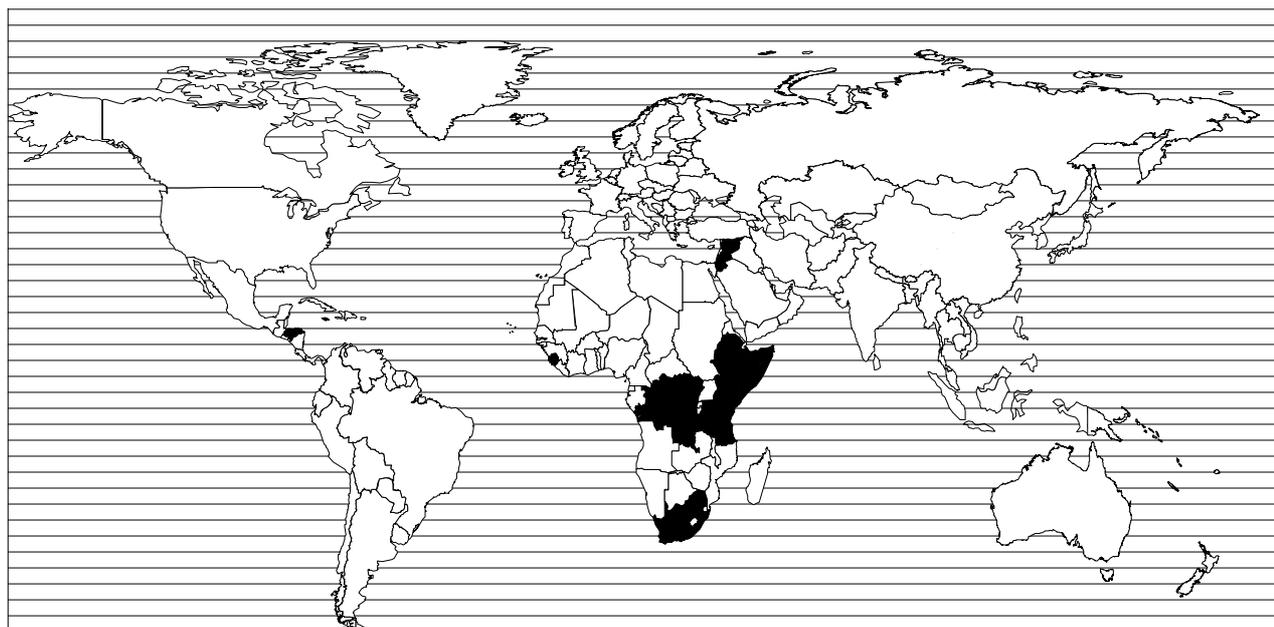


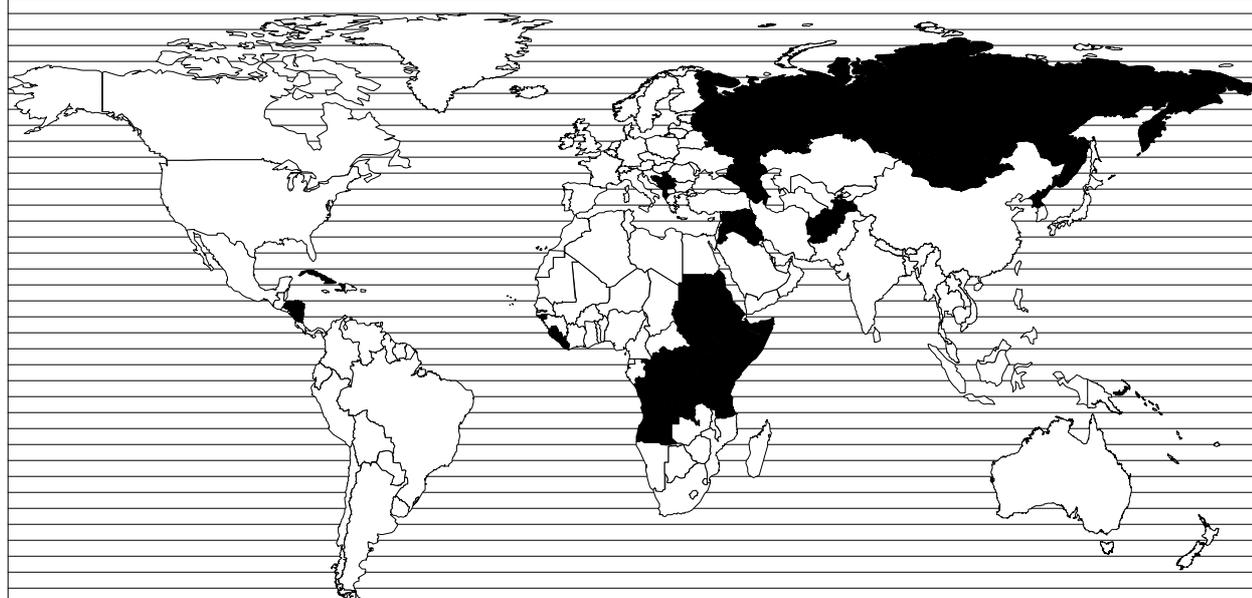
FOODCROPS AND SHORTAGES

No.5

November 1999



UNFAVOURABLE PROSPECTS FOR CURRENT CROPS



FOOD SUPPLY SHORTFALL IN CURRENT MARKETING YEAR REQUIRING EXCEPTIONAL ASSISTANCE



FOOD AND AGRICULTURE ORGANIZATION OF THE UNITED NATIONS

AFFECTED COUNTRIES^{1/}

UNFAVOURABLE PROSPECTS FOR CURRENT CROPS^{2/}

<u>Country</u>	<u>Harvest date</u>	<u>Main contributory factors</u>
Congo, Dem.Rep.of*	Nov./Dec.	Civil strife
Congo, Rep. of*	Nov./Dec.	Civil strife
Ethiopia*	Oct./Dec.	Delayed plantings, low rainfall
Honduras	Nov./Feb.	Reduced plantings, flooding
Kenya	Feb./Mar.	Erratic rains
Sierra Leone*	Nov./Dec.	Civil strife
Somalia*	Jan./Feb.	Drought
South Africa	Nov./Dec.	Reduced plantings
Tanzania	Jan./Feb.	Low rainfall

SHORTFALLS IN FOOD SUPPLIES IN CURRENT MARKETING YEAR REQUIRING EXCEPTIONAL AND/OR EMERGENCY ASSISTANCE (Total: 34 countries)

AFRICA (15 countries):

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

ASIA (10 countries):

Afghanistan*; **Armenia***; **Azerbaijan**; **Georgia***; **Iraq***; **Jordan**; **DPR Korea***; **Mongolia***; **Syria**; **Tajikistan***

CENTRAL AMERICA (4 countries):

Cuba; **Haiti***; **Honduras**; **Nicaragua**

EUROPE (5 countries):

Albania; **Bosnia-Herzegovina***; **The Former Yugoslav Rep. of Macedonia**; **Russian Federation**; **Fed.Rep.of Yugoslavia***

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

- Burkina Faso, Chad, Mali, Niger, Senegal, Sudan

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

^{2/} Main crop unless otherwise indicated.

HIGHLIGHTS

Cyclones and extensive flooding cause havoc in several parts of Asia, killing thousands of people, making hundreds of thousands homeless and seriously threatening food supplies. The worst hit was eastern India, where up to 10 000 people may have died in Orissa state, following a cyclone on 29 October. Floods also destroyed coastal areas of Vietnam, killing up to 550 people and destroying property and infrastructure. Despite the damage, a recovery in rice production is anticipated in the region and imports are likely to be well down on last year's record. In East Timor, humanitarian operations continue and an FAO/WFP Crop and Food Supply Assessment Mission is planned for the end of November.

The food crisis in southern Somalia has intensified with nearly 1.6 million people inaccessible to humanitarian agencies due to an upsurge in civil unrest. Elsewhere in eastern Africa, dry spells and erratic rains sharply reduced cereal production in Kenya, Uganda, Tanzania and Ethiopia, resulting in large numbers of people needing food assistance. In Eritrea, the food situation has deteriorated for more than half a million people displaced by the war with Ethiopia. In Sudan, despite favourable harvest prospects, more than 2 million people in the south continue to rely on emergency food assistance due to civil war.

In Burundi, growing insecurity has resulted in renewed displacement of people and forced a suspension of humanitarian assistance. The food and health situation of around 821 000 people in camps is of serious concern. Overall crop prospects are unfavourable, due to dry weather and reduced planting. Elsewhere in the Great Lakes region, an estimated 10 million people in the Democratic Republic of Congo are food insecure due to civil strife. In the Republic of Congo, civil strife continues to hamper agriculture and marketing activities and to displace large numbers of people.

In Angola, the food supply and nutritional situation remains critical among displaced people in several areas. Despite Government advances against rebels in central and northern parts, insecurity and landmines hamper humanitarian operations. In Madagascar, locusts are reported to be forming in central and south-western areas. Elsewhere in southern Africa, the food supply situation is tight in some countries due to reduced harvests.

In the Sahel, a record harvest is anticipated, with cereal production in the nine CILSS member countries estimated at a record 10.9 million tonnes, some 16 percent above average. Prospects are also favourable in the coastal countries, except in Sierra Leone and Liberia where food production continues to be constrained by insecurity.

In northern Africa, below-normal rains have delayed planting of winter cereal crops. In Morocco, 1999 cereal output was significantly reduced due to poor rainfall, while above-average crops are expected in Egypt. Output in Tunisia is slightly higher than 1998.

Storms and floods have affected crops in Central America and the Caribbean. Serious crop losses are reported in parts and evacuation of people and distribution of relief food assistance is underway. Extensive damage to infrastructure and property is reported from the region. The north-eastern Caribbean is presently threatened by Hurricane "Lenny".

A major humanitarian crisis is emerging in the North Caucasus. In the Russian Federation, where overall food supply situation remains tight, recent intensified military action in Chechnya has led to the displacement of some 250 000 people, mainly to the neighbouring impoverished Republic of Ingushetia which is unable to cope with the sudden and massive influx. Large scale international humanitarian assistance will be required to cope with the deteriorating situation of the civilian Chechan population trapped inside the capital, Grozny and for refugees in the neighbouring areas.

In the United States, winter wheat planting for harvest in 2000 is complete and early indication point to little change in area from last year. Dry weather affected emerging crops in some areas.

In Australia, prospects for the winter cereal crops are favourable reflecting good weather. Another bumper wheat crop is in prospect.

SUMMARY

WEATHER CONDITIONS AND CROP PROSPECTS

In **northern Africa**, land preparation has started for planting of winter crops, but was delayed by below-normal rainfall in September/October. Aggregate 1999 wheat output is estimated at about 13 million tonnes, some 9 percent below last year. The coarse grains crop is estimated at some 11 million tonnes, similar to last year. Weather conditions were mixed in Morocco and Algeria, where cereal output has been well below average due to poor rainfall, while conditions in Egypt and Tunisia were favourable and above-average cereal output is expected.

In **western Africa**, a bumper crop is anticipated in the Sahel for the second consecutive year, due to favourable weather conditions. Rains were timely, except in Senegal, where some replanting was necessary. Widespread rainfall, however, caused serious localized flooding in The Gambia, Senegal, Mauritania, Mali, Niger and Chad. 1999 cereal output in the nine CILSS countries is estimated by FAO/CILSS at a record 10.9 million tonnes, some 2 percent above 1998 and 16 percent above average. Record crops are anticipated in Cape Verde, The Gambia, Mali and Mauritania, whilst above-average output is anticipated in Burkina Faso, Chad, Niger and Senegal. Output, however, remained below average in Guinea-Bissau following civil strife in 1998. In coastal countries along the Gulf of Guinea, harvest prospects are generally good in Benin, Côte d'Ivoire, Guinea and Togo but are less favourable in Nigeria and Ghana, following serious floods. Liberia and Sierra Leone remain heavily dependent on international food aid despite some improvement in food production.

In **central Africa**, crop prospects are generally favourable in Central African Republic and Cameroon, but civil strife in both the Republic of Congo and the Democratic Republic of Congo continues to hamper agricultural activities. In Kivu, main season planting is underway, but prospects are poor due to insecurity.

In **eastern Africa**, early prospects for secondary "Deyr" season are poor in Somalia, due to poor rains and population displacement. In Kenya, output is forecast to fall sharply due to drought and pest infestation. In Tanzania, poor rains affected planting of main season crops in most areas. In Uganda, recent rains favoured the 1999 second season crops. In Ethiopia, floods and drought earlier reduced main season crop yields. In Eritrea and Sudan, prospects for the 1999 main season cereals are favourable.

In **southern Africa**, wheat harvesting is well advanced. The outlook is unfavourable, due to another reduced harvest in South Africa, which accounts for 80 percent of sub-region's wheat production. Dry weather reduced planting and output is forecast at 3 percent below last year. Planting of 1999/2000 coarse grains is underway.

In **Asia**, recent cyclones, storms and floods devastated several parts. In India, a cyclone devastated large parts of Orissa state, causing extensive crop damage. Overall, however, well distributed rains revived prospects for main season rice after erratic rains earlier. In China seasonably dry weather in late October, favoured harvesting of summer crops and planting of winter wheat, but drought/high temperatures earlier affected maize. Production is forecast to be lower than in 1998. In Viet Nam, heavy rain and floods resulted in extensive damage in central coastal areas, though overall rice prospects for 1999/2000 remain favourable. Also in Cambodia, despite localised floods in late October, prospects for main wet season rice remain satisfactory. In Bangladesh, notwithstanding floods in north/central parts, monsoon rains this year have been generally favourable for development of main aman rice. In Pakistan, seasonably dry conditions favoured summer crops and preparations for rabi planting. In Indonesia, rainfall increased moisture supplies for main season rice transplanting. In Japan, storms and heavy rainfall in October, resulted in localised flooding and some crop damage to rice in the south. In DPR Korea, rainfall at important stages of maize development (May-July) was well below normal, seriously affecting yields. Agriculture in the country also remains heavily constrained by lack of essential inputs. In the Philippines, heavy rains in late October, affected maturing (main) rice somewhat. However, overall rice output this year is expected to be much higher than in recent years. In Sri Lanka, land preparation/planting of main (Maha) rice, to coincide with the north east monsoon rains, is underway. Above-normal rainfall in September/October supplemented soil moisture and was generally favourable for planting. In Afghanistan, prospects for the 2000 winter grains are uncertain due to insecurity in important crop areas. Poor rains are hampering planting of winter grains in Iraq, Syria and Jordan. In the Asia CIS countries, 1999 production is forecast to recover to 24 million tonnes from 17 million tonnes in 1998. The 1999 wheat crop is forecast at 6 million tonnes higher mainly due to

higher yields in Kazakhstan, Turkmenistan, Uzbekistan and Georgia. Production of coarse grains is forecast at 4 million tonnes compared to 3 million tonnes in 1998. Elsewhere, the outlook is less favourable, except in Georgia where favourable conditions offset area reduction and output could increase by 10 percent.

In **Central America** and the **Caribbean**, storms and floods in September/October affected harvesting of 1999/2000 first season cereal crops and planting of second season crops. Despite losses in maize, near-average output for the year is forecast in Costa Rica, El Salvador, Guatemala and Nicaragua, while production is likely to be below average in Honduras. In Mexico, the worst affected country, average output is expected as no serious damage occurred in maize production areas. In Cuba, hurricane "Irene" damaged banana plantations and minor foodcrops, but food supplies remain satisfactory. In Antigua and Barbuda major damage to housing and infrastructure has been caused by Hurricane José, while the country, as well as other small island states, are presently being threatened by Hurricane "Lenny".

In **South America**, 1999 wheat harvesting has begun in Argentina, Brazil and Uruguay while it will commence in Chile in December. Early forecast points to average output. Planting of 1999/2000 coarse grain crops is also underway in these countries. In Andean countries, in Bolivia, harvesting of 1999 second season (winter) wheat is complete while planting of 1999/2000 first season cereal crops has begun in parts. In Ecuador, harvesting of 1999 second season maize has begun and above-average output is forecast. In Peru, harvesting of 1999 wheat and maize is complete and an above-average output is forecast. In Colombia, despite heavy rains and flooding in main maize areas, near-average output is provisionally forecast. In Venezuela, heavy rains and flooding also affected crops and below-average maize output is expected.

In **Europe**, aggregate 1999 cereal production in the EC is forecast at almost 202 million tonnes, some 4 percent lower than last year but above average. The decline in output is largely due to a 5 percent increase in compulsory set-aside and adverse weather. Latest information also confirms lower 1999 cereal output in several eastern European countries due to reduced planting and/or adverse weather. Winter grain planting is underway throughout Europe under generally satisfactory conditions. In CIS countries west of the Ural Mountains, indications are that 1999 cereal and pulse output may be marginally above last year's drought-affected crop. FAO forecasts aggregate cereal and pulse output in Belarus, Moldova, the Russian Federation and Ukraine at 92.5 million tonnes, some 2.5 million tonnes more than in 1998. Aggregate wheat output in these countries is forecast at 48.4 million tonnes, compared to last year's drought reduced crop of 48.8 million tonnes. Aggregate production of coarse grains is tentatively forecast at 41.5 million tonnes, some 2.7 million tonnes more than 1998. In the Russian Federation, FAO provisionally forecasts total grain output at 59 million tonnes, some 5 million tonnes above last year. In the Baltics, low grain prices depressed planting and output is forecast to fall to 3.7 million tonnes from 4.5 million tonnes in 1998. In the Federal Republic of Yugoslavia, (Serbia and Montenegro), 1999 wheat output was 2.2 million tonnes, some 27 percent less than 1998. Despite disruption caused by war and shortages of fuel and spare parts, indications are that spring area increased and coarse grain production is officially put at 8.6 million tonnes. In Croatia, 1999 wheat output almost halved and area and yields of coarse grains also fell, due to economic problems and excessive rains. In Bosnia-Herzegovina, the current outlook is for both wheat and coarse grain production to remain stable at about 200 000 tonnes and 900 000 tonnes respectively.

In **North America**, winter wheat planting in the United States for harvest in 2000 is complete. Dry conditions favoured fieldwork but adversely affected crop condition in parts. Early indications indicate little change in area from last year's reduced level. Officially, 1999 wheat production is put at 62.8 million tonnes, about 10 percent below 1998 and coarse grains at 266 million tonnes, 2 percent below 1998. 1999 paddy output is estimated at a record 9.6 million tonnes. In Canada, the bulk of 1999 harvesting is complete, later than normal due to rain and cool temperatures. Wheat output is estimated to be above last year, while production of coarse grains has declined.

