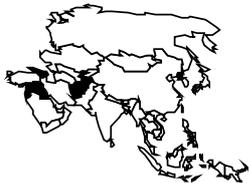


# FOODCROPS AND SHORTAGES

No.1

January/February 2000

	<p><b>AFRICA:</b> Worst floods in 40 years devastate parts of Southern Africa, leaving thousands homeless. Continuous rains are impeding relief operations. Food outlook is already poor in several countries due to erratic rains earlier. In East Africa drought in parts has caused serious food supply difficulties; worst affected is Bakool region in Somalia, where many starvation-related deaths are reported. In Western Africa, the overall food situation is satisfactory, except in Liberia and Sierra Leone which continue to depend heavily on food aid.</p>
	<p><b>ASIA:</b> Vulnerable populations in a number of countries still affected by serious food supply difficulties due to past disasters and economic turmoil. Major relief operations continue in north eastern India, following a devastating cyclone last year, whilst food assistance is being provided to some 5.6 million people in DPR Korea, where economic problems, exacerbated by natural disasters, continue to affect food production and supplies. In East Timor, international assistance is urgently needed to rehabilitate the economy and agriculture.</p>
	<p><b>LATIN AMERICA:</b> Torrential rains in December resulting in heavy flooding and mudslides, cause a large number of casualties in Colombia and Venezuela, and widescale damage to agriculture and the economy. Emergency relief is being provided. In central America and the Caribbean, cereal production increases in almost all countries over 1998/99, when crops were severely affected by Hurricane Mitch.</p>
	<p><b>EUROPE:</b> In CIS countries, the crisis in Chechnya continues and large numbers of displaced people/refugees need emergency assistance. Elsewhere, the outlook for winter grains is satisfactory in the Russian Federation but mixed in other countries. Grain supplies remain tight in the Russian Federation and Tajikistan, while large-scale international aid continues in the Balkans. In the Kosovo Province, around 1 million people receive food assistance.</p>
	<p><b>NORTH AMERICA:</b> In the United States, the winter wheat area falls to the lowest level since 1972/73, mostly due to poor price prospects at planting. Furthermore, weather conditions at planting and during the winter have been unfavourable in parts, pointing to higher rates of winterkill than in the previous year. In Canada, early indications point to increased wheat plantings this spring at the expense of canola and flaxseed because of their relatively low prices.</p>
	<p><b>OCEANIA:</b> A bumper wheat crop of about 23 million tonnes is gathered in Australia. Prospects for the developing 2000 summer coarse grain crops are generally satisfactory but output provisionally forecast to fall reflecting reduced plantings.</p>



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

### UNFAVOURABLE PROSPECTS FOR CURRENT CROPS

<u>Country</u>	<u>Harvest date</u>	<u>Main contributory factors</u>
<u>Afghanistan*</u>	May/Jun.	Civil strife
<u>Congo, Dem.Rep.of*</u>	Nov./Dec.	Civil strife
<u>East Timor</u>	Mar./Apr.	Civil strife
<u>Ecuador</u>	Apr./Aug.	High costs; credit constraints
<u>Eritrea*</u>	Jan./Feb.	Drought
<u>Iraq*</u>	May/Jun.	Drought, lack of inputs
<u>Kenya</u>	Feb./Mar.	Drought
<u>Madagascar</u>	Apr.	Drought
<u>Mexico</u>	Mar./May	Adverse weather, reduced yield
<u>Mozambique</u>	Mar./Apr.	Floods
<u>Somalia*</u>	Feb./Mar.	Drought, civil strife
<u>Tajikistan*</u>	May/Jun.	Shortages of quality seed
<u>Tanzania</u>	Jan./Feb.	Insufficient rainfall

### COUNTRIES FACING EXCEPTIONAL FOOD EMERGENCIES (Total: 32 countries)

<u>Country/Region</u>	<u>Reason for Emergency</u>	<u>Country/Region</u>	<u>Reason for Emergency</u>
<b><u>AFRICA (15 countries)</u></b>		<b><u>LATIN AMERICA (5 countries)</u></b>	
<u>Angola*</u>	Civil strife, population displacement	<u>Cuba</u>	Drought
<u>Burundi*</u>	Civil strife and insecurity	<u>Haiti*</u>	Structural economic problems
<u>Congo, Dem.Rep.*</u>	Civil strife, IDPs and refugees	<u>Honduras</u>	Adverse weather (hurricane Mitch)
<u>Congo, Rep. of*</u>	Civil strife	<u>Nicaragua</u>	Adverse weather (hurricane Mitch)
<u>Eritrea*</u>	IDPs, returnees and drought	<u>Venezuela</u>	Adverse weather (flooding/mudslides)
<u>Ethiopia*</u>	Drought, IDPs		
<u>Kenya</u>	Drought	<b><u>EUROPE (2 countries)</u></b>	
<u>Liberia*</u>	Past civil strife, shortage of inputs	<u>Russian Fed.</u>	Civil strife, vulnerable groups
<u>Mozambique</u>	Floods	<u>F.Rep. Yugoslavia*</u>	Vulnerable groups and refugees
<u>Rwanda*</u>	Insecurity in parts		
<u>Sierra Leone*</u>	Civil strife, population displacement		
<u>Somalia*</u>	Drought, civil strife		
<u>Sudan*</u>	Civil strife in the south		
<u>Tanzania</u>	Food deficits in several regions		
<u>Uganda</u>	Civil strife in parts, drought		
<b><u>ASIA (10 countries)</u></b>			
<u>Afghanistan*</u>	Civil strife		
<u>Armenia*</u>	Vulnerable groups and refugees		
<u>Azerbaijan</u>	Vulnerable groups and refugees		
<u>East Timor</u>	Civil strife		
<u>Georgia*</u>	Vulnerable groups and refugees		
<u>Iraq*</u>	Economic embargo, drought		
<u>Jordan</u>	Drought		
<u>Korea, DPR*</u>	Economic problems, drought		
<u>Syria</u>	Drought		
<u>Tajikistan*</u>	Reduced harvest, poverty		

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

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

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

## CROP AND FOOD SUPPLY SITUATION

The worst floods in 40 years in early February devastated many countries in Southern Africa, leaving thousands stranded and homeless. Continuous rains are impeding access and relief operations. Southern Mozambique was the worst hit, with an estimated 300 000 people displaced, whilst ongoing rains continue to hamper relief operations. In East Africa severe drought has caused serious food supply difficulties in a number of countries, with Bakool in southern Somalia giving particular cause for concern. Food supplies also remain tight in Liberia and Sierra Leone, which continue to depend on food aid, though other countries in the region had a favourable crop harvest in 1999. Major relief operations continue in the North Eastern States of India, devastated by a cyclone last October when many thousands were killed and thousands more displaced and left homeless. More food assistance is needed in DPR Korea as the lean season approaches, whilst in East Timor international aid is urgently needed to rehabilitate agriculture and the economy on which future food security depends heavily. In the CIS countries, the humanitarian crisis in Chechnya continues with a large section of the affected population needing urgent food and medical assistance. Many countries in the Balkans remain affected by food supply problems to varying degrees; the problem is being exacerbated by acute economic crisis. In Kosovo province, food assistance continues to be provided to around 600 000 people.

No significant weather events occurred to affect short term crop prospects in Asia, where the main wheat crop is developing in China, India and Pakistan, whilst prospects for main and second season rice in most other countries are generally satisfactory. In the CIS countries in Asia, it is too early to forecast crop output, but the 1999 production is estimated to have increased by some 7 million tonnes compared to 1998. In the Near East recent rainfall improved crop prospects, suggesting recovery from last year when a number of countries were affected by a devastating drought. In Europe, winter weather conditions have been generally favourable and soil moisture levels are adequate for crops. Aggregate wheat area is estimated to have increased by around 5 percent. In most South American and Caribbean countries, production is anticipated to continue recovering, following the devastation caused by hurricane Mitch in late 1998.

## REGIONAL OVERVIEW

### Africa

In **northern Africa**, early prospects for the 1999/2000 cereal crops, to be harvested from around April, are generally favourable in Algeria, Egypt, Morocco and Tunisia, despite some delay in planting in parts due to below-normal rainfall at the beginning of the season. In Egypt and Morocco in response to government initiatives to increase production and food security, output is expected to increase over last year, due to greater emphasis placed on promoting the use of high yielding varieties and technologies and an expansion in the areas under cultivation respectively. In most parts final output depends considerably on timely rainfall for the remainder of the season. The food supply situation in the sub-region remains stable.

In **western Africa**, currently there is little agricultural activity, except for limited cultivation of recession or off season crops. Prospects are generally favourable, notably in Mauritania and Senegal where rivers flooded large areas. However, flooding also affected some irrigated rice fields or crop zones in Mauritania, Senegal, Niger and Chad. Following above normal to record harvests in most countries in 1999, the overall food supply situation is favourable.

Generally abundant and regular rains were received in the Sahel during the main 1999 crop season, providing favourable growing conditions. Pest attacks were minimal. As a result, a bumper crop was produced for the second consecutive year. Aggregate cereal production in 1999 in the nine CILSS member countries is estimated by FAO/CILSS at a record 10.9 million tonnes, some 2 percent higher than 1998 and 16 percent above the five-year average. Cape Verde, The Gambia, Mali and Mauritania all had record production, whilst Burkina Faso, Chad, Niger and Senegal had above-average output.

Favourable 1999 production allowed replenishment of farm and national security stocks. Cereal prices decreased substantially in markets which are well supplied.

Elsewhere in western Africa, Liberia and Sierra Leone remain heavily dependent on international food assistance despite some improvement in food production, notably in Liberia. An FAO assessment mission to Sierra Leone in December estimated paddy production at around 45 percent of pre-war production and 60 percent that in 1997, when the security situation improved. Steady substitution of roots and tubers for cereals during the war years has reduced cereal imports to meet needs.

In **central Africa**, production was favourable in the Central African Republic and Cameroon. Civil strife in both the Republic of Congo and the Democratic Republic of Congo, however, continues to hamper agriculture and marketing. In the Republic of Congo, floods affected the north and the capital Brazzaville in November/December. There are concerns regarding the nutritional situation of displaced people.

In the Democratic Republic of Congo, severe food shortages and malnutrition are reported among large numbers of displaced people, mainly in northeastern Katanga and South Kivu areas, which remain inaccessible due to insecurity.

In **eastern Africa**, due to drought, significant crop and livestock losses have occurred, causing serious food supply difficulties, and substantial food assistance is required throughout 2000. In general, successive poor rains in most pastoralist areas in the sub-region, including most of Somalia, eastern Ethiopia and northern Kenya, have severely affected pastures and livestock, resulting in critical food shortages and migration of large numbers of people in search of water and food.

Past or ongoing civil conflicts in parts, particularly in Somalia, Sudan and Uganda, are also seriously disrupting food production and distribution, resulting in food shortages and population displacement. Appeals for food assistance have recently been launched for millions of people affected by drought and/or conflict in Ethiopia, Eritrea, Kenya and Sudan while food aid is being distributed in Somalia, Tanzania and Uganda.

Currently, harvesting of the secondary 1999/2000 cereal crop is well underway in several countries and the outlook is mixed. Following delayed and erratic rainfall during the season, lower production is anticipated in Kenya and Tanzania. In contrast, overall prospects remain favourable in Somalia, Sudan and Uganda due to good weather during the season. In Somalia, however, poor "Deyr" rains over large areas of Bakool region in the south, resulted in the seventh successive poor harvest. Nearly 68 000 agro-pastoralists in the region are facing severe food shortages that have already claimed some human lives. Thousands of cattle have also perished from water and pasture shortages. Elsewhere, in Rwanda, production of the recently harvested 2000 season A crops was estimated substantially above last year, mainly reflecting an increase in the area planted. However, despite the general improvement in production, food shortages persist in parts. By contrast, in Burundi, dry weather and massive displacement of the population due to insecurity resulted in a decline in the 2000 season A food production. Overall food supplies in the country are tight following the 2000 season A reduced harvest and the food and health situation is particularly critical for some 800 000 displaced people in regroupment camps, most of whom do not have access to fields. Rising malnutrition is reported in this population. The Government recently announced that it will start closing some camps.

In **southern Africa**, overall prospects for 2000 cereal crops, to be harvested from April/May, remain uncertain. The situation, however, varies from country to country, with rains having been erratic since the beginning of the season. In some areas, excessive rainfall was received, whilst in others there were prolonged dry spells. Torrential rains in the first dekad of February in Mozambique, South Africa, Botswana and Swaziland, resulted in loss of life and severe damage to housing and infrastructure, compounding the problem. An assessment of crop losses is not yet available but the floods, reported to be the worst in 40 years, affected agricultural areas at the critical flowering stage of growth. Thousands of people have been left homeless and many towns have become isolated due to severe damage to roads and bridges. This has hampered evacuation and relief operations. In Mozambique, the number of people severely affected by the floods is currently estimated at 300 000. The Government of Mozambique has appealed for US\$ 2.7 million in international assistance to cope with the emergency. WFP is currently distributing emergency food aid to 150 000 people in the country. In South Africa, the number of people left homeless is provisionally estimated at 100 000 and in Botswana at 4 000. No assessment is yet available for Swaziland. In Lesotho, abundant rains in early February brought relief to crops stressed by previous dry weather but may have been too late to prevent a reduction in yields. In contrast, more rains are needed in Malawi, Namibia and Zambia, where precipitation in February has been below average. In Madagascar, the outlook for the 2000 paddy crop is unfavourable; dry weather from the third dekad of January until mid-February negatively affected planting and yields. In Zimbabwe, while growing conditions are satisfactory due to favourable rains since the beginning of the season, maize production is likely to be affected by a reduction in area planted due to diversion of land to more profitable crops.

Elsewhere in the sub-region, the food situation remains extremely serious in war-affected Angola, where emergency food aid continues to be necessary for some 1.1 million displaced people, as well as for large numbers of Angolan refugees in Zambia and Namibia. The food situation is also tight for large numbers of vulnerable people in the urban areas of Zimbabwe, due to high levels of inflation and fuel shortages.

## Asia

Despite some floods in the Philippines and the Islamic Republic of Iran, and relatively minor earthquakes in Nepal and on the borders of Thailand and Laos, in the period December to the beginning of February, there were no natural disasters that seriously affected food production or resulted in large population displacement. Agriculturally the main activities in the region's largest producers, China and India are centred around wheat, where it remains dormant and at development stage respectively. Early prospects for the crop in both countries were favoured somewhat by increased precipitation in January. However, the overall area planted in China this year declined by some 7 percent compared to 1998 due to lower producer prices, whilst in India the area decreased by some 2 percent to 26.2 million hectares. Early wheat prospects were also favoured by increased precipitation in Pakistan, which, together with higher support prices for this year's crop, is officially estimated to result in an increase of around 2 million tonnes compared to 1999.

