200 000 tonnes, whilst a further 810 000 tonnes of the import requirement has been pledged as food assistance through WFP and 500 000 tonnes more through bilateral concessional imports.

KOREA, REPUBLIC OF (13 June)

The country is reported to be facing its worst drought in almost 100 years. The central regions have been hit the hardest with the amount of rainfall during the last three months standing at as low as 10 percent of the annual average. The drought is reported to have affected rice transplanting which started in May. So far, only 30 percent of the average rainfall has been recorded in some rice growing areas. The Government estimates that about 4 500 hectares of paddy fields have been left unseeded and another 8 000 hectares have been affected by water shortage. Irrigation reservoirs are reportedly drying up. Vegetable prices have risen sharply in major cities. It is estimated that up to 10 percent of crops this year would be damaged by the drought.

KYRGYZ REPUBLIC (31 May)

The 2001 grain production target is 1.7 million tonnes. The cropping situation is generally satisfactory and spring grain planting is virtually completed. Biomass development to date is more advanced than at the corresponding time last year except in western Osh region. As The SyrDarya river supplying irrigation to the central Asian region rises, in the mountains of Kyrgyzstan, this country may not be affected to the same extent as the downstream neighbours by inadequate precipitation this winter. However, increased demand for electricity in the winter months in response

to a debt-induced cut-off of gas supplies, has resulted in water accumulation this winter being diverted to hydro-electrical production and reduced availability for irrigation for the entire region in the summer. The spring grain area is targeted to reach 398 000 hectares and include 67 000 hectares of maize grain. The 2000 grain harvest is officially estimated at 1.57 million tonnes including 1.04 million tonnes of wheat. This is somewhat less than the previous year's harvest (1.63 million tonnes) and below target, reflecting crop losses due to dry weather and early snows.

The overall food supply situation remains satisfactory and indeed the country exports some cereals to neighbouring Tajikistan and Afghanistan. However, a significant proportion of the population is poor, and access to adequate food is primarily a problem of purchasing power. 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 due to poor internal communications.

LAOS* (25 May)

Pre-monsoon rain benefited field preparations for the planting of the wet season rice season, which is expected to start in June for harvest in September/October. Assuming normal weather conditions forecast for paddy production in 2001 is put at 2.3 million tonnes, similar to the output level achieved last year. Despite some improvements in food production in recent years, targeted food assistance is still required for people affected by last year's floods.

In September 2000 an FAO/WFP Crop and Food Supply Assessment Mission found that in keeping with the Government's strong emphasis on agricultural development in recent years, there has been appreciable growth in rice output due to increased adoption of high yielding varieties and an increase in the area under irrigated dry season farming. In addition, in spite of the floods during the last wet season, rainfall overall was satisfactory, resulting in generally favourable production. Based on official data for 2000 wet season production and a tentative forecast for the 2001 dry season, the Mission projected milled rice production for the current marketing year at some 1.28 million tonnes. With bilateral programme food aid and pledged emergency food assistance, total rice availability will amount to approximately 1.30 million tonnes, which would entirely cover estimated utilisation needs.

LEBANON (25 May)

The output of 2001 wheat crop, now being harvested, is expected to be about 60 000 tonnes, sharply above last year's level. Imports of wheat in 2000/01 (July/June) are forecast at some 510 000 tonnes.

MALAYSIA (27 May)

Planting of the second rice season for harvest in July is complete. During April, continuous thunderstorms with very heavy rain occurred frequently over the Peninsula, causing flash floods in many areas.

The country produces normally about 2 million tonnes of rice annually, of which 60 percent is accounted for by the main rice crop. The outlook for 2001 crops is favourable with a paddy output estimated at 2.3 million tonnes. Normally a third of domestic consumption requirements of rice are imported into the country, whilst wheat and maize are almost entirely imported. To enhance production, the Government has announced various strategies to enable sustainable food production and 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 rice, fruit, vegetables, fisheries and poultry farming.

MONGOLIA* (20 May)

Planting of the main wheat crop is underway in main producing areas for harvest in September. The combined effect of the second consecutive winter disaster, which followed two successive summer droughts and underlying problems in the agricultural sector, could

result in further reduced cereal production in 2001 and increased dependency on international food assistance. A blizzard in April had added to the suffering of many herders by causing more deaths to livestock. Outbreaks of foot and mouth disease and rabies have resulted in additional losses of animals. According to official estimates, the number of dead livestock stood at just over 2 million as of 15th April 2001 - three times higher than last winter. As several provinces have not yet submitted their updated figures for losses it is expected the number of animal deaths could be much higher. The scale of livestock deaths coupled with those of last year mean that many herders no longer have the ability to barter their animals to provide supplementary food and other essential non-food items for their families.

An UN/Government appeal for international assistance of US\$7 million in cash and US\$4.7 million in cash was launched last January to assist affected people in 73 affected counties.

MYANMAR (15 May)

Planting of the main wet season rice is well underway in most parts of the country. The main rice crop accounts for about 95 percent of the aggregate output. Assuming normal growing conditions, the 2001 rice crop is expected to increase over last year's output of 20 million tonnes.

NEPAL (15 May)

Maize crop is scheduled for harvest in July onward, while rice planting is underway. Rice output is anticipated to increase in 2001 to around 4.1 million tonnes, about 100 000 tonnes above last year, as a result of increased yields. The Government is aiming at developing an irrigation system to expand irrigated crop production, increase fertiliser supply through greater private sector participation and improving agricultural infrastructure.

PAKISTAN (18 June)

A third consecutive drought has affected crops in many parts of the country. During the last three years, Balochistan and parts of Sindh Provinces have received below average rainfall, which has progressively turned into a drought. These persistent drought conditions are now affecting several other parts of Pakistan. The rainfed wheat crop has been seriously reduced while significant yield losses have been sustained in the irrigated crops. The output of wheat in 2001 is forecast at 17-18 million tonnes, down from last year's bumper harvest of 22 million tonnes. The livestock has also been adversely affected, reflecting shortage of pasture and feed. Most rivers are substantially below normal which will adversely affect prospects of subsequent rice and sugarcane crops.

Given a reduced harvest, the food supply situation is expected to tighten in the marketing year 2001/02 (May/April). However, the availability of some 3 million tonnes of wheat stocks from last year's record harvest are sufficient to cover the shortfall. An FAO/WFP Crop and Food Supply Assessment Mission has just returned from the country and its report will be issued shortly.

PHILIPPINES (25 May)

With the arrival of rains and the southwesterly winds in many parts of western Luzon in late May, the monsoon season was reported to have started on schedule.

In most parts of the country, harvesting of second lowland rice and maize crops is underway with expected normal yields. Planting of the third rice crop has started. Assuming a normal monsoon season, the 2001 aggregate rice crop is expected to reach 12.6 million tonnes, some 100 000 tonnes above last year. Food demand and consumption this year are projected to decline due to economic slowdown and on-going political events. Official sources indicated that rice imports might not be necessary this year, as rice stocks remain large.

SAUDI ARABIA (25 May)

Production of wheat in 2000/01 is forecast at 1.8 million tonnes, slightly higher than last year. Imports of cereals in 2000/01 (July/June) is currently forecast 6.9 million tonnes. Saudi Arabia is the world's largest importer of barley, accounting for nearly one-third of the world barley trade.