In **Oceania**, the outlook for 1999 winter wheat and coarse grains in Australia remains favourable following abundant and timely rainfall. Official forecast points to a well-above-average crop of 21.9 million tonnes, while production of coarse grains is expected to decline somewhat as a result of lower planting.

COUNTRY REPORTS ^{1/}

AFRICA

NORTHERN AFRICA

ALGERIA (10 November)

Land preparation has started for planting of winter crops. However, farming activities are delayed by below-normal rainfall and high temperatures in September and October. The 1999 cereal production is estimated at 2.2 million tonnes, some 29 percent below last year. Wheat production stands 1.5 million tonnes, 25 percent below the 1998 level. Imports of cereals, mostly wheat, are forecast at about 6 million tonnes for the 1999/2000 (July/June) marketing year.

EGYPT (10 November)

Planting of the mostly irrigated wheat crop is underway. The 1999 wheat production stands at about 6.3 million tonnes, some 4 percent up on last year. Maize output is estimated at 5.2 million tonnes and total cereal at about 17 million tonnes. The recently harvested rice crop is estimated at about 6 million tonnes, some 34 percent above last year's level. It is also above average as a result of a large increase in area planted and good yields.

MOROCCO (10 November)

Land preparation has started for winter crops but farming activities are delayed as a result of below normal rainfall in September and October. Production of cereals in 1999 is estimated at 3.8 million tonnes, some 42 percent below last year's crop, due to unfavourable weather conditions. The output of wheat, estimated at about 2.1 million tonnes, is 51 percent lower than last year while barley is down 25 percent. Imports of wheat in 1999/2000 (July/June) are forecast at 2.8 million tonnes and coarse grains at 1.6 million tonnes.

TUNISIA (10 November)

Rainfall in September and October was below normal, delaying the start of the new crop season. However, abundant rains were received in early November, covering most parts of the country, particularly the northern cereal growing regions. This allowed farmers to complete ploughing and start sowing cereal crops to be harvested next April/May. The 1999 cereal production is now estimated at 1.8 million tonnes, 9 percent higher than last year's output. This includes 1.4 million tonnes of wheat and 410 000 tonnes of barley.

Cereals imports in 1999/2000 (July/June) are now estimated at about 1.5 million tonnes, mostly wheat and maize.

^{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 (10 November)

Generally above normal rains have been received since August. Harvest prospects are generally favourable. However, torrential rains caused flooding in many villages and thousands of people were displaced. Infestations of armyworms caused damage to emerging millet, sorghum and maize in Atakora and Borgou departments.

Food supply is satisfactory in the south. Prices remain lower than in 1998 mainly because Sahelian countries imported less this year and farmers needed to sell more to compensate for low cotton incomes.

BURKINA FASO (10 November)

Harvest prospects are favourable following generally above normal rains since July. Cumulative rainfall is generally normal to above normal countrywide except in the east and west. Soil moisture was generally adequate for satisfactory crop development. Pastures are abundant and of good quality. The pest situation remained mostly calm despite some attacks of blister beetles and other insects on millet, maize or rice in several areas.

A joint FAO/CILSS Crop Assessment Mission from 18 to 22 October estimated 1999 cereal production at 2 448 164 tonnes (rice in paddy equivalent), 9 percent below the 1998 record but 2 percent above the last five years average. Millet and sorghum production decreased by 9 percent and 8 percent respectively while maize and fonio production increased by 10 percent and 29 percent respectively.

The overall food supply situation is satisfactory. Markets are well supplied and prices of local millet and sorghum are low. However, some populations may be vulnerable following flooding or successive reduced harvests.

CAPE VERDE (10 November)

Significant and widespread rains since August permitted satisfactory crop development. Soil moisture reserves are adequate to meet crop needs in most areas. Maize and beans are developing satisfactorily, particularly in Fogo and Brava islands where good harvests are expected. A joint FAO/CILSS Crop Assessment Mission in late October estimated 1999 cereal production at a record 25 745 tonnes which is about 5 times higher than in 1998 and 1997 and the last five-year average.

Following this record crop, the overall food supply situation will improve in rural areas affected by several successive poor crops. Markets are well supplied and stocks and planned imports or food aid for the year 2000 are adequate to cover needs.

CHAD (10 November)

Harvest prospects are favourable, reflecting above-normal rains in August and September. Pastures are abundant and the pest situation remained mostly calm. A joint FAO/CILSS Crop Assessment Mission from 18 to 22 October estimated 1999 cereal production at 1 153 294 tonnes (rice in paddy equivalent), which is 15 percent below the 1998 record but 9 percent above the five-year average.

The overall food supply situation is satisfactory. However, impassable roads due to heavy rains in recent months have affected market supply. Prices of cereals decreased in rural areas as producers sold their stocks before the harvest. WFP distributed 1 337 tonnes of food in deficit zones (Mayo-Kebbi, Tandjilé, Logone occidentale and Logone orientale) and 640 tonnes as emergency relief to refugees in Adré in the east.

COTE D'IVOIRE (10 November)

Abundant and regular rains benefited crop development. Harvest prospects are favourable so far.

The overall food supply situation is satisfactory. Cereal import requirement for 1999 (January/December), is estimated at 640 000 tonnes, mostly wheat and rice.

THE GAMBIA (10 November)

Harvest prospects are good, reflecting satisfactory growing conditions. Unusually heavy rains have been registered, notably in August. They caused substantial flooding, notably in the west. Cumulative rainfall is above normal as it generally exceeds 1000 mm, reaching up to 1723.4 mm in Sapu in south CRD. Pastures are adequate. No significant pest infestation has been reported. A joint FAO/CILSS Crop Assessment Mission from 18 to 22 October estimated 1999 cereal production at 137 144 tonnes (rice in paddy equivalent), 20 percent above the 1998 level and 29 percent above the five-year average.

The overall food supply situation is satisfactory. Markets are well supplied. Vulnerable populations affected by poor crops in 1998 received WFP food aid of 2 671 tonnes of cereals, 400 tonnes of pulses and 167 tonnes of oil.

GHANA (10 November)

Growing conditions are satisfactory so far. Rainfall was well distributed and above normal from the second dekad of June to mid-September, favouring crop development. Army worm infestations were reported in the Upper East region, threatening millet and sorghum. In September, severe floods devastated three areas in the Northern Regions as major rivers burst their banks. Some 332 000 people have been made homeless by the floods (300 000 in Northern Region, 15 000 in Upper West Region and 17 000 in Upper East Region). The floods have destroyed farmlands, crops and livestock and caused an outbreak of cholera in some villages. Emergency assistance is underway for some 300 000 victims.

The overall food supply situation is satisfactory except in the flooded areas. About 20 000 Liberian refugees remain in the country, receiving food assistance.

GUINEA (10 November)

Harvest prospects are generally favourable, reflecting adequate growing conditions. However, heavy rains in July/August caused crop damage. Thousands of people were displaced in Conakry due to floods.

The overall food supply situation is satisfactory except for displaced persons and refugees. According to UNHCR, some 366 000 refugees remain in the country. Over 14 000 have recently been moved away from the Liberian border following fighting in mid-August.

GUINEA-BISSAU* (10 November)

Abundant and well-distributed rains in September and October favoured crop development. Cumulative rainfall is above normal and soil moisture reserves are sufficient for satisfactory crop development. Rice has been transplanted in swamps. A joint FAO/CILSS Crop Assessment Mission from 11 to 15 October estimated the 1999 cereal production at 138 666 tonnes (rice in paddy equivalent), which is 6 percent above last year's output but remains below the 1997/98 pre-crisis level and below average. Production of coarse grains increased, while that of rice decreased due to flooding and pest attacks.

The overall food supply situation has improved after the conflict. However, some populations are still facing food supply difficulties, notably in urban areas. Repatriation of refugees is underway and displaced persons and returnees are receiving food assistance.

LIBERIA* (10 November)

Growing conditions are favourable so far but crop prospects remain constrained by continuing civil disturbances in some areas. The 1999 rainy season has progressed satisfactorily with generally well distributed and above-normal rainfall. Output is expected to be similar to or above last year's level, except in the north where fighting broke out in Lofa County in August. Agricultural production has been increasing in Bong, Bomi, Montserrado and Nimba counties, but not in Maryland, Sinoe and Grand Kru where poor roads have made access to farms difficult. With the exception of Lofa County, relative peace prevails elsewhere in the country and has exerted a positive influence on farming activities. The cultivated area should be substantially higher than in 1998, with rice production expected to be around 80 percent of pre-war level and 100 percent for cassava. Although a shortage of basic agricultural inputs was a limiting factor for farmers, it was minimized by substantial distribution of seeds and tools and improved technical assistance to resettling farm families. In Lofa County, most of the estimated 25 000 displaced people are farmers who will not be able to harvest their crops. Several thousands have been displaced from Voinjama and Kolahum in upper Lofa to Tarvey in lower Lofa.

The overall food situation has improved significantly in 1999 as rice production in 1998 was up to 70 percent of pre-civil war levels, compared to 25 percent in 1995, and cassava production reached almost 100 percent of pre-civil war levels compared to 50 percent in 1995. Food supply on the urban markets is relatively stable, and in general, prices are relatively lower than in 1998. Food supply in rural areas continued to be tight, particularly during the rainy season when roads are in poor condition. Resettlement and rehabilitation activities have allowed refugees and internally displaced persons to return to their homes. However, humanitarian programmes for Liberian returnees and Sierra Leonean refugees were disrupted by insecurity and looting in Lofa county, where the nutritional and health conditions of displaced people has deteriorated. About 90 000 refugees from Sierra Leone remain in Liberia. The country continues to rely heavily on food aid.

MALI (10 November)

Abundant and well-distributed rains since August benefited crop development and maintained adequate soil moisture in most productive zones. Pastures of good quality are available across the country. Surveys reported isolated Desert Locusts in a few areas in the Timetrine and the Adrar des Iforas. During September, mature adults and swarms were reported near Aguelhok, Tessalit and in the Tilemsi Valley, and numbers are expected to increase in these areas and could extend to parts of Tamesna. Once vegetation starts to dry out, some concentration and grouping may occur.

A joint FAO/CILSS Crop Assessment Mission from 25 to 29 October estimated 1999 cereal production at 2 951 633 tonnes (rice in paddy equivalent), exceeding the previous 1998 record by 17 percent. The estimated output is 28 percent above the five-year average. Production of rice increased by 13 percent and 41 percent respectively compared to 1998 and the average for the last five years, while coarse grains production increased by 17 percent and 23 percent respectively.

Following two successive bumper crops, the overall food situation is satisfactory. Markets are well supplied and cereal prices remain low. Although some areas may be in deficit, no food aid is required.

MAURITANIA (10 November)

Prospects for rainfed and recession crops are favourable, reflecting abundant precipitation which, however, caused flooding of irrigated rice fields. Abundant rains in mid and late August and September, combined with the high level reached by the Senegal river, caused substantial flooding in Brakna, Gorgol and Trarza, in the Senegal river basin. An inter-agency mission has been organized to assess the impact of these floods. Pastures are in good condition. Low numbers of Desert Locusts were reported in September in Brakna west of Moudjeria, in Tagant near Tidjikja, in the Akoukar region near Aïoun El Atrous and north of Nema. Limited breeding started in early September and is expected to continue in Brakna and Aouker Aïoun, and will almost certainly extend to Trarza, northern Assaba and the two Hodhs. Once vegetation starts to dry out, locusts are likely to concentrate and form small groups. Some may also start to appear further north in Inchiri and Adrar.

A joint FAO/CILSS Crop Assessment Mission from 18 to 22 October estimated aggregate cereal production in 1999/2000 at 250 900 tonnes (rice in paddy equivalent) which is 28 percent above the 195 444 tonnes harvested in 1998/99.

The food situation is likely to improve in rural areas following this good harvest, except in the flooded areas. Food distributions are underway for the affected populations. WFP distributions also started in September for 161 692 people in Aftout and Affolé affected by poor harvests in 1998.

NIGER (10 November)

Growing conditions have been generally favourable during the rainy season. Cumulative rainfall is above normal. Good pastures are widespread. Infestations of grasshoppers and other insects are reported in Diffa, Tahoua, Maradi and Zinder departments. Low numbers of Desert Locust adults may be present and breeding in central Tamesna and on the western side of the Aïr, but as vegetation starts to dry out, the numbers will decline.

A joint FAO/CILSS Crop Assessment Mission from 25 to 29 October estimated the 1999 cereal production at 2 832 600 tonnes (rice in paddy equivalent) which is about 5 percent below last year's record of 2.98 million tonnes but is 23 percent above average. Production of rice increased by almost 25 percent while that of coarse grains decreased.

The overall food supply situation remains satisfactory. Markets are well supplied and prices of cereals are low as cereal traders sold their stocks before the harvest.

NIGERIA (10 November)

Rains started later than normal over northern Nigeria, reaching these areas only in late May. However, despite the late planting, crop production is expected to be normal to above normal following widespread and abundant rainfall up to the end of October. Due to heavy rain, three hydroelectric dams released water in the Kaduna, Benue and Niger rivers in early October, causing flooding of villages located along the river banks and population displacements. The Nigerian Government estimates that about 300 000 people have been affected by the flooding, and that several thousand hectares have been flooded in 5 States (Sokoto, Adamwara, Borno, Kwara and mostly Niger State). Most displaced people have lost their homes and most of their crop fields, and have temporarily settled on higher ground. About 6 000 hectares of sugar cane plantation, expected to produce about 25 000 tonnes of sugar, have been flooded in central region. The south-eastern Bayelsa State and five districts in the Niger Delta (in the municipalities of Patani, Oshimili South, Ndokwa East, Burutu and Bomadi) have also been affected by floods.

The overall food supply situation is satisfactory except in the flooded areas.

SENEGAL (10 November)

Overall crop prospects are favourable, reflecting widespread and generally above normal rainfall in August and September. The Senegal River overflowed its banks, causing flooding, notably in Saint-

Louis region. Pastures are abundant countrywide, benefiting from regular rains since July. Infestations of grasshoppers and other insects are reported in several areas. Prospects for recession crops are good as large areas have been flooded in the Senegal River valley.

A joint FAO/CILSS Crop Assessment Mission from 25 to 29 October estimated 1999 rainfed cereal production at about 962 000 tonnes (rice in paddy equivalent), which is 7 percent above the five-year average. With recession and off-season crops estimated at about 47 000 tonnes, the aggregate cereal production amounts to 1 009 100 tonnes (rice in paddy equivalent).

The overall food situation is satisfactory. Markets are well supplied and the price of rice is stable. Prices of local cereals are low. However, in the flooded areas in Diourbel, Kaolack, Fatick regions and in the Sénégal river valley (Dagana, Podor, Matam, Bakel), localized food supply difficulties are likely.

SIERRA LEONE* (10 November)

Growing conditions have generally been favourable since the beginning of the season, despite reduced rains in late July and in August. Security conditions have improved in many rural areas but might not affect the 1999 production substantially. Output is expected to remain close to last year's level despite favourable climatic conditions so far. Insecurity in major parts of the country at the beginning of the season prevented the delivery of agricultural inputs and disrupted agricultural activities. Recent fighting in the northern towns of Makeni and Lunsar interrupted food deliveries.

Following the peace agreement in early July, the security situation improved and allowed emergency and rehabilitation activities in the country. Food distribution is underway following the reopening of main roads from Freetown to Bo and Kenema, and from neighbouring Guinea to Kambia. However, the amount of food is insufficient to meet the needs of the large number of returnees and displaced persons, particularly in the north and the east. Current estimates put the number of displaced people at 700 000, whose nutritional status is reported to be precarious. A recent inter-agency food needs assessment mission to Kailahun area estimated the total population in the visited towns at about 15 000 inhabitants of whom some 3 000 may be Sierra Leonean refugees who fled Lofa county in Liberia due to renewed insecurity. Even with successful implementation of the peace agreement, the country will continue to rely heavily on food assistance for several years.

TOGO (10 November)

Harvest prospects are favourable reflecting widespread and above-normal rains during the growing season. Soil moisture reserves are adequate and so far the pest situation remains calm. Floods have been reported in Kara, Plateaux, Maritime and Savanes regions. The worst affected regions is Savanes where at least 1 000 hectares of arable land have been inundated, hundreds of homes and over 100 bridges destroyed, and 800 km of roads made impassable, isolating villages and affecting an estimated 42 000 people.

The overall food supply situation is satisfactory.

CENTRAL AFRICA

CAMEROON (10 November)

Crop prospects are favourable, reflecting generally widespread and normal to above normal rainfall. Heavy rains and the spilling of water from the Lagdo hydroelectric dam caused floods and some damage to infrastructure along the River Benue in the Northern Province. About 1 000 persons have been displaced

The overall food supply situation is satisfactory. However, following food supply difficulties in northern areas affected by poor crops in 1998, WFP distributed 9 500 tonnes of food to 660 000 affected persons.

CENTRAL AFRICAN REPUBLIC (10 November)

Following reduced rainfall in June and early July, precipitation remained generally widespread and normal to above normal since mid-July. Rains were particularly heavy in late July/early August and in late September/early October. Harvest prospects are favourable.

The food supply situation is satisfactory.

CONGO, DEMOCRATIC REPUBLIC OF* (10 November)

Abundant and regular rains covered the entire country in September and October except in the south-east and the extreme west. The food supply situation is very tight in most parts of the country. Recent FAO estimates indicate that over 10 million people are living in conditions of food insecurity, including some two million seriously-affected people. In addition, 150 000 people have taken refuge in neighbouring countries. The most affected groups according to the report include 831 000 displaced persons, 844 000 vulnerable urban residents and some 300 000 refugees currently in the DRC. Other affected people include 5.1 million living along the front line, and 2.5 million people in homes hosting the displaced. Another 4.1 million people are in isolated rural areas and are vulnerable to food insecurity. The division of the country in two since the start of the conflict has virtually halted all formal internal trade, while population displacements have seriously disrupted agricultural activities. The deterioration of people's purchasing power, and the shortage of basic consumer goods have exacerbated the food problem.

A cholera outbreak was reported in Kisangani in September. Tens of thousands have fled ethnic clashes in Bunia in the northeast, near the Ugandan border, following an outbreak of ethnic clashes between the Wahema and Walendu people. Many villages have been destroyed since July and 100 000 to 150 000 people have fled their homes. Fighting is also reported in Equateur Province.