With regard to rice production, coinciding with the north-east monsoon, the main crop is currently developing in Indonesia and Sri Lanka and early prospects are generally satisfactory. In Vietnam the main winter/spring crop is being planted, whilst in most other rice growing countries in the region, the main crop has already been harvested and only secondary, dry season/irrigated crops are presently being planted or are at early stages of development. The prospects are generally favourable. In the Philippines, forecast production of the current crop, at 5.4 million tonnes, is around 2 percent higher than 1999. In Thailand planting of the second season crop is underway, for harvest in May/June. This crop accounts for around 20 percent of aggregate rice production per year, with the bulk coming from the main crop planted mainly around June/July. In Bangladesh, overall 1999/2000 rice prospects are also good, with output of the first and second (Aus and Aman) crops registering an increase, whilst planting of the irrigated boro crop is underway. The target for the boro crop is 9.2 million tonnes (milled). The harvest of the main wet season crop in Cambodia is near completion and prospects are generally favourable, with aggregate paddy production forecast at 3.8 million tonnes, some 8 percent above 1998/99.

Vulnerable populations in a number of countries in the region continue to be affected by serious food supply difficulties, due to past disasters and the effects of economic turmoil. Large-scale humanitarian assistance continues to be provided to people affected by a devastating cyclone in north-eastern India last year. Elsewhere, the food supply situation in DPR Korea continues to give cause for concern as domestic food production remains well below needs, whilst, due to economic problems, the country's capacity to import commercially, to cover the deficit, is heavily constrained. Economic problems have also meant that the supply of essential inputs to agriculture, on which the sector depends heavily for intensive production, also remains highly constrained. Elsewhere, in East Timor, food assistance needs were significant in the months between November 1999 and March this year when harvesting of main crops commences. However, overall food supply prospects in the medium term (2000/01 marketing year April/March) are less gloomy than envisaged at the height of the crisis following the August 1999 referendum. Nevertheless, considerable donor support continues to be needed for economic recovery. Concerns persist regarding the plight of refugees still in West Timor, with UNICEF reporting that around 24 percent of children in camps are suffering from moderate to severe malnutrition and four percent are severely malnourished.

It is too early to forecast the outlook for 2000 crops in the CIS countries in Asia. In Kazakhstan, by far the largest producer in the area, the bulk of 2000 grains will not be planted until the spring. In the other countries, indications are that the area sown to winter grains has continued to decline (in the Caucasus and Kyrgyzstan) as farmers shift to more profitable crops. In Tajikistan, serious crop losses due to yellow rust and smut in 1999 need to be addressed if output is to recover this year. In Uzbekistan, the area sown to winter grains has increased by 50 000 hectares. Turkmenistan plans to increase area sown by cultivating virgin land. Aggregate 1999 grain production (cereals and pulses) in the eight CIS countries of Asia is estimated to have increased to 24 million tonnes from 17 million tonnes in 1998. Wheat production increased by 6 million tonnes to 19 million tonnes mainly in Kazakhstan, Azerbaijan, Georgia, Turkmenistan and Uzbekistan. Coarse grain production increased by 1.4 million tonnes to 4.5 million tonnes. In Kazakhstan, the wheat harvest doubled to 11 million tonnes, while coarse grain production recovered to 2.8 million tonnes from 1.5 million tonnes in 1998. Turkmenistan achieved a record grain harvest of 1.5 million tonnes (mainly wheat). In Uzbekistan, the 1999 aggregate grain harvest is estimated at 4.45 million tonnes (1998: 4.2 million tonnes), and includes 3.7 million tonnes of wheat (1998: 3.6 million tonnes). In Kyrgyzstan, the grain harvest (1.6 million tonnes) equalled that of 1998, but wheat production (1.1 million tonnes) declined as land was moved to more profitable crops and feedgrains. Output declined significantly only in Tajikistan, by 20 percent to an estimated 400 000 tonnes. In the Caucasus, timely rains during the season and better land management by private farmers resulted in higher wheat yields, which on aggregate offset the reduction in the area sown.

The overall food supply situation has improved due to greater production, which has reduced import requirements, except in Tajikistan. Moreover, the large exportable surplus in Kazakhstan, estimated at up to 7-8 million tonnes in 1999/2000, means that grain is available in the CIS region to cover import needs of the Russian Federation and other neighbouring countries. In Tajikistan, the cereal import requirement is expected to rise to 455 000 tonnes, including 148 000 tonnes of food aid requirement. Indications are that the deficit is being covered by imports, mainly from Kazakhstan, which exported some 250 000 tonnes of wheat to the country between June and December 1999.

In all these countries, however, aggregate statistics hide increasingly large income discrepancies. As a result, all countries have socially and economically vulnerable people. In Armenia, Azerbaijan, Georgia and Tajikistan, countries where the sharp drop in GDP following independence was aggravated by prolonged civil strife, the vulnerable populations (including refugees and IDPs) continue to require humanitarian food assistance. In Kyrgyzstan also, the counterpart funds of a proportion of programme food aid pledges are being used to help fund more timely payment of social benefits to economically vulnerable people.

In the **Near East**, crop prospects improved recently due to favourable rains in Jordan, Syria, Saudi Arabia and Turkey. In Afghanistan, however, production is likely to be constrained due to serious shortages of agricultural inputs and population displacements caused by civil conflict. In Iraq, despite recent beneficial rains, extended drought conditions and shortage of agricultural inputs continue to affect cereal production.

Normally, most countries in the region, except Afghanistan, cover cereal import requirements commercially. However, in 1999, several countries in the region experienced the worst drought in decades severely reducing food production and leaving hundreds of thousands of vulnerable people in need of food assistance. In Iraq, despite some improvement in the overall food supply situation following the implementation of the "oil-for-food" deal, health and nutritional problems remain widespread in many parts.

### Latin America

In **Central America and the Caribbean**, the main agricultural activities include the completion of harvesting of the 1999/2000 second and third season ("apante") crops. Cereal output has increased considerably over 1998/99 in virtually every country, except in Honduras, where it declined, principally due to unattractive producer prices. Aggregate cereal output for Costa Rica, El Salvador, Guatemala and Nicaragua is provisionally estimated at 3.3 million tonnes compared to 2.9 million tonnes in the previous year, when crops were severely affected by Hurricane "Mitch". In Mexico, harvesting of the 1999/2000 wheat crop is about to commence. Output is anticipated to be below-average, largely due to adverse weather at planting. In contrast, the 1999/2000 maize crop should be slightly above average. In Haiti and the Dominican Republic, harvesting of second season crops has been completed and average to above-average 1999/2000 cereal production is provisionally forecast. In Cuba, however, dry conditions persist and the situation needs to be closely monitored as the rainy season is still some weeks away.

In the southern parts of **South America**, harvesting of 1999 wheat has recently been completed and production was above-average in Argentina, Brazil, and Uruguay. In Chile, harvesting is still underway and a recovery from last year's drought-affected crop is anticipated. In the former countries, planting of the 2000 maize crop has been completed and early production forecasts point to average or above-average output. In the Andean countries, the outlook is favourable for planting of first season cereal crops in Bolivia and Peru, while prospects are poor in Ecuador, where planting of maize was below-average due to the high cost of farm inputs and credit constraints caused by the economic crisis. In Colombia, harvesting of 1999/2000 second season coarse grain crops is underway and, despite possible losses due to heavy rains and flooding in December, output is expected to be average. In Venezuela, incessant torrential rains in December resulted in extensive mudslides and floods, causing a high number of casualties and large scale agricultural and economic damage. Emergency assistance, including food distribution, is being provided by the international community and rehabilitation programmes are underway.

### Europe

In the EC, the winter wheat crop sown last autumn in the northern countries is still mostly dormant, while planting of later sown crops in the south was completed in December/January. Winter weather conditions have been generally favourable and soil moisture levels are reported to be adequate for crop development this spring. The aggregate winter wheat area in the EC is estimated to have increased by about 5 percent,

mostly at the expense of oilseeds, because of large oilseeds stocks and reduced producer aid for oilseeds production in 2000, under the first year of the Agenda 2000 reform.

Among eastern European countries, early indications also point to an overall increase in wheat area over the previous year, mostly due to better weather at planting. However, in several countries, limited or no credit for small farmers remains the largest constraint to productivity, restricting access to high quality seed, fertilizers and pesticides/herbicides. At the outset of 2000, the Balkan countries remain affected, to varying degrees, by the decade of civil unrest which culminated most recently in war in the Kosovo Province of the Federal Republic of Yugoslavia (Serbia and Montenegro) in 1999. The Federal Republic of Yugoslavia now has more refugees than any other European country and is in a state of acute economic crisis. This is characterized by the deterioration of public utilities, the destruction of fertilizer and fuel plants and the virtual collapse of social services. There are over 1.1 million internally displaced persons. Economically and socially deprived people currently receive food assistance in Serbia (excluding Kosovo) and Montenegro. In the Kosovo Province, WFP continues to provide food assistance for around 600 000 people, whilst other organizations provide assistance to 400 000. During the spring and early summer (April-June) however, the number of people in need of food aid within Kosovo is likely to decrease as the economy and household incomes improve. Assistance continues to be provided in Albania and The Former Yugoslav Republic of Macedonia for refugees and vulnerable people affected by the Kosovo war.

In the three Baltic countries, the area sown to winter grains could recover somewhat in response to higher cereal prices this season. The 1999 grain harvest is estimated at only 3.7 million tonnes, sharply lower than in 1998. All three countries have lower output, but the reduction is most marked in Lithuania where 1999 grain production fell to 2.1 million tonnes (1998: 2.8 million tonnes). Nevertheless, the food supply situation remains satisfactory and imports are not expected to increase rapidly.

In the four CIS countries west of the Urals, the winter crops (mainly wheat and rye) for harvest this year, have been planted on a somewhat smaller area. The outlook, therefore, is mixed. In Belarus and the Russian Federation, crop prospects to date are satisfactory. By contrast, in Moldova and the Ukraine, dry conditions at planting and delays in planting have led to poor emergence and up to 1.5 million hectares of some 7.5 million hectares planted in these two countries may need to be replanted with spring barley. Coupled with inadequate use of agro-chemicals and more stringent conditions for commodity credits, another poor winter harvest is in prospect in the Ukraine. However, some 50 percent of grain crops will not be planted until spring.

Economic difficulties and policies which resulted in reduced planting and input availability, coupled with adverse weather conditions (particularly in the Ukraine, but also in Belarus and Moldova), meant that the 1999 cereal and pulse harvest was only marginally above the poor harvest in 1998. FAO estimates the aggregate output of cereals and pulses in Belarus, Moldova, the Russian Federation and Ukraine at 93 million tonnes, only 2 million tonnes above estimated output in 1998. Aggregate production of wheat in these four countries increased marginally to 50 million tonnes, with better yields in the Russian Federation (harvest estimated by FAO at 34 million tonnes versus 30 million tonnes in 1998) offsetting lower harvests in Belarus, Moldova and the Ukraine (15 million tonnes versus 17 million tonnes). Aggregate production of coarse grains is estimated at 40 million tonnes, only 1 million tonnes higher than 1998.

Due to the second poor harvest in succession, the food supply situation remains tight in all four countries. With imports, food needs are likely to be covered, but the availability of animal feed is highly constrained and livestock production is likely to contract further in 2000. Aggregate imports for these four countries are currently estimated to almost double to 7.5 million tonnes, reflecting larger imports particularly in Belarus and the Russian Federation. Indications are that volumes not covered by food aid pledges will be mobilized commercially. In Belarus, economic problems and adverse weather resulted in a record low harvest of 3.7 million tonnes and the country is seeking to import both food and feedgrains. In the Russian Federation, despite the somewhat larger harvest (estimated by FAO at 60 million tonnes against 54 million tonnes in 1998), the overall supply situation remains tight and there is no scope to rebuild stocks drawn down in 1998/99. Restrictions on the movement of grain by regional authorities are aggravating the supply situation. Cereal prices, which remained stable until the beginning of this year, are rising, also in response to a 15 percent increase in the cost of rail transport of grain from Kazakhstan, a major supplier. Nevertheless, against its overall import requirement, estimated at 6 million tonnes, (including 3 million tonnes of food aid pledges mainly carried forward from 1998/99) commercial imports in the first six months amounted to 2.1 million tonnes. In 1999/2000, despite a worse harvest than 1998, the Ukraine will remain a net exporter of some cereals, but may have to import some foodgrains for deficit areas.

The massive humanitarian crisis in the northern Caucasus continues unabated. Some 250 000 Chechens are displaced in Ingushetia as a result of the conflict and many lack basic human needs such as shelter, food, water, heating and medical care. In addition, there are many homeless and displaced in Chechnya itself, and the security situation has precluded planting of winter crops and considerable damage has been inflicted on the livestock and fruit sectors. Land mines in occupied areas will also slow any recovery in food production in 2000. A UN Inter-Agency team is currently in Ingushetia and is scheduled to travel to Chechnya, to assess humanitarian needs in preparation of the 2000 appeal. Donor response to the appeal issued in 1999 has been generous, but security and other considerations hinder delivery of aid to refugees.

### **North America**

In the United States, the winter wheat crop (which accounts for about 70 percent of total annual wheat output) was planted last autumn and remains mostly dormant. The area planted has declined to 17.4 million hectares, the lowest level since 1972/73, mostly as a result of poor price prospects at planting. Weather conditions at planting and overwinter conditions since then have been generally unfavourable and it is likely that the percentage of winterkill will be higher than in the previous year. The bulk of the coarse grains crop will be planted in April-May. In Canada, wheat and coarse grains crops are mostly sown in May/June. Early indications of planting intentions point to a possible increase in wheat area at the expense of canola and flaxseed because of relatively lower prices.

### **Oceania**

The 1999 winter grain harvest in Australia has recently been completed and preliminary estimates indicate that a bumper wheat crop of about 23 million tonnes has been produced. Prospects for the developing 2000 summer coarse grains are generally satisfactory after heavy January rains in main-producing areas of New South Wales and Queensland. However, output is provisionally forecast to fall somewhat reflecting reduced plantings.

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

### **AFRICA**

#### **NORTHERN AFRICA**

##### ALGERIA (6 February)

Early prospects are so far favourable for the 1999/2000 growing season. Although land preparation and planting were somewhat delayed by below-normal rainfall in September/October, conditions improved in November/December with widespread rains over most growing areas. However, more timely rains are needed during the next two months to ensure a good harvest.

The 1999 cereal crop is estimated at about 2.1 million tonnes, some 30 percent below the previous year's level. This includes 1.5 million tonnes of wheat, 25 percent below the previous year, and 660 000 tonnes of coarse grains, a 37 percent decrease. Imports of cereals, mostly wheat, are forecast at about 6 million tonnes for the 1999/2000 (July/June) marketing year.