SRI LANKA (18 June)

The Yala rice crop, which accounts for one-third of the aggregate output started in May with the arrival of the Southwest monsoon rains. Since planting, normal to above-normal rainfall has been providing good growing conditions to the crop in the North Central, Eastern, Uva and Sabaragamuwa Provinces, which account for 62 percent of the Yala aggregate output. The remaining portion of the Yala crop is grown in the Northwestern, Central, Western and Southern provinces where rains have been below normal since the beginning of the season. Over the last five years, the cost of production of rice has increased significantly due to increased cost of labour, fuel and fertilizer. In addition, farm prices, which continue to remain unattractive in recent years, could affect future planting intentions and rice production.

SYRIA (25 May)

Three consecutive years of drought have severely affected crop and livestock production. Rainfall this year is reported to have been better than last year but pockets still remain where the rains were not enough to offset the soil moisture deficit.

In 1999 and 2000 severe droughts decimated cereal crops and led to a significant increase in sheep mortality rates that seriously affected incomes of small herders. Latest reports put the 2000 wheat production at 2.7 million tonnes, about 4 percent above the previous year's reduced crop but 25 percent below average. Barley production, which is almost entirely rainfed, is estimated at 130 000 tonnes, about 88 percent below the previous five-year average.

TAJIKISTAN* (1 June)

The outlook for the 2001 cereal harvest is not good. The latest official data available indicate that the area sown to wheat, contrary to earlier expectations, has not declined due to shortages of seed after last year's drought-reduced crop, but remained stable at 345 000 hectares. However, after last years' drought some plantings were late. Salination problems, due to the poor state of the irrigation/water management system and inadequate drainage, persist. Fertilizer use also remains low in part reflecting high world oil prices. In addition, very partial data indicate that while precipitation in the period October–December 2000 was more than in the corresponding period the preceding year, its level between January and April has been markedly less. The government has requested help to meet food supply needs in view of fears of a drought for the second year in succession.

Satellite imagery up to mid-May indicate that biomass development is less than in 2000 in southern Khatlon and northern Leninabad regions, but still better further upstream along the major rivers. Crop development is markedly less than in 1999, when aggregate grain production was officially estimated at 482 000 tonnes. Hot weather with temperatures above normal has persisted since late April, increasing moisture stress and irrigation needs. If the hot dry conditions persist, food and cotton crop output will again be reduced. At this early stage, given yields somewhat lower than last year's, the 2001 grain harvest could fall below 350 000 tonnes. However, the final outcome will depend crucially on the intensity and duration of the drought.

Two successive unfavourable years for basic food production could have severe consequences for the population. Many households are already in dire condition. The Government has appealed for international assistance. An FAO/WFP Crop and Food Supply

Assessment Mission is currently assessing the impact of the drought on crops and evaluating the food supply situation including the food assistance needs of the affected population.

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 who are in serious need of food assistance. More than 15 600 tonnes of food commodities were distributed to 775 000 drought-affected population in the first quarter of 2001. WFP plans to extend food distribution programmes until December 2001. Without adequate assistance, about 1.2 million people will face a very difficult situation with virtually no employment opportunities or other sources of income to purchase food from the market.

THAILAND (28 May)

Low pressure swept across the northern part in early May causing heavy rains in the area and flash floods in Kalasin and Nakhon Ratchasima provinces. The worst cyclonic rain in its history hit Phrae Province in the northern region in early May. One of the major causes of the flooding was the mismanagement of the Province's forest resources. Survey results indicated that in addition to the loss of lives, much of the economic and agricultural infrastructure in the thirty-nine affected villages has been destroyed. Well over 7 000 rai (1 120 hectares) of various crops have been destroyed along with massive losses to livestock and fisheries. Phrae Province is expecting further heavy rainfall in the coming weeks.

Scattered thunderstorms and widespread heavy rainfalls across the country since late April signaled the progression of the monsoon season over the Andaman Sea to the Gulf of Thailand. Pre-monsoon rains which slowed harvest of the secondary rice crop, increased soil moisture for the planting of the main rice and maize crops. The aggregate rice output in 2001 is provisionally forecast at 24 million tonnes, similar to last year's production. The 2001 rice exports are expected to remain at the same level as last year.

TURKEY (15 June)

Prospects the 2001 winter crops, to be harvested from June, are unfavourable due to drought and some flood damage in early May. As a result, the 2001 wheat production is projected to fall to 17 million tonnes, down from earlier Government forecast of 20 million tonnes. Similarly, the barley crop is expected to drop to 6.5 million tonnes compared to last year's 8 million tonnes.

The government has significantly reduced its grain support prices in June 2000 with the objective of reducing inflationary pressures and lowering government outlays. For instance, support prices for Anatolian Hard Red Wheat, which is most commonly produced, has been reduced by about 14 percent to 166 US\$/tonne compared to 1999.

Turkey's state grain board (TMO) purchase from farmers in 2001 is forecast at about 3.5 million tonnes of cereals.

TURKMENISTAN (6 June)

Irrigation water shortages again this year, could result in the (ambitious) official grain and cotton production targets not being achieved. The winter wheat production target is 2 million tonnes and in addition quantities of rice and maize are also grown in the spring. Winter cereals are officially reported to be planted on some 775 000 hectares, which would be some 10 percent more than last year in a country largely consisting of desert, where the bulk of crops need irrigation. The drive to increase rice production, which failed last year, is continuing and this year some 40 000 hectares are planned to be sown by specialised producers.

The official estimates of the areas sown could be unrealistic. The fact that wheat, rice and cotton are crops which remain under state marketing orders, and for which inputs can be mobilised, could also mean that the areas sown are being overestimated and inputs diverted to other food crops. Moreover, most private sources also find crop yield estimates inflated. On the one hand, land privatisation and private responsibility for production under leasehold has provided incentives to maximise yields. On the other hand, unofficial sources indicate that actual wheat yields are between 1.5-2.0 tonnes per hectare rather than the 2.5–2.6 tonnes per hectare officially reported since 1999. Salinisation due to excessive irrigation of fragile desert soils and poor drainage is a growing problem.

In view of these considerations, and the sharp increase in cereal availability given the official forecasts, FAO has lowered its production series since 1999. Output of wheat in 2000 is now estimated at 1.4 million tonnes and total grain production at 1.5 million tonnes. Early reports indicate that the reservoir levels are lower than last year and water has only been available for one irrigation in April. It is reported that inadequate water was available to irrigate crops in May and that this, in addition to compromising the yield of spring grain and cotton crops, could also affect the yield of winter wheat. The worst affected areas are said to be Dashagouz province (bordering Karakalpakstan and nearer the tail end of the Amu Darya River) and Mary province (bordering Iran and Afghanistan). Mary province is dependent on the Murghab river for irrigation, which has been reportedly dry for most part of the spring crop growing season. Given the threat of water shortages, the outlook for the 2001 foodcrop harvests is to decrease despite reports of a larger area sown.

Imports of wheat have fallen sharply in recent years and are estimated to remain stable at about 40 000 tonnes in 2001/02 provided the cereal production forecasts materialise. However, data on trade is difficult to obtain and there are reports of informal flows of wheat flour. The government strategy emphasises increased domestic wheat and rice production, to minimise import needs. At the same time the government also wishes to quintuple cotton seed production by the year 2010.