CONGO, REP OF* (10 November)

The upsurge of civil conflict between Government forces and Ninja militia disrupted agriculture and marketing activities, reduced food imports and seriously affected the nutrition and food supply situation, notably in Brazzaville. About 800 000 persons were displaced following civil disturbances. About 100 000 came to Pointe Noire and 200 000 to Brazzaville, while about half a million were still in the interior of the country. Heavy rains caused floods that affected some 40 000 people in about 30 villages in the Cuvette region in the north. The Pool region remains inaccessible to humanitarian organizations. Out of the 200 000 displaced people who have returned from Pool to Brazzaville since May, 14 700 people, including more than 3 300 children under five, have been treated for serious malnutrition in the city's nutritional centres.

EQUATORIAL GUINEA (10 November)

Rainfall remained below average in October. The staple crops are sweet potatoes, cassava and plantains.

GABON (10 November)

The main foodcrops are cassava and plantains but some maize is also produced (around 25 000 tonnes). The country commercially imports the bulk of its cereal requirement, estimated at around 82 000 tonnes in 1999. Around 10 000 refugees from Congo-Brazzaville are reported in temporary sites or in Libreville.

EASTERN AFRICA

BURUNDI* (5 November)

The deteriorating security situation in Burundi following an escalation of violence in rural areas has resulted in large-scale population displacement and forced a suspension of virtually all humanitarian assistance. Intensified fighting between Government forces and rebels in several areas during the past two months, particularly in Bujumbura Rural province, has caused loss of civilian lives, including the death of two UN international humanitarian workers, and the displacement of an estimated 300 000 people who have been grouped into camps by the Government. The newly displaced add to an estimated 500 000 people who were already in 300 "regroupment" sites away from their homes. Living conditions in these sites are reported to be extremely poor, with no clean water, shelter and sanitary facilities. It is estimated that 821 000 people, or more than 13 percent of the total population, are at present in regroupment camps. The worst affected provinces are Bujumbura Rural with 73 percent of its population displaced, followed by Bubanza with 60 percent, Makamba with 24 percent and Bururi with 20 percent. Also, in the province of Rutana, which was relatively calm until recently, the number of displaced people has increased from around 2 000 to over 16 000 since September.

The food and health situation of the regrouped populations gives cause for serious concern. Only a limited number of people have access to their fields, at a time when the first cropping season has already started. With most of them entirely dependent on emergency food aid for their survival, the suspension of international humanitarian assistance some three weeks ago following the killing of UN staff has aggravated an already dire food and health situation. If security is not restored quickly to allow a resumption of humanitarian assistance, there is a serious threat of starvation among the regrouped population.

Notwithstanding the impact of population displacement on food production, crop prospects for the first season of 1999/2000 (September-January) are also affected by unfavourable weather. Planting, which normally starts from mid-September to mid-October, has been delayed by dry weather during October. In the most productive areas of Kirungo in the north, Mosso in the east and Imbo in the west, no significant planting has taken place because of insufficient precipitation. In areas where planting took place with the first rains in late September, such as in the highlands of the central plateau, crops are reported to be stressed by lack of soil moisture. Even if more rains are received in the coming weeks, serious reductions in plantings and yields can be expected, thus compounding the food supply difficulties further over the next year.

A reduced harvest this season will follow a below-normal harvest of the last season, which ended last July. It is, therefore, expected that the already tight supply of cereals and pulses,

which has resulted in high prices, is set to deteriorate in the coming months. The current dry weather could also negatively affect planting in the first season of 2000 starting next February as harvesting of the late-planted crops this season will overlap with planting next season, and a shortage of seeds could limit the planted area.

ERITREA* (3 November)

Normal to above-normal rains in September and October maintained favourable conditions for the 1999 main season cereal and pulse crops the harvest of which has already started. However, the erratic and inadequate spring rains (March to May) and the below average rains in June that delayed land preparation and sowing in some parts of the country may affect yields. In addition, in areas affected by the armed conflict with neighbouring Ethiopia, production is expected to be seriously affected due to population displacement.

Most rangelands were reported to have good vegetative cover, which should cover livestock needs for at least 6 months. The Desert Locust situation remains calm but with winter rains along the coastal areas approaching, there is risk of increased locust numbers along the Red Sea coastal plains.

The food situation is very tight for more than 550 000 people affected by the war with Ethiopia. Donor support is sought for an emergency operation approved by FAO and WFP in March this year to provide food assistance for 268 000 people most affected by the war. Total pledges by the end of October amounted to 20 000 tonnes, of which 5 000 have been delivered.

ETHIOPIA* (3 November)

Heavy Rains in September and October in several parts of the country have resulted in serious flooding causing several deaths, displacement of a large number of people and severe damage to crops and property. Food and non-food assistance is being distributed by the Government in the affected areas.

Elsewhere in the country, earlier drought conditions and unusually heavy rains in October have affected yield potential of the 1999 main "Meher" season cereal and pulse crops now being harvested. An FAO/WFP Crop and Food Supply Assessment Mission is planned to visit the country in mid-November to assess the "Meher" production and estimate food assistance requirements in 2000. The Government has recently revised the number of people in need of food assistance to 7 million from the previous estimate of 5.3 million, including those affected by the failure of the "Belg" season, as well as 385 000 internally displaced people due to the ongoing conflict with Eritrea. An Emergency Operation for food assistance to 1.2 million people, worth some US\$40.5 million was jointly approved by FAO and WFP on 31 May 1999. Pledges as of 31 October amounted to 565 000 tonnes, of which 476 000 tonnes have been delivered.

KENYA (3 November)

Harvesting of the 1999 main "long rains" cereal crops is nearing completion in the main growing areas of the Rift Valley. Significant output reductions are reported for the Eastern, Central, Western and Nyanza Provinces due to drought, inadequate agricultural input supply and armyworm infestation in some parts. Prospects for the 1999/2000 "short rains" cereal crops in the bi-modal areas of the Western, Central and Eastern provinces, for harvest in February/March, are also unfavourable due to drought conditions. Preliminary official estimates indicate a maize output of about 2.1 million tonnes compared to 2.44 million tonnes last year and 2.5 million tonnes average over the previous five years.

Cereal stocks at the National Cereals and Produce Board (NCPB) were under 34 000 tonnes as of end September, against a target reserve requirement of 270 000 tonnes. The Government plans procurement of about 90 000 tonnes at the peak of the harvest period in November and December, leaving a significant deficit to be made up by imports. The food supply situation is critical in the northern and north-eastern pastoral districts, particularly in Turkana District, where rainfall from the long rains season has been too erratic and insufficient for adequate pasture and water supplies. Severe food shortages are also reported in parts of Central and Eastern provinces. The Government has recently set up emergency co-ordinating committees and provided more than 4 000 tonnes of relief food to vulnerable households in Eastern Province and the pastoral districts. More food assistance is needed for the affected population.

RWANDA* (5 November)

Planting of the 2000 A season crops, which normally takes place from mid-September to mid-October, has been delayed by a prolonged dry spell during October, particularly in eastern and southern parts. The dry weather also adversely affected crops planted in September with early rains. Abundant precipitation in the first week of November may have arrived too late to avoid reductions in the area planted and yields. A Ministry of Agriculture/International Agencies Mission is currently in the field assessing the crop prospects.

Despite a relatively stable overall food supply situation, severe food shortages are reported in the north-east prefecture of Umutara, particularly in the Kahi commune, as well as in parts of Gikongoro, Kigali-rural, Byumba and Butare. The Government has asked for international assistance for the affected population.

SOMALIA* (3 November)

The food supply situation in southern Somalia gives serious cause for concern following an upsurge in inter-clan fighting which has disrupted food production activities and assistance to war and drought victims. Mounting civilian casualties, destruction of property and large-scale population displacements are reported. A number of starvation-related deaths have also been reported. The food crisis has been exacerbated by the extension of roadblocks and obstruction of runways that are hindering the movement of goods and food commodities, including food aid. Latest reports indicate that nearly 1.6 million people in Mogadishu, Lower and Middle Juba, parts of Gedo and Lower Shabelle are not accessible to humanitarian agencies. The escalation of violence against humanitarian workers has further reduced the flow and distribution of humanitarian assistance.

An FAO/WFP Mission which visited the country last August found that the 1999 Gu cereal production, estimated at about 135 683 tonnes, is about 32 percent below the post-war (1993-1998) average due to low and poorly distributed rains, uncontrolled crop pests and farmers' displacement. Prospects for the "Deyr" secondary season, which runs from October to January, in the agriculturally important regions of southern Somalia, are not promising, with below-normal rains received so far. Even assuming a post-war average Deyr harvest of 70 000 tonnes, the Mission estimated the deficit in 1999/2000 marketing year (August/July) at 310 000 tonnes.

Elsewhere in Somalia, despite recent beneficial rains, which improved pasture conditions, the food situation remains precarious for a large segment of the population due to the cumulative effects of droughts. In north-eastern Somalia (Puntland), an estimated 50 000 displaced and vulnerable people are in need of urgent food assistance, while in north-western Somalia (Somaliland), acute food insecurity is concentrated among the poor pastoralists of Sool and Togdheer, estimated at 40 000 to 60 000 people.

For the 1999/2000 marketing year (August/July) total food aid requirements were estimated by the Mission at about 70 000 tonnes. However, with the recent escalation of the civil conflict and uncertain "Deyr" season, the amount of food assistance required can only increase. Where conditions allow, aid agencies are providing emergency assistance, but more funds are needed to cover the food needs until, hopefully, the next main harvest in August 2000. WFP distributed close to 2 200 tonnes of food during the month of September, mostly in southern Somalia bringing the total distributed from January to September 1999 to 16 870 tonnes. At the beginning of this year, the UN launched a Consolidated Inter-Agency Appeal for Somalia, for a total is US\$64 million; as of mid-October, donor contributions amounted to around US\$35 million, or 55 percent. The CAP for the year 2000 has just been launched, totalling US\$ 50.6 million. The international donor community is urged to be more generous in their contributions; otherwise the increasingly desperate population will face starvation.

SUDAN* (3 November)

A recent FAO/WFP Crop and Food Supply Assessment Mission to southern Sudan indicated an overall increase in cereal production in the traditional sector compared to last year, due to improved security conditions, well-distributed rains and a relatively pest-free season. However, a sharp decline in sorghum production and a major shift to cash crops, mainly sesame, is observed in the mechanised sector, following last year's record sorghum harvest and the attendant low prices. Localised crop failures were also observed in some areas, particularly northern Bahr el Ghazal and Unity states.

In central and northern Sudan, harvesting of the 1999 main season cereal crops is underway. Despite severe floods that caused heavy crop and property damages, overall harvest prospects are favourable. An FAO/WFP Crop and Food Supply Assessment Mission is planned to visit the northern parts of the country from end-November to appraise the 1999 main season cereal production and estimate overall commercial imports/exports and food aid requirements in 2000.

In anticipation of the good harvest and reflecting high levels of carryover stocks, prices of sorghum remain at very low levels.

WFP delivered about 8 200 tonnes of food aid to southern areas in July, against a target of 9 500 tonnes, a 38 percent increase on June deliveries.

TANZANIA (5 November)

Planting of the 2000 main season cereal crops in the unimodal central and southern areas, as well as that of 1999/2000 short ("Vuli") crops in bi-modal northern areas, are underway. Generally below-normal rains in October have caused moisture stress, particularly for earlier planted crops.

The 1999 cereal crop, mainly maize, is estimated at 3.8 million tonnes, about 11 percent below last year's output due to erratic rains, reduced use of inputs and an outbreak of armyworms. By contrast, production of other food crops, including beans, potatoes, cassava and plantains have increased by nearly 13 percent to 3.3 million tonnes. As a result of the reduced production, the domestic cereal supply gap in 1999/2000 is currently forecast at nearly 190 000 tonnes. In addition to substitution with non-cereal foodcrops, much of the deficit is expected to be covered by commercial imports. However, food assistance is required for nearly 1.2 million people, mainly in the regions of Dodoma, Mara, Shinyanga, Singida, Tabora, Tanga and southern Mwanza, all of which have now suffered their third

consecutive poor harvest. WFP has extended its current Emergency Operation in selected central, lake and coast regions until the end of 1999.

Food prices in most markets, particularly for beans and potatoes, have declined with the increased availability.

UGANDA (3 November)

A prolonged drought experienced in various parts of the country has affected the 1999 main season crops and brought a near total failure of crops in some areas. About 700 000 people in at least 28 districts are reported to be facing severe food shortages. The western and south-western counties of Nyabushozi, Kashari and Ibanda in Mbarara, and Ruhinda and Ruhaama in Bushenyi and Ntungamo respectively, are among the hardest hit areas, but the agro-pastoral north-eastern Districts of Moroto and Kotido are particularly vulnerable as the flow of foodstuffs, including food aid, is restricted due to insecurity. International food aid is being provided for more than 400 000 displaced people by persistent insurgency in northern parts of the country.

Prospects for the 1999 second season food crops, to be harvested from next January, have improved with abundant rains in October, except in some areas of Mbarara, Rakai and Apac districts.

SOUTHERN AFRICA

ANGOLA* (5 November)

Government advances against rebels in central and northern areas have resulted in fresh waves of displaced people escaping from the fighting. Planting of the 1999/2000 cereal crops is underway. Prospects are uncertain. Persistent insecurity and constant movements of population, coupled with dry weather in October in central and southern parts, have adversely affected field operations.

The food supply situation remains extremely serious. Severe nutrition problems among the displaced population continue to be reported from several parts, including Matalala, Kuito, Huambo and Malange. Despite the Government's capture of Bailundo and Andulo, insecurity and land mines continue to prevent access of humanitarian workers to these and other formerly besieged cities, which also remain isolated from commercial traffic. Prices of food have increased sharply in the provincial capitals, resulting in increased food difficulties for the resident population.

The Government has launched a programme to relocate two million displaced people in agricultural areas and has appealed for international assistance to support the programme.

BOTSWANA (3 November)

Normal rains in October in southern growing areas facilitated land preparation for planting of coarse grains, mainly sorghum, about to start. However more precipitation is needed in several parts where rains have been erratic.

The 1999 coarse grains output was estimated at 19 000 tonnes, almost twice the extremely poor level of the previous year, but half the average of the past five years. Production was adversely affected by a prolonged dry spell. However, the country's consumption needs are mainly met by imports. Cereal import requirement in marketing year 1999/2000 (April/March) are estimated at

250 000 tonnes, including 185 000 tonnes of coarse grains and 65 000 tonnes of wheat. All imports will be covered on commercial basis.

LESOTHO (3 November)

Harvesting of the 1999 wheat crop has started. The outlook is satisfactory. However, the forecast production of 30 000 tonnes may not be reached due to a dry spell early in the season that is likely to have reduced plantings and yields. Abundant rains in the third dekad of September allowed land preparation for planting of the 1999/2000 coarse grains. However, erratic rains in October have delayed sowing in parts. More rains are needed to prevent declines in the area planted.

The overall food supply situation is satisfactory. The 1999 coarse grain production increased 21 percent from the reduced crop of the previous year, to 182 000 tonnes. However, maize output covers less than half the domestic consumption and imports in marketing year 1999/2000 are estimated at 155 000 tonnes, most of which will be covered commercially.

MADAGASCAR (3 November)

Planting of the 1999/2000 paddy and maize crops is about to start. Soil moisture is adequate reflecting normal rain in the past month. According to official reports, migratory locusts are forming in central and south-western areas. Breeding is expected to start with the onset of the rainy season and FAO will be carefully monitoring the situation in the coming months.

The 1999 paddy output, harvested until June, was estimated at a good level of 2.6 million tonnes, an increase of 8 percent over the previous year's reduced output. Abundant rains during the growing season, coupled with absence of pests and cyclones, favoured this year's rice production.

Reflecting the good paddy harvest, the overall food supply situation is stable and has markedly improved in vulnerable areas of the South.

MALAWI (3 November)

Normal weather conditions in October have facilitated land preparation for planting of the 1999/2000 maize crop about to start. Distribution of agricultural inputs by the Government, which boosted production last year, is again underway.

The 1999 maize production increased sharply from the previous year. Final official estimates indicate a record output of 2.5 million tonnes. As a result, the food supply situation has improved substantially. Markets are well supplied and real prices of maize are below their levels of a year ago. After replenishing the Security Grain Reserve, the country has an exportable surplus in marketing year 1999/2000 (April/March) estimated at 400 000 tonnes.

MOZAMBIQUE (3 November)

Planting of the 1999/2000 coarse grain crops has started following normal precipitation in October.

Cereal production in 1999 increased for the fifth year in succession, to 1.7 million tonnes. Maize exportable surplus in marketing year 1999/2000 (April/March) is estimated at 150 000 tonnes. Import requirements of wheat and rice are estimated at 175 000 tonnes and 150 000 respectively, which are expected to be covered mostly on commercial basis. As a result of this year's bumper crop, the food supply situation is satisfactory and markets are well supplied. In areas that suffered crop losses due to floods early in the season, a second crop has been obtained after water receded and the food security situation has improved. Pastures and livestock are also reported in good condition throughout the country.

NAMIBIA (3 November)

Land preparation for planting of the 1999/2000 crops has started in northern areas. Weather conditions are normal so far. The recently harvested wheat crop is estimated at an average level of 5 000 tonnes.

The 1999 coarse grains production was estimated at 70 000 tonnes, substantially higher than last year but below average. However, the food supply situation is stable, reflecting the country's import capacity. Cereal import requirements in marketing year 1999/2000 (April/March) are estimated at 126 000 tonnes.

SOUTH AFRICA (13 November)

Harvesting of the 1999 wheat crop is underway. Prospects are poor. Latest forecasts point to a crop of 1.58 million tonnes, 7 percent lower than the revised production figure of last year and below average. This reflects mainly reduced plantings

Planting of the 1999/2000 coarse grains has started. More rains are needed following erratic precipitation in late October/early November.

Final estimates of the 1999 maize harvest indicate an output of 7.4 million tonnes, almost unchanged from 1998 and well below the average of the past five years. The crop was affected by excessive precipitation early in the season, which were followed by prolonged dry weather. After two consecutive poor maize harvests, the country's exportable surpluses in marketing year 1999/2000 (April/March) has been sharply reduced.

SWAZILAND (3 November)

Abundant rains in the third dekad of September allowed land preparation for planting of the 1999/2000 maize crop. However, subsequent dry weather in October has delayed field operations. More rains are urgently needed to avoid reductions in the area planted.