##### EGYPT (7 February)

Early prospects for the mainly irrigated wheat crop, to be harvested from April are generally favourable. The area planted is expected to be about 1 million hectares, similar to 1999. However, production is expected to increase as a result of Government incentives to expand cultivation of wheat varieties with higher yield and quality, and assistance to farmers to apply better technology. The 1999 cereal output is estimated at about 17.2 million tonnes, some 10 percent over the previous year and above average. This includes 6.3 million tonnes of wheat, 5.8 million tonnes of maize and 4 million tonnes of rice.

Imports of wheat and wheat flour in 1999/2000 (July/June) are forecast at about 7 million tonnes, slightly below the previous year's level. A small decrease is also anticipated in coarse grain imports (mostly maize), forecast at about 3.3 million tonnes.

##### MOROCCO (7 February)

Conditions have been generally favourable so far for the 1999/2000 winter grain crops with widespread and timely rains covering most growing areas. The area sown to cereal is reported to be much higher than the average for the previous five years, largely as a result of a new Government cereal security programme being implemented over the next 3 years. However, widespread timely rains will be needed in the coming months for normal crop development.

Production of cereals in 1999 is estimated at 3.8 million tonnes, some 42 percent below the previous year's crop, due to unfavourable weather conditions. As a consequence, imports of wheat in 1999/2000 (July/June) are forecast to increase by 33 percent at 2.8 million tonnes, and coarse grains by 7 percent at 1.6 million tonnes.

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

#### TUNISIA (7 February)

Land preparation and planting of crops were somewhat delayed by below-normal rainfall and high temperatures in September/October. Conditions improved substantially in November/December with widespread rains over most growing areas. The area sown to cereals, mainly wheat, in 1999/2000 season is currently estimated at 1.4 million hectares, slightly lower than the previous year's level. Overall, prospects for harvests from May are currently favourable. However, more timely rains will be needed during the next few months to ensure a good harvest.

1999 cereal production is estimated at 1.8 million tonnes, 9 percent above the previous year. This includes 1.4 million tonnes of wheat, which is 3 percent more than in 1998. Cereals imports in 1999/2000 (July/June) are estimated at about 1.4 million tonnes, mostly wheat and maize.

### **WESTERN AFRICA**

#### BENIN (1 February)

Seasonably dry conditions prevail. Planting of the first maize crop should start in March in the south following the onset of the rains. At the end of last rainy season, in September/October, floods were reported in many villages and thousands of people were displaced. Despite armyworms infestations in Atakora and Borgou departments, harvest prospects are generally favourable. The aggregate output of cereals (rice in paddy equivalent) in 1999 is estimated at 925 000 tonnes, which is well above average.

The overall food supply situation is satisfactory.

#### BURKINA FASO (1 February)

Seasonably dry conditions prevail. The 1999 aggregate cereal production has been estimated by a joint FAO/CILSS Crop Assessment Mission last October at 2 448 000 tonnes (with rice in paddy equivalent), which is 8 percent below the 1998 record but 2 percent above the last five years average. Millet and sorghum production decreased while maize and fonio production increased.

The overall food supply situation is satisfactory. Markets are well supplied and prices of local millet and sorghum are lower than previous years. However, some populations may be vulnerable following flooding or successive reduced harvests. Emergency food assistance (340 tonnes of assorted food purchased locally) is being distributed in the provinces of Boulkemdeto, Kouritenga, Passore, Poni, and Yatenga to 12 000 Burkinabe who fled since early November the area of Tebou in south-west Côte d'Ivoire following land tenure disputes in cocoa plantations. Around 4 000 have been identified as particularly vulnerable. Some of the returnees have started to return to Côte d'Ivoire.

#### CAPE VERDE (1 February)

Seasonably dry conditions prevail. An FAO/CILSS Crop Assessment Mission in October estimated 1999 cereal production at a record 25 700 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 has improved in rural areas affected by several successive poor crops. Following regular cereal imports, markets are well supplied and prices are stable. 1999 domestic production covers only about a quarter of consumption requirement, however, stocks and planned imports or food aid for the year 2000 are adequate to cover needs.

#### CHAD (1 February)

Seasonably dry conditions prevail. Off-season crops are growing satisfactorily and prospects are good for berbéré (recessional sorghum) in Chari Baguirmi, Mayo Kebbi and Salamat Prefectures as well as for maize and wheat crops in the Lake Chad polders. Reflecting adequate growing conditions, the aggregate 1999 cereal production has been estimated by a joint FAO/CILSS Crop Assessment Mission at 1 153 300 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. Prices of cereals remain stable. Farmers could reconstitute stocks for the second consecutive year or sell cereals to compensate for low cotton prices and poor groundnut production. Some areas were also flooded in Moyen Chari and Logone Oriental prefectures.

#### COTE D'IVOIRE (1 February)

Seasonably dry conditions prevail. Planting of the first maize crop will start in March following the onset of the rains in the south. Production of rice in 1999 increased due to good rains and area expansion. The aggregate output of cereals in 1999 is estimated at almost 1.7 million tonnes (rice in paddy equivalent), which is close to 1998 level.

The overall food supply situation is satisfactory. About 100 000 Liberian refugees and 1 500 Sierra Leoneans are present in the west. The number of Liberian refugees is decreasing due to repatriation.

#### THE GAMBIA (1 February)

Seasonably dry conditions prevail. Reflecting satisfactory growing conditions, the aggregate 1999 cereal production has been estimated by a joint FAO/CILSS Crop Assessment Mission at 137 150 tonnes (rice in paddy equivalent), which is 13 percent above 1998 and 29 percent above the five-year average.

The overall food supply situation is satisfactory. Markets are well supplied. However, some areas have been affected by substantial flooding, especially in the west.

#### GHANA (1 February)

Seasonably dry conditions prevail. Severe floods in September 1999 devastated three areas in the Northern Regions as major rivers burst banks. Some 332 000 people have been made homeless by the floods which have destroyed farmlands, crops and livestock and caused an outbreak of cholera in some villages. The aggregate output of cereals in 1999 is estimated at 1 686 000 tonnes (rice in paddy equivalent) which is slightly below 1998 and the average.

The food supply situation is tight for the populations affected by flooding. WFP is providing 900 tonnes of maize and 83 tonnes of beans to some 50 000 vulnerable people, including women, children and the elderly in Northern Region (30 000), Upper East Region (12 000) and Upper West Region (8 000). Water and sanitation remains a problem as small dams and wells were destroyed, particularly in the Upper East Region. Many water sources have been contaminated. About 10 000 Liberian refugees remain in the country. Out of these, only 2 000 are receiving food rations.

#### GUINEA (1 February)

Seasonably dry conditions prevail. Reflecting favourable growing conditions, the output of cereals in 1999 is estimated at a record of 1.04 million tonnes (rice in paddy equivalent). Markets are well supplied both in urban and rural areas. Surpluses are available in the Guinée Maritime and Guinée Forestière regions.

The overall food supply situation is satisfactory except for displaced persons and refugees. Some 488 000 refugees remain in the country (120 000 from Liberia and 366 000 from Sierra Leone). They are located mainly in Gueckadou (360 000), Forecariah (60 000) and N'zerekore (60 000). They are receiving food assistance and are considered at moderate nutritional risk.

#### GUINEA-BISSAU (1 February)

Seasonably dry conditions prevail. A joint FAO/CILSS Crop Assessment Mission estimated 1999 cereal production at 138 700 tonnes (rice in paddy equivalent), which is 6 percent above 1998, but 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.

Following recent presidential elections, the political situation should remain stable and the overall food supply situation has improved. However, some population groups are still facing food supply difficulties, notably in urban areas.

#### LIBERIA\* (2 February)

**Seasonably dry conditions prevail. Reflecting favourable growing conditions and an improved security situation, 1999 cereal production is expected to be similar to or above the previous year, except in the north where fighting broke out in Lofa County during the growing season. Agricultural production increased 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 prevailing peace 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 have not been able to harvest their crops. Several thousands have been displaced from Voinjama and Kolahum camps in upper Lofa to Tarvey and Sinje in lower Lofa.**

**The overall food situation has improved significantly in 1999. Food supplies in urban markets are relatively stable, and in general, prices are relatively lower than in 1998. Food supply in rural areas continues to be tight. Rehabilitation programs allow resettlement and reintegration of refugees and internally displaced persons through provision of repatriation packages. 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 have deteriorated. About 90 000 refugees from Sierra Leone remain in Liberia. The country continues to rely heavily on food aid.**

#### MALI (1 February)

Seasonably dry conditions prevail. Harvesting of rice is underway in the Niger River areas where fish catches are also very good (almost double compared to previous year). Prospects for off-season irrigated or recession crops are particularly favourable. Reflecting adequate growing conditions, the aggregate 1999 cereal production was estimated by a joint FAO/CILSS Crop Assessment Mission last October at 2 951 700 tonnes (rice in paddy equivalent). This exceeds the previous 1998 record by 16 percent and 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. Desert Locusts have been reported in the Timetrine area in December. About 1 700 hectares were treated out of 2 575 hectares infested. Locusts escaping control will concentrate in the remaining green areas of Adrar or move further north into southern Algeria.

Following two successive bumper crops, the overall food situation is satisfactory. Markets are well supplied and cereal prices decreased strongly following harvest and are much lower than the previous years. The national early warning system (SAP) estimated that only 3 arrondissements out of the 173 it monitors in the centre and the north (namely Baye, Diankabou and Ouenkoro), are moderately at risk of food shortages following floods which destroyed rice crops. Therefore, no food aid distributions or sales are required.

#### MAURITANIA (4 February)

Prospects for off-season and recession crops are excellent (anticipated to be the best in 30-40 years in many areas). Abundant precipitation during the rainy season filled dams and much larger areas can be sown with recession (walo) or "bas-fonds" crops. Pest attacks are also limited. However, the high level reached by the Sénégal river caused substantial flooding in Brakna, Gorgol and Trarza, in the Sénégal river basin and reduced irrigated rice production.

A joint FAO/CILSS Crop Assessment Mission in October estimated aggregate cereal production in 1999/2000 at 250 900 tonnes (with rice in paddy equivalent) which is 28 percent above the 1998/99 production and well above average. Desert Locusts have been reported in Dakhlet Nouadhibou, in northern Trarza and Tiris Zemmour. Breeding of sparse populations will continue in the extreme north-west but the development will be slowed down by low temperatures.

The food situation improved in rural areas following a good harvest, except in the flooded areas. Food distributions are underway for the affected populations. Markets are well supplied and prices of cereals declined substantially following harvest. By contrast, prices of imported food rose in December in Nouakchott.

#### NIGER (4 February)

Seasonably dry conditions prevail. Prospects for off-season irrigated crops are favourable. A joint FAO/CILSS Crop Assessment Mission estimated the 1999 cereal production at 2 832 600 tonnes (rice in paddy equivalent) which is about 5 percent below previous year's record of 2.98 million tonnes but 23 percent above average. Production of rice increased by almost 25 percent while that of coarse grains decreased. Desert Locusts have been reported in south-eastern Air in late December. They are expected to concentrate in the remaining green patches of vegetation of Tamesna and along the wadis and in the cultivated areas in the Air Mountains.

The overall food supply situation remains satisfactory. Markets are well supplied and prices of cereals are low. However, they surprisingly started to increase in December. The National Early Warning System estimated that no emergency assistance is needed. However, some areas in the arrondissements of Bilma, Diffa and Guidan Roundji may be somewhat vulnerable. As of late 1999, the national security stock has been reconstituted at a level of 12 277 tonnes of millet and 2 132 tonnes of sorghum.

#### NIGERIA (4 February)

Seasonably dry conditions prevail. Planting of the first maize crop is expected to start in March in the south.

The overall food supply situation is satisfactory. However, 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 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. Rising waters in Lake Chad have also left an estimated 25 000 people homeless in northern Nigeria. The government has approved in late 1999 the purchase of 55 000 tonnes of local grains as part of the country's strategic food reserve.

The government decided on 11 February to remove import duties and value-added tax on all agricultural inputs, including fertilizer. The government would no longer be involved in the importation and distribution of fertilizer.

#### SENEGAL (2 February)

Seasonably dry conditions prevail. Prospects for off-season irrigated or recession crops are favourable as large areas have been flooded in the Sénégal River valley. Reflecting adequate growing conditions, aggregate 1999 cereal production has been estimated by a joint FAO/CILSS Crop Assessment Mission in October 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. Following substantial imports of rice in late 1999, markets are well supplied and the price of rice is stable. Import taxes were reduced from 15.7 percent to 12.2 percent in early 2000. 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\* (4 February)

**An FAO Crop Assessment Mission visited the South West, Southern and part of Eastern regions in December 1999. The other northern or eastern regions were not accessible due to security constraints. The Mission found that the agricultural sector has been extensively disrupted by civil disturbances throughout the country, even including the Southern region where relative peace now prevails. Over the years, farmers have lost all their productive resources including seeds, implements and other capital assets. There has been large-scale destruction of infrastructure and rural institutions. As most rural farm families were displaced, availability of labour for planting and harvesting is a major constraint. Also, farmers' capacity to retain stocks is low due to financial constraints and the fear of looting by rebels. Practically all the farmers are dependent on Government and NGOs for the supply of seeds, and thus planted areas are highly determined by the capacity of these agencies to assist them. Due to shortages of seeds and other inputs, average rice area per farm has declined from about 0.80 hectare normally to about 0.60 hectare in the current year. Thus, the shortage of tools, fertilizers and labour adversely affected food production in 1999.**

The Mission estimated rice area in 1999 at about 225 000 hectares, about 21 percent below the 1998 estimate of 285 000 hectares. Despite very good rainfall, delayed transplanting and shortages of inputs resulted in a decline in yields of about 4 percent from the previous year. Thus, production of paddy is estimated as 248 220 tonnes for 1999, about 24.4 percent below the 1998 estimate of 328 310 tonnes. 1999 paddy production is around 45 percent of the pre-war (1990) production and just about 60 percent of 1997 production when the security situation improved in many parts of the country. In the South-West region, where the security situation has improved, production has increased slightly over the previous year. However, in the North, North-West and part of Eastern region, where insecurity was high and remained

inaccessible to most of the relief agencies, both area and yield decreased from the previous year.

Total cereal supply in 2000, including rice in milled form, is estimated at 181 000 tonnes against a utilization requirement of 510 000 tonnes, resulting in an import requirement of 329 000 tonnes for 2000. This compares with 1999 estimated imports of 290 000 tonnes, an increase of 13 percent. Over the war years, there has been a steady substitution of roots and tubers for cereals, and this largely explains the estimated small increase in cereal imports between the two years.