UZBEKISTAN (4 June)

The outlook for the 2001 cereal harvests is again threatened by a shortage of irrigation water. As at end April, river flows at most stations on both the Syr Darya and Amu Darya were less than at the corresponding time last year. Unless glacier melt increases, in response to very hot temperatures since late April, there remains the risk that irrigation water supplies could be inadequate to meet crop needs in the region. Irrigation levels are low for a number of reasons, precipitation in the catchment area that was not adequate to offset last year's low levels, the diversion of water resources to generate hydro-electricity upstream in the winter months and the increasingly poor state of the irrigation system. If this situation persists, the outlook is for another reduced spring crop harvest.

Unseasonably high temperatures since late April have allowed early spring planting but have also increased irrigation needs. Planting of cotton, the major cash crop has been virtually completed. Planting of spring grains (mainly rice and maize) and other food crops may be affected by the shortage of irrigation water. In Karakalpakstan, (KK) the area worst affected by the water shortage last year, the total area sown to spring crops has roughly fallen by half to about 200 000 hectares. Virtually no land has been planted to rice (the target was 80 000 hectares) and as a result, the aggregate area sown to rice could fall to about 75 000 hectares from a low of 125 000 hectares last year. The area sown to cotton in KK is also reduced by up to a third.

The latest official estimates reconfirm that the area sown to winter wheat has decreased by about 100 000 hectares, to an estimated 1.2 million hectares as some rainfed land has been taken out of production. As a result of lower wheat and rice plantings, the aggregate area sown to grains for harvest in 2001 is estimated at only 1.4 million hectares, some 200 000

hectares less than last year. Given drought also in neighbouring countries, the 2001 grain harvest could be less than last year's poor 3.9 million tonnes.

An FAO/WFP joint mission in October 2000 in response to the water shortages in that year found that some 45 000 people in KK would experience food supply problems unless assisted. This number could be higher if the water shortage situation repeats itself this year.

VIET NAM (29 May)

The monsoon season has arrived in May in the Mekong Delta and some areas in the Central Highlands with widespread heavy rains. Harvest of the winter-spring rice crop, the largest rice crop in the northern and southern parts of the country. A larger winter-spring crop is forecast this year in the Red River and Mekong River Deltas, as a result of extensive use of high yielding hybrid rice varieties.

Planting of the summer-fall rice is progressing in the south for harvest in October. In view of weaker rice prices, cropped area has declined, and in some areas farmers have switched from summer-fall rice cultivation to other more profitable crops. To prevent prices from falling, the Government purchased about 1 million tonnes of rice from local farmers in April. Quotas imposed on exports and fertilizer imports have been recently abolished to stimulate exports and production. About 2 million tonnes, or 50 percent of this year's export target, have been shipped to buyers in Africa, Middle East and Asia.

YEMEN (25 May)

Rainfall and temperatures for the main, sorghum and millet crops to be harvested towards the end of this year, are reported to be normal. Total cereal output in 2000 is estimated at 672 000 tonnes, similar to the average for the previous five years.

The Desert Locust situation remains calm but with recent winter rains along the Red Sea coastal plains, conditions are likely to be favourable for locust breeding.

CENTRAL
AMERICA
(including the
Caribbean)

COSTA RICA (28 May)

The rainy season has started, and with it the 2001 agricultural campaign. White maize planting intentions remain unchanged from last year. Sowing of first season paddy crops is almost complete and the area planted is also expected to be similar to last year. Harvesting of the third and largest bean crop is complete, and output is estimated at 16 000 tonnes.

The marketing year 2000/01 (July/June) is coming to an end, and wheat imports are expected to be close to 120 000 tonnes. Imports of white maize are estimated at about 50 000 tonnes, and of yellow maize at 500 000 tonnes. Beans imports in marketing year 2001/02 (Jul/Jun) are forecast at 40 000 tonnes.

CUBA (28 May)

Heavy rains in May benefited flowering coffee plants, but forced the country to stop the harvest of 2001 sugar cane which was earlier affected by drought. Cuba's sugar cane crop is now expected to yield 3,6 million tonnes, compared to 4,1 million tonnes last year. Paddy production is expected to be higher than last year, as moderate rain over Pinar del Río, La Habana and Matanzas partially recovered water reservoirs. The drought is not over despite the rains, and monitoring of water stress will be required throughout 2001 due to the accumulated water deficit.

Rice imports in marketing year 2001 (January/December) are forecast to remain unchanged from last year at 400 000 tonnes.

DOMINICAN REPUBLIC (28 May)

The rainy season has started, and with it the planting of first season crops. Spring paddy harvest is well advanced and a bumper crop of 540 000 tonnes is expected in 2001. Paddy prices are low due to large carry-over stocks from last year and the expectation of a bumper crop. The area planted with secondary food crops (jucca, beans and potatoes) is reported average.

Wheat imports in marketing year 2000/01 (July/June) are anticipated to reach 300 000 tonnes, while yellow maize imports (used as feed) are expected to remain unchanged from last year at 700 000 tonnes.

EL SALVADOR (28 May)

The country is slowly recovering from two strong earthquakes in January and February, but the provision of food and other types of emergency relief assistance is expected to continue until the harvest of the first crop season starts in August/September. The economy is reported to be showing signs of recovery, but the shocks left an additional 160 000 people living in poverty. The government is distributing agricultural input packages to small farmers in an attempt to ensure the planting of the first season crop, and official sources report that the output of basic grains of the current agricultural campaign is not likely to be below last year's level. Small after-shocks are frequently being reported, and there is concern that hurricanes during the rainy season that has started could provoke land and mudslides.

The 2000/01 (July/June) marketing year is well advanced. Wheat imports are expected to be close to 200 000 tonnes, while maize imports are revised downwards to about 320 000 tonnes. Rice imports in marketing year 2001 (Jan/Dec) are forecast at 30 000 tonnes .

GUATEMALA (28 May)

Planting of first season crops is well advanced and the harvest is scheduled for August/September. April was a relatively dry month, but rains fell in May over the most important maize producing departments, including Jutiapa, Sololá, Quetzaltenango and San Marcos. This represents a good start to the agricultural campaign compared to last year, when planting was delayed until June due to the late arrival of rains.

Imports at the end of marketing year 2000/01 (July/June) are expected to be about 400 000 tonnes of wheat and 550 000 tonnes of maize (mostly yellow). Rice imports in marketing year 2001 (Jan/Dec) are forecast to increase to some 35 000 tonnes compared to 30 000 tonnes in 2000.

HAITI* (2 May)

Three days of continuous and heavy rains in mid-May marked the start of the rainy season, and planting of coarse grain crops is now under way. Planting intentions are expected to remain unchanged from last year. The rains caused some deaths and damaged plantations and livestock. However, the water deficit from last year's drought is not covered yet, and a close monitoring of the situation is necessary during the forthcoming months to anticipate problems in the development of crops. The government is co-ordinating the supply of food aid as a way towards poverty alleviation and greater food security during these critical months between harvests. Food aid deliveries in marketing year 2000/01 (July/June) amounted to 85 000 tonnes.

HONDURAS (28 May)

Planting of the important first season maize crop has started and will continue until July. This normally accounts for more than 80 per cent of the total production. The area planted is expected to be normal due to the timely start of the rainy season. Planting of first season paddy started in March and a slight increase in area planted is anticipated. A new price for paddy has been agreed between farmers and the milling industry, which aims at fostering production in the current agricultural campaign (paddy production never recovered from Hurricane Mitch in 1998 when output fell by almost two thirds).