The food supply situation is stable. The 1999 maize harvest was estimated at 113 000 tonnes, well below last year's bumper crop, but was average. Despite an increase in plantings, excessive rains followed by a dry spell negatively affected the crop. Import requirement for maize in marketing year 1999/2000 is estimated at 24 000 tonnes. The country has a structural deficit in wheat and rice of 48 000 tonnes. All imports are anticipated to be covered commercially.

ZAMBIA (4 November)

Harvesting of the irrigated 1999 wheat crop is almost completed. The output is forecast at 99 000 tonnes, a substantial increase on last year's level of 71 000 tonnes, reflecting increased sowings. Planting of the 1999/2000 maize crop has started. Availability of agricultural inputs, mainly seeds and fertilizers, is reported to be adequate.

The 1999 maize production was estimated at 856 000 tonnes, a marked recovery from the poor harvest of the previous year but still below average. Import requirements in marketing year 1999/2000 are estimated at 370 000 tonnes, to be covered on commercial basis. The overall food supply is adequate at this time of the year. Markets are well supplied with maize and other staples such as Irish and sweet potatoes. Prices of maize started their seasonal increase in September, but remained at relatively low levels.

ZIMBABWE* (3 November)

Harvest of the 1999 wheat crop is well advanced. Reflecting an increase in the area planted, official forecasts point to an output of 320 000 tonnes, a significant increase on last year, also a record. However, unseasonable widespread rains in the last week of October disrupted harvesting operations. If they persist, they may result in crop and quality losses. At the forecast level of production, only limited quantities of imported wheat, to improve the flour quality, will be necessary next year.

Rains in late October improved soil conditions for planting of the 1999/2000 coarse grains, mainly maize, and favoured the early planted crops.

The 1999 maize output was estimated at 1.52 million tonnes, higher than the reduced crop of the previous year but well below average. Production was adversely affected by excessive rains during the season. Imports of maize in marketing year 1999/2000 (April/March) are estimated at 450 000 tonnes, mostly on commercial basis. Commercial imports of 200 000 tonnes were reported by the end of October. The food supply situation is tight in areas where a poor harvest was gathered and in urban areas due to sharply increased food prices and record levels of inflation.

ASIA

AFGHANISTAN* (3 November)

Land preparation for the 1999/2000 winter grains has started. Planting may be hampered in the northern provinces, due mainly to upsurge in fighting. As the eight northern provinces together comprise some 40 percent of the country's irrigated cereal and about 53 percent of its rainfed area, a decline of the 1999/2000 production is expected if security conditions do not improve. Recent reports indicate that more than 100 000 people have been displaced by the recent escalation of factional fighting in the Shomali Plains. More than 60 000 are believed to have arrived in the capital since 5 August. The FAO/WFP Crop and Food Supply Assessment Mission that visited the country last May/June estimated the 1999 total cereal production at 3.24 million tonnes (rice in paddy equivalent), about 16 percent below the previous year's bumper output of 3.86 million tonnes due to low level of precipitation and outbreak of pests.

The food situation is tight for the displaced population. In 1999 food aid has been distributed to approximately more 60 000 vulnerable households in the central highlands and to some 8 000 households in the north-eastern province of Badakhshan. Vulnerable groups are being provided through urban bakeries, institutional feeding programmes in hospitals, orphanages and health centres, and through food-for-work activities.

Total cereal import requirements in the 1999/2000 marketing year (July/June) is estimated at a record 1.1 million tonnes, of which more than 95 percent is wheat. Commercial imports of cereals in 1999/2000 are forecast at 800 000 tonnes, about one-third higher than last year due to increased private sector activity, cash crop production and active cross-border trade. Emergency food aid requirement (including food-for-work and food-for-seed), estimated at 97 000 tonnes, is already in the pipeline, leaving an uncovered 226 000 tonnes.

ARMENIA* (3 November)

The 1999 grain harvest is forecast to fall to 270 000 tonnes from 326 000 tonnes in 1998. The area sown to winter wheat declined sharply reflecting mainly import competition from cheaper Russian grain in the wake of the rouble devaluation in 1998, as well as below normal autumn and winter precipitation. Increased spring plantings were not sufficient to compensate the reduced winter grain area and spring conditions were not good in some areas. In 1999/2000 the cereal import requirement is estimated to increase to nearly 400 000

tonnes. Against this requirement food aid pledges of roughly 73 000 tonnes have been made. The balance is expected to be imported commercially. However, mobilizing wheat from neighbouring countries could be more difficult (and expensive) in view of the poor harvests in Iran and Turkey.

The country achieved positive economic growth in 1998, despite the adverse effect of the Russian financial crisis, which reduced exports, expatriate employment opportunities and remittances from abroad. Agricultural reform has resulted in a large number of small private farms, operating at low levels of productivity and facing major constraints in marketing their produce beyond rural markets. Domestic production and imports are covering the country's food needs, and per capita consumption appears to be slowly recovering from the low levels of the early nineties, but household purchasing power remains low and nearly one half of the population has officially reported incomes at or below the poverty line. Higher wheat prices will affect this group disproportionately. In total, 170 000 vulnerable people will be covered by the WFP food assistance. WFP will continue to provide relief food aid to 110 000 refugees and the most vulnerable. Assistance will also focus on community based food-for-work activities for 60 000 vulnerable people who are able to work, supporting economic and social development. The programme will have duration of three years and will be reviewed annually.

AZERBAIJAN (3 November)

Import competition from cheap Russian grain because of the devaluation of the rouble in late 1998 resulted in below average winter grain plantings for the 1999 harvest, but a larger area devoted to fruit and vegetables. Dry autumn weather and the persistent economic problems on farm exacerbated the reduction in the area sown to grains. Therefore, the 1999 grain harvest could decline by up to 16 percent to an estimated 900 000 tonnes. Official data collection tends to underestimate production by a margin of about 20 percent. At the household level, lower grain production is being offset by a sharp increase in potatoes and by increased production of livestock products.

Land privatization is in progress but the availability of credit for newly established farmers remains a major problem.

The actual level of cereal (and other food imports) is difficult to ascertain as substantial quantities are imported via Dagestan. Indications are that annual cereal imports are of the order of 550 000-600 000 tonnes per annum in recent years. In 1999/2000, the cereal import requirement could rise to almost 700 000 tonnes, to offset the lower output. The bulk of this will be covered commercially although the vulnerable groups, including the refugees, will continue to need targeted food assistance. WFP continues its support to 485 000 beneficiaries through Protracted Relief and Recovery Operation which started from July 1999 after the termination of emergency operation. This operation is for a period of three years with a total of 47 880 tonnes of food aid. The current programme supports IDPs with supplementary assistance, relief support to socially vulnerable groups, resettlement of refugees/returnees and recovery through food-for-work and food-for-training.

BANGLADESH (2 November)

Notwithstanding some localised flooding in the north and central regions in September, monsoon rainfall so far this year has been normal/above normal and generally favourable for development of the main aman rice crop currently being harvested. In the period 1 June to 11 October, of the 13 rainfall stations monitored, none had below-normal rainfall compared to two in 1998. Overall, the 1999/2000 production target is 9.5 million tonnes, and that for the aus and boro crops 1.8 and 9.2 million tonnes respectively. Total milled rice production is therefore tentatively projected at 20.5 million tonnes, though the final outcome will depend on weather next year and input supplies. In

addition, the production target for next year's wheat crop has been set at 1.9 million tonnes similar to output in 1999.

Rice imports for 1999 (calendar year) are estimated at 1.8 million tonnes. The overall food supply situation is satisfactory. Government stocks at the end of September stood at around 1.4 million tonnes, comprising 830 000 tonnes of rice and 561 000 tonnes of wheat.

CAMBODIA (4 November)

Torrential rains resulted in widespread flooding, principally around the capital Phnom Penh in late October/early November, when 150 mm of rainfall was received instead of 30 mm in normal years. The worst affected areas were around Pursat, Battambang, Kg.Speu, Takeo and Kandal. Although thousands of people had to abandon homes, no serious casualties have been reported so far. The full extent of damage to the main rice crop, to be harvested shortly, is yet to be determined, though unconfirmed reports indicate that around 2 000 hectares had been affected. Risks of further rainfall and flooding still remain relatively high. The overall food situation, however, remains satisfactory, following a good early rice crop and generally favourable prospects for the main wet season crop, to be harvested from January.

Rice accounts for some 84 percent of annual food crop production and is planted on around 90 percent of cropped area, mainly in the Central Mekong Basin and Delta and the Tonle Sap Plain. In recent years after the end of hostilities rice production has been increasing. Aggregate 1998/99 paddy production was around 3.52 million tonnes, some 3 percent above 1997/98 production and 19 percent above the five year average. The target for 1999/00 is between 3.5-4.0 million tonnes. Before the recent floods, a good rainy season rice crop was in prospect, suggesting that there may have been an exportable surplus in parts.

Although the overall food situation remains satisfactory, a sizeable section of the population remains vulnerable to food shortages, which this year may be exacerbated by the recent floods. An FAO/WFP Crop and Food Supply mission, earlier assessed that some 40 000 tonnes of rice in food assistance (through a WFP Protracted Relief and Recovery Operation) would be needed to meet the needs of the most vulnerable, in addition to varying amounts of fish and vegetable oil.

CHINA (2 November)

Seasonably dry weather favoured harvesting of summer crops and planting of winter wheat. Cool weather early in the season, followed by drought and high temperatures subsequently affected maize production in several provinces in the north. This year although planted area was similar to last year, growing conditions were worse and output is likely to be lower than 1998. Abundant and above-average rainfall in the main producing areas in the north-east and north west, in October replenished soil moisture levels and was generally favourable for winter wheat planting, now near completion. However, the rains did not ease earlier drought conditions in the northern provinces of Hebei, Shanxi, Shaanxi and Ningxia, which may affect the winter crop somewhat. Winter wheat accounts for more than 80 percent of total wheat production. Overall, due to a lower autumn harvest, 1999 grain output is officially expected to be lower than the 490 million tonnes (including roots and tubers) produced last year.

In the first nine months of 1999 official estimates indicate that some 2.11 million tonnes of maize was exported around 40 percent lower than in the same period in 1998.

CYPRUS (3 November)

Sowing of the 2000 wheat and barley crops is underway. Aggregate output from the wheat and barley crops in 1999 is estimated at 106 000 tonnes, some 63 percent above last year's reduced output but 6 percent lower than the average for the previous five years.

Imports of wheat in 1999/2000 (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.

GEORGIA* (3 November)

Contrary to earlier reports, the country has harvested 280 000 tonnes of wheat, some 80 000 tonnes more than in 1998 and is expected to harvest about 550 000 tonnes of maize. Consequently the 1999 aggregate grain harvest (including also barley, oats, pulses etc) is estimated at 880 000 tonnes, 10 percent above that of 1998.

Information on the level of annual utilisation of cereals is conflicting. The existence of sizeable unregistered flows of cereals (particularly wheat and flour) into the country and the transshipment to other neighbouring countries make analysis difficult. Estimates of the utilization of wheat range from 650 000 to 800 000 tonnes per annum. Registered imports in 1998/99 amounted to 114 000 tonnes from other CIS countries (59 000 tonnes from the Russian Federation and 55 000 tonnes from Ukraine).

FAO estimates the annual domestic utilization of wheat (for all uses) of nearly 800 000 tonnes and an aggregate cereal utilization of about 1.35 million tonnes of cereals, including nearly 750 000 tonnes for human consumption and some 500 000-600 000 tonnes for feed and other uses. Given this assumption, the cereal import requirement in 1999/2000 is tentatively estimated by FAO at 0.5 million tonnes. This is less than last year in response to the larger output, the increased difficulty in mobilizing grain in neighbouring Turkey, given the poor harvest and the restrictions (insofar as they can be implemented) on exports from the Russian Federation, should this country receive food aid and/or close the border. Against this requirement, food aid pledges amounting to 78 000 tonnes have been reported to date. Most of the balance is expected to be imported commercially.

WFP has planned to provide 18 190 tonnes of food aid to 182 000 vulnerable people and targeted food-for-work schemes over a one-year period, which commenced in July 1999 with a new phase of the protracted relief and recovery operation. The emphasis in the new phase for recovery strategy is to increase the overall level of self-sufficiency through rehabilitation. The programme also provides assistance to the vulnerable people to meet their food needs under the current conditions of decreasing purchasing power.

INDIA (8 November)

On 29 October, the worst cyclone in almost 30 years, struck coastal areas along the North Eastern state of Orissa, leaving up to two million people homeless. The worst affected districts included; Balasore, Cuttack, Ganjam, Jagatsinghpur, Jajpur and Kendrapara. An estimated 11 million people, almost a third of the state's population, were affected and current official estimates put the number killed at about 10 000. The number of deaths, however, could rise further as large numbers of people remain unaccounted for. Many of the displaced people are marooned and have no access to food and clean water, whilst the health and nutritional situation is deteriorating fast due to outbreaks of gastro-enteritis and cholera.

The state of Orissa has an estimated population of around 36 million people and a cropped area of approximately 5.4 million hectares, or around 4 percent of national total. It is a food deficit state, with a relatively large rural population (60 percent) relying primarily on low productivity subsistence agriculture. Only 25 percent of cultivated area is irrigated, compared to an average of 40 percent nationally, whilst fertiliser use is significantly lower than levels applied in other states. Only 25 to 30 kg/ha of nutrients (NPK) are used, compared to an average of 75 kg/ha. Agricultural productivity, therefore remains low, with average yields of rice (the main staple) up to 40 percent lower than average for the country as a whole. Given the state of agriculture and the level of poverty in the state, household food security, would have depended heavily on the main rice harvest, to have commenced in a few weeks, and stored grain. Current official estimates indicate that the rice

harvest in the State will be around 3.5 million tonnes compared to an expected output of 6.5 million tonnes before the cyclone. These losses will have serious repercussions not only on immediate food security but also for food supplies over the greater part of next year. This is especially so as rabi (winter) production, mainly of wheat, from Oct/Nov till March/April is negligible in the state. In addition to farm households, those that lost their entire source of livelihood, such as fishermen, will also face severe hardship in the coming months. In view of significant crop losses in the State, aggregate Kharif rice production will be around 3 million tonnes lower than the 75 million tonnes expected before the floods.

Notwithstanding strenuous government efforts to provide assistance, the scale of the devastation was so large that over a week after the cyclone, hundreds of villages still remain isolated from urgently needed food and medical supplies, depending entirely on food air drops. In response to the emergency, the Government has so far provided US \$130 million in cash assistance, in addition to the US \$59.5 million provided in the aftermath of the earlier cyclone in mid-October. Food assistance is being transported to affected areas by road and sea, whilst 395 tonnes have been air-dropped. Relief assistance is also being provided in the form of hospital care, shelter, medical supplies and communications equipment.

INDONESIA* (2 November)

Scattered heavy rainfall in October increased moisture supplies for main season rice transplanting in main producing areas. Main season rice is planted in October/November to coincide with rains from the north east monsoon, for harvest from March onwards. In contrast to 1998, and the currency crisis, fertilizer supplies have increased and prices have stabilized, due to greater competition following liberalisation last year. Consequently, the official forecast for paddy production this year, has been increased marginally to 49.53 million tonnes, from 11.6 million hectares. Output at this level would be average and similar to last year.

Private sector imports have been severely limited by a recent Government limiting importers to imports of 5 percent broken or higher quality only. The policy is to protect domestic producers from lower international rice prices. In the period January-September 1999, imports from the National Logistics Agency (BULOG) amounted to 1.9 million tonnes. 1999 maize production is estimated at 9.13 million tonnes, almost 10 percent lower than last year. In general with economic recovery and higher demand for maize feed, production is likely to increase to meet demand. Wet season maize will be planted in Oct/Nov for harvest around March/April.

The humanitarian and food situation in East Timor, remains precarious, though the security situation is reported to be improving. An estimated 219 000 registered refugees are still in West Timor, of which 70 percent are expected to return. A large proportion of the population still remain internally displaced some in difficult locations with little food and water. The UN recently made a consolidated appeal for US \$199 million for humanitarian assistance to cover immediate humanitarian needs during the reconstruction phase of the province and its economy. In addition to concerns regarding food and water, the start of the rainy season has also increased the risk of health problems and diseases, such as cholera and malaria. October/November are normally the period for rice and maize planting to coincide with the start of the monsoon. To assess early crop prospects and the overall food supply situation, an FAO/WFP Crop and Food Supply Assessment Mission is planned for late November.

IRAN, ISLAMIC REPUBLIC OF (2 November)

Winter wheat and barley planting are near completion for harvest in June/July and March next year respectively. 1999 agricultural production was severely affected by drought, which followed a lack of rain since last December and reduced snow over winter. Both rainfed and irrigated production declined sharply as did output of livestock. The output of wheat, the main staple, fell by almost a quarter to 9 million tonnes. As a result the decline in domestic output, to cover demand wheat imports in the 1999/2000 marketing year (July/June) are expected to increase sharply over the previous year and are currently projected at 5.8 million tonnes. Rice production was also affected

by floods in July in Mazandaran, which damaged an estimated 3 600 hectares of crops. As a result of the drought and floods, milled rice production declined to 1.45 million tonnes, some 17 percent lower than the previous year. Rice imports are projected at 900 000 tonnes for the current (calendar) year.

IRAQ* (4 November)

Planting of the winter crops, which normally starts in the second half of October, is delayed due to inadequate rainfall so far. Production is also likely to be constrained by the serious shortages of essential agricultural inputs. Last year, in addition to the shortage of agricultural inputs, a severe drought and the widespread incidence of pests and weeds adversely affected cereal crops. Total cereal output in 1999 is estimated at 1.6 million tonnes, nearly 40 percent below the previous five-year average. The drought has also caused serious damage to livestock, already weakened by foot and mouth disease.

In October 1999, the UN Security Council approved an increase in the current sixth phase of the "Oil-for-food" deal to US\$8.3 billion worth of oil, from the US\$5.26 billion announced at the beginning of the phase in May, to buy food, medicine and health supplies, and for emergency repairs to infrastructure. Despite some improvement in the overall food supply situation following the implementation of the "Oil for food" deal, however, health and nutritional problems remain widespread in many parts. A recent survey conducted by UNICEF found that child mortality rates have more than doubled in south and central Iraq since 1990.

ISRAEL (4 November)

Planting of the year 2000 wheat and barley crops, to be harvested during April/May next year, is underway. Production of the wheat crop in 1999 was estimated at 152 000 tonnes, about 10 percent below last year, due to the severe drought that affected several countries in the Near East. Imports of cereals in 1999/2000 (July/June) are forecast at some 2.5 million tonnes.