#### TOGO (4 February)

Seasonably dry conditions prevail. Land preparation and planting of the first maize crop is about to start in the south. Reflecting widespread and above-normal rains during the growing season, the aggregate output of cereals in 1999 is estimated at a record 748 000 tonnes (rice in paddy equivalent) which is 27 percent above 1998 level. This good result is mainly due to a strong increase of maize production, notably in Savanes, Plateaux and Kara regions where it increased by respectively 64 percent, 61 percent and 42 percent. Production of tubers and beans also increased by respectively 5 percent and 6 percent.

Following this record crop, the overall food supply situation is satisfactory. However, floods have been reported in the regions of Kara (in the north), Plateaux (in the west), Maritime (in the south) and Savanes (in the extreme north). The worst affected regions is Savanes where at least 1 000 hectares of arable land have been inundated, isolating villages and affecting an estimated 42 000 people.

## **CENTRAL AFRICA**

#### CAMEROON (4 February)

Planting of the first maize crop is going to start in the south. Reflecting favourable growing conditions, 1999 cereal production is anticipated to be average to above average. Strong rains led to water release from the Lagdo dam and flooding along the Benue river in the north, forcing the displacement of about 1 000 persons.

The overall food supply situation is satisfactory except in the flooded areas. About 1 000 Congolese refugees arrived in northern Cameroon in December.

#### CENTRAL AFRICAN REPUBLIC (2 February)

Seasonably dry conditions prevail. Reflecting abundant rains and favourable growing conditions, cereal production in 1999 is estimated at a record of 161 000 tonnes which is 10 percent above 1998.

Following successive record crops, the food supply situation is satisfactory.

#### CONGO, DEMOCRATIC REPUBLIC OF\* (4 February)

The food supply situation remains tight in most parts of the country as a result of the persistent civil war. In particular, severe food shortages and malnutrition are reported among the large numbers of the displaced population in northeastern Katanga, South Kivu and Ituri area of Upper Congo. In the latter, reports indicate that a serious humanitarian crisis is developing. A UN assessment mission to Djugu area of Ituri, estimated last October that over 100 000 people had been displaced and about 5 000-7 000 people killed. In another measure of the seriousness of the situation in the area, a recent nutritional survey by MSF showed 11.6 percent global malnutrition and 9.1 percent severe to acute malnutrition. In addition to

people who have died as a direct result of the conflict, there are the untold numbers that have died of illnesses or epidemics attendant upon living under marginal socio-economic circumstances or in the bush, without adequate access to drinking water or medical care.

Among the population most affected by the crisis, are also those in urban areas, in particular in the city of Kinshasa (about 6 million people). 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 in surrounding rural areas. Recent estimates indicate that about 10 percent of the population in Kinshasa is severely affected by the decline in purchasing power and suffer acute malnutrition, against 6 percent in 1998.

Overall, it is estimated that more than 10 million people in the country are living in conditions of food insecurity, including 1 million internally displaced persons. The most affected population remain inaccessible to humanitarian assistance due to insecurity and cut-off of roads. While WFP has recently created a fourth corridor to access displaced people in Northeastern Katanga and South Kivu, food aid pledges for the emergency operation remain well below requirements. There is an urgent need of additional contributions.

#### **CONGO, REP OF\* (2 February)**

Substantial floods affected the north of the country in early November and the districts of Mpila and Kangabanzi in the north-east of Brazzaville in late November/early December. The security situation has improved in the Pool region over the past months but remains fragile. Severe malnutrition is affecting the displaced population. Nutrition centres have been recently opened to help malnourished people. The rate of return of displaced people to the cities is rising fast. Of an estimated 810 000 people displaced last year, 370 000 were estimated to have returned by the beginning of January. By February the number of returnees is expected to be more than 400 000, and if the pace continues, some 600 000 could have returned by April or May.

#### **EQUATORIAL GUINEA (2 February)**

Rainfall remained low during the 1999 season but this would not affect too much food production as the staple crops are sweet potatoes, cassava and plantains.

#### **GABON (1 February)**

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 fled Congo-Brazzaville and are reported to be based in temporary sites in Libreville.

#### **SAO TOME (2 February)**

The staple foodcrops are roots, tubers and plantains. The country imports around 10 000 tonnes of wheat and rice annually.

## **EASTERN AFRICA**

### **BURUNDI\* (4 February)**

The output of the recently harvested 2000 A season crops is estimated to be lower than last year's already reduced level. This reflects adverse weather during the growing season, coupled with deterioration in the security situation. Following an early start of the rains, a prolonged dry spell from mid-October to mid-November resulted in reductions in plantings and yields, particularly in the northern province of Kirundo. The displacement and regroupment in camps of large numbers of population, as a result of the escalation of the civil conflict, occurred immediately after the beginning of the rains, also contributing to the reduction in the area planted. Provinces most affected by insecurity were Rutana, Makamba and Bujumbura rural.

The output of cereals is estimated at 74 000 tonnes, a decline of 13 percent from last year and that of beans 17 percent down at 62 000 tonnes. Production of roots and tubers and of bananas and plantains declined by 3 percent and 1 percent to 464 000 tonnes and 450 000 tonnes respectively.

The overall food and nutritional situation continue to deteriorate following a succession of reduced harvests and the persistent population displacement. Food prices have increased sharply from a year ago, mainly that of beans, the crop most affected by the dry weather. It is estimated that some 1.6 million people have been seriously affected by a drought-reduced harvest this season. Food aid is being distributed to 60 000 families in the province of Kirundo. In addition, the situation of some 800 000 (12 percent of the population) in regroupment camps gives particular cause for concern. Living conditions in the camps are extremely poor. Only a limited number of people have access to their fields, while the rest are entirely dependent on food aid. A nutritional survey carried out in nine regroupment camps last December shows a global malnutrition rate of about 18 percent and severe malnutrition rates between 3 and 5 percent. WFP resumed its normal activities in the camps in mid-November, since the suspension of all UN operations in mid-October.

### **ERITREA\* (7 February)**

The outlook for the sorghum crop, about to be harvested, in coastal areas is unfavourable due to drought. Furthermore, despite normal to above-normal rains in September and October the yields of the 1999 main season grains, which have just been harvested, were affected due to delayed sowing. In addition, in areas affected by armed conflict with neighbouring Ethiopia, production was seriously affected by population displacement.

The Desert Locust situation remains calm but with recent winter rains along coastal areas, there is risk of increased locust numbers along Red Sea coastal plains.

The food situation is very tight for nearly 600 000 people affected by the war with Ethiopia and prevailing drought along the coastal areas. Donor support is sought for an Emergency Operation approved by FAO and WFP in March 1999 for 44 321 tonnes, to provide food assistance for 268 000 people most affected by the war with Ethiopia, of which less than 5 000 tonnes had been delivered by the end of December. Total pledges by the end of December amounted to 31 000 tonnes, with only 15 000 tonnes delivered so far. The UN Country Team has also appealed in January 2000 for US\$42.7 million to assist some 372 000 war-affected and over 211 000 drought affected people.

#### **ETHIOPIA\* (3 February)**

Planting of the 2000 secondary "belg" season crops is about to start. The "belg" crop accounts for around 8 to 10 percent of annual cereal and pulses production but in some areas it is the main harvest.

Harvesting of the main 1999 "meher" season crops was completed late last year. An FAO/WFP Crop and Food Supply Assessment Mission in November/December forecast the cereals and pulses output of the 1999 meher season at 10.7 million tonnes, some 6 percent below the previous year's outturn but 22 percent higher than the poor year of 1997. Compared with last year, most of the reduction in production has come from a lower planted area (down by 4 percent), although the mean yield of all cereals and pulses has also fallen, by 2 percent. The most important factors affecting areas planted and yields were the poor belg rains, the late start of the meher rains and, in the unimodal areas of the west, the late start to the rains for long-season crops.

The dry belg season in much of the country (but specially in the north) left livestock in poor condition and in reduced numbers. The availability and performance of plough oxen were significantly reduced and land preparation suffered. The delayed main rains led to late cultivation and planting and, in some areas, long-cycle stalk crops (especially sorghum) could not be planted. In most areas there was a switch from long to short cycle crops (both to short season stalk crops and to small grains). Cultivation, planting and weeding of different crops were concentrated into a short time period and the effectiveness of these operations was poorer than usual. The reduction in production from last year is most severe in Tigray (35 percent decline) but the southern region (SNNPR) is also forecast to be down, by 12 percent. In terms of individual cereals, the greatest reduction is the 26 percent fall in sorghum production, with maize down 13 percent and barley slightly down on last year.

Furthermore, due to an on-going drought in the Somali region, where some areas have had three consecutive years of little or no rainfall, the food supply situation is critical with severe livestock losses and people migrating out of the region in search of water and food.

With a below-average belg crop of about 250 000 tonnes anticipated for 2000 (due to continued shortages of oxen and possibly of seed), the Mission estimates the national import requirement to be 764 000 tonnes - significantly above last year's level. A net relief food aid requirement in 2000 of almost 652 000 tonnes is estimated to support 7.8 million people affected by severe food shortages resulting from droughts, waterlogging and other weather related hazards. In addition to the relief needs caused by natural disasters, food aid will also be needed for IDPs coming from the border areas with Eritrea, who have been unable to plant their land and have lost income-earning opportunities.

The UN country team has recently launched an appeal for US\$ 190 million to avert another major humanitarian crisis in the country. Total pledges by mid-February amounted to 275 000 tonnes of which 57 000 tonnes have been delivered.

#### **KENYA (14 February)**

Harvesting of the 1999/2000 secondary "short rains" cereal crop, accounting for some 20 percent of annual production, is underway. Despite recent heavy rains that improved crop conditions somewhat, a below-average output is anticipated. Late and insufficient rains resulted in reduction in planting and negatively affected yields. Current estimates put the short rains maize crop at 315 000 tonnes, compared with the previous five year average of about 410 000 tonnes.

The output of the main "long rains" cereal crop, harvested until last October, was significantly reduced, particularly in Eastern, Central, Western and Nyanza Provinces due to drought, inadequate input supply and armyworm infestation in parts. Official estimates

indicate maize output of about 2.1 million tonnes compared to 2.44 million tonnes in 1998 and 2.5 million tonnes average over the previous five years.

The food supply situation is critical in the northern, eastern and north-eastern pastoral districts, particularly in Turkana District, where erratic and insufficient rainfall has caused successive crop failures and were insufficient for adequate pasture and water supplies. An Emergency Operation was jointly approved in January 2000 by FAO and WFP for food assistance to 2.74 million drought affected people, worth US\$ 43.4 million for a period of five months. The Government has also appealed in February for about US\$62 million to combat the looming food shortage.

#### **RWANDA\* (4 February)**

The output of the recently harvested 2000 A season was good despite severe crop losses due to dry weather in eastern and southern parts. Aggregate food production is estimated at 2.8 million tonnes, a rise of 20 percent from the previous year. A substantial increase in area planted compared to the 1999 A season, as well as overall favourable rains, supported the increase in production. However, a prolonged dry spell during the month of October, severely damaged cereal and beans crops in the Eastern and Southern provinces.

As a result of the satisfactory food production and increased flow of commercial imports, there has been an improvement in the overall food supply situation and a decline in food aid requirements for the first half of the year. However, the food situation remains critical for vulnerable people in several areas. A recent nutritional survey carried out in the Northwest province of Ruhengeri last December, indicate a global chronic malnutrition rate of 56 percent and a severe malnutrition rate of 2.5 percent.

#### **SOMALIA\* (14 February)**

Harvesting of the 1999/2000 secondary "Deyr" cereal crop, normally accounting for some 25 percent of annual cereal production, is underway. Preliminary estimates of the area planted indicate an increase of about 18 percent compared to the previous Deyr season for the sorghum crop, to 190 000 hectares and an increase of 4 percent for the maize crop, mainly in irrigated areas, to nearly 100 000 hectares. At crop establishment, the total cereal production for the 1999/2000 Deyr season is, therefore, forecast at about 130 000 tonnes, 85 percent above the post-war (1993-1998) average.

Despite expected food supply improvement in parts of southern Somalia with better Deyr harvest, nearly 68 000 agro-pastoralists in Bakool Region are facing severe food shortages due to poor rainfall. Hardest hit are farmers in Huddur, Wajid and Rab-Dure districts, where many have left their villages in search of food assistance. Furthermore, the food supply situation remains tight for the agro-pastoralists in Gedo, Bay and Hiran regions due to successive poor harvests and displacements. Poor rainfall in rainfed areas has equally affected crops, water sources and pasture availability, and the mainstays of the food economy. The vulnerable population in southern Somalia is estimated at over 500,000 people.

The main 1999 "Gu" season, harvested until last September, was estimated by an FAO/WFP Mission at 135 683 tonnes of cereals, about 32 percent below the post-war average due to low and poorly distributed rains, pests and displacement of farmers.

Elsewhere, in north-western Somalia (Somaliland) and north-eastern Somalia (Puntland), heavy rains during October/November caused some damage to property but improved water availability and pasture. However, the food situation remains precarious for poor pastoralists, estimated at 40 000 to 60 000 people, from the Haud region of Sool and Togdeer.

Food aid deliveries during the last quarter of 1999 were reported to be below the estimated needs due to security conditions and heavy rains that blocked roads. WFP distributed close to 230 tonnes of food during the month of December, mostly in southern Somalia bringing the total distributed from January to December 1999 to 20 480 tonnes.

#### **SUDAN\* (7 February)**

The outlook for the 2000 irrigated wheat crop, to be harvested from next month, remains favourable, reflecting abundant irrigation water supplies. An FAO/WFP Crop and Food Supply Assessment Mission, which visited southern Sudan from 10 October to 3 November 1999 and northern Sudan from 24 November to 13 December, forecasted cereal production at about 3.9 million tonnes in 1999/2000 comprising 3.05 million tonnes of sorghum, 499 000 tonnes of millet and 288 000 tonnes of wheat (to be harvested in April 2000) and 65 000 tonnes of maize (mainly produced in the south). At this level, cereal production is about 31 percent below last year's bumper crop.

Despite generally favourable weather, low sorghum prices for most of 1999, which in some cases have fallen below production costs, have prompted large-scale mechanized farmers, accounting for more than 60 percent of the total sorghum production, to reduce sorghum planting by some 50 percent. Many farmers have shifted to producing sesame, which gave much better returns last year, while others have simply reduced planted area. Lack of credit for agricultural inputs has also reinforced the farmers' decision to opt out of producing cereals.