Wheat import requirements in marketing year 2001/02 (July/June) are forecast at about 200 000 tonnes. Maize imports in the current marketing year 2000/01 (July/June) should reach about 160 000 tonnes and a similar volume is forecast for next year.

MEXICO (28 May)

Harvesting of 2001 wheat is underway and output is expected to be 3.2 million tonnes, about 5 per cent lower than last year due to a lower area planted and dry weather conditions. Planting of rain-fed coarse grain crops started in April. Maize planting intentions are unchanged from last year, but if the rains are favourable this year, the maize area this summer should be about 1 million hectares higher, while output should be 2.6 million tonnes more than last year. Some 1.9 million hectares of sorghum are expected to be planted from July, representing a 4 per cent increase from last year, following an expansion in the demand from the animal feed industry. Paddy production for 2001 is forecast to remain unchanged from last year's some 400 000 tonnes.

Imports in marketing year 2000/01 (Jul/Jun) are expected to be about 2.4 million tonnes of wheat, 5.6 million tonnes of maize and 4.2 million tonnes of sorghum. Rice import in marketing year 2000/01 are estimated at 440 000 tonnes.

NICARAGUA (30 May)

A timely start of the rainy season suggests a favourable prospect for winter coarse grain crops currently being planted in humid and semi-humid areas. The area planted this campaign is officially forecast to be about 4 per cent smaller than last year due to low prices and financial constraints. Paddy output in year 2000 is expected to be close to 300 000 tonnes.

Import requirements in marketing year 2001/02 (Jul/Jun) are forecast at 120 000 tonnes of wheat, 90 000 tonnes of maize and 90 000 tonnes of rice.

SOUTH AMERICA

ARGENTINA (30 May)

Wheat planting started under a relatively rainy and cold autumn. Rains during the period delayed soil preparation, but provided abundant soil moisture that guarantees a good germination. Area planted with wheat is expected to increase and reach 7 million hectares. The increase is due to the expectation of higher prices and a record 10 million hectares planted with soybean last summer (wheat is usually rotated with soybean). Maize harvest is almost complete and production is expected to reach 15.4 million tonnes. Paddy area planted in 2001 dropped by a third from last year, and output is anticipated to be 640 000 tonnes.

BOLIVIA (30 May)

Land is being prepared for the forthcoming wheat and potato campaign. Water accumulated in valley reservoirs from abundant summer rains gives these crops an early good prospect. Harvesting of

cereal and root crops in the highlands and valleys is under way and yields in departments not affected by floods are reported above-average. Important crop losses were observed in the northern highlands of La Paz and Oruro, mainly because of excess water in river banks and plains. In the valleys, both cereals and root tubers were also affected by water logging and hales, but yields in areas not affected are reported above-average. In the tropics, crops have reached maturity and harvest is progressing normally. Official reports indicate that there is a low availability of seeds for the forthcoming agricultural campaign.

The 2000/01 (July/June) marketing year is coming to an end, and wheat imports are estimated at about 305 000 tonnes. Wheat import requirements in the next marketing year are forecast in excess of 300 000 tonnes.

BRAZIL (30 May)

Favourable weather conditions helped the timely planting of wheat in Paraná State, which accounts for half of the country's total area planted. The number of hectares this campaign is anticipated to be similar to last year. Summer maize harvest reached a record level and total maize production for 2001 is expected to increase by almost 7 million tonnes from last year's average level. As a result, the country should move from being a net importer to a net exporter of maize. The area planted with *safrinha* maize (second season crop) is estimated to be 15 per cent smaller than last year, and may not reach one million hectares. The *safrinha* crop is not developing well in the northeast (Goiás and Pernambuco) due to dry weather conditions, and production is expected to fall by 25 per cent from last year. Only scattered showers were observed during May in arid and semi-arid North and Northeast, and the outlook is not favourable. Paddy harvest is complete with an estimated production of 11 million tonnes. Wheat imports in marketing year 2000/01 (July/June) are estimated at 7.7 million tonnes.

CHILE (31 May)

Moderate rains during May are helping the germination and early development of 2001 wheat in central areas. Planting intentions indicate a 6 per cent increase relative to last year. The 2001 maize harvest is complete with an estimated 720 000 tonnes. Paddy production is expected to increase 15 per cent from last year's drought affected level and reach about 140 000 tonnes.

Import requirements for the marketing year 2001/02 (July/June) are forecast at 460 000 tonnes of wheat, 1.1 million tonnes of maize (mostly yellow) and 70 000 tonnes of rice.

COLOMBIA (31 May)

Rains in April signaled the start of the wet season, and planting of first season wheat, maize, sorghum, barley, rice and potatoes is under way. Official sources indicate that most Andean and Caribbean departments of the country are showing water deficits slightly below the historic average, while water is abundant in western, Amazonian and Atlantic departments. The overall weather conditions are favourable for the normal development of crops.

Imports in marketing year 2000/01 (July/June) are estimated at 1.2 million tonnes of wheat and 2.1 million tonnes of maize. Import requirements of both commodities in the next marketing year are forecast to increase by about 5 per cent.

ECUADOR (31 May)

Yellow maize and paddy crops of coastal areas develop normally thanks to moderate and evenly distributed autumn rains. In Loja, in the south, land preparation for planting second season paddy crops in August/September is under way. In the Andean departments, harvest of early maize, wheat and barley crops (planted in September) has started. In the Amazonian departments, the government declared the state of emergency after heavy rains in June caused localized floods, mudslides and

forced the evacuation of more than 8 000 people. Maize production in 2001 is estimated at 770 000 tonnes (3 per cent higher than last year), and paddy output is estimated at 1.5 million tonnes.

Import requirements in marketing year 2001/02 (July/June) are estimated at 450 000 tonnes of wheat and 200 000 tonnes of maize.

PERU (31 May)

In coastal areas, wheat crops are being harvested and yields are expected to be average. Yellow maize is developing normally and an increase of 8 per cent from last year is forecast due both to water availability and larger plantings. In the highlands, where most peasants live, harvesting of white maize crops started in May and will continue until July. Aggregate output of the past three months indicate a fall in production of 15 per cent from last year. The rainy weather delayed the maturing and harvesting of paddy crops (65 per cent of total output is harvested from May until August), but the output is forecast at 1.9 million tonnes. Floods in Puno Province during February and March ruined about 17 000 hectares of agricultural land, and compromised the food security situation of some 30 000 people. The international community, the government and civil society organizations are providing assistance through food for work.

Import requirements in marketing year 2001/02 (July/June) are estimated at 1.3 million tonnes of wheat and 1 million tonnes of maize (mostly yellow).

URUGUAY (4 June)

Planting intentions for 2001 wheat campaign stand at 200 000 hectares, representing a significant increase from the 120 000 hectares planted last year. The increase is due to the expectation of higher wheat prices and the high yields obtained last year. Moreover, farmers this year are expected to shift resources from beef production into agriculture following recent outbreaks of foot and mouth disease. Barley planting intentions are also on the increase. The recently harvested maize crop is estimated at 200 000 tonnes. The Association of Rice Growers (ACA) reports that a total of 157 000 hectares of paddy were harvested, with an estimated output of 990 000 tonnes.

Heavy rains in early June left homeless some 8 000 people in the northern department of Artigas and southern Brazil. The economic situation of the area is precarious because of the suspension of trade earlier in the year to contain the spread of foot and mouth disease.