JAPAN (2 November)

In September and October, tropical storms brought heavy rainfall, resulting in localised flooding and some crop damage to the rice crop, particularly around in the south around Kyushu. As a result the Ministry of Agriculture lowered its forecast for rice production from its projection in September. Official forecast indicates that 1999 rice production, (brown basis) will be around 9.18 million tonnes, some 3 percent above last year.

The government proposes to provide subsidies to farmers to grow wheat, soybeans and feed grains to improve self-sufficiency in these crops and promote a shift from rice. In addition farmers will be paid compensation for reducing rice cultivation.

JORDAN (4 November)

Sowing of the 2000 wheat and barley crops, for harvest in May/June next year, is underway. Last year, a severe drought seriously damaged cereal and horticultural crops. Consequently, aggregate output of wheat and barley declined by 88 percent in 1999 to 13 000 tonnes. The livestock sector was also affected and many sheep farms were seriously affected as costs increased and products diminished in quality and quantity. An outbreak of foot and mouth disease has exacerbated drought-induced production losses.

The FAO/WFP Crop and Food Supply Assessment Mission that visited the country last May estimated the total cereal import requirement at 1.94 million tonnes for the 1999/2000 marketing year (July/June). About 80 percent of the requirement is anticipated to be covered commercially, leaving a deficit of 387 000 tonnes to be covered by food aid. Some 300 000

tonnes have so far been pledged through direct food aid and concessional grants. An Emergency Operation was jointly approved by FAO and WFP in July for food assistance to 180 000 vulnerable people, worth some US\$429 000 for a period of nine months.

KAZAKHSTAN (3 November)

With harvesting completed, the 1999 grain crop is officially estimated at 15.9 million tonnes, about 14.4 million tonnes cleaned weight, i.e. more than double the poor 1998 harvest officially put at 6.4 million tonnes. Overall growing conditions for the 1999 crop have been satisfactory and average yields approaching 1.3 tonnes per hectare are more than double last year's. In addition, unusually good weather during the harvest season has permitted harvesting activities to continue well into October, permitting the bulk of the 11.9 million hectares sown to be harvested.

The country exported 2.5 million tonnes of cereals in 1998/99 and has an export availability of 7-8 million tonnes in the current marketing year. Grain shipments from the port of Aktau have been resumed.

KOREA, REPUBLIC OF (2 November)

Late season rains in October, affected rice harvesting somewhat. The official estimate for 1999 rice production is put at around 5.2 million tonnes, which is about average and slightly higher than last year. Production this year was adversely affected by damage from heavy rains and typhoons since during the monsoon season from July. In particular typhoon Anne and Bart caused significant rice damage in south-eastern provinces in late September. The 1999 rice procurement target is one million tonnes.

KOREA, DEMOCRATIC PEOPLE'S REPUBLIC OF* (3 November)

An FAO/WFP Crop and Food Supply Assessment Mission, which visited the country from 9 to 19 October, noted that food supply prospects will remain precarious over the next 12 months despite some improvement in rice production this year. The increase in rice was principally due to increased fertilizer use, adequate irrigation supplies and the absence of serious pest and disease attacks. Although fertilizer availability (NPK) almost doubled this year, to around 199 000 tonnes (nutrient equivalent) compared to 1998, supplies covered less than one third of requirements to attain optimum yields and maintain basic soil productivity. In addition, heavy nutrient mining, where more nutrients are being extracted from the soil than replaced, and the growing importance of double cropping in enhancing food security, mean that overall requirements of fertilizers are likely to be considerably higher than hitherto.

The gains in rice production, however, were more than offset by the reduction in maize output as the area cultivated fell sharply, due to substitution and increased national emphasis on potatoes, restriction of maize cultivation on hill slopes to control degradation and a prolonged dry spell at critical stages in the crop cycle. The weather pattern in 1999 was erratic. Following a slow start to the season, rainfall at important stages of maize development from May to July was well below normal, which seriously affected yields.

Overall, therefore, paddy production is put at 2.34 million tonnes, around 14 percent or 280 000 tonnes higher than estimated production in 1998, whilst maize production is estimated to have fallen by almost 30 percent from the 1.76 million tonnes estimated by FAO/WFP in 1998 to 1.24 million tonnes this year. In addition to rice and maize, food supply prospects in 1999/2000 will also depend heavily on the output of next year's potato and double crop barley and wheat crops. Although only a tentative forecast at this stage, based on target areas, production of these crops is forecast at 1.813 million tonnes of potato (453 000 tonnes cereal equivalent) and 241 000 tonnes of wheat and barley. In grain equivalent including milled rice and other minor cereal crops, such as sorghum and millets,

overall domestic grain availability for the next marketing year is forecast at 3.472 million tonnes.

Based on revised population figures provided by the Government, grain demand for food and other utilization needs for 1999/2000 is estimated at 4.76 million tonnes. This leaves a deficit of around 1.29 million tonnes, of which the Government is expected to import 300 000 tonnes commercially, whilst a further 126 000 tonnes is covered by pipeline food aid imports. Taking these into account, the uncovered import requirement, therefore, is estimated at 867 000 tonnes, with which the country still needs assistance. In addition, although sizeable contribution were made over the last year to rehabilitate agriculture, to ensure food security, much more is needed. In particular, contributions to the Agricultural Recovery and Environmental Protection Programme (AREP), jointly prepared by the Government and the UN have so far been disappointing and need to be enhanced.

KYRGYZ REPUBLIC (3 November)

The 1999 grain and pulse harvest is forecast at 1.6 million tonnes, marginally less than output in 1998 in response to the declining trend in the area sown and some damage to crops by rain and hail. Provided the 1999 harvest forecast materialises, cereal imports, including food aid pledges amounting to 61 000 tonnes, in 1999/2000 are provisionally estimated at about 126 000 tonnes, mainly wheat. At the same time the country also exports some wheat to neighbouring Uzbekistan (in payment for gas) and Tajikistan.

About half of the population is estimated to live below the poverty line and 15 percent to live in extreme poverty. The payment of social benefits in 1998 was on average delayed by more than 80 days. In the absence of money, pensions and other benefits are mainly paid in kind, notably in flour, oil and sugar. The Araket poverty alleviation programme, introduced in 1998 seeks to improve the quality of life for the poorest segments through the provision of goods (food, fuel) and more recently micro-credit schemes. Official data indicate that per caput consumption of basic foodstuffs is recovering steadily. However, the availability of cash remains a major constraint, which is felt particularly in the health and education sectors.

LAOS (2 November)

Heavy rains in October in parts affected main crop rice maturation, harvesting of which is underway. Main season production is currently estimated at around 1.3 million tonnes, with overall 1999/2000 production forecast at 1.77 million tonnes. Around 73 percent of aggregate production will come from the main (rainy season) crop and around 15 percent from irrigated cultivation in the dry season. The rest is from upland rice.

LEBANON (4 November)

The planting of the wheat and barley crops is underway. However, domestic cereal production usually covers only about 10 percent of the consumption requirements. Aggregate production of wheat and barley crops in 1999 is estimated at 62 000 tonnes, about the same as last year. Imports of wheat in 1999/2000 (July/June) are forecast at some 0.51 million tonnes, slightly above last year.

MALAYSIA (2 November)

Paddy production this year is estimated at an average 2 million tonnes. The country is a regular importer of whitt milled rice, and is likely to increase imports of more paddy and brown rice for domestic milling to increase value-added milling to cater for rising demand for higher-quality rice. The country is approximately 60-65 percent self-sufficient in rice. It produces about 1.2 million tonnes of rice compared to annual consumption of 1.7 to 1.8 million tonnes.

To promote agricultural development in the country, the Government proposes to introduce a number of policy initiatives to promote research, technology transfer and use of new machinery.

MONGOLIA* (2 November)

In addition to reforms in the agriculture sector, which have meant that former state farms have been disbanded and sold, problems of economic transition continue to constrain supplies of essential inputs to agriculture. 1999 production of the main staple, wheat, was further disrupted by high temperatures and drought, over a two week period, in July. Wheat production is therefore put at around 190 000 tonnes, similar to last year's reduced crop. Compared to 1990, before the transition programme from a centrally planned to a market economy, domestic wheat production this year would be less than half, around 42 percent. In addition there may be shortage of seed for next year's planting. Areas planted this year included 273 300 hectares of wheat, 8 300 hectares of potatoes, 5 500 hectares of other vegetables. An estimated 40 percent of annual demand for wheat is domestically met and the rest imported. Around 60 000 tonnes of food aid were pledged to the country this year as assistance to vulnerable groups.

MYANMAR (3 November)

Harvesting of the main, monsoon, rice crop has commenced. The forecast for 1999/2000 paddy production is 17.5 million tonnes, from an aggregate area of around 5.5 million hectares. A total of 38 700 tonnes of rice were exported in the first half of 1999, almost double the volume exported in the same period last year. To meet increasing domestic demand for rice, the overall potential for increasing exports remains constrained. To encourage production the Government, is promoting the private sector by leasing over 400 000 hectares of vacant and new lands.

NEPAL (3 November)

Paddy production this year is projected at 3.6 million tonnes, slightly above last year and the five year average. The area under paddy is also estimated to have increased marginally to 1.5 million hectares.

PAKISTAN (3 November)

Seasonably dry conditions, favoured maturing summer crops and facilitated preparations for rabi wheat planting. The estimate of 1999 rice production has been increased slightly from earlier projections due to an increase in area and improved weather. Production is put at 4.87 million tonnes (milled), some 3 percent higher than last year and 17 percent above the five year average. The wheat production target for 1999/2000 has been set at 20 million tonnes, some 10 percent higher than production this year. The area target is 20.9 million hectares compared to 20.5 million hectares last year. Reports indicated, however, that the target may not be achieved due to lower support prices than expected and relatively high input costs. Imports for the 1999/2000 marketing year (July/June) are projected at 3.2 million tonnes.

PHILIPPINES (8 November)

Heavy rains in late October, affected the maturing (main) rice crop somewhat. Main rice is mainly planted around May/June for harvest in Oct/Nov. The procurement price of paddy has been increased to support local farmers who experienced difficulty due to excessive rains this year, attributed partly to La Nina weather disturbances. The increase in support price will be given to farmers selling rice (with up to 24 percent moisture content).

Despite losses in parts to excessive rains and to typhoon damage, rice production this year is expected to be appreciably higher than in recent years. First and second quarter production were also favourable and official reports expect paddy output to be around 11.76 million metric tonnes (7.64 million tonnes of milled rice) this (calendar) year. This represents an almost 3 million tonne or 35 percent increase over the 1998 calendar year. Improved rice prospects mean that import demand will be much lower than last year.

SAUDI ARABIA (4 November)

The wheat crop for harvest in April/May next year is now being planted. Production of wheat in 1999 is estimated at 1.5 million tonnes, about 17 percent below last year's output. Low number of adult desert locusts are likely to be present near Jizan where numbers could gradually increase as a result of recent rainfall. Import of cereals in 1999/2000 (July/June) is currently forecast at about 6.9 million tonnes, similar to last year.

SRI LANKA (3 November)

Land preparation and planting of the main Maha rice crop to coincide with the north east monsoon rains is underway. Above-normal rainfall in September and October supplemented soil moisture levels and was generally favourable for planting and transplanting the crop. Output of the second yala rice crop, harvested earlier in August/September, was put at 987 000 tonnes, around 8 percent higher than 1998. Total 1998/99 paddy production is estimated at 2.7 million tonnes (1.73 million tonnes from the 1998 maha crop and 0.987 million tonnes from the 1999 yala)

SYRIA (4 November)

Recent light showers in northern parts of the country prompted planting of winter grains. However, lack of rains and above-normal temperatures in the south have delayed planting. Sowing of the 2000 wheat and barley crops is expected to continue until mid-January next year. Crop and livestock production in 1999 was seriously affected by the worst drought in decades. As a result, barley production, which is almost entirely rainfed, is estimated at 380 000 tonnes, around 72 percent below the previous five-year average. Wheat production, 40 percent of which is irrigated, is estimated at 2.74 million tonnes, about 28 percent below average. The drought had also devastated range vegetation leading to a significant increase in sheep mortality rates that seriously affected household incomes and exposed a large number of the Badia population to food shortages.

Domestic wheat requirements in 1999/2000 (July/June), estimated at about 3.8 million tonnes, are anticipated to be met from current production and existing stocks. However, significant barley imports, estimated at around 1.18 million tonnes, are needed to compensate for the loss of feed and forage. In view of the country's economic slowdown, Government imports are estimated at only 200 000 tonnes, leaving an uncovered deficit of 980 000 tonnes. As part of an emergency measure, private sector imports of barley have been authorised this year, but with low purchasing power of herders, only limited quantities are anticipated to be imported.

On 7 October, an emergency operation was jointly approved by FAO and WFP to assist 329 000 herders in the drought affected areas of the country for six months (October 1999 to March 2000), for a total cost of US\$ 5.46 million.

TAJIKISTAN* (3 November)

Latest reports confirm a reduced grain and pulse harvest in 1999 of about 430 000 tonnes (compared to 500 000 tonnes last year) and a deteriorating food supply situation. Official reports indicate that the area sown declined somewhat to about 370 000 hectares. Lower yields than last year are due to heavy rains in July which caused severe but localized damage, heavy infestation of wheat with yellow rust and smut, inadequate use of quality seed and other inputs and poor irrigation. Given that about 150 000 hectares of the land sown to grain is irrigated, official average yield expectations seem too low, despite persistent economic problems in the sector. Lack of resources available to the national statistics office and the government's weak control over large parts of the country limit the accuracy of information on economic and agricultural activity. The agricultural sector employs almost half of the labour force but generates less than 30 percent of recorded GDP.

The shortfall in cereal production will have to be met by food aid and commercial imports, the latter mainly from Kazakhstan, Kyrgyzstan and Uzbekistan. In 1999/2000, the cereal import requirement is estimated to increase to 453 000 tonnes of which up to 127 000 is likely to be provided as food aid.

The overall food supply situation remains problematical, as poverty is endemic in the country. About 85 percent of the population have incomes below the poverty line and purchasing power remains low. Not all families are able to cover a shortfall in household food production by market purchases. In rural areas, high leasing costs also restrict household food availability. Recent assessments in the Karategin Valley found that large segments of the population were food insecure. Humanitarian assistance to vulnerable populations will continue to be necessary.

THAILAND (3 November)

In late October, heavy rains from tropical storms hampered main season rice maturation and harvesting in central parts of the country. Main season rice is planted from May to June/July and harvested from October to December. Normally the crop accounts for around 80 percent of aggregate production the remainder coming from the second rice crop planted in January/February. The current forecast for 1999/2000 paddy production is put at around 23 million tonnes. This represents an increase of some 700 000 tonnes or 3 percent over 1998/99.

The export target for the year 2000 has been set at six million tonnes compared to between 5.5-6.0 million tonnes expected to be exported this year. To the end of September approximately 4.7 million tonnes had been exported.

TURKEY (16 November)

Sowing of the 2000 wheat crop is underway. The 1999 wheat production is estimated at 18 million tonnes, about 14 percent below last year and about 4 percent below average, due to the severe drought that affected several countries in the region, including Turkey. Output from the barley crop which is estimated at 7 million tonnes is 15 percent lower than in previous year. maize production is estimated at 2.17 million tonnes, almost the same as in the previous year.

Two major earthquakes which struck the north-western parts of the country on 17 August and on 12 November have killed more than 16 000 people, caused more than 52 000 major injuries and an estimated 630 00 homeless people. The earlier earthquake, in around Izmit, have affected heavily populated and mainly industrial areas, while the latter, in Bolu province, struck less populated areas with more localised damages. National and international assistance is being provided to the victims.

Turkey's state grain board (TMO) bought from farmers in 1999 a total of 5.1 million tonnes of cereals, comprising 4.2 million tonnes of wheat and 818 000 tonnes of barley.

TURKMENISTAN (3 November)

The 1999 grain harvest is officially estimated at a record 1.5 million tonnes, nearly 300 000 tonnes above 1998, including 226 000 tonnes produced by private farmers. The area sown to grains fell to 570 000 hectares but the import of high quality seed and increased use of fertilizer raised yields significantly. Given the difficult foreign exchange situation and the large 1999 harvest, which would be adequate to meet domestic requirements, cereal imports in 1999/2000 are expected to remain very low. The country has introduced excise duties as of 1 October 1999 to protect domestic production. These include duties of 50 percent on imports of flour and pasta and of US\$100 on exports of ammonium nitrate fertilizer.

The outlook for the cotton harvest is also satisfactory and the target of 1.3 million tonnes could be achieved. Some 550 000 hectares have been planted and yields average 2.4 tonnes per hectare so far.

UZBEKISTAN (3 November)

The 1999 wheat and barley crop is officially estimated at 3.9 million tonnes, some 140 000 tonnes above 1998. As the country also produces maize and rice, indications are that total 1999 grain production could be around 4.4 million tonnes. The rice production target is 500 000 tonnes, of which 300 000 tonnes are to be sold to the government. Imports of grain are being reduced to maintain a positive trade balance. Cereal imports in 1999/2000 are estimated to fall to about 350 000 tonnes, to be met commercially.

VIET NAM (3 November)

Heavy rains, over several days in late October/early November, led to the worst flooding in decades in central coastal areas. Current reports indicate that around 550 people were killed and over 600 000 displaced. In addition damage to property and infrastructure is officially estimated at around US \$200 million. Several areas remain isolated by flood waters, where concerns are mounting of food shortages. Problems may be exacerbated by further rains and floods.

Although, civilian damage has been high, crop damage, was not as serious as it may have been, as the areas affected were not in the main food/rice basket of the country in the south or the coffee and tea areas further north. The main crop currently would have been the tenth month rice crop, which is planted in June/July for harvest in October/November. In normal years this rice crop nationally accounts for around 25 percent of aggregate annual production, whilst the winter/spring crop (planted from January) accounts for the largest share. The worst affected provinces were along a 500 kilometre stretch between Quang Binh to Quang Ngai, home to some 6 million of the country's 79 million people. The area is amongst the poorest in the country and is normally food deficit as it is agriculturally and industrially less developed than the rest of the country.