In the Southern States, however, a relative improvement in security coupled with favourable growing conditions have yielded a 12 percent increase in cereal production from the traditional sector. Western Equatoria, which usually is a surplus area, has produced twice its local need this year due to favourable conditions and increased marketing opportunities offered by NGOs based in the State. By contrast, Unity State, which could not be visited by the Mission due to security problems, has suffered greatly from internecine fighting and Government/rebel clashes. Major cereal deficits are also estimated in Lakes and Bahr el Jebel due mainly to floods, and in specific localities throughout Jonglei, Upper Nile and Eastern Equatoria where conditions were not so favourable.

Expectations of lower harvests (sorghum and millet) in 1999 and the depletion of stocks due mainly to a surge in exports, have led to an increase in cereal prices which will have an adverse effect on poorer segments of the population. Overall, with the estimated cereal production and imports of wheat and rice estimated at 680 000 tonnes and 38 000 tonnes respectively, the country's cereal requirement of about 5.2 million tonnes in 1999/2000 is expected to be met by a draw-down of stocks of nearly 240 000 tonnes.

For the various interventions in southern Sudan, war affected and food deficit regions in the northern states, it is estimated that a total of 103 453 tonnes of food aid will be required during 2000. An Emergency Operation was jointly approved in January 2000 by FAO and WFP for food assistance to 2.4 million people affected by war, drought and floods, worth US\$ 58.14 million for a period of 12 months.

#### **TANZANIA (4 February)**

Harvesting of the 1999/2000 short "Vuli" season crops is well advanced in the bi-modal rainfall areas of the northern coastal belt and north-eastern, where the crop accounts for some 40 percent of the annual food supplies. Poor rains during the growing season have prompted farmers to drastically reduce plantings and have affected yields. Recent official reports suggest that the current Vuli crop is expected to be about 70 percent below the previous five years average.

The 1999/2000 cereal crop, mainly maize, is estimated at 4 million tonnes, about 8 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.

Overall, the food supply situation is stable reflecting large maize imports in the latter half of 1999 and the maize export ban imposed by the Government. In the last quarter of 1999, maize prices in several markets of the country were up to 40 percent lower than at the same period a year earlier. However, food assistance is required for nearly 800 000 people identified as food insecure, mainly in the regions of Dodoma, Mara, Shinyanga, Singida, Tabora, Tanga and southern Mwanza, all of which have now suffered their third consecutive poor harvest. WFP school-feeding programme began in January in 128 primary schools in Dodoma region and is expected to expand to Arusha and Singida regions.

#### **UGANDA (7 February)**

Harvesting of the 1999/2000 second season cereal crops is well underway. The output is anticipated to be average to above average reflecting well distributed rains during the season. However, in Gulu and Kitgum Districts, despite reported large increases in area cultivated due to earlier improved security and favourable rainfall, the escalation of conflict since late December 1999 has displaced many farmers thus hindering the timely harvesting of crops.

The output of the main season crop, harvested from late last summer, was below average due to a prolonged drought experienced in various parts of the country. Cereal production in 1999 is estimated to be about 9 percent below average at 1.7 million tonnes.

Prices of maize and beans, which were unseasonably high following last year's reduced main season crop, have started to decline with the arrival of the new crop in the markets. Nevertheless, the food supply situation has deteriorated in Kotido and Morito districts, with nearly 215 000 people needing urgent food assistance, mainly due to last season's poor harvest and loss of cattle due to raids. Also, the food supply situation in Gulu and Kitgum gives cause for serious concern due to renewed civil conflict. Furthermore, food assistance continues to be needed for nearly 112 000 people in Bundibugyo District displaced by civil unrest.

### **SOUTHERN AFRICA**

#### **ANGOLA\* (10 February)**

The escalation of the civil war in recent months has resulted in a deterioration of the food situation in the country and is disrupting agricultural activities. The outlook for the 2000 cereal crops is uncertain. Overall good rains since the beginning of the season have provided adequate soil conditions for planting and crop developing, despite localized floods in early January in southern areas. However, persistent movements of population fleeing from violence, are likely to negatively affect production.

Fighting has intensified in recent months along the southern border with Namibia and in many other areas of the province of Kuando Kubango. The number of Angolan refugees in Namibia has increased to 9 000, while in the eastern border with Zambia the number of refugees has reached 170 000. Insecurity incidents are also reported from Huila, Huambo and Benguela provinces.

The food situation is particularly critical for the internal displaced population, estimated at 2 million. Malnutrition is on the increase among this people and daily deaths for starvation have been reported from Coconda municipality in Huila and from other areas. However,

**persistent insecurity hamper access to the population in need of emergency food assistance in several parts, including Andulo, province of Bie, Kuando Kubango, Kuito, Moxico and Zaire.**

**Food aid is being distributed to some 1.1 million people, including 6 000 affected by recent floods. Against overall food aid requirements for the 1999/2000 marketing year (April/March) of 180 000 tonnes of cereals, 123 000 tonnes have been pledged by end-January, of which 100 000 tonnes have been delivered.**

#### BOTSWANA (14 February)

Torrential rains from 7 to 9 February, which in southern areas were equivalent to three quarters of the annual precipitation, resulted in the worst floods in 30 years causing loss of life and severe damage to infrastructure and housing. The country's main road and railway have been cut in several places. Preliminary assessment indicate that 25 000 people has been affected and some 4 000 homes have been destroyed. An evaluation of the damage to agriculture is not yet available but crop losses are reported in several areas. The outlook for the 2000 cereal crops, mostly sorghum is uncertain. Precipitation during December and January had been generally adequate in cereal growing areas, but the excessive rains of February are likely to have negatively affected the developing crops.

The food situation is difficult for the populations who have lost their properties and for those who remain isolated by floodwaters. The Government is providing emergency assistance to people left homeless and has asked for humanitarian assistance, including tents, blankets and food rations. At the overall level, the food supply situation is stable reflecting the commercial import capacity of the country.

#### LESOTHO (14 February)

Prospects for the 1999/2000 cereal crops, to be harvested from May, are uncertain. Abundant rains in the first dekad of February provided relief to the 1999/2000 cereal crops stressed by below average precipitation in January, but they may have arrived late to avoid reductions in yields. Rains started late and have been irregular during the season.

The 1999 wheat crop is estimated at 14 000 tonnes, half the level earlier anticipated, reflecting the adverse effect of dry spell on the crop. The output of the 1999 coarse grains has also revised downwards to 158 000 tonnes, still 12 percent above the reduced production of the previous year.

The food supply remains stable following adequate levels of commercial imports.

#### MADAGASCAR (14 February)

**The outlook for the 1999/2000 rice crop is unfavourable. After a good start of the rainy season in November, below-average precipitation from the third decade of December to the first dekad of February in the main growing areas in the north has resulted in severe planting and yield reductions. In the important growing region of Lac Alaotra, only 20- 25 percent of the area under rice have been cultivated this season. Paddy production is forecast to decline from the good level of 1999.**

**The food supply situation is satisfactory reflecting the 1999 good cereal harvest, particularly in the structurally deficit areas of the South.**

#### MALAWI (10 February)

Prospects for the 1999/2000 maize crop are uncertain, reflecting erratic and patchy rains since the beginning of the season. After good rains in November, which favoured planting operations and benefited early-planted crops, a prolonged dry spell during December, particularly in the main

growing areas in the south, severely stressed developing crops. Widespread rains received in the first half of January provided relief to the moisture-stressed crops, but were too late in some areas where yield reductions are anticipated. Dry weather resumed in the third dekad of January and irregular precipitation in early February may have been insufficient to avoid further reduction in yields.

The overall food supply remains satisfactory following the record cereal crop of last year, which resulted in exportable surplus and a substantial increase in maize stocks. Food prices remain stable.

#### **MOZAMBIQUE (14 February)**

**Torrential rains in the first dekad of February in the south of the country has resulted in the worst floods in 50 years, causing a large number of deaths and considerable damage to infrastructure and housing. Many towns have become isolated due to the destruction of roads and bridges, while continuous rains are hindering evacuation and relief operations. As a result of contamination of drinking water, diseases such as malaria and cholera are expected in the coming weeks. The number of the people severely affected by the floods is currently estimated at 300 000 but is rising. Worst affected area is the province of Maputo; the number of displaced people in the cities of Maputo and Matola is estimated at 150 000. The Government has appealed for US\$2.7 million in international assistance to cope with the emergency but this amount does not include the cost of food assistance. WFP is currently distributing emergency food aid to 150 000 persons in the country.**

**The outlook for this year's cereal harvest is poor. Anticipated crop losses in southern parts will add to planting reductions due to erratic and highly localized rains since the beginning of the season in November. An assessment of the agricultural and crop losses is underway. However, preliminary indications point to an urgent need for seeds and tools to increase plantings profiting from water recession.**

#### **NAMIBIA (10 February)**

After a good start of the rainy season, prospects for the 2000 maize and sorghum crops have deteriorated as a result of a one-month dry spell in northern growing areas. More precipitation is urgently needed to avoid yield reductions. Pastures and livestock are reported in good conditions following earlier good rains.

The 2000 wheat crop was estimated average at 5 000 tonnes.

The food supply situation remains stable reflecting an increase in production last year and the country's import capacity.

#### **SOUTH AFRICA (14 February)**

Heavy rains in the north of the country during the first dekad of February resulted in floods, causing loss of life and damage to housing and infrastructure. Several towns have become isolated and an estimated 100 000 persons have been left homeless by floodwaters. Worst affected areas are the Northern, Mpumalanga and Guateng provinces. Preliminary estimates for the Northern Province alone indicate the cost of the infrastructure damage at US \$33 million. An estimate of the agricultural damage is not yet available.

Despite anticipated localized crop losses, the abundant rains of early February are likely to have benefited the maize crop stressed by below average precipitation in the second and third dekads of January in central areas. However, the outcome of the season will depend on the weather in the remaining of the season. Preliminary estimates of the area planted to maize point to an increase of 10 percent from last year level due to diversion of land from other crops.

Latest official estimates indicate a 1999 wheat output of 1.52 million tonnes, slightly less than last year's below average crop. This mainly reflects diversion of land to more profitable crops, but also reduced yields in parts.

The food situation is difficult for large number of people who has lost their properties or is isolated by the floods. However, the overall food supply situation remains satisfactory. Despite the reduced coarse grain harvest of last year, commercial import of yellow maize, wheat and rice continue at adequate levels.

#### SWAZILAND (14 February)

Torrential rains in the first dekad of February resulted in floods following the break of ten rivers banks. Loss of life and extensive damage to roads, bridges, basic infrastructure and housing are reported. Water shortages are being experiencing in the capital city Mbabane. An assessment of the damage to agriculture is not yet available as fields are still waterlogged. Prospects for the 1999/2000 maize crops are uncertain. Precipitation during the rainy season had been generally adequate but the recent floods are likely to have negatively affected crops at a critical development stage.

#### ZAMBIA (10 February)

Prospects for the 1999/2000 cereal crops are uncertain. Rains have been irregular and patchy since the beginning of the season, with prolonged dry spells in December and January. Widespread rains are needed soon to avoid reductions in yields.

Estimates of the 1999 wheat crop have been revised downward to 90 000 tonnes, but at this level is still 27 percent up from the previous year and a record level.

The food supply situation remains overall stable as a result of a recovery in the 1999 maize production and a good harvest of non-cereal crops.

Heavy fighting in southeast Angola between government forces and UNITA rebels in recent weeks, has raised fears of a fresh refugee influx into Zambia, where around 170 000 Angolans have already fled. The conditions of these refugees are poor as heavy rains and impassable roads hamper emergency food aid distributions.

#### ZIMBABWE\* (4 February)

Normal to above normal rains in the first dekad of February provided relief to the 1999/2000 cereal crops stressed by dry weather in late January. Although rains have been erratic since the beginning of the season, growing conditions are generally adequate for the developing crops. However, the outlook for the harvest is poor as a result of a decline in the area planted from both last year and the average level. This reflects a widespread dry spell in December, that adversely affecting sowing operations, as well as diversion of land to other crops following low support prices for maize, coupled with high prices and low availability of agricultural inputs.

The 1999 wheat crop, harvested until last November, was estimated record at 320 000 tonnes. The increase reflected higher plantings and yields.

The overall food supply situation is satisfactory following the recovery on last year production and adequate levels of maize imports so far. However, prices are reported on the increase in deficit areas, as well as in urban areas.

## **ASIA**

### **AFGHANISTAN\* (7 February)**

Cereal production, for harvest from May/June, is expected to be constrained by shortage of agricultural inputs and persistent insecurity in the provinces of the north, which comprise some 40 percent of the country's irrigated area. Due to low level of precipitation and outbreak of pests, total cereal production in 1999 is estimated at 3.24 million tonnes (rice in paddy equivalent), about 16 percent below the previous year's bumper output of 3.86 million tonnes.

The food situation is tight for the displaced population. Recent reports indicate that nearly 350 000 internally displaced people in Kabul alone are being targeted by WFP. In 1999, food aid has been distributed to more than 60 000 vulnerable households in the central highlands and to some 8 000 people in the north-eastern province of Badakhshan.

Commercial imports of cereals in 1999/2000 are forecast at 800 000 tonnes, about one-third higher than the previous year due to increased private sector activity, cash crop production and active cross-border trade. This compares with a cereal import requirement of about 1.1 million tonnes, of which more than 95 percent is wheat.

### **ARMENIA\* (3 February)**

Indications are that the winter crop area has been further reduced in response to uncompetitive yields and higher fuel prices. By November 1999, only 65 000 hectares had been sown to winter crops.

The 1999 grain harvest is officially estimated at 298 000 tonnes, some 9 percent less than the 326 000 tonnes harvested in 1998. Winter wheat output declined reflecting mainly imports competition from cheaper Russian grain in the wake of the rouble devaluation in 1998 and below normal autumn and winter precipitation. In 1999/2000 the cereal import requirement is estimated at nearly 392 000 tonnes. Against this requirement food aid pledges of roughly 81 000 tonnes have been made. The balance is expected to be imported commercially.

Domestic production and imports are covering the country's food needs, and per capita consumption is slowly recovering from the low levels of the early nineties but household purchasing power remains low. In total, some 170 000 vulnerable people will be covered by WFP food assistance, including some 110 000 refugees and vulnerable persons being provided with relief food aid, and 60 000 will be reached through community based food-for-work activities, supporting economic and social development. The programme is planned for three years and will be reviewed annually.

### **AZERBAIJAN (3 February)**

The area sown to winter crops (mainly wheat), had reached 450 000 hectares by late November. Although about 6 percent more than that sown for the 1999 harvest, it remains about two thirds of the average up to 1997, in response to import competition from imported wheat following liberalization of the grain trade.