VENEZUELA (1 June)

Relatively dry conditions in April and moderate rains in May allowed both soil preparation and planting of the first (summer) 2001 season crop. Some 420 000 hectares of white maize, 30 000 hectares of yellow maize and 300 000 hectares of sorghum are expected to be planted this campaign. Paddy production is anticipated to increase slightly from last year and to reach 800 000 tonnes.

Both wheat and yellow maize imports in marketing year 2001/02 (July/June) are expected to be around 1.3 million tonnes each.

EUROPE

EC (11 June)

Conditions for the 2001 cereal crops remain mixed. Northern parts of the community were generally characterized by abundant rainfall during April and early May, which hampered spring and summer crop planting and other spring field activities such as fertilizer application. However, by mid-May, a period of drier and warmer conditions eased earlier problems of excess moisture and soil conditions improved. By contrast, in the Iberian Peninsula, lack of rainfall and above normal temperatures in

April stressed the most advanced crops. However, conditions for newly planted summer crops improved in mid-May with cooler temperatures and the arrival of some light rain showers.

Latest information confirms expectations of a decrease in the EC cereal crop in 2001, largely reflecting a significant contraction in the winter sown soft wheat area. The aggregate wheat crop in 2001 is now forecast at 97.5 million tonnes, somewhat down from the forecast in the previous report and 7.5 percent down from last year's bumper crop. Apart from the large area reduction, yield prospects have reduced somewhat over the past two months because of less than optimum growing conditions in many parts. Regarding coarse grains, although the outcome of spring/summer crop planting is still uncertain, tentative forecasts point to an overall reduction in output to just under 108 million tonnes, compared to 108.3 million tonnes in 2000. While barley production may decrease slightly, output of maize could increase if the larger area expected in France, the Community's major producer, should materialize. The 2001/02 paddy season is in progress but planting intentions remain largely uncertain. Pending more information, production in the EC is tentatively forecast to recover from the 11 percent contraction experienced last year that followed from flood-induced losses in Italy. Area ceilings at the national level under the Common Agricultural Policy (CAP), continue to limit the scope for large increase in plantings. However, such ceilings were overshot last year in Spain. Abundant water availability in the country, combined with steady productivity gains, might induce planting to yet again exceed the CAP national planting limit, despite the resulting penalties to producer income payments in breach of the ceiling.

ALBANIA (11 June)

This year's cereal crop is forecast to increase slightly from last year reflecting generally more favourable weather conditions. Aggregate output could be about 600 000 tonnes, including about 350 000 tonnes of wheat.

BELARUS (7 June)

Spring crop cultivation has been completed, well ahead of last year's schedule. Favourable weather conditions and adequate soil moisture have generally favoured both spring and winter crops. Spring grains in 2001 are expected to cover some 1.6 million hectares, similar to last year's area, producing some 2.8 million tonnes (2000: 2.6 million tonnes). Indications are that the 2001 grain harvest could reach 5 million tonnes, cleaned weight compared to an estimated 4.8 million tonnes in 2000.

BOSNIA-HERZEGOVINA* (4 June)

The outlook for the 2001 cereal harvest is mixed. The condition of winter grains is satisfactory so far, but the final outcome of spring maize will depend crucially on regular precipitation to continue to recharge soil moisture reserves after last summer and autumn's dry conditions. To meet consumption demand, wheat imports have increased steadily and the country has also imported maize in the wake of last year's drought reduced output.

BULGARIA (11 June)

Weather conditions have remained generally satisfactory over the past two months for the developing cereal crops and a recovery is forecast in this year's cereal output, after last year's reduced crop. Aggregate output of cereals in 2001 is now forecast at about 5.4 million tonnes, about 18 percent up from 2000, of which, wheat will account for about 3.2 million tonnes.

CROATIA (4 June)

The early outlook for the 2001 cereal harvest is mixed. After the drought-reduced output last year, precipitation has been adequate for the winter cereal crops to date but soil moisture reserves are not yet fully recharged. The 2001 wheat harvest, sown on an area of 215 000 hectares, is officially forecast at between 0.95 and 1.0 million tonnes, somewhat higher than last year's 929 000 tonnes and above average. The area being sown to spring crops will be somewhat lower than last year's,

reflecting planned reductions in sunflower, sugarbeet and barley. The maize area is targeted to increase marginally to 386 000 hectares, from 379 000 hectares in 2000 to help replenish maize supplies after the drought reduced harvest in 2000 of only 1.3 million tonnes, compared to 2.1 million tonnes in 1999. Despite the poor harvests and a tight supply situation, maize is being exported to neighbouring Bosnia Herzegovina. The country annually needs some 650 000 tonnes of wheat, leaving an exportable surplus. Releases of wheat from the state reserves have throttled back domestic price rises for this commodity.

CZECH REPUBLIC (11 June)

An average cereal output is expected this year reflecting generally satisfactory planting and growing conditions. The 2001 cereal area is estimated to be similar to the previous year's level at about 1.6 million hectares, and output is forecast at about 6.7 million tonnes.

ESTONIA (4 June)

The early outlook for winter grains is satisfactory. Adequate precipitation in April and May and above normal temperatures in April have also allowed an early start to spring plantings. The 2001 winter grain harvest is likely to be close to last year's good level and, provided growing conditions remain favourable until the completion of the harvests in September, aggregate output could remain close to last year's bumper 0.6 million tonnes cleaned weight, some 25 percent more than in 1999. The recovery in milk production continued in the first quarter of 2001 and the rate of slaughter of animals decreased.

FORMER YUGOSLAV REPUBLIC OF MACEDONIA (11 June)

Prospects for the 2001 cereal crops remain somewhat uncertain after exceptionally dry winter conditions, especially in eastern parts of the country. Winter wheat production in particular has been severely affected in some counties and, as a result, the overall output could fall below average this year.

WFP continues to provide basic rations for refugees living in host families and collective centres. Since late May, the increasing tension and exchange of fire between the Macedonian Security Forces and ethnic Albanian armed groups in the region of Lipkovo municipality have brought about a renewed influx of displaced persons in and out of the country. All IDPs are lodged with host families.

HUNGARY (11 June)

Dry April conditions favoured spring crop sowing. Scattered showers in early and mid-May helped to improve soil water supplies, which have been generally low since last summer, but more moisture is still needed to ensure satisfactory development of crops through to harvest. Wheat output is now forecast to recover to about 4.5 million tonnes, after reduced outputs in the past two years. A significant recovery in maize output is also expected as long as satisfactory amounts of rainfall continue to be received.

LATVIA (4 June)

The early outlook for the 2001 cereal harvest is satisfactory. Good precipitation this winter and spring has provided adequate soil moisture reserves. The area sown has likely remained average. Provided favourable growing conditions continue, the 2001 grain output could remain close to last year's good 924 000 tonnes, 18 percent above the poor harvest of 1999. With livestock production remaining depressed, and animal numbers continuing to shrink, imports of cereals in recent years are limited to about 50 000-70 000 tonnes per annum, mainly of bread quality wheat to admix with local production. Indications are that animal productivity is increasing.