The approximate rice area along this stretch is estimated at around 340 000 hectares of which approximately 64 000 hectares were reportedly damaged. In addition around 30 000 hectares of other crops were also affected and over 100 000 tonnes of rice and maize damaged in store. In recent years, these provinces produced around 1.2 million tonnes of rice, or around 7 percent, compared to national production of around 17 to 18 million tonnes. In addition, the affected provinces produce around 25-30 thousand tonnes of maize or less than 3 percent of aggregate production of around 1.2 to 1.3 million tonnes per year. Large quantities of rice and maize in store were also damaged. Central coastal parts of the country are regularly prone to bad weather and storms, with a reported 397 people killed by storms and floods last year.

The Government has responded quickly to the emergency by distributing food assistance to affected areas, which are amongst the poorest in the country and the most vulnerable to food shortages. In spite of current humanitarian operations, it is likely that food supply problems will

persist into next year, while significant intervention would also been needed to rehabilitate agriculture.

The floods followed earlier damage by tropical Storm Eve, which also resulted in several deaths and damage. Rice production in 1999/2000 is tentatively projected at 19.5 million tonnes (milled), similar to the 1998/99 record crop, though much will depend on the final outcome of the tenth rice crop and the main winter/spring and summer autumn crops next year.

Although indications were that the country would export around 4.3 million tonnes of rice in 1999, in line with the Government's target, the floods and resultant food shortages may mean that some of the rice is diverted as assistance to vulnerable groups. In the first nine months of the year, the country exported 3.8 million tonnes.

YEMEN (4 November)

The output of the main sorghum crop, now being harvested, is forecast at 416 000 tonnes, some 12 percent lower than last year, due to reduced planted area. Small scale breeding of desert locust could extend into areas of recent rainfall in the eastern desert and small bands and swarmlets may form.

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

ANTIGUA AND BARBUDA (12 November)

The country has been affected by hurricane "José" rains and winds in late October. Preliminary reports indicate that damage to housing and infrastructure has been incurred, while an evaluation of possible damage to the important tourist infrastructure is underway. An assessment of damage to the agricultural sector has not yet been made available. The island is currently being threatened by Hurricane "Lenny".

COSTA RICA (2 November)

Storm rains and flooding in September and October have affected the country, particularly the provinces of San José and Cartago, in the centre, Guanacaste and Puntareanas on the Pacific coast, and Heredia on the north Atlantic coast. Preliminary estimates indicate that about 7 000 hectares of agricultural fields have been affected, with consequent damage to foodcrops, mainly paddy and beans. Export crops such as sugar cane and fruits, as well as livestock pastures, have been also affected. Despite losses incurred to the developing 1999/2000 second season cereal crops, for harvesting from November, an average maize output (both crops) is anticipated. Production of paddy, principally in the Chorotega and Brunca regions, is forecast to be above average; however, some 90 000 tonnes of rice will need to be imported in marketing year 2 000(January/December) to meet domestic demand for this important food staple.

CUBA (2 November)

The central and western parts of the country were affected by hurricane "Irene" torrential rains and winds in mid-October. A number of victims is reported and mass evacuation of people was effected. Considerable damage to housing and infrastructure is reported, particularly in the capital, Havana, and surrounding areas. Emergency assistance for house reconstruction has been provided by the Government. A preliminary assessment of damage to the agricultural sector indicates that considerable losses have been inflicted to banana plantations, particularly in the Province of Havana. Harvesting of the spring/summer paddy crop (planted from March to August approximately) has been also affected, principally in the

Province of Pinar del Rio, by the heavy rains and flooding; however, despite possible losses incurred, an above-average paddy output for the whole country is forecast. Minor foodcrops such as roots and tubers are reported to be affected. Planting of the important export earning sugar crop was interrupted, and large growing areas have been flooded, principally in the central provinces of Sancti-Spiritus, Villa Clara, Cienfuegos and Matanzas. No serious damage to the crop is anticipated; however, some damage to the supporting infrastructure of the sugar industry is reported. Tobacco plantations, another important export crop, were also spared of the ravage of the hurricane. The rains helped, by contrast, refill water reservoirs all over the country that had been suffering from a dry spell since November last year. Food assistance from the international community continues to be provided. About 4 400 tonnes of wheat have been delivered against a similar quantity of pledges so far.

DOMINICAN REPUBLIC (2 November)

Planting of the 1999/2000 second season coarse grain crops has only started, while harvesting of the second season paddy crop is underway. Weather conditions have favoured the crops and average outputs are expected. Good outturns are also anticipated from other basic foodcrops, such as plantains, fruits, potatoes and roots and garden vegetables. Livestock pastures are reported in good conditions.

Maize imports of some 650 000 to 700 000 tonnes would nevertheless be required in the 1999/2000 (July/June) marketing year, largely to meet an anticipated expansion in the demand for animal feed, following last year's contraction in the poultry sector due to hurricane "Georges" impact.

EL SALVADOR (2 November)

Storm rains and flooding in September and first half of October have affected the country, particularly in the low lying areas of the Lempa River region, in the east, the Ahuachapán department, in the west, and the capital of San Salvador and suburbs. A state of emergency has been declared by the Government. A number of casualties is reported. Mass evacuation of people has been effected and emergency food distributed with the assistance of the international community. Considerable damage to infrastructure has been incurred as some of the areas had been severely affected in 1998 by the passage of hurricane "Mitch". A preliminary assessment of damage to the agricultural sector indicates that some 8 000 tonnes of maize, 1 324 tonnes of beans, 1 325 tonnes of sorghum and 345 tonnes of rice have been destroyed. These represent, in aggregate, about 2 per cent of the anticipated annual output; however, maize losses between 50 and 100 percent are reported in the most affected areas. Other minor foodcrops and some major export crops, such as sugar (1 900 hectares), and numerous small animal farms have been affected by the floods. The food situation for the country as a whole is under control, but some of the affected areas have suffered from food shortages and an increase in the price of beans is reported. Despite losses incurred, cereal outputs (both crops) are expected to be above average, while production of beans, an important food staple in the population's diet, is anticipated to be average.

Maize imports in marketing year 1999/2000 (August/July), mostly for the feed industry, is forecast to decrease from last year's 264 000 tonnes to about 150 000 tonnes.

GUATEMALA (3 November)

Storm rains and flooding in September and the first half of October have affected the country, particularly around the capital of Ciudad Guatemala and the town of Retalhuleu, south west of the capital, where damage to housing as well as to crops is reported. A state of alert has been declared by the Government. A preliminary assessment of damages to the agricultural sector indicates that several thousand hectares of the important banana export crop, near the department of Izabal, in the north-east, are reported to be affected. Harvesting of the 1999/2000 second season maize crop is about to start, and despite affected plantings (315 hectares) an above-average output is expected for the year as a whole.

Maize imports, mainly yellow, in marketing year 1999/2000 (July/June) are forecast to be about 550 000 tonnes, similar to the previous year.

HAITI* (2 November)

Weather conditions have favoured planting of the 1999/2000 sorghum crop and that of the second season irrigated paddy crop. Early production forecasts point out to an average sorghum output of some 80 000 tonnes, while paddy output (irrigated and non-irrigated) for the whole year should be slightly below last year's average 70 000 tonnes. Technical and food assistance from the international community continue to be distributed. Food assistance from the international community continued to be distributed through development projects to some sectors of the population. About 1 000 tonnes have been distributed against pledges so far of 30 000 tonnes.

Maize imports in the 1999/2000 marketing year (July/June) are expected to be some 70 000 tonnes, which compares to 50 000 tonnes the year before. Rice imports in 1999 (January/December) are provisionally estimated at 170 000 tonnes, similar to last year.

HONDURAS (2 November)

Torrential rains and flooding in September and the first half of October have affected the country, particularly in the Sula Valley, in the north, near the industrial city of San Pedro de Sula. High waters and mudslides have also affected the capital, Tegucigalpa, and its surrounding areas. Mass evacuation of people has been effected and a number of casualties reported. A state of emergency has been declared by the Government, and relief and food assistance from the international community has been distributed to the victims. Significant damage to housing and infrastructure is also reported in the most affected areas, which had been severely affected last year by hurricane "Mitch". A preliminary assessment of damage to the agricultural sector indicates that about 8 000 hectares of basic grains have been affected due to the incessant rains and flooding, also previously affected by drought. Damage has also been inflicted on banana, sugar cane and African palm plantations, the main agricultural exports of the country. Harvesting of the 1999/2000 first season cereal crops was near completion and planting of the second season crops had only started when the adverse weather struck. Below-average outputs for the year, close to 1998/99 hurricane affected crops, are forecast. Assessments for the rehabilitation of the agricultural sector are also being conducted.

MEXICO (2 November)

Torrential rains, flooding and mudslides in September and during the first half of October have seriously affected the central and southern parts of the country, particularly the states of Puebla, Veracruz, Hidalgo, Tabasco and some areas in Chiapas. A significant number of casualties is reported. A preliminary official report indicates that more than 270 000 people have been directly affected, including about 90 000 farmers and livestock raisers in an area of near 240 000 hectares. Prompt emergency assistance has been provided by the Government. It is reported that roads and basic infrastructure have been severely hit by the phenomenon. Harvesting of the important spring/summer maize crop had only started when the adverse weather struck. Although no major damage to maize growing fields has been so far reported, as the states most severely affected are not major producers of basic grains, some localized losses have been experienced, principally in the large growing state of Chiapas. Moreover, the outlook is favourable for the other major grain producing areas in the country. Maize production in 1999 is consequently expected to be about average. There is some probability of food shortfalls, however, in the most affected areas, but no food shortage is anticipated for the domestic market as a whole. Major export crops grown in the affected areas, such as sugar cane and citrus, have been affected, but only minor damage is reported according to preliminary assessments.

NICARAGUA (2 November)

Storm rains and flooding during September and the first half of October have affected the country, particularly the department of Rivas, in the south, around the capital, Managua, some coastal areas on the Pacific, and the northern departments of Estelí, Madriz and Nueva Segovia. Several of these areas had been severely affected last year by hurricane "Mitch". States of emergency and alert have been declared by the Government in various locations. A number of casualties has been reported and more than 100 000 persons have been directly affected. Roads and minor infrastructure have received the brunt of the damage. Damage to rural housing is also reported, as well as some disease outbreaks in some municipalities. Preliminary assessment of damage to the agricultural sector indicates that about 2.5 percent of the planted area to the second season cereal crops has been affected, although localized damage of a much bigger magnitude is reported. A loss of about 12 percent of the anticipated production from the sesame export crop is estimated. Emergency assistance, including food distribution from the international community, has been provided to the affected population. Despite the damage, near average 1999/2000 grain output is anticipated.

SOUTH AMERICA

ARGENTINA (3 November)

Recent light rains have favoured the developing 1999/2000 wheat crop for harvesting from November. The crop had been suffering from lack of rain, particularly in the northern provinces of Chaco and Entre Rios. By contrast, soil moisture conditions in the main producing areas of Buenos Aires and La Pampa provinces are reported adequate. Early production forecasts point out to an increase from last year's below-average 11.5 million tonnes to a near-average 13 million tonnes, mainly as a result of enlarged plantings. Sowing of the 1999/2000 maize crop is underway. The area planted is forecast to increase by 8 to 10 percent from 1998/99 average plantings. Expanded plantings are anticipated particularly in the provinces of Entre Rios and Santa Fe. By mid-October, about 33 percent of intended plantings had been sown which compares to 22 percent the year before. Planting of the 1999/2000 paddy crop is underway. The area planted is expected to decline considerably from last year, principally in the main growing areas of Corriente and Entre Rios, mostly as result of a constraint in exports to neighbouring countries.

BOLIVIA (3 November)

Harvesting of the 1999 winter wheat crop has been completed and output for the year is estimated at 141 000 tonnes, which compares to last year's 164 000 tonnes and to the 1997 crop of 187 000 tonnes. This is due to dry weather particularly during the crop development phase which has contributed to lower than average yields. Recent rains in the highlands and in some of the highland valleys have favoured sowing of the 1999/2000 first season cereal and potato crops, while planting is being delayed in the southern parts because of insufficient precipitation.

Wheat imports in the 1999/2000 marketing year (July/June) are forecast at 260 000 tonnes, some 10 percent above the previous year. Some 10 000 tonnes of food aid have been received against pledges so far of 169 000 tonnes.

BRAZIL (2 November)

Harvesting of the 1999 wheat crop in the main producing states of Parana and Rio Grande do Sul has benefited from relative dry hot weather. Harvesting operations are also proceeding well in other growing states. Production is officially forecast to increase from last year's 2.2 million tonnes to a slightly above-average 2.4 million tonnes. The dry weather, by contrast, has delayed planting of the 1999/2000 maize crop, particularly in the main growing central and southern areas. Some recent light rains are nevertheless reported, and timely normal rainfall is expected during the growing

period. This should help achieve average yields. The area planted is forecast to expand from the previous year, largely as a result of improved domestic prices. Sowing of the 1999/2000 paddy crop has started and intended plantings should decline from the above-average level of the previous season, mainly as a result of credit constraints coupled with the strong competition of low priced imports from neighbouring countries.

CHILE (2 November)

Planting of the 1999/2000 wheat crop continues under generally dry weather conditions. Soil moisture conditions are still below average despite beneficial rains in September. Harvesting is due from December and a recovery from last year's severely drought affected crop is tentatively forecast. Planting of the 1999/2000 maize crop is also underway and plantings are expected to improve from the previous year's below-average level.

COLOMBIA (4 November)

Heavy rains and flooding in October have affected the country, particularly the Pacific coastal provinces in the south, where significant damage to housing and infrastructure is reported. Damage is also reported in some of the northern and Caribbean coastal areas. An assessment of damage to the agricultural sector has not been made available yet. Harvesting of the 1999/2000 first season maize crop had been completed when the adverse weather struck, and planting of the second season crop is underway. Despite possible losses incurred, aggregate maize output (both crops) is expected to be near average. A slightly above-average 1999 paddy output is estimated. This is due to the combination of enlarged plantings, as a result of attractive prices, and the abundant rains which have contributed to higher than average yields.

ECUADOR (2 November)

Following normal to abundant rains in September, harvesting of the 1999 second season maize, mostly white, has started under dry and cold weather conditions which are affecting plantings and livestock pastures in some parts. Some crops in the highlands have been affected by frosts. Despite possible damage to crops, the 1999 maize output is provisionally estimated at a near-average 590 000 tonnes, a significant increase from the El Niño severely affected 1997/98 crop when only 380 000 tonnes were collected. Harvesting of the 1999 second season paddy crop has also started and output for the year (both crops) is tentatively estimated at an average 1.2 million tonnes (unmilled).

PERU (2 November)

Harvesting of the 1999 wheat crop has been virtually completed under generally dry weather. Output is estimated at 120 000 tonnes which compares to the last 5-year average of 134 000 tonnes. Harvesting of the 1999 yellow maize crop has also been practically completed and aggregate output (white and yellow) for the year is estimated at a slightly above-average 855 000 tonnes. A bumper paddy crop of 1.8 million tonnes has been collected, some 33 percent above the average.

URUGUAY (3 November)

Harvesting of the 1999/2000 wheat crop has started in some parts under generally dry weather. Early production forecasts point out to an above-average output of some 545 000 tonnes. Planting of the 1999/2000 coarse grain crops is underway and aggregate area planted is expected to be about average. Planting of the 2000 paddy crop, the main agricultural export, has also started and plantings are expected to decline from 1999 record level, largely as a consequence of an anticipated decline in exports to neighbouring countries.

VENEZUELA (3 November)

Heavy rains and flooding have affected harvesting of the 1999 coarse grain and paddy crops. Despite possible crop losses, maize output is anticipated at an average 1 million tonnes, while production of paddy is also provisionally estimated at a slightly below-average 673 000 tonnes.

EUROPE

EC (11 November)

FAO's latest forecast puts aggregate 1999 cereal production in the EC at almost 202 million tonnes, some 4 percent below last year but above average for the past 5 years. The decline is largely due to reduced area (5 percent increase in the compulsory set-aside requirements) and adverse weather. Wheat output is now estimated at 97.6 million tonnes, 5 percent below 1998. The reduction occurred mostly in France, where output is estimated at 37 million tonnes, some 3 million tonnes below 1998. Other significant reductions among the EC's major producers are reported in Denmark, Spain and Germany. Aggregate output of coarse grains is now forecast at 101.6 million tonnes, 4 percent below last year. In the EC, harvesting of the 1999 paddy crop is in progress and the expectation is for output to be close to last year's official estimate of about 2.6 million tonnes.

ALBANIA (11 November)

The 1999 cereal output is estimated to have fallen to about 0.5 million tonnes (including 0.3 million tonnes of wheat). Adverse weather affected autumn wheat planting and farmers' preference away from traditional cereals towards more lucrative cash crops continues to limit cereal area. Food assistance continues to be provided to remaining Kosovar refugees and vulnerable population groups.

BELARUS (3 November)

The aggregate 1999 grain and pulse harvest is officially reported to be only 3.7 million tonnes. This record low output, is the result of severe economic problems coupled with adverse weather (May frosts, hot and dry conditions in June/July). Given the high levels of inflation, the degree of market interference exercised by the government and the consequent shortages of most items in the official distribution chain, it is likely that the actual level of output is higher. Official data indicate that yields of potatoes, vegetables and fodder are also down, and livestock numbers are being reduced. .

In view of the second poor cereal harvest in succession, nearly 25 percent less than last year's, the official reports indicate that the country will need up to US\$100 million to import up to 1.5 million tonnes of cereals including 0.5 million tonnes of foodgrains. It is uncertain if this large quantity of feedgrains will be mobilized. Aggregate cereal imports in 1999/2000 are tentatively estimated at 1.2 million tonnes. Demand for livestock products remains high, mainly for export to the Russian Federation in payment for fuel, but foreign exchange constraints limit feedgrain imports. As of 1 January 2000, the Belarus rouble is to be redenominated with one new rouble replacing 1000 old Belarussian roubles.

BOSNIA-HERZEGOVINA* (3 November)

Indications are that the 1999 cereal harvest could remain close to last year's 1.1 million tonnes. Although the area sown to spring maize increased, untimely rains resulted in lower yields. The area sown to winter crops remained stable. The economy has been negatively affected by civil unrest in the region but indications are that the crop and overall food supply situation have not been unduly disrupted.

BULGARIA (11 November)

Latest (official) estimates put 1999 wheat output at 3 million tonnes, higher than earlier expectations but still lower than last year and below average. The fall was largely due to reduced planting and a fall in fertilizer use. As of early November winter wheat planting for harvest in 2000 was reported to be well advanced, with some 600 000 hectares already planted under generally favourable conditions. The pace of planting is ahead of last year. Total area planted is expected to reach about 1 million hectares. Some 150 000 hectares of barley has also been planted.