A Joint FAO/WFP mission, which visited the country in November 1999, found that the outlook for significantly increasing cereal (mainly wheat) production in the short term is poor. Lack of access to credit for quality seed and fertilizer, coupled with the unreliable availability of irrigation water supplies, prevent most farmers from increasing the yield of domestic wheat to a level where it would be competitive with imports in urban areas, and increasingly, in rural areas. In addition, poor marketing infrastructure and the lack of an enabling environment for producers, processors and traders has severely limited investment in the agri-food sector and domestic producers' access to the growing urban markets. Rural households are increasingly producing food for autoconsumption, selling surpluses on the rural market. Moreover, private

farmers are shifting land to more profitable crops (potatoes, vegetables, fodder crops) and livestock production.

Grain production in 1999 is forecast at 1 090 000 tonnes, 14 percent more than in 1998 but still nearly 20 percent below output in 1991. Improved yields because of better weather and management by private farmers offset the sharp reduction in the area sown to grains. Production of potatoes and vegetables has increased but that of cotton, tea, tobacco and grapes continues to fall. Production of meat, milk and eggs expanded in 1999.

There is no shortage of food in rural or urban markets. Any shortfall in domestic production is offset by imports. Urban areas are almost entirely supplied by imported wheat, as well as poultry and processed products. In 1999/2000 imports of cereals are estimated at 601 000 tonnes, about 10 percent less than last year. The bulk of this will be covered commercially although the vulnerable groups, including the internally displaced, still need targeted food assistance. WFP continues to support to 485 000 beneficiaries through the 3-year Protracted Relief and Recovery Operation which started in July 1999. Total food commodities committed for the life of the project amount to 47 880 tonnes of food aid. The current programme supports IDPs with supplementary assistance, relief support to socially vulnerable groups, resettlement of refugees/returnees and recovery through food-for-work and food-for-training.

#### BANGLADESH (1 February)

Rainfall during the important aman rice season, (1999/2000) planted around July and harvested in November/December was favourable benefiting crops. By the end of the monsoon season, all areas had received above-average rainfall, compared to only 90 percent with normal/above-normal rainfall in 1998/99. Area planted also increased from around 5.16 million hectares in 1998-99 to 5.8 million hectares, whilst yields are also likely to be higher due to an increase in the area of high yielding varieties planted. As a result, it is expected that the country will exceed the aman target of 9.5 million tonnes (milled) for the current marketing year. Early prospects for the recently planted boro rice crop, for harvest in April/May, however were somewhat affected by pest attacks in parts. The target for boro production has been set at 9.2 million tonnes, lower than actual production last year. Earlier, the final estimate of the 1999/2000 aus rice crop was put at 1.73 million tonnes, some 6 percent higher than the previous season.

Foodgrain production in 1999-2000 is forecast at around 22.4 million tonnes (milled), some 4 percent above last year. The overall food situation is favourable, with the country having the highest level of food stocks in decades due to the bumper rice crops in 1999. Currently governmental rice and wheat stocks are estimated at 1.2 million tonnes. As a result official reports indicate that Government imports during 1999/2000 will be negligible whilst a five percent levy has been placed to discourage private imports.

The Government aman procurement target for the current has been set at 250 thousand tonnes. With favourable rice supplies in the country, domestic prices declined in November/ December

#### CAMBODIA (1 February)

The harvest of early and medium rice varieties was completed by mid-January, some 2-3 weeks later than normal, whilst harvesting of longer duration varieties will be completed by early February. Notwithstanding flood and drought that adversely affected wet season rice production in parts of the country, 1999/2000 rice production is forecast at around 3.8 million tonnes, some 8 percent above 1998/1999. At this level of production, output would be similar to levels in the early 1970s, when the country regularly exported rice. As a result of favourable prospects, rice prices in late January eased whilst cross border exports to neighbouring Vietnam increased.

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.

Despite a satisfactory food supply situation overall, a sizeable section of the population remains vulnerable to food shortages. In part some of these needs are being met through a WFP Protracted Relief and Recovery Operation.

#### CHINA (1 February)

Despite cold weather in the south which adversely affected winter wheat in some less important producing areas, overall widespread precipitation increased moisture supplies for winter wheat across main wheat producing areas in north central parts of the country. Official reports indicate that the area under winter wheat (planted Oct/Nov for harvest from April/May) declined to 23.7 million hectares, some 7 percent lower than 1998. The decline in area planted is mainly attributed to lower producer prices and substitution to other crops considered more profitable, such as oilseeds and vegetables. Lower prices and sizeable stocks in the country, are also likely to result in a decline in the area planted of maize in 2000, and farmers are likely to substitute more soya, vegetables or ground-nuts for maize.

The grain production target has officially been revised down to 490 million tonnes from estimated production of 500 million tonnes (including roots and tubers) in 1999. The downward revision is officially attributed to large grain stocks in the country and lower prices of some commodities and lower area planted.

Wheat imports in 1999 are expected to be significantly lower than 1998, when main producing areas were adversely affected by serious drought.

#### CYPRUS (7 February)

Sowing of the 2000 wheat and barley crops for harvest from May has been completed under generally normal weather. Aggregate wheat and barley output in 1999 is estimated at 106 000 tonnes, some 63 percent above the previous 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.

#### EAST TIMOR (4 February)

**Violence following the referendum for independence at the end of August last year, resulted in large numbers of deaths and massive population displacement. It also severely affected food distribution and marketing systems and essential services. An FAO/WFP Crop and Food Supply Assessment Mission last November, however, noted that although infrastructure and property damage was extensive, agricultural damage was less severe as crops had already been harvested and only relatively minor second season crop were damaged. The mission also noted that notwithstanding the importance of food assistance in the months between November 1999 and March this year when harvesting of main crops commences, the overall**

food supply prospects in the medium to long term (the 2000/2001 marketing year April/March) are less gloomy than envisaged at the height of the crisis following the referendum.

In addition to reinstating food production, considerable amount still needs to be done in repairing infrastructure and inducing recovery in the economy. Although an international agreement amongst key donor countries was reached late last year to provide US \$ 522 million in aid, reports indicate that relatively little has been disbursed so far.

Of the original population of some 900 000 people before the crisis, it is estimated that up to 174 000 still remain in refugee camps in West Timor. UNICEF estimates that around 24 percent of refugee children in camps in border areas are suffering from moderate to severe malnutrition, whilst four percent were severely malnourished. The prevalence of diarrhoea and respiratory infection among young children is also reported to be high.

In addition to food aid, as part of the consolidated UN Interagency Appeal for East Timor, FAO has prepared a number of initiatives to rehabilitate agriculture and food production. These include the distribution of urgently needed maize and paddy seed last planting season and the deployment of an agricultural expert to assist the Emergency Coordination Unit in Dili to monitor the situation and advise on needed interventions in agriculture. An important initiative already advocated is the establishment of a seed multiplication programme to provide high quality seed to future returnees and to strengthen the quality of indigenous seed stock.

#### GEORGIA\* (3 February)

The area planted to winter crops (mainly wheat but also barley) fell further, partly due to the sharp increase in the price of fuel during the planting period. The sown area to winter crops fell to 110 000 hectares from 134 000 in the preceding year, and is below target (124 000 hectares). An FAO Crop and Food Supply Assessment Mission, which visited the country in November 1999, found that the aggregate area being farmed is recovering, but that the wheat area is declining steadily, in favour of more profitable crops (sunflower, potatoes, vegetables and maize) and also due to competition from imports of wheat.

Despite a reduction in the area sown to wheat, the 1999 grain harvest is officially estimated to have increased by 182 000 tonnes to 780 000 tonnes, including 280 000 tonnes (1998:168 000 tonnes) of grains other than maize and 490 000 tonnes (1998: 420 000 tonnes) of maize. Actual production could be somewhat higher. The efficacy of data collection is hampered by the lack of funds and the margin of error in data on foodcrop production is high. FAO's estimate of production in 1999 is 850 000 tonnes, some 10 percent higher than official data. Above all, timely rains during the growing season as well as some improvement in farmers' access to inputs and better care for crops by private farmers have led to markedly better yields than in 1998. Production of potatoes, vegetables, sunflowerseed and tea has also increased sharply, but fruit/citrus production declined further in the absence of an effective marketing/processing system.

The existence of sizeable unregistered flows of cereals (particularly wheat and flour) into the country and the transshipment to other neighbouring countries make analysis of the supply and demand situation difficult. In 1999/2000, aggregate cereal utilization is estimated at nearly 1.5 million tonnes of cereals, including 815 000 tonnes for human consumption, 100 000 tonnes for seed/processing/losses and the balance for feed. Based on the findings of the Household Budget Survey, per caput consumption of cereals is estimated at 173 kg/person per year. Given a resident population of 4.7 million, the aggregate use of cereals for food is estimated at 815 000 tonnes, including 650 000 tonnes of wheat and 155 000 tonnes of maize. Given domestic production (excluding pulses) of 841 000 tonnes, imports of cereals are estimated at 555 000 tonnes, about 8 percent less than last year, when wheat was more easily available and cheaper in neighbouring countries. Against this requirement, food

aid pledges amounting to 80 000 tonnes have been reported to date. The balance is expected to be imported commercially.

There is no shortage of food in rural or urban markets. Any shortfall in domestic production is offset by imports. Although GDP has grown since 1996, it is still only about one third of that in 1990. However, available GDP statistics have to be treated with caution. In addition, income disparity has increased greatly. Food constitutes a large proportion of household expenditures, and a considerable percentage of the population is poor. Although there is no officially recognized acute malnutrition, a slow but clear increase of malnutrition among children is being observed, despite some targeted distribution of supplementary food aid. In all, several hundred thousand people still need humanitarian assistance, including the 182 000 receiving assistance from the World Food Programme under the current Protracted Relief and Recovery Operation. The PRRO is for a period of one year with a total food commitment of 18 190 tonnes and a total WFP cost of about US\$10 000 000. The WFP assistance under PRRO is comprised of two components - (i) protracted relief with free food distribution to the most vulnerable people and (ii) recovery through food for work. .

#### INDIA (1 February)

The main rabi (winter) crop currently in the ground is wheat, which is planted in the period October to December, for harvest in March/April. The area under the 1999/2000 crop is reported to have decreased somewhat compared to the previous year. In main producing areas in the north, recent rains improved prospects, though in general rainfall was below normal in many growing areas, with 37 percent of wheat area receiving below-average rainfall up to the end of January, compared to almost none last year. Rainfall during the rabi season, however, is less critical than during the monsoon season, as many areas rely on irrigation. Temperatures have been generally favourable. Wheat is the major component of the winter crop and contributes around 40 percent to national food grain production. In 1999 a record 73 million tonnes were produced. The area under rabi rice, in contrast, has declined by around 10 percent to 1.6 million hectares compared to 1.8 million hectares last year.

The latest estimate for 1999/2000 kharif (monsoon) rice production is put at 74.8 million tonnes (milled) some 3 million tonnes, or 4 percent above 1998. Overall 1998/99 food grain production was a record 202.5 million tonnes, including pulses.

The overall food situation in the country is satisfactory with large Government stocks of cereals. The Food Corporation of India (FCI), is estimated to have around 17 million tonnes of wheat in stock at the beginning of January 2000, compared to a minimum buffer requirement of around 8 million tonnes for this time of the year. The Government announced recently that the target for wheat procurement for the 2000/2001 marketing year, from April, has been set at 15 million tonnes, compared to an estimated 14 million tonnes which is likely to be procured during the current 1999/00 year. At the beginning of December last year the Government imposed a 50 percent levy to restrict cheaper wheat imports.

#### INDONESIA\* (1 February)

Seasonably heavy showers over main rice producing areas in Java, in the first half of January increased moisture supplies for main-season rice, planted from Oct/Jan for harvest from March/April. The target for paddy (unmilled) rice production in the current year, has been set at 50 million tonnes (around 33 million tonnes milled), similar to output in 1999.

Following the Asia financial crisis and El Niño related weather disturbances that affected domestic food production in 1997/98, leaving large numbers of people vulnerable to food shortages, food supply prospects are forecast to improve. This is due to indications of economic recovery, which is having a positive impact on exchange rates and food prices and the return of greater consumer and investor confidence in the economy. Agricultural production is also anticipated to be satisfactory in 1999/2000, in view of greater economic stability, increasing consumer confidence and specific

Government programmes and efforts at increasing domestic food security and self sufficiency. Overall rice supplies are anticipated to remain satisfactory up to the harvest of the main paddy crop from March, with prices likely to remain competitive in view of imports and prospects of a reasonable harvest. In late 1998 the Government allowed private imports of rice. As import prices, especially of lower quality grades (25 percent and A1) remained much lower than domestic prices through out 1999, in September private imports were restricted to 5 percent broken or above only, to prevent further fall in domestic prices. However, as imported rice, still remained cheaper and sizeable private imports continued in October and November, further depressing prices, at the end of 1999 the Government imposed a 30 percent tax on imported rice to prevent further falls. The import levy came into effect on 1 January 2000. Total rice imports in 1999 are estimated at 4 million tonnes, significantly lower than around 6 million tonnes imported in 1998.

#### IRAN, ISLAMIC REPUBLIC OF (1 February)

Storms across northern parts of the country in mid-January, killed several people and destroyed more than 1 000 homes. The worst affected area was the province of Gilan, though the full extent of damage to agriculture is yet not known. Currently the main crops in the ground are wheat, the country's main staple and barley, which is extremely important for the livestock sector, on which a large part of the population depend. Harvesting of barley will commence from March, whilst that of wheat will begin around May/June.

In 1999, the worst drought in 30 years severely affected agricultural production, as a result of which domestic wheat production fell by 25 percent from around 12 million tonnes in 1998 to around 9 million tonnes. Rice production (milled) also fell significantly by around 17 percent from 1.74 million tonnes to 1.45 million tonnes, whilst barley output went down from around 3 million to 2.5 million tonnes. As a result of the shortfall in crop production, large imports were necessary to meet demand, including some 6 million tonnes of wheat. The country is one of the largest importers of rice.

#### IRAQ\* (7 February)

**Despite recent beneficial rains prospects for the 2000 cereal harvest in May/June remain uncertain, as extended drought substantially affected planting. Production is also likely to be constrained by serious shortages of essential agricultural inputs. Last year, in addition to the shortage of agricultural inputs, a severe drought and 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 also caused serious damage to livestock, already weakened by foot-and-mouth disease.**

**In December 1999, the UN Security Council approved the seventh phase of the "Oil-for-food" programme, from January to June, which anticipates oil revenues of US\$5.26 billion, but may be revised upward if earnings are higher, to buy food, medicine and health supplies, and for emergency repairs to infrastructure. Despite some improvement in the overall food supply situation following the implementation of the "Oil-for-food" deal, health and nutritional problems remain widespread in many parts.**

#### ISRAEL (7 February)

Recent beneficial rains improved prospects for the 2000 wheat and barley crops, to be harvested from April. Domestic production of wheat in normal years covers less than one-fifth of total requirement, the rest being imported commercially. Wheat production in 1999 was estimated at 152 000 tonnes, about 10 percent below the previous year, due to severe drought which affected several countries in the Near East. Imports of cereals in 1999/2000 (July/June) are forecast at some 2.6 million tonnes.