LITHUANIA (4 June)

The early outlook for the 2001 winter cereal harvest is satisfactory but crop development in the north-eastern corner of the country, bordering Latvia, is somewhat less than a year ago. Overwintering conditions have been satisfactory this year and the 2001 grain harvest could approach the above average level of 2.7 million tonnes achieved in 2000, provided favourable conditions prevail throughout the growing season. Exports of meat (beef) have been affected by BSE but exports of dairy products increased.

MOLDOVA (4 June)

Spring crop cultivation is virtually completed and has benefited from mostly satisfactory weather conditions and adequate soil moisture. The area sown to the main spring grain crops, maize and pulses, are expected to remain stable at nearly 500 000 hectares. The outlook for winter wheat, planted on an estimated 350 000 hectares is better than last year. As a result, the aggregate grain harvest is tentatively forecast to reach some 2.4 million tonnes, to be harvested from nearly 1 million hectares. This would be about 0.3 million tonnes higher than the drought reduced harvests of 1999 and 2000.

POLAND (11 June)

Winter and spring weather conditions have been excellent for the 2001 cereal crops. As a result, although the overall cereal area is expected to remain close to last year's level, improved yields should lead to a significant rise in output. Currently, aggregate cereal output is forecast to recover to almost 26 million tonnes, 15 percent up from last years reduced crop. Of the total wheat is forecast to account for 9 million tonnes.

ROMANIA (11 June)

Prospects for the 2001 cereal crops have improved over the past two months with beneficial rain helping to replenish soil water reserves, which had earlier been severely depleted. Yields are likely to recover from last year's poor levels and aggregate cereal output is tentatively forecast at almost 14 million tonnes, 4 million tonnes up from last year but still well below the average of the 5 years preceding the 2000 severe drought year.

RUSSIAN FEDERATION (30 May)

Spring planting is proceeding well ahead of last year's pace. By mid May, over half of the targeted spring grain area had been sown. Growing conditions for both the winter and spring crops have been mostly good, with adequate precipitation in most areas. Indications are that the aggregate area sown to grains (winter and spring) will increase by over 2 million hectares to nearly 48 million hectares, including 35 million hectares of spring grains. Most marked increase in grain sowing is expected in the Volga river basin and Central Regions. Winter grain crops were sown on 14.7 million hectares. Winterkill was limited to an average of about 1.2 million hectares.

Overall, the outlook for the 2001 grain harvest is good so far. Official forecasts put the 2001 grain harvest at 65-70 million tonnes, up to 5 million tonnes more than in 2000 (65.4 million tonnes). FAO tentatively forecasts this year's grain harvest at about 74 million tonnes, some 3 million tonnes more than its estimate for 2000 (71 million tonnes), about 10 percent higher than the official estimates. The Grain Union estimates that about 10-20 percent of the grain market operations are in the shadow market. Severe flooding in Yakutia has caused hardship and losses but is unlikely to affect the overall level of production.

Following a relatively good harvest in 2000, cereal imports in the marketing year 2000/01 are expected to fall to 2.4 million tonnes, compared to 8.4 million in the previous year. This includes 1.4 million tonnes of wheat and 0.7 million tonnes of coarse grains (barley, maize and rye). Cereal exports are estimated to reach 1.24 million tonnes, compared to 0.67 million tonnes in the preceding

year. Official reports indicate that total grain stocks, as of 1st May, stood at 16.3 million tonnes, nearly 4 million tonnes (29 percent) higher than at the corresponding time in the preceding year. The country's grain stocks is also reported to be sufficient to cover consumption needs until the upcoming harvest.

Official reports indicate that the spring crop area target in Chechnya is 116 000 hectares, including 63 000 hectares of grains. Nearly 38 000 hectares (33 percent of plan) had already been cultivated as of 15 May. The comparable figure for last year was 29 000 hectares. However, security problems and lack of sufficient farm inputs continue to compromise production.

Displaced and otherwise conflict-affected persons in Chechnya and in neighbouring Ingushetia continue to depend on WFP and NGOs for basic and complementary food assistance.

During the second half of May a total of 1 900 tonnes WFP food commodity was distributed to approximately 131 000 beneficiaries in both Republics. Funding constraints continue to limit WFP activities.

SLOVAK REPUBLIC (11 June)

In the Slovak Republic, prospects for the winter grain crops are satisfactory and output is expected to recover after last year's reduced crop.

THE UKRAINE (31 May)

Spring crop planting has been completed well ahead of last year's schedule. Favourable weather conditions as well as improved access to farm inputs have enabled farmers to sow 16 million hectares of land to spring crops, by 18 May. This compares with only 12.6 million hectares at the corresponding time last year. The winter grain area also increased by 0.6 million hectares. If targets are achieved, which is likely given current good conditions, the aggregate area sown to grains for harvest in 2001 could reach 14.6 million hectares, nearly 700 000 hectares less than last year. At this stage, yield expectations on average are higher than last year and total cereal output in 2001 could reach 31 million tonnes, nearly 8 million tonnes more than FAO's estimate for last year. Provided favourable weather persists until the completion of the harvests, output is forecast to include 18 million tonnes of wheat (2000: 11 million tonnes) and 13 million tonnes of coarse grains (2000: 12 million tonnes).

Provided production forecasts materialise, cereal imports in 2001/02 are expected to decline to less than 200 000 tonnes from nearly 900 000 tonnes in the current marketing year. By contrast, exports in 2001/02 could reach nearly 5 million tonnes, about 3.5 million tonnes more than in 2000/01, including 3 million tonnes of wheat and nearly 2 million tonnes of coarse grains.

YUGOSLAVIA, FED. REP. OF (SERBIA AND MONTENEGRO)* (4 June)

The winter wheat harvest, to be started this month, has fared fairly well in response to generally good precipitation since December and despite dry conditions in the autumn, late plantings, shortages of fertilizer and a general disarray in the sector following the change of government. Estimating the area sown and the upcoming harvest is difficult in view of the uncertain benchmarks on which to base forecasts. Earlier reports that the area sown to winter cereals, (mainly wheat) had reached the targeted 700 000-750 000 hectares, despite the autumn dry conditions and shortages of inputs and money, are increasingly being queried and the figure of 670 000 hectares sown to wheat for harvest in 2001 is thought to be more realistic. Up to end May, satellite imagery indicates that crop development is on a par with last year, except that crops are better in the eastern Vojvodina, an area severely affected by flooding and prolonged waterlogging last year. Given the FAO Crop Assessment estimate of between 1.7 and 1.8 million tonnes of wheat, harvested from an area in the range of 0.6-0.64

million hectares, and the shortages of fuel, fertilizer and other inputs in 2000, the wheat harvest is forecast at about 2 million tonnes for 2001. This is below the official expectations of 2.9 million tonnes from 800 000 hectares.

With regard to the spring crops, the outlook remains uncertain. Soil moisture reserves are rebounding with good spring rains but have not yet been fully replenished. Crop yields will continue to depend on regular rains throughout the growing period until October. The area being sown to maize is officially forecast to reach 1.4 million hectares. Maize prices in the country continue to be more attractive than wheat prices, giving farmers good incentives to plant maize (the commodity is less subject to market regulation than wheat). However, even if the planned area target is achieved, the official target of a bumper yield of 6 million tonnes seems high, given shortages of fuel and agro-chemicals. Indications are that plantings of sugarbeet and soya are likely to be reduced.

WFP is currently targeting about 700 000 refugees and socially vulnerable people. WFP plans to reduce this number by half by mid-2002. In addition the ICRC assists 200 000 IDPs with an individual food ration and 100 000 people (social cases) through a hot meal under their soup kitchen programme.