CROATIA (4 November)

The 1999 cereal harvest fell by over one third to 2.1 million tonnes, in response to economic problems which reduced winter and spring grain plantings and untimely rains which reduced yields. Early indications are that the area sown to winter wheat, for harvest in 2000 is likely to recover from last year's 150 000 hectares, but by 20 October, the target area of 293 000 hectares had not yet been achieved.

Overall, the cereal supply situation in 1999/2000 is likely to remain satisfactory, as there are substantial wheat carry-in stocks. Even with the reduced 1999 crop, farmers are experiencing difficulties obtaining payment for sales to the millers and processors.

CZECH REPUBLIC (11 November)

Latest official estimates put aggregate cereal output in 1999 is estimated at 6.9 million tonnes, slightly up from last year with better yields more than offsetting a reduction in area. Of the total, wheat is estimated to account for just over 4 million tonnes.

ESTONIA (4 November)

The early outlook for winter cereals for harvest in 2000 is satisfactory. The 1999 grain harvest is officially estimated at 625 000 tonnes, some 10 percent less than output in 1998 in view of reduction in the area sown in response to import competition. In 1999/2000, cereal imports are forecast at nearly 200 000 tonnes.

HUNGARY (11 November)

Latest estimates put 1999 wheat output at 2.6 million tonnes, almost 50 percent lower than 1998. The fall was due to sharply reduced plantings and severe rains and flooding. In contrast, coarse grain output is estimated to be up slightly reflecting a larger maize crop which more than offset reduced output of the other coarse grains. As of late October, winter grain planting was reported to be progressing normally with wheat planted on some 60 percent of the expected 1.1 million hectares.

LATVIA (4 November)

The 1999 grain harvest is expected to fall by 5 percent to 925 000 tonnes as the winter grain area declined in response to low cereal prices. Private trade in grain is not encouraged and farmers feed grain on farm or sell to mills. The official intervention prices this year are Lats 67 for top grade wheat and rye. This is higher than the market price of Lats 60-63 but the volume that will be purchased depends on the availability of funds. High production costs, (old machinery, small farms

etc) make exports, also of meat, not competitive although small quantities are bartered. Imports are limited to about 70 000 tonnes, mainly of bread quality wheat per annum.

LITHUANIA (4 November)

The 1999 grain harvest is estimated to have fallen by almost 25 percent to 2.1 million tonnes in response to a percent reduction in the area sown and lower yields. Low grain prices and recession in the livestock industry following the devaluation of the Russian rouble as well as the accumulation of livestock and grain stocks has contributed to the reduction in area. In contrast, the areas sown to oilseeds and that under perennial pasture increased. Despite the lower harvest, the overall food supply situation is likely to remain satisfactory in view of the substantial carry-forward stocks of cereals.

MOLDOVA (4 November)

Difficulties in marketing last year's crop and adverse growing conditions have reduced the area sown to grains and average yields. The aggregate 1999 grain harvest is anticipated to fall to 2.1 million tonnes, (from 2.5 million tonnes in 1998) in response to an 11 percent reduction in the area sown to wheat and dry conditions, which affected spring grains. Despite the reduced harvest, 1999 cereal production will be adequate to meet domestic food needs and significant commercial imports of cereals are not expected in the 1999/2000 marketing year (July/June). However, government purchases of bread grains are proceeding slowly. The government planned to purchase 100 000 tonnes of food wheat at US\$ 91 per tonne from this year's harvest but has obtained only 42 000 tonnes to date.

POLAND (11 November)

The 1999 cereal output is estimated at about 26.5 million tonnes, somewhat below last year's bumper harvest but above average of the past five years.

ROMANIA (11 November)

1999 cereal output is estimated at about 16.5 million tonnes. The wheat harvest is now forecast at only 4.6 million tonnes, compared to 5.2 million tonnes in the previous year, due to smaller plantings and also reflecting crop damage due to floods and torrential rains in the summer. In contrast, the summer maize crop is expected to recover to about 10 million tonnes from last year's low level. Winter wheat planting is well underway and is expected to cover about 1.3 million hectares this autumn.

RUSSIAN FEDERATION (4 November)

Current production this year is projected to be above last year's poor crop, despite a sharp reduction in area and locust infestation in parts. Although growing conditions have been mixed, overall yields were 8 percent higher than last year. Yields were much higher in the area from North Caucasus to the Ural Region and in part of East Siberia. East of the Urals growing conditions were generally better but inflation, shortage of inputs and untimely rains in parts, led to delays in harvest and lower yields than last year.

Official sources forecast 1999 grain and pulse production at 58 million tonnes (bunker weight) or 53 million tonnes cleaned weight. However, in view of restrictive grain marketing policies and shortage of cash, there is consensus that production estimates are underestimated by as much as 10-20 percent. FAO, therefore, forecasts 1999 grain output at about 59 million tonnes, 11 million tonnes higher than official output in 1998.

Aggregate grain area fell by 8 percent to 46.8 million hectares. This decline is due to increased winterkill in 1999 (2.75 million hectares compared to 2.1 million hectares in 1998)

and a 3 million hectares decline, to 35.4 million hectares, in spring area. Hot/dry weather in summer further reduced the harvested area.

The grain supply situation in 1999/2000 will remain tight, with no possibility of stock replenishment following the sharp drawdown last year. In addition, economic problems and policies which act as a disincentive to farmers, point to little improvement in output next year. Therefore, the tight supply situation is likely to continue and priority will have to be given to meeting human consumption needs. The livestock sector is likely to remain under pressure.

FAO estimates minimum cereal requirement in 1999/2000 (including 1 million tonnes of pulses) at 70 million tonnes.

Against this requirement, cereal availability, with rice in milled equivalent and opening stocks is estimated at 63 million tonnes, leaving an import requirement of at least 6 million tonnes to be covered by commercial imports and food aid. Outstanding deliveries of food aid pledged in 1998/99 amount to about 2.7 million tonnes (1.5 million tonnes wheat, 125 000 tonnes of rice, about 800 000 tonnes of maize and 300 000 tonnes of rye), leaving an import requirement of 3.2 million tonnes to be met commercially. Between 3.7 and 4 million tonnes of cereals were mobilized commercially in 1995/96 and 1996/97. With a good harvest and a sizeable export surplus of up to 7 million tonnes in neighbouring Kazakhstan, this level of commercial imports should be feasible in 1999/2000.

In view of tight supplies and distribution problems, the government has requested over 4 million tonnes of grain in food aid, including 1 million tonnes of food quality wheat, and 1 million tonnes of soybeans. Such a large additional quantity of aid for the second year in succession risks making the country dependent on food aid. However, given that there is a shortage of feed grain along with a distribution problem, it may be possible to provide assistance in the form of maize, soybeans and meal, which do not compete directly with the domestic production

The unfolding humanitarian crisis in Chechnya has led to the displacement of some 250 000 people, mostly to neighbouring Ingushetia. The government of Ingushetia, a small country of 300 000 inhabitants, has requested international assistance to feed and shelter the large number of refugees. These people are urgently in need of humanitarian assistance, food, shelter, blankets and health supplies. Their plight will get worse as the winter advances.

The intensified military action in Chechnya has resulted in deaths and serious damage to infrastructure, property and agriculture. Although the plight of the refugees in Ingushetia and other neighbouring areas is a cause of immediate concern, the food security of the civilian population trapped in the capital, Grozny, is rapidly deteriorating. Substantial humanitarian assistance will be required in the coming months.

The outlook for winter grains, for harvest in the spring of 2000 is unfavourable. Some 12.4 million hectares have been planted, compared to 13.2 at the same time last year.

SLOVAK REPUBLIC (11 November)

The 1999 cereal production is estimated at 3.4 million tonnes, just below last year and slightly below the average of the past five years. A sharp reduction in wheat output to 1.2 million tonnes has been only partially offset by a larger coarse grains crop (mostly barley and maize).

SLOVENIA (11 November)

The 1999 cereal output is estimated at about 500 000 tonnes (including 155 000 tonnes of wheat), 15 percent below last year's good crop and below the average of the past five years. The winter wheat area fell and adverse summer weather is reported to have affected yields.

THE FORMER YUGOSLAV REPUBLIC OF MACEDONIA (11 November)

The 1999 cereal production is estimated to be slightly above last year's crop at about 770 000 tonnes (including 380 000 tonnes of wheat). As of late October some food aid was still being distributed to the remaining Kosovar refugees and host families.

THE UKRAINE (4 November)

Indications are that the aggregate 1999-grain harvest is no better than last years-poor 29 million tonnes. This poor result is mainly due to hot and dry conditions in June and July, which exacerbated the effects of economic difficulties, shortages of inputs, heavy weed infestation and untimely frosts in May. Provided the 1999 maize crop reaches 1.5 million tonnes, as is likely, FAO forecasts the aggregate 1999 cereal and pulse harvest at 28.4 million tonnes, nearly 1 million tonnes less than last year's good harvest. Output of wheat is provisionally estimated by FAO at 16 million tonnes, about 1 million tonnes less than last year, and that of coarse grains at 11.7 million tonnes compared to 11.4 in the preceding year. Again this year, many regions placed controls to the free movement of grain and efforts by the government and regional authorities to recover debts owed by farmers have probably resulted in understatement in actual yields. The validity of this year's harvest estimates may also have been affected by the recent elections; persistent rumours of hryvnia devaluation after the elections and well-publicised moves by the government to regulate grain exports. Nevertheless, there is little doubt that 1999 will see the second poor harvest in succession.

Indications are that the area sown to winter crops has reached 7.9 (of which 7.1 million on the former state farms). Growing conditions for winter grains have not been good but have improved in the last few weeks.

Despite another poor harvest, the food supply situation is likely to remain satisfactory. Even at the reduced level, domestic wheat production far exceeds the aggregate requirements for human consumption. The country exported 5.8 million tonnes of grain, including 4.4 million tonnes of wheat in 1998/99. Official reports indicate that the country had already exported 1.9 million tonnes of cereals from this year's harvest by October, including 1.5 million tonnes of wheat. However, the availability of animal feed will remain highly constrained. Current indications are that it is more profitable to export feed grains than to sell on the domestic market and cereal exports are likely to continue in 1999/2000, but at a reduced level. FAO tentatively forecasts cereal exports at 3.8 million tonnes, including 2.3 million tonnes of wheat.

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

Official reports indicate that sharply higher spring grain yields have offset the reduced planted area, bringing aggregate cereal production in 1999 to 8.6 million tonnes compared to 8.7 million tonnes in 1998. The wheat harvest is put at only 2.2 million tonnes, some 27 percent less than last year. Lower average yields, some 15 percent down, exacerbated the reduction in the area sown during the autumn. The area sown to winter wheat fell to around 700 000 hectares mainly in response to economic difficulties, particularly rapid inflation and shortages of inputs, as well as persistent and untimely rains at planting and harvest. Official harvest estimates put the 1999 maize harvest at between 5.8 and 6 million tonnes. Spring sowing operations were considered a strategic priority. Official reports indicate that the spring crop target area - 2.5 million hectares, including 1.5 million hectares of coarse grains - was achieved, despite floods in July, and chronic shortages of farm funds and inputs, disruption of labour and damage to fields and other infrastructure.

The area target for winter crops, to be harvested in the spring of 2000, is set at 1.1 million hectares. Included in this target are 850 000 hectares of wheat (actual in 1998/99 was closer to 700 000 ha) and 150 000 hectares of barley (1998/99 130 000 ha). Chronic shortages of fertilizer and agrochemicals will also depress yields, pointing to another poor wheat harvest next year.

Substantial carry-forward stocks from 1998/99 are available. Even if, according to official estimates, the overall cereal supply situation is expected to remain satisfactory, there are a large number of economically and socially deprived people and internally displaced who will require targeted assistance to get through the winter, not only with food but also with shelter and heating. Some 825 000 socially and economically vulnerable people are assessed to need 74 300 tonnes of food aid over 6 months.

In the Province of Kosovo, the output of all crops was severely disrupted by hostilities and large-scale population displacement. An FAO/WFP Crop and Food Supply Assessment Mission which visited the Province in August, forecast wheat production in the province in 1999 at about 113 000 tonnes, 65 percent lower than estimated output in 1997. This will meet only 30 percent of the domestic requirement. Output of maize, at 57 000 tonnes, is forecast to be only 20 percent of average. In addition, the normal spring/summer vegetable harvest was almost zero and there has been widespread looting and slaughter of livestock. These losses will have both nutritional and economic consequences in the coming year.

Although the Republic of Serbia is a net exporter of cereals, the Province of Kosovo has a wheat import requirement in 1999/2000 marketing year of an estimated at 228 000 tonnes, of which 143 000 tonnes of emergency food aid deliveries/pledges are scheduled up to the end of 1999, leaving an uncovered import gap of about 85 000 tonnes.

NORTH AMERICA

CANADA (11 November)

The 1999 wheat harvest was mostly complete by the end of October, somewhat later than normal due to cool and rainy weather during the season. The later harvested crops are reported to have suffered some yield loss due to frost damage. The latest official forecast puts 1999 wheat output at 25.9 million tonnes, some 7 percent above last year but about 5 percent below the 10-year average. Aggregate coarse grain production is expected to decrease in 1999 to 25.8 million tonnes, 3 percent lower than last year but 6 percent higher than the 10-year average.

UNITED STATES (11 November)

The November USDA crop report put the 1999 aggregate wheat (winter and spring) output at 62.8 million tonnes, about 10 percent down from 1998 and slightly below the average of the past five years. Planting of winter wheat for harvest next year was reported to be more than 90 percent complete by 7 November, which is about normal for the time of season. However, the overall condition of the crop is somewhat down on the previous year, mostly reflecting persisting dry conditions over the past few weeks, particularly in the southern Plains and the Pacific north west. On 7 November, 50 percent of the crop was assessed to be in "good to excellent" condition, down from 66 percent a year earlier, and the worst since 1992. With regard to the final area to be sown to wheat this autumn, there remains considerable uncertainty. With current new crop prices (futures prices) for wheat lower than those at the same time last year, there is little incentive for farmers to increase plantings and they may continue the shift towards alternative crops in search of better returns.

The outlook for the 1999 coarse grains crop remains generally satisfactory. The USDA's November forecast put aggregate coarse grain production at 266 million tonnes, about 6 million tonnes below

last year. Maize harvesting was virtually complete by early November and the latest estimate of output has been revised up slightly to 242 million tonnes. However, at this level, production would still be some 2 percent below last year. The barley, oats and rye crops are also forecast to be down somewhat compared to 1998 but a larger sorghum crop is in prospect. The estimate of paddy output in 1999 remains unchanged at a record 9.6 million tonnes.

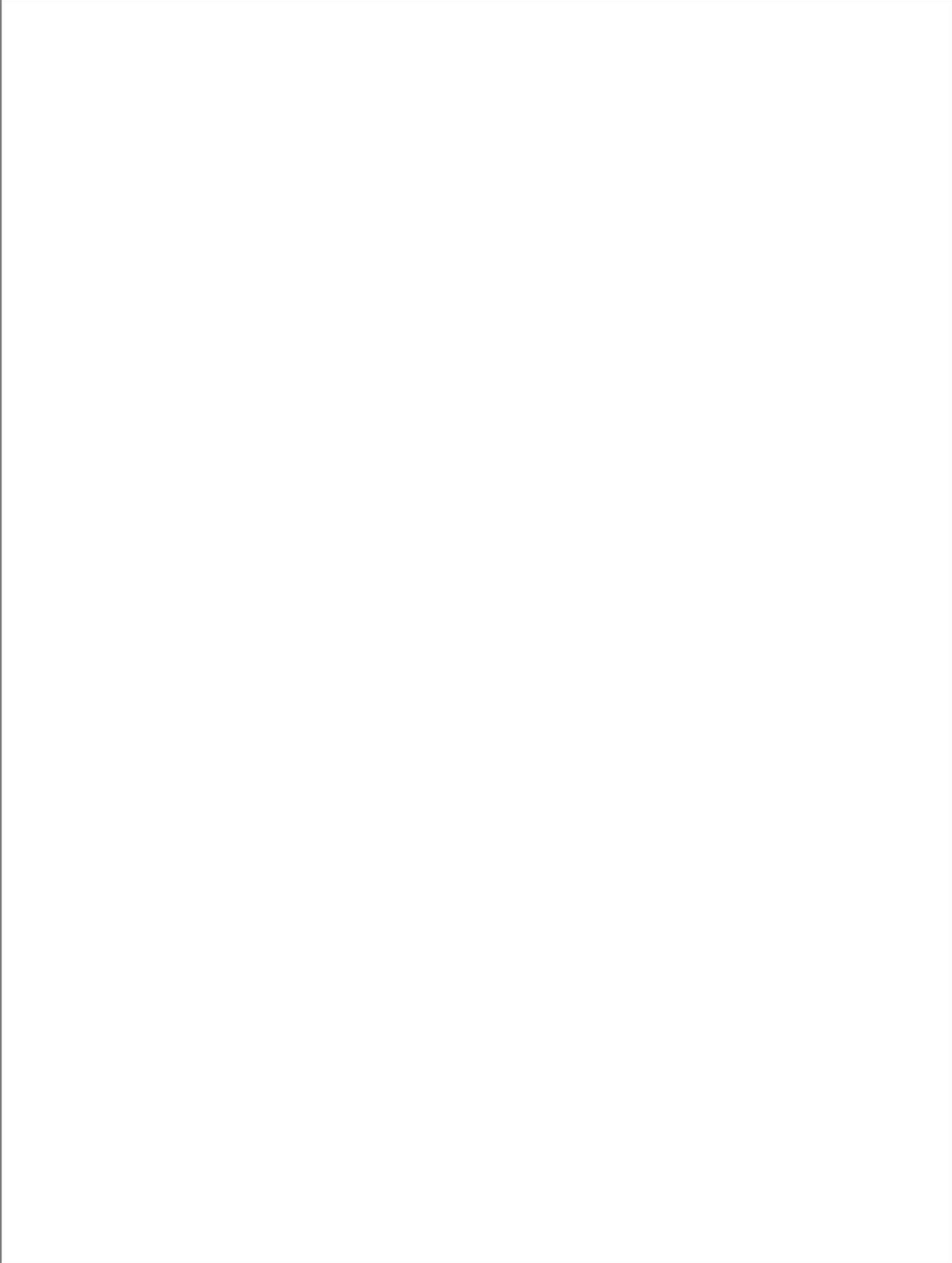
OCEANIA

AUSTRALIA (11 November)

Latest information confirms that another bumper wheat harvest is in prospect. Timely rainfall in early October in most of the eastern states' wheat areas boosted the yield potential of the crops which were already in good condition. The latest official forecast puts the 1999 wheat crop at 21.9 million tonnes, about 4 percent up from last year and well above the average of the past 5 years. The recent rains also benefited the winter coarse grain crops (mostly barley and oats). However, reflecting reduced plantings of barley and oats, and despite good summer coarse grain crops of sorghum and maize harvested earlier this year, aggregate coarse grains production in 1999 is expected to decline somewhat to about 8.1 million tonnes compared to 8.9 million tonnes in 1998. In Australia, preparations for the 2000 paddy season are underway and output is officially forecast at 1.3 million tonnes from an area of about 150 000 hectares. However, the final outcome will largely depend on the availability of irrigation water in New South Wales where most of the rice is produced.