#### JAPAN (1 February)

In January/February there are no major agricultural crops, the main rice crop being planted in May/June for harvest in October/November. 1999 rice production was officially estimated at around 9.1 million tonnes, slightly higher than the previous year. The increase was attributed to favourable weather in main rice growing regions. Under government schemes to balance supply and demand, the area under rice declined to around 1.78 million hectares in 1999 from 1.8 million hectares in 1998.

#### JORDAN (7 February)

**Despite recent beneficial rains, the prospects for the 2000 wheat and barley crops, for harvest in May/June, are poor due to prolonged drought that delayed sowing. In 1999, a severe drought seriously damaged cereal and horticultural crops. Consequently, aggregate output of wheat and barley in 1999 declined by 86 percent to 15 000 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 exacerbated losses.**

**Total cereal import requirement for the 1999/2000 marketing year (July/June) is estimated at 1.94 million tonnes. 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 1999 for food assistance to 180 000 vulnerable people, worth some US\$429 000 for a period of nine months.**

#### KAZAKHSTAN (3 February)

The bulk of the cereals are grown in the spring. Winter grains account for a very small proportion of the total harvest.

The 1999 grain harvest is officially estimated at 14.2 million tonnes cleaned weight, i.e. more than double the poor 1998 harvest which was officially put at 6.4 million tonnes. The area sown to grains remained stable and the markedly better outcome is due to timely rains during the growing season and at harvesting. As a result, 96 percent of the sown area was 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. However infrastructure and logistical considerations are likely to keep exports lower and grain exports in 1999/2000 are tentatively estimated at less than 5 million tonnes, mainly to other CIS countries. Between July and December 1999, in excess of 3 million tonnes of cereals, mainly wheat have been exported.

#### KOREA, REPUBLIC OF (1 February)

Despite heavy rains and flooding during the 1999 crop season, overall paddy production was around 5.2 million tonnes, from an area of approximately 1.06 million hectares. The level of production was around 146 000 tonnes or almost 3 percent above output in 1998. In general, the number of productive farms and rice acreage is declining in the country as more land is made available to

infrastructure and urban development. Any future expansion will come mainly from marginal and reclaimed land, including land subject to flooding. Yields in these areas will be below average and highly dependant upon weather. In view of falling domestic production, most of the country's food needs are imported.

#### **KOREA, DEMOCRATIC PEOPLE'S REPUBLIC OF\* (1 February)**

Currently no main agricultural activities are underway, whilst winter wheat and barley will remain dormant till spring, around March, and warmer weather. March is also the time for spring wheat and barley planting. In view of harsh climatic conditions and topography, the country is restricted to planting one main crop of rice and maize per year the main staples, from May for harvest in September/October. Much depends on this period, with the country suffering severe setbacks from 1995 to 1997, when floods and drought seriously reduced domestic food supplies.

In comparison to these adverse years, 1998 and 1999 saw relative stability in agricultural production. However, production trends during these years, indicate that DPR Korea has entered an era of relatively low-input low-output agriculture. Even in the absence of major natural hazards, therefore, domestic food production will remain well below minimum needs due to serious lack of investment and essential inputs into agriculture. Despite substantial improvement in the 1999 crop season, fertilizer availability remains well below requirements. Fuel and energy for critical mechanized operations are in very short supply, whilst large numbers of tractors and machines are inoperable due to lack of spare parts and replacement. These, in turn, are due to serious economic contraction and critical shortage of foreign exchange for necessary purchases of inputs and food. Shortage of capital has resulted in severely reduced land and labour productivity, whilst more and more operations are becoming labour intensive. Overall, therefore, under prevailing constraints, the country has serious problems of maintaining agricultural production and food supply.

Due to chronic food supply constraints, the last four years have already witnessed a significant decline in living standards, as per caput availability of food has shrunk, whilst serious health problems have increased due to lack of resources, drugs and essential supplies. A vicious circle of poor nutrition compounding poor health and vice versa has, therefore, become deeply entrenched. The full extent of the problem and the inter-linkages is not known as a comprehensive nutritional survey is yet to be undertaken. The government has advised that a nutrition survey will be carried out in April 2000. There will be no international participation as with the 1998 WFP/UNICEF/EU nutritional survey which indicated an acute malnutrition rate of 16 percent, amongst children six months to 7 years, which represents one of the highest rates of wasting in the world.

In view of chronic food supply problems, WFP has so far this marketing year (November/October) provided 96 000 tonnes of food assistance, and another 220 000 tonnes are scheduled for arrival in February and March. Assistance is concentrated on children under 16 in nurseries, kindergartens and primary and secondary schools, as well as pregnant and nursing women, orphans, hospital patients and the elderly. WFP is currently providing food aid to around 5.6 million beneficiaries and intends to make additional distributions during the lean season, from April to June. However, such distributions can only proceed if new donations are received as its pipeline for cereals runs dry in April.

#### KYRGYZ REPUBLIC (3 February)

Indications are that the area sown to winter grains (mainly wheat) for harvest in the summer of 2000 could remain stable. By 1 December, 271 000 hectares had been sown to winter crops including grains (1998: 269 000 hectares).

The 1999 grain and pulse harvest is officially put at 1.6 million tonnes, about the same as in the preceding year despite a 4 percent reduction in the area sown. Wheat production is officially estimated at 1.1 million tonnes, 8 percent less than last year, while coarse grain (maize) production increased sharply. Cereal imports, including food aid pledges amounting to 100 500 tonnes, in 1999/2000 are provisionally estimated at nearly 150 000 tonnes, mainly wheat. Import duty on wheat has been lifted temporarily to facilitate imports. 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 wages and social benefits are often delayed and a part of the food aid is being used to make timely payments of benefits to low-income families. Official data indicate that per caput consumption of basic foodstuffs is recovering steadily. However, the availability of cash remains a major constraint, particularly in the health and education sectors.

#### LAOS (1 February)

Seasonably dry conditions in January continued to assist farmers with second season rice preparations, which is planted in Jan/Feb for harvest in May/June. The second rice crop is largely irrigated and contributes around 15 percent of average annual paddy production of around 1.7 million tonnes. In mid-January there was an earthquake, measuring 5.9 on the Richter in the north, though no damage to agriculture nor property has so far been reported.

For vulnerable sectors of the population, project food aid continues to be needed to support well-targeted project interventions in areas affected by reduced rice production in 1998/99. Based on earlier FAO/WFP estimates 251 000 people needed around 12 000 tonnes of assistance last year for an average duration of 4 months. Some 8 000 tonnes have been pledged and delivered during the past marketing year.

#### LEBANON (7 February)

The prospects for the 2000 winter harvest in June/July remain favourable so far. However, domestic cereal production usually covers only about 10 percent of consumption requirements. Aggregate production of wheat and barley in 1999 is estimated at 62 000 tonnes, similar to the previous year.

Imports of wheat in 1999/2000 (July/June) are forecast at some 0.51 million tonnes, slightly above last year.

#### MALAYSIA (1 February)

Heavy rains in December/January, attributed to the La Niña weather anomaly, may have caused some damage to plantation crops, though no reports of damage to food crops have been reported. The rice crop is due for harvest from January to around March in Sabah and Sarawak. The northeast monsoon normally begins retreating by mid-January, except in Sabah and Sarawak which are expected to receive between 30 to 40 percent more than normal rainfall this year. The areas are important for producing pepper and cocoa.

The country produces an average of around 2 million tonnes of paddy annually, of which 60 percent is from the main and 40 percent from the off season crop.

#### MONGOLIA (1 February)

The main staple food crop produced in the country is wheat, which is planted around June for harvest in Oct/November. Official reports indicate that grain production improved in 1999 compared to previous years, which had been affected by unfavourable weather and the declining importance of state agriculture. Total grain production, is officially reported to have increased by around 17 000 tonnes, whilst potato output was around 8 000 tonnes higher. The main reasons for the rise were an increase in area harvested and early harvesting of crops. Aggregate 1999 wheat production is put at 190 000 tonnes, which still, however, remains lower than the 245 000 tonnes produced on average in the period 1994-98.

To help the country during its transition, various multi-lateral and bi-lateral aid packages have been announced. Last year, international donors pledged a record \$320 million in aid to stimulate the economy and promote foreign investment. The aid is primarily directed at infrastructure development and banking reforms which will improve the environment for investment. There are also positive trends in foreign investment which is expected to increase. The main sectors for investment are agro-processing (meat and milk products, camel wool, cashmere and leather processing) and tourism.

In 1999 around 45 000 tonnes of food aid were provided to the country from various donors to assist vulnerable groups, together with 48 000 tonnes of wheat seed.

#### MYANMAR (1 February)

Main crop rice in the country is planted with the onset of the monsoon rains around May/June for harvest in the period October to December. The dry season rice crop, which is irrigated, is planted in Nov/Dec for harvest in April/May. Total 1999/2000 paddy production is estimated at 17.5 million tonnes, slightly below average and around 2 percent below the previous year.

Earlier, the rice export target for 1999/2000 (April/March) was increased to 500 000 tonnes, in response to favourable procurement by the Government trading agency (MAPT). In 1998/99 MAPT procured 1.1 million tonnes of milled rice, of which around 600 000 tonnes, was for distribution to government employees. In addition to carry overstocks there was approximately half a million tonnes available for export. However, as export demand has been weak, it is unlikely that the target will be met before the end of the current marketing year in March.

#### NEPAL (1 February)

An earthquake measuring 4.6 on the Richter scale affected eastern parts of the country, in late January. There were no reports of serious damage. The main crop currently is wheat, which will be harvested from April/May. In 1999, the country produced a slightly above-average wheat crop of around 967 000 tonnes. The 1999 paddy crop, which is harvested around Oct/Nov, was around 3.6 million tonnes, 4 percent above average and 6 percent higher than 1998.

#### PAKISTAN (2 February)

The main crop is currently winter (rabi) wheat, which is planted around October/November for harvest in March/April. The crop is mostly irrigated. Less important rabi crops include barley, though relatively little, around 150 000 tonnes, is produced on average annually. In view of favourable weather in January, following dry conditions earlier, and an increase in 1999/2000 support prices for wheat, official expectations are that production could increase to around 20 million tonnes this year compared to 18 million tonnes in 1999.

Latest reports indicate that the 1999/2000 rice crop was a record 4.9 million tonnes, from an area of 2.4 million hectares. Rice exports in 1999/2000 are projected at 2 million tonnes, whilst wheat imports are put at around 3.2 million tonnes (July/June).

#### PHILIPPINES (2 February)

Heavy rains and floods in Mindanao in the south in late January, killed at least 11 people and displaced a further 20 000. There is possibility that casualties and the estimate of damage will increase. Although heavy crop damage is reported, as yet the full damage is not known. The Office of Civil Defense has recommend a provision of 40.0 million pesos, for emergency relief and rehabilitation for affected families.

The main crops in the ground are currently dry season rice and maize, planted in Oct-Dec for harvest from April/May. Latest projections, indicate that output of the paddy crop will be around 5.4 million tonnes, some 2 percent higher than 1999. Overall, an increase in area planted and higher expected yields, indicate that paddy production could be around 12.5 million tonnes this (2000) calendar year, similar to last year's record 11.8 million tonnes. Production in 1998 was severely affected by El Niño related weather anomalies. Much however, will depend on the weather during the remainder of the year, especially during the main wet season from July to December.

1999 maize output was 4.6 million tonnes, around 9 percent above the five-year average and 20 percent higher than the previous year. Due to heavy rains which resulted in a decrease in area planted, first quarter maize production is projected at 1.1 million tonnes, some 14 percent lower than in the same period in 1999. In view of the shortfall, it is expected that additional maize imports will be necessary to meet demand in the feed sector.

#### SAUDI ARABIA (7 February)

Following recent good rainfall, prospects improved for the 2000 wheat crop, to be harvested in April/May. Production of wheat in 1999 is estimated at 1.5 million tonnes, about 17 percent below the previous year's output. The low to moderate rains throughout January in most of the country are expected to be suitable for breeding desert locusts and low numbers are likely to be present near Jizan where numbers could gradually increase.

Import of cereals in 1999/2000 (July/June) is currently forecast at about 6.9 million tonnes, similar to last year.

#### SRI LANKA (2 February)

The main crop is currently the main Maha rice crop, which is planted from Oct to Dec for harvest from March onwards. Maha planting coincides with the arrival of the northeast monsoon, the country's main rainy season. Of total rice production, approximately two thirds comes from the Maha crop and a third from the irrigated Yala crop, which is harvested in August/September. Overall 1998/99 paddy production was 2.7 million tonnes, some 9 percent higher than the five year average and marginally above the previous year.

In addition to rice, the country's main staple, some 850 - 900 000 tonnes of wheat are imported annually to meet demand for bread and other wheat based products.

#### SYRIA (7 February)

**The prospects for winter grain crops to be harvested from mid-May have improved due to recent favourable rains. Crop and livestock production in 1999 were 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 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 (nomadic) population to food shortages.**

Domestic wheat utilization in 1999/2000 (July/June), estimated at about 3.6 million tonnes, are anticipated to be met from current production and existing stocks. Government imports of barley are estimated at only 150 000 tonnes. As part of an emergency measure, private sector imports of barley have been authorized in 1999.

An Emergency Operation was jointly approved in October 1999 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 February)**

Systematic data on crop production is seriously lacking. Latest (partial) reports indicate serious problems in mobilizing inputs to sow 2000 winter crop and confirm a poor grain harvest in 1999/2000. Shortages of seed, fuel and machinery have reportedly slowed planting operations and the area sown to winter crops is less than last year. One forecast suggests that the wheat area for harvest in 2000 could fall, by 80 000 hectares to 250 000 hectares.

Reports regarding the 1999 harvest have been very conflicting. The latest indications were that the area sown declined somewhat but that crop yields were much lower in part reflecting heavy rains in July, heavy infestation with smut and yellow rust, inadequate use of quality seed and the poor state of the irrigation system. One report from Khatlon indicates that the average yield fell to 0.9 tonnes per hectare, an extremely low yield given that a substantial proportion of the grain is grown with irrigation and the seeding rate approaches 300 kilograms per hectare.

In the absence of systematic official data, FAO tentatively estimates the 1999 grain crop at only 400 000 tonnes, some twenty percent less than last year's good crop. Production of cotton, the major cash crop also fell, by 16 percent to 316 000 tonnes.