NORTH AMERICA

CANADA (11 June)

In Canada, with the 2001 spring planting season virtually completed, latest information confirms earlier expectations of a decline in the overall wheat area. The latest official forecast puts the wheat area to be harvested later this year at 10.7 million hectares, 2 percent down from the previous year. In addition, following adversely dry seeding conditions in Alberta and parts of Saskatchewan, the average yield for Western Canada is likely to be less than anticipated earlier and the country's aggregate wheat output is now forecast at 23.7 million tonnes, some 2 million tonnes down from earlier expectations. For coarse grains, latest indications continue to point to an increase in area. The barley area is expected to increase by 4-5 percent to almost 4.7 million hectares, while that of maize, by 14 percent, to about 1.2 million hectares. However, yield expectations for coarse grains, barley in particular, have also been curbed by the dry planting conditions, and the forecast of aggregate output has been reduced somewhat from earlier this year to about 27 million tonnes. This would, nevertheless, be some 10 percent up from 2000.

UNITED STATES (11 June)

Aggregate (winter and spring) wheat production in 2001 is officially forecast at 53.4 million tonnes, 12 percent down from the previous year. The area of winter wheat to be harvested in 2001 is now forecast at about 13 million hectares, some 8 percent down from 2000 and the smallest area since 1971. Regarding spring wheat, planting was virtually complete by late May and, if early indications in the USDA's Prospective Plantings Report have materialized, the area will be down by about 1 percent from 2000 to 7.7 million hectares. With regard to coarse grains, according to the USDA's Prospective Plantings Report, a decrease in the overall area sown is expected compared to the previous year. Plantings of Maize, barley and oats are seen to decrease while the area of sorghum could increase. Planting of maize was reported to be about 90 percent complete by time of the USDA June 4 Crop Progress Report, similar to last year's pace and the average. Based on the indicated areas planted, and assuming normal weather conditions prevail for the remainder of the season, aggregate 2001 coarse grains output in the United States is forecast at about 267 million tonnes, about 3 percent down from the previous year. Of the total, maize would account for 243 million tonnes. Planting of the 2001/02 paddy crop is underway. Concerns over recurrent power shortages in the major growing state of California, necessary for irrigation, and concerns over reduced demand by millers, have dampened output expectations for this season's crop.

Consequently, paddy production for 2001/02 is officially forecast to fall by about 3 percent from the previous year to 8.4 million tonnes.

OCEANIA

AUSTRALIA (11 June)

Prospects for the 2001 winter grain crops improved significantly with the arrival of much needed rains in early June after a prolonged dry spell. The moisture benefited crops that had already been planted into dry soils and encouraged many farmers to continue planting winter grains. After a promising start to the planting season, a prolonged dry during most of April and May had threatened to make many farmers reconsider their cropping plans, which would have led to a reduction in the winter cereal area. The latest official forecast for the 2001 wheat crop, which was released in early June, just before the arrival of the beneficial rains, was cut considerably from earlier expectations to 21.7 million tonnes, similar to last year's level. However, based on latest indications there is renewed likelihood that the final outcome will be a crop somewhat above last year's level, although maybe not as large as the season's first forecasts suggested. The difference may be taken up by barley, which is normally later sown, and would have been the preferred winter crop should the dry conditions have continued. The harvest of the 2001 rice crop is virtually complete, and a record harvest of nearly 1.8 million tonnes has been gathered, reflecting increased availability of irrigation water and ideal growing conditions during the rice season.

PAPUA NEW GUINEA (15 June)

The country was hit in early June by two earthquakes affecting mostly northern areas, as in December 2000. The two earthquakes reaching 6.4 degrees on the Richter scale were followed by a number of aftershocks, particularly landslides in their immediate vicinity. Although the reported injuries and damage crops were limited, two villages were destroyed, leaving some 200 people homeless.

SOLOMON ISLANDS (15 June)

The food supply situation continues to be tight for many people in the country, particularly the internally displaced and the new returnees who need humanitarian assistance. Despite the signing of a comprehensive peace agreement between the major factions at the end of last year, progress in the rehabilitation and resettlement process has been slow. Income and employment opportunities are scarce in the country as the economy is officially reported to have reduced its output and performance for the past three years to less than half of its normal level.

VANUATU (15 June)

The cyclone season has been generally calm this year, with the only major tropical cyclone reported in the northern tip of the country in early April. Little damage was reported to crops. Heavy rains in the affected areas may have benefited crops.

ESTIMATED CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/
a) 2000/01 or 2001 estimates (in thousand tonnes)

COUNTRY	Marketing year	1999/00 or 2000			2000/01 or 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		26 801.7	2 772.0	29 573.7	31 680.0	17 833.2	1 730.9	16 102.3
Northern Africa		13 856.7	83.3	13 940.0	16 032.0	12 378.0	293.3	12 084.7
Egypt	July/June	9 575.9	64.1	9 640.0	10 730.0	9 081.5	20.7	9 060.8
Morocco	July/June	4 280.8	19.2	4 300.0	5 302.0	3 296.5	272.6	3 023.9
Eastern Africa		4 278.2	1 873.5	6 151.7	5 654.0	1 969.1	914.5	1 054.6
Burundi	Jan./Dec.	61.3	8.7	70.0	106.0	2.2	2.2	0.0
Comoros	Jan./Dec.	46.0	0.0	46.0	46.0	9.4	0.0	9.4
Djibouti	Jan./Dec.	58.5	9.5	68.0	68.0	0.4	0.0	0.4
Eritrea	Jan./Dec.	84.1	212.4	296.5	240.0	73.7	54.5	19.2
Ethiopia	Jan./Dec.	106.3	1 108.3	1 214.6	520.0	596.6	585.0	11.6
Kenya	Oct./Sept.	1 771.3	117.1	1 888.4	2 164.0	531.6	160.1	371.5
Rwanda	Jan./Dec.	55.0	169.0	224.0	175.0	16.4	16.4	0.0
Somalia	Aug./July	274.6	35.4	310.0	203.0	70.0	39.2	30.8
Sudan	Nov./Oct.	1 166.3	143.6	1 309.9	1 442.0	293.0	55.0	238.0
Tanzania	June/May	654.8	69.5	724.3	690.0	375.8	2.1	373.7
Southern Africa		1 593.0	328.3	1 921.3	2 137.0	2 039.1	320.5	1 718.6
Angola	April/March	389.6	140.9	530.5	753.0	640.0	167.0	473.0
Lesotho	April/March	235.0	3.0	238.0	248.0	263.1	3.1	260.0
Madagascar	April/March	214.1	16.0	230.1	518.0	518.0	13.5	504.5
Malawi	April/March	61.6	67.9	129.5	60.0	60.0	29.9	30.1
Mozambique	April/March	208.4	93.5	301.9	413.0	413.0	103.1	309.9
Swaziland	May/April	73.0	0.0	73.0	81.0	81.0	0.0	81.0
Zambia	May/April	411.3	7.0	418.3	64.0	64.0	3.9	60.1
Western Africa		6 292.7	427.8	6 720.5	7 118.0	1 386.3	182.4	1 203.9
Coastal countries		4 491.8	245.4	4 737.2	5 024.0	1 240.5	89.7	1 150.8
Benin	Jan./Dec.	93.6	6.0	99.6	118.0	9.1	4.7	4.4
Cote d'Ivoire	Jan./Dec.	1 179.0	16.6	1 195.6	778.0	355.6	3.8	351.8
Ghana	Jan./Dec.	445.6	95.0	540.6	490.0	146.5	36.1	110.4
Guinea	Jan./Dec.	263.5	1.3	264.8	330.0	4.2	4.0	0.2
Liberia	Jan./Dec.	98.8	102.0	200.8	200.0	20.7	7.8	12.9
Nigeria	Jan./Dec.	2 216.7	0.0	2 216.7	2 670.0	659.5	0.0	659.5
Sierra Leone	Jan./Dec.	130.6	20.5	151.1	360.0	37.1	33.3	3.8
Togo	Jan./Dec.	64.0	4.0	68.0	78.0	7.8	0.0	7.8
Sahelian countries		1 800.9	182.4	1 983.3	2 094.0	145.8	92.7	53.1
Burkina faso	Nov./Oct.	122.3	35.1	157.4	210.0	11.7	10.9	0.8
Cape Verde	Nov./Oct.	30.7	49.7	80.4	88.0	57.3	57.3	0.0
Chad	Nov./Oct.	40.2	14.7	54.9	85.0	1.2	1.2	0.0
Gambia	Nov./Oct.	115.4	4.6	120.0	120.0	6.9	1.9	5.0
Guinea Bissau	Nov./Oct.	53.7	10.4	64.1	72.0	1.1	1.1	0.0
Mali	Nov./Oct.	104.2	2.6	106.8	90.0	5.5	2.3	3.2
Mauritania	Nov./Oct.	271.7	17.2	288.9	285.0	26.1	0.7	25.4
Niger	Nov./Oct.	342.1	10.7	352.8	377.0	2.7	2.7	0.0
Senegal	Nov./Oct.	720.6	37.4	758.0	767.0	33.3	14.6	18.7
Central Africa		781.1	59.1	840.2	739.0	60.7	20.2	40.5
Cameroon	Jan./Dec.	289.5	2.8	292.3	300.0	15.9	0.0	15.9
Cent.Afr.Rep.	Jan./Dec.	36.8	2.6	39.4	33.0	0.0	0.0	0.0
Congo, Dem.Rep.	Jan./Dec.	220.3	37.8	258.1	250.0	9.1	2.2	6.9
Congo, Rep.	Jan./Dec.	214.4	10.8	225.2	135.0	23.5	14.0	9.5
Eq. Guinea	Jan./Dec.	13.7	0.9	14.6	10.0	5.8	0.0	5.8
Sao Tome	Jan./Dec.	6.4	4.2	10.6	11.0	6.4	4.0	2.4