PAPUA NEW GUINEA (4 November)

Crop prospects are good, mainly for roots and tubers, following good rains during the growing season. However, the food supply situation is likely to be tight for vulnerable population groups and those who lost their crops as a result of the drought earlier in the year.



ESTIMATED CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/
a) 1998/99 or 1999 estimates (in thousand tonnes)

COUNTRY	Marketing year	1997/98 or 1998			1998/99 or 1999			
		Actual imports			Total import requirements (excluding re-exports)	Import position		
		Commercial purchases	Food aid	Total commercial and aid		Total commercial and aid	Food aid allocated committed or shipped	Commercial purchases
AFRICA		25 488.7	1 885.5	27 374.2	25 945.0	24 195.4	2 178.4	22 017.0
Northern Africa								
Egypt	July/June	9 933.7	52.4	9 986.1	10 600.0	10 600.0	13.0	10 587.0
Morocco	July/June	3 687.5	12.5	3 700.0	3 616.0	3 619.6	9.9	3 609.7
Eastern Africa		3 762.9	998.6	4 761.5	3 221.0	3 042.3	1 234.1	1 808.2
Burundi	Jan./Dec.	41.5	0.5	42.0	42.0	5.8	4.4	1.4
Comoros	Jan./Dec.	41.8	4.2	46.0	46.0	10.6	4.1	6.5
Djibouti	Jan./Dec.	61.7	10.8	72.5	80.0	74.9	2.0	72.9
Eritrea	Jan./Dec.	223.7	103.3	327.0	109.0	24.4	20.3	4.1
Ethiopia 2/	Jan./Dec.	61.8	546.1	607.9	625.0	591.9	564.6	27.3
Kenya	Oct./Sept.	1 874.7	76.0	1 950.7	790.0	790.0	95.8	694.2
Rwanda	Jan./Dec.	58.1	141.8	199.9	200.0	205.7	203.5	2.2
Somalia	Aug./July	265.1	16.6	281.7	296.0	274.9	51.9	223.0
Sudan	Nov./Oct.	509.0	63.3	572.3	583.0	614.1	216.5	397.6
Tanzania	June/May	625.5	36.0	661.5	450.0	450.0	71.0	379.0
Southern Africa		1 349.4	373.3	1 722.7	1 736.0	1 765.2	412.6	1 352.6
Angola	April/March	350.8	157.3	508.1	515.0	523.5	140.0	383.5
Lesotho	April/March	127.0	7.8	134.8	158.0	157.8	8.4	149.4
Madagascar	April/March	176.2	38.0	214.2	134.0	134.2	18.5	115.7
Malawi	April/March	113.0	3.6	116.6	202.0	200.1	34.1	166.0
Mozambique	April/March	151.9	164.8	316.7	271.0	279.4	173.4	106.0
Swaziland	May/April	61.5	0.0	61.5	63.0	75.0	0.0	75.0
Zambia	May/April	369.0	1.8	370.8	393.0	395.2	38.2	357.0
Western Africa		6 077.7	436.3	6 514.0	6 058.0	4 892.0	491.0	4 401.0
Coastal countries		3 801.3	287.8	4 089.1	4 145.0	3 047.0	260.7	2 786.3
Benin	Jan./Dec.	110.8	10.2	121.0	125.0	52.6	18.0	34.6
Cote d'Ivoire	Jan./Dec.	603.3	22.6	625.9	640.0	450.5	18.0	432.5
Ghana	Jan./Dec.	419.4	51.8	471.2	475.0	307.1	102.3	204.8
Guinea	Jan./Dec.	403.1	6.9	410.0	385.0	77.9	18.1	59.8
Liberia	Jan./Dec.	94.6	105.3	199.9	155.0	117.6	78.9	38.7
Nigeria	Jan./Dec.	1 844.7	0.0	1 844.7	2 000.0	1 954.3	0.3	1 954.0
Sierra Leone	Jan./Dec.	206.2	87.6	293.8	290.0	30.2	25.1	5.1
Togo	Jan./Dec.	119.2	3.4	122.6	75.0	56.8	0.0	56.8
Sahelian countries		2 276.4	148.5	2 424.9	1 913.0	1 845.0	230.3	1 614.7
Burkina faso	Nov./Oct.	195.2	20.5	215.7	150.0	141.3	69.6	71.7
Cape Verde	Nov./Oct.	35.5	45.5	81.0	95.0	90.3	60.1	30.2
Chad	Nov./Oct.	64.0	21.5	85.5	72.0	81.5	17.5	64.0
Gambia	Nov./Oct.	116.1	5.5	121.6	124.0	134.7	11.4	123.3
Guinea Bissau	Nov./Oct.	103.4	0.9	104.3	92.0	65.5	11.0	54.5
Mali	Nov./Oct.	84.3	9.9	94.2	80.0	116.3	0.0	116.3
Mauritania	Nov./Oct.	303.1	17.3	320.4	295.0	240.2	27.7	212.5
Niger	Nov./Oct.	478.6	25.5	504.1	200.0	326.4	19.6	306.8
Senegal	Nov./Oct.	896.2	1.9	898.1	805.0	648.8	13.4	635.4
Central Africa		677.5	12.4	689.9	714.0	276.3	17.8	258.5
Cameroon	Jan./Dec.	257.5	2.5	260.0	280.0	113.0	2.6	110.4
Cent. Afr. Rep.	Jan./Dec.	37.1	1.9	39.0	34.0	6.7	0.0	6.7
Congo, Dem. Rep.	Jan./Dec.	247.8	2.2	250.0	250.0	101.5	11.6	89.9
Congo, Rep.	Jan./Dec.	119.2	1.7	120.9	130.0	51.1	3.2	47.9
Eq. Guinea	Jan./Dec.	8.3	0.7	9.0	9.0	3.6	0.0	3.6
Sao Tome	Jan./Dec.	7.6	3.4	11.0	11.0	0.4	0.4	0.0

ESTIMATED CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/
a) 1998/99 or 1999 estimates (in thousand tonnes)

COUNTRY	Marketing year	1997/98 or 1998			1998/99 or 1999			
		Actual imports			Total import requirements (excluding re-exports)	Import position		
		Commercial purchases	Food aid	Total commercial and aid		Total commercial and aid	Food aid allocated committed or shipped	Commercial purchases
ASIA		39 238.1	3 115.3	42 353.4	38 276.0	37 001.9	4 031.5	32 970.4
Afghanistan	July/June	562.0	138.0	700.0	740.0	743.3	73.8	669.5
Armenia	July/June	236.0	154.0	390.0	367.0	367.0	15.0	352.0
Azerbaijan	July/June	477.0	60.0	537.0	594.0	594.0	21.0	573.0
Bangladesh	July/June	2 698.3	549.4	3 247.7	4 100.0	4 100.0	1 566.8	2 533.2
Bhutan	July/June	15.0	0.0	15.0	20.0	20.0	0.0	20.0
Cambodia	Jan./Dec.	43.5	16.5	60.0	60.0	12.7	12.7	0.0
China 3/	July/June	10 009.1	90.1	10 099.2	8 800.0	8 800.0	259.8	8 540.2
Georgia	July/June	447.0	160.0	607.0	605.0	605.0	97.0	508.0
India	April/March	2 263.9	208.4	2 472.3	1 600.0	1 675.3	247.9	1 427.4
Indonesia	April/March	6 857.9	0.0	6 857.9	6 900.0	6 900.0	716.1	6 183.9
Korea, D.P.R.	Nov./Oct.	578.6	1 196.6	1 775.2	1 856.0	1 856.0	575.8	1 280.2
Kyrgyz Republic	July/June	73.0	72.0	145.0	120.0	120.0	5.0	115.0
Laos	Jan./Dec.	60.7	4.3	65.0	67.0	8.0	8.0	0.0
Maldives	Jan./Dec.	34.3	2.7	37.0	35.0	3.0	0.0	3.0
Mongolia	Oct./Sept.	170.0	30.0	200.0	193.0	193.0	45.3	147.7
Nepal	July/June	24.0	4.9	28.9	75.0	75.0	24.7	50.3
		4 147.9	173.1	4 321.0	2 921.0	2 921.4	15.0	2 906.4
Philippines	July/June	4 500.0	8.5	4 508.5	3 700.0	3 689.5	2.5	3 687.0
Sri Lanka	Jan./Dec.	999.0	81.5	1 080.5	1 118.0	1 394.2	116.7	1 277.5
Syria	July/June	916.2	21.0	937.2	750.0	750.0	17.5	732.5
Tajikistan	July/June	280.0	128.0	408.0	396.0	396.0	42.0	354.0
Turkmenistan	July/June	204.0	0.0	204.0	75.0	75.0	0.0	75.0
Uzbekistan	July/June	937.0	0.0	937.0	514.0	514.0	0.0	514.0
Yemen	Jan./Dec.	2 703.7	16.3	2 720.0	2 670.0	1 189.5	168.9	1 020.6
CENTRAL AMERICA		3 450.3	285.1	3 735.4	3 713.0	3 741.3	324.0	3 417.3
Cuba 5/	July/June	1 521.2	104.6	1 625.8	1 625.0	1 460.8	10.9	1 449.9
Guatemala	July/June	972.1	12.5	984.6	930.0	986.0	33.7	952.3
Haiti	July/June	420.0	115.0	535.0	480.0	495.7	122.7	373.0
Honduras	July/June	370.8	23.0	393.8	500.0	532.7	45.3	487.4
Nicaragua	July/June	166.2	30.0	196.2	178.0	266.1	111.4	154.7
SOUTH AMERICA		1 343.4	74.5	1 417.9	1 375.0	837.7	175.6	662.1
Bolivia	July/June	321.8	68.0	389.8	501.0	364.5	155.5	209.0
Ecuador	Jan./Dec.	1 021.6	6.5	1 028.1	874.0	473.2	20.1	453.1
OCEANIA		338.4	8.0	346.4	326.0	80.2	8.6	71.6
Kiribati	Jan./Dec.	8.0	0.0	8.0	8.0	8.0	0.0	8.0
Papua New Guinea	Jan./Dec.	275.4	8.0	283.4	263.0	17.2	8.6	8.6
Samoa	Jan./Dec.	17.0	0.0	17.0	17.0	17.0	0.0	17.0
Solomon Isl.	Jan./Dec.	26.0	0.0	26.0	26.0	26.0	0.0	26.0
Tuvalu	Jan./Dec.	1.0	0.0	1.0	1.0	1.0	0.0	1.0
Vanuatu	Jan./Dec.	11.0	0.0	11.0	11.0	11.0	0.0	11.0
EUROPE		660.6	38.4	699.0	763.0	764.4	127.7	636.7
Albania	July/June	336.7	2.3	339.0	388.0	388.0	25.9	362.1
Bosnia&Herzegovina	July/June	213.9	36.1	250.0	290.0	291.4	91.8	199.6
Macedonia, FYR	July/June	110.0	0.0	110.0	85.0	85.0	10.0	75.0
TOTAL		70 519.5	5 406.8	75 926.3	70 398.0	66 620.9	6 845.8	59 775.1

ESTIMATED CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/
b) 1999/2000 estimates for LIFD countries which have entered the 1999/2000 marketing year (in thousand tonnes)

COUNTRY	Marketing year	1998/99 or 1999			1999/2000			
		Actual imports			Total import requirements (excluding re-exports)	Import position		
		Commercial purchases	Food aid	Total commercial and aid		Total commercial and aid	Food aid allocated committed or shipped	Commercial purchases
AFRICA		18 857.8	1 101.0	19 958.8	21 239.0	4 421.9	328.7	4 093.2
Northern Africa								
Egypt	July/June	10 587.0	13.0	10 600.0	10 800.0	2 779.5	0.0	2 779.5
Morocco	July/June	3 609.7	9.9	3 619.6	4 415.0	1 091.7	0.0	1 091.7
Eastern Africa		1 693.8	435.2	2 129.0	2 410.0	83.3	32.5	50.8
Kenya	Oct./Sept.	694.2	95.8	790.0	1 100.0	13.3	13.3	0.0
Somalia	Aug./July	223.0	51.9	274.9	310.0	8.4	8.4	0.0
Sudan	Nov./Oct.	397.6	216.5	614.1	400.0	2.9	2.9	0.0
Tanzania	June/May	379.0	71.0	450.0	600.0	58.7	7.9	50.8
Southern Africa		1 352.6	412.6	1 765.2	1 524.0	429.1	257.9	171.2
Angola	April/March	383.5	140.0	523.5	505.0	83.5	57.5	26.0
Lesotho	April/March	149.4	8.4	157.8	200.0	51.1	2.1	49.0
Madagascar	April/March	115.7	18.5	134.2	150.0	10.7	7.3	3.4
Malawi	April/March	166.0	34.1	200.1	52.0	28.2	28.1	0.1
Mozambique	April/March	106.0	173.4	279.4	175.0	249.7	161.7	88.0
Swaziland	May/April	75.0	0.0	75.0	72.0	4.7	0.0	4.7
Zambia	May/April	357.0	38.2	395.2	370.0	1.2	1.2	0.0
Western africa		1 614.7	230.3	1 845.0	2 090.0	38.3	38.3	0.0
Sahelian countries		1 614.7	230.3	1 845.0	2 090.0	38.3	38.3	0.0
Burkina faso	Nov./Oct.	71.7	69.6	141.3	150.0	3.6	3.6	0.0
Cape Verde	Nov./Oct.	30.2	60.1	90.3	100.0	22.3	22.3	0.0
Chad	Nov./Oct.	64.0	17.5	81.5	80.0	1.5	1.5	0.0
Gambia	Nov./Oct.	123.3	11.4	134.7	130.0	0.7	0.7	0.0
Guinea Bissau	Nov./Oct.	54.5	11.0	65.5	100.0	0.0	0.0	0.0
Mali	Nov./Oct.	116.3	0.0	116.3	100.0	2.7	2.7	0.0
Mauritania	Nov./Oct.	212.5	27.7	240.2	280.0	3.0	3.0	0.0
Niger	Nov./Oct.	306.8	19.6	326.4	350.0	4.5	4.5	0.0
Senegal	Nov./Oct.	635.4	13.4	648.8	800.0	0.0	0.0	0.0
ASIA		30 669.3	3 725.2	34 394.5	32 821.0	9 889.2	2 504.8	7 384.4
Afghanistan	July/June	669.5	73.8	743.3	1 127.0	59.6	59.6	0.0
Armenia	July/June	352.0	15.0	367.0	392.0	128.0	73.0	55.0
Azerbaijan	July/June	573.0	21.0	594.0	695.0	61.3	48.0	13.3
Bangladesh	July/June	2 533.2	1 566.8	4 100.0	2 500.0	1 177.4	602.4	575.0
Bhutan	July/June	20.0	0.0	20.0	22.0	0.0	0.0	0.0
China 3/	July/June	8 540.2	259.8	8 800.0	9 900.0	2 121.6	99.9	2 021.7
Georgia	July/June	508.0	97.0	605.0	505.0	79.6	77.7	1.9
India	April/March	1 427.4	247.9	1 675.3	1 200.0	410.5	190.2	220.3
Indonesia	April/March	6 183.9	716.1	6 900.0	6 000.0	3 581.6	670.8	2 910.8
Korea, D.P.R.	Nov./Oct.	1 280.2	575.8	1 856.0	1 293.0	30.0	30.0	0.0
Kyrgyz Republic	July/June	115.0	5.0	120.0	126.0	107.5	107.5	0.0
Mongolia	Oct./Sept.	147.7	45.3	193.0	203.0	15.0	15.0	0.0
Nepal	July/June	50.3	24.7	75.0	79.0	0.0	0.0	0.0
Pakistan 4/	May/April	2 906.4	15.0	2 921.4	3 200.0	605.5	335.1	270.4
Philippines	July/June	3 687.0	2.5	3 689.5	3 600.0	1 013.7	50.0	963.7
Syria	July/June	732.5	17.5	750.0	1 175.0	372.6	20.4	352.2
Tajikistan	July/June	354.0	42.0	396.0	453.0	125.3	125.2	0.1
Turkmenistan	July/June	75.0	0.0	75.0	1.0	0.0	0.0	0.0
Uzbekistan	July/June	514.0	0.0	514.0	350.0	0.0	0.0	0.0
CENTRAL AMERICA		3 417.3	324.0	3 741.3	3 635.0	727.1	227.0	500.1
Cuba	July/June	1 449.9	10.9	1 460.8	1 467.0	226.2	4.4	221.8
Guatemala	July/June	952.3	33.7	986.0	960.0	157.3	36.7	120.6
Haiti	July/June	373.0	122.7	495.7	525.0	63.2	29.7	33.5

Honduras	July/June	487.4	45.3	532.7	525.0	138.3	57.7	80.6
Nicaragua	July/June	154.7	111.4	266.1	158.0	142.1	98.5	43.6
SOUTH AMERICA		209.0	155.5	364.5	271.0	16.9	16.9	0.0
Bolivia	July/June	209.0	155.5	364.5	271.0	16.9	16.9	0.0
EUROPE		636.7	127.7	764.4	786.0	11.4	7.2	4.2
Albania	July/June	362.1	25.9	388.0	431.0	10.2	6.0	4.2
Bosnia&Herzegovina	July/June	199.6	91.8	291.4	290.0	0.0	0.0	0.0
Macedonia, FYR	July/June	75.0	10.0	85.0	65.0	1.2	1.2	0.0
TOTAL		53 790.1	5 433.4	59 223.5	58 752.0	15 066.5	3 084.6	11 981.9

SOURCE: FAO

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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.

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