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 455 000 tonnes of which up to 148 000 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 and assistance to develop agriculture will continue to be necessary.**

#### **THAILAND (2 February)**

The main agricultural operations currently ongoing, include planting of second season rice for harvest from May/June. The main rice crop, which accounts for 80 percent of total production, is planted in June/July, to coincide with the arrival of the south west monsoon, for harvest from Oct/Nov. Depending on the final outcome of the current crop, total 1999/2000 paddy production is projected at 23.3 million tonnes, of which 19 million tonnes was from the main, and 4.3 million tonnes from the second crop. The main crop in 1999 was around 500 000 tonnes or 3 percent above 1998. The increase was mostly from the northeast which received more than adequate rainfall and encouraged an increase in area planted.

A total of around 5.7 million tonnes of rice were exported in 1999, 8 percent above 1998.

#### TURKEY (7 February)

Despite recent reports of drought conditions in eastern Turkey, the overall prospects for the 2000 winter crop are favourable so far reflecting good rains in the agriculturally important areas. The 1999 wheat production is estimated at 18 million tonnes, about 14 percent below the previous year and about 4 percent below average, due to drought.

The government is planning to set its grain support prices at a maximum of 35 percent higher than world prices rather than the more than twice world prices that caused heavy borrowing to finance grain purchases from farmers. Instead a direct income support system will be adopted to protect farmers.

Two major earthquakes which struck the country in August and November 1999 have killed more than 17 000 people, caused more than 52 000 major injuries and an estimated 630 000 homeless people. The main affected areas in and around Izmit were reported to be mainly industrial but also produce grains and oilseeds.

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 February)

Reports indicate that the area sown to winter crops has increased sharply to 680 000 hectares and that 190 000 tonnes of quality seed has been used in sowing. Reportedly, virgin land has been bought into production. The grain production target is 1.6 million tonnes. In addition, resources are to be allocated to farmers to expand rice production to 200 000 tonnes per annum in the coming three years. The country is planning further substantial imports of land improvement, irrigation and harvesting equipment in 2000.

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 about 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, 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.

Good growing conditions also favoured cotton production and output almost doubled to 1.3 million tonnes.

#### UZBEKISTAN (3 February)

The area sown to winter crops on the large state farms (mainly wheat) increased by 4 percent to 1.36 million hectares. In addition, farmers also have to plant wheat on their household's plots, which would bring the aggregate area sown to wheat up to an estimated 1.46 million hectares. The winter grain production target is 4.1 million tonnes.

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. Imports of grain are being reduced to maintain a positive trade balance. Cereal imports in 1999/2000 are estimated to fall to about 355 000 tonnes, to be met commercially.

The 1999 cotton harvest increased by over 400 000 tonnes to 3.7 million tonnes.

VIET NAM (2 February)

In the last decade of January, heavy showers resulted in localized flooding in central parts of the country, where the main crop activity includes planting of winter spring rice, for harvest from April/May. Rice planting in central/coastal parts has also been delayed due slow drainage of earlier flood waters in the Mekong River Delta basin. The winter spring crop is the largest of the three rice crops produced each year, contributing some 36 percent to aggregate rice production in 1998/99. Total 1998/99 paddy production was around 31 million tonnes, some 10 percent above the average of the previous five years.

Rice exports in 1999 totaled some 4.5 million tonnes, some 18 percent above the previous year. Prior to 1989, the country was a net importer of rice but since the onset of liberalization and market reforms, around 26 million tonnes have been exported in the ten year period between 1989 to 99. As an important foreign exchange commodity, the importance of rice cultivation has increased with area cultivated rising from around 5.7 million hectares in 1989 to 7.4 million hectares last year.

YEMEN (2 February)

The output of the 1999 sorghum crop recently harvested is estimated at 416 000 tonnes, some 12 percent lower than the previous year, due to reduced planted area.

Small scale breeding of desert locust may be in progress in few places along the Red Sea coastal plains.

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

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

COSTA RICA (3 February)

Harvesting of the 1999/2000 second season cereal crops has been virtually completed. Part of the crop has been affected by heavy rains and flooding in early January, particularly in the growing areas around the Atlantic coast. Cash crops are also reported to be affected. Despite possible losses incurred, maize (white) output for the whole year is estimated at a near-average 27 000 tonnes, which compares to 32 000 tonnes in the previous year. Harvesting of the bean crops, an important staple in the population's diet, is well advanced and about 19 000 tonnes are provisionally forecast, which represents an increase over last year's 16 700 tonnes. Production of paddy in 1999 is estimated at an above-average 285 000 tonnes. Some 90 000 tonnes of rice will nevertheless be required as imports in 2000 (January/December) to meet domestic demand.

### **CUBA (3 February)**

Despite some recovery in water reservoir levels due to heavy rains in November, overall, the level of moisture continues to be low in extreme provinces of the country, particularly the south-eastern areas of Camaguey, the southern parts of Las Tunas, central Granma and the northern parts of Guantanamo. Close monitoring of moisture conditions and reservoir levels is required, as the beginning of the rainy season is still some weeks away and planting of the important irrigated paddy crop, as well as of the rainfed maize crop, are due to start from March/April. Dry weather since December has favoured harvesting of the 1999/2000 sugar cane crop, the most important export, and latest official forecasts indicate that between 4.1 and 4.4 million tonnes should be produced, compared to 3.8 tonnes in 1998/1999. Food assistance from the international community continues to be provided to last year's drought affected population.

### **DOMINICAN REPUBLIC (3 February)**

Harvesting of the 1999/2000 cereal crops has been recently completed while land is being prepared for planting of the 2000/2001 first season coarse grain crops. Maize output is estimated at about 37 000 tonnes, slightly above the 35 000 tonnes produced in 1998/99, when crops were affected by Hurricane "Georges". Production of sorghum is estimated at 22 000 tonnes which compares to the last 5-year average of 18 000 tonnes. Paddy output in 1999 (January/December) was 500 000 tonnes, similar to 1998, when production was above average. Output of other minor foodcrops has been satisfactory.

Maize imports of some 650 000 tonnes to 700 000 tonnes would nevertheless be required in the next marketing year, largely to meet strong demand from the animal feed industry.

### **EL SALVADOR (3 February)**

Harvesting of the 1999/2000 third season "apante" maize and bean crops is about to start while harvesting of the second season paddy crop has begun under generally dry weather conditions. Production forecasts point to a satisfactory maize output for the whole year of some 680 000 tonnes, which compares to 555 000 tonnes collected in the 1998/99 season and to the last 5-year average of 563 000 tonnes. By contrast, sorghum output is provisionally estimated at a below-average 147 000 tonnes. Paddy output collected in 1999 was an average 58 000 tonnes, which compares to 50 000 in 1998. Production of beans is also expected to recover from last year's low 46 000 tonnes and an average 66 000 tonnes is anticipated.

Maize imports in marketing year 1999/2000 (August/July), mostly for the feed industry, is forecast to decrease from 1998/99 import volume of 264 000 tonnes to about 150 000 tonnes.

### **GUATEMALA (3 February)**

Harvesting of the 1999/2000 second season cereal crops has been completed and land is being prepared for planting of the 2000/2001 crops to be started from April. Maize output collected for the whole year is provisionally estimated at 1.2 million tonnes, about 7 percent above last year's average production. Sorghum output is estimated at 50 000 tonnes, lower than last year's 52 000 tonnes but above the last 5-year average of 45 000 tonnes.

Maize imports, mainly yellow, in marketing year 1999/2000 (July/June) are forecast to be about 550 000 tonnes, similar to 1998/99.

#### **HAITI\* (3 February)**

Harvesting of the 1999/2000 second season coarse grain crops is about to be completed while planting of the 2000 first season irrigated paddy crop has recently started and sowing of the 2000/2001 first season bean crop is due to start from March. Weather conditions have favoured the developing second season maize and sorghum crops and average outputs for the whole year are provisionally estimated. Maize output should be about 190 000 tonnes, which compares to the last 5-year average of 195 000 tonnes, while production of sorghum should be at about 80 000 tonnes. By contrast, production of paddy in 1999 is estimated at a below-average 70 000 tonnes. Food assistance from the international community continues to be distributed through development projects to some sectors of the population. About 7 000 tonnes have been distributed so far against pledges of 70 000 tonnes so far.

Maize commercial imports in the 1999/2000 marketing year (July/June) are forecast to increase to some 70 000 tonnes from 50 000 tonnes in the previous year. Rice imports in year 2000 (January/December) are forecast to be close to 1999 imports of some 170 000 tonnes.

#### **HONDURAS (3 February)**

Harvesting of the 1999/2000 second season coarse grain and bean crops is well advanced. Maize output for the year (first and second season crops) is provisionally forecast at some 450 000 tonnes, which is lower than the 1998/99 crop of 505 000 tonnes, which was affected by Hurricane "Mitch". Production of sorghum is put at a below-average 60 000 tonnes. Paddy output in 1999 is also estimated at a low 12 000 tonnes. This is largely due to reduced plantings as a consequence of low producer prices. Food assistance from the international community continues to be distributed to the hurricane affected population.

Maize imports in 1999/2000 marketing year (July/June) is forecast to increase from 240 000 tonnes in 1998/99 to some 260 000 tonnes.

#### **MEXICO (3 February)**

Harvesting of the 1999/2000 irrigated wheat crop is about to start. Early forecasts indicate an output close to last year's below-average 3.2 million tonnes, largely as a result of low water reservoir levels in the northwest growing areas coupled with adverse weather at planting in the central states of Guanajato and Jalisco. Harvesting of the important spring/summer maize crop has been virtually completed and production is anticipated to increase from last year's 15.1 million tonnes to 15.7 million tonnes, despite the heavy rains and flooding which affected the crops in September/October. Production of maize for the year as whole is tentatively forecast to be at a slightly above-average 18.5 million tonnes. An above-average sorghum output of some 6.3 million tonnes is anticipated.

#### **NICARAGUA (3 February)**

Harvesting of the 1999/2000 third season "apante" maize and bean crops has started under generally dry weather. Growing conditions are reported to be good and maize output for the year is tentatively forecast to be a well above-average 371 000 tonnes, a significant recovery from 1998/99 Hurricane "Mitch" affected crop of 311 000 tonnes. Sorghum output for the year is also estimated at an above-average 83 000 tonnes, which compares to last year's 111 000 tonnes. Production of milled rice was 162 000 tonnes which compares to the last five-year average of 132 000 tonnes. Food assistance from the international community continues to be provided to the hurricane affected population.

## **SOUTH AMERICA**

### **ARGENTINA (8 February)**

Harvesting of the 1999/2000 wheat crop has been recently completed following a period of erratic weather which affected the quality of the crop. Adequate yields have nevertheless been obtained and production is officially estimated at about 14.2 million tonnes, which compares to last year's volume of 11.5 million tonnes and the last 5-year average of 12.6million tonnes. The increase is also due to larger plantings caused by the combination of attractive prices and expanding exports. Planting of the 1999/2000 maize crop has just been completed and harvesting is due to start from March. The area planted is tentatively estimated at 10 percent higher than the 1998/99 season. Higher plantings are reported in particular for the provinces of Entre Rios, La Pampa and Cordoba. Sowing of the 2000 paddy crop has been completed and plantings are provisionally estimated some 27 percent lower than the 1999 record but still above average.

### **BOLIVIA (3 February)**

Growing conditions are reported normal in general for the recently planted 1999/2000 cereal and potato crops. Sowing is still underway in some of the eastern tropical areas such as Chaco and Santa Cruz as a consequence of insufficient rains. By contrast, slight damage to crops is reported in the southern department of Tarija due to floods. Enlarged plantings are reported for most cereals. Harvesting is due to start from March, and early forecasts point out to increases in production assuming adequate weather conditions persist.

### **BRAZIL (3 February)**

Prolonged dry weather favoured the recently completed harvest of the 1999 wheat crop. Output collected is provisionally estimated at a slightly above-average 2.4 million tonnes and quality of the crop is reported to be good. Dry weather, by contrast, affected plantings of the 1999/2000 first season maize crop, currently being harvested, as well as delaying planting of the second season crop in the north and north-east areas of the country. Main producing states, such as Parana, Santa Catarina and Rio Grande do Sul, have been affected by the dry weather and losses up to 18 percent of expected production are reported in the latter state. Despite enlarged plantings with respect to the previous year's average level, production for the whole year is tentatively forecast to remain close to the 33 million tonnes average of the last 5 years. Harvesting of the 2000 paddy crop is underway and about 10.3 million tonnes are tentatively forecast, a decrease from 1999 near record 11.6 million tonnes, but still slightly above average.

### **CHILE (3 February)**

Harvesting of the 1999/2000 wheat crop continues normal weather conditions and output is forecast to recover from last year's drought affected crop. Some 1.5 million tonnes are expected to be produced, compared to 1.2 the year before. Growing conditions and water reservoir levels are reported adequate for the 2000 maize crop. Harvesting is due to start from March and production is also forecast to recover significantly from last year.

### **COLOMBIA (3 February)**

Heavy rains, flooding and mudslides in December caused heavy loss of life and inflicted enormous damage to housing and infrastructure. Damage to the agricultural sector is reported, particularly to the coffee crop, but a detailed assessment of damage has not been made available yet. Particularly affected were the provinces of Norte de Santander, Tolima, Antioquia and some parts in the south-west of the country near the border with Ecuador. Harvesting of the 1999/2000 second season cereal crops is underway and, despite possible losses incurred, maize output for the year as a whole (both crops) is forecast to be about average. Production of paddy in 1999 is estimated at a slightly above-average 1.8 million tonnes.

### **ECUADOR (3 February)**

**Planting of the 2000 first season cereal crops is underway. Generally dry weather conditions have been registered in January and the only rains reported have been in the Andean highlands, where most of the wheat crop is grown, but precipitation has been scarce and irregular. Intended plantings of maize are provisionally forecast to decline from the 1999 average level. The outlook is also poor for the area planted to paddy, which is expected to decline from the 1999 average level. This is mainly the result of credit constraints and the high cost of agricultural inputs, largely caused by the serious economic crisis affecting the country. Imports of rice are expected to increase considerable in order to fill the anticipated decline in production.**

### **PERU (3 February)**

Normal-to-abundant rains in the north and north-west areas in December replenished water reservoirs principally in the Departments of Piura, Lambayeque and La Libertad, thus fulfilling water requirements for planting for year 2000 irrigated crops in these areas; by contrast, water reservoir levels in the southern valleys of the department of Arequipa are reported lower than in the previous month. Planting of maize, which is grown all year around, is underway. Output collected in 1999, during the period January/November, is officially estimated at a bumper 996 000 tonnes which compares to 873 000 tonnes gathered in 1998 during the same period. A bumper paddy crop was obtained in 1999. A near-record 2 million tonnes had