ESTIMATED CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/
a) 2000/01 or 2001 estimates (in thousand tonnes)

COUNTRY	Marketing year	1999/00 or 2000			2000/01 or 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
ASIA		36 919.7	3 871.7	40 791.4	34 648.0	24 888.6	3 150.8	21 737.8
Afghanistan	July/June	1 155.5	113.9	1 269.4	1 325.0	780.5	164.5	616.0
Armenia	July/June	353.0	19.0	372.0	372.0	318.5	105.7	212.8
Azerbaijan	July/June	745.0	33.0	778.0	721.0	531.0	10.3	520.7
Bangladesh	July/June	1 237.1	906.9	2 144.0	1 641.0	1 825.6	750.6	1 075.0
Bhutan	July/June	50.0	0.0	50.0	55.0	0.2	0.2	0.0
Cambodia	Jan./Dec.	33.2	33.4	66.6	60.0	51.7	32.8	18.9
China 2/	July/June	10 108.0	192.0	10 300.0	9 000.0	6 290.6	58.6	6 232.0
Georgia	July/June	440.0	70.0	510.0	517.0	175.9	96.2	79.7
India	April/March	1 848.4	259.1	2 107.5	339.0	339.0	192.8	146.2
Indonesia	April/March	8 012.0	508.3	8 520.3	7 015.0	7 015.0	420.0	6 595.0
Korea, D.P.R.	Nov./Oct.	725.5	920.5	1 646.0	1 867.0	842.7	686.5	156.2
Kyrgyz Republic	July/June	227.0	79.0	306.0	173.0	112.5	61.0	51.5
Laos	Jan./Dec.	53.1	3.9	57.0	37.0	0.0	0.0	0.0
Maldives	Jan./Dec.	34.3	2.7	37.0	37.0	4.3	0.0	4.3
Mongolia	Oct./Sept.	203.0	0.0	203.0	203.0	82.2	40.0	42.2
Nepal	July/June	117.7	6.3	124.0	79.0	9.8	9.8	0.0
Pakistan	May/April	2 054.0	267.2	2 321.2	290.0	290.0	2.2	287.8
Philippines	July/June	3 874.3	110.1	3 984.4	4 320.0	3 760.4	144.3	3 616.1
Sri Lanka	Jan./Dec.	993.9	52.6	1 046.5	1 100.0	391.1	103.2	287.9
Syria	July/June	1 316.8	27.8	1 344.6	1 725.0	794.7	28.0	766.7
Tajikistan	July/June	524.0	77.0	601.0	655.0	402.7	138.5	264.2
Turkmenistan	July/June	52.0	7.0	59.0	38.0	5.2	3.4	1.8
Uzbekistan	July/June	633.0	0.0	633.0	749.0	458.0	55.0	403.0
Yemen	Jan./Dec.	2 128.9	182.0	2 310.9	2 330.0	407.0	47.2	359.8
CENTRAL AMERICA		3 515.8	507.4	4 023.2	3 927.0	2 774.1	341.9	2 432.2
Cuba	July/June	1 662.3	50.6	1 712.9	1 607.0	676.0	1.9	674.1
Guatemala	July/June	915.0	58.8	973.8	950.0	918.0	181.1	736.9
Haiti	July/June	417.8	182.9	600.7	635.0	290.9	85.0	205.9
Honduras	July/June	323.9	110.2	434.1	501.0	685.8	44.1	641.7
Nicaragua	July/June	196.8	104.9	301.7	234.0	203.4	29.8	173.6
SOUTH AMERICA		798.1	97.8	895.9	998.0	889.8	214.5	675.3
Bolivia	July/June	151.0	53.9	204.9	316.0	191.7	73.7	118.0
Ecuador	July/June	647.1	43.9	691.0	682.0	698.1	140.8	557.3
OCEANIA		387.4	0.0	387.4	381.0	29.1	0.0	29.1
Kiribati	Jan./Dec.	8.0	0.0	8.0	8.0	0.0	0.0	0.0
Papua New Guinea	Jan./Dec.	324.4	0.0	324.4	318.0	29.1	0.0	29.1
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		655.6	197.1	852.7	721.0	84.8	52.3	32.5
Albania	July/June	374.0	19.0	393.0	329.0	31.8	0.0	31.8
Bosnia&Herzegovina	July/June	206.0	84.7	290.7	290.0	50.3	50.3	0.0
Macedonia, FYR	July/June	75.6	93.4	169.0	102.0	2.7	2.0	0.7
TOTAL		69 078.3	7 446.0	76 524.3	72 355.0	46 499.6	5 490.4	41 009.2

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.\$ 1 445 in 1999), 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 import requirements of Taiwan Province.

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DEFINITIONS:

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

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

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

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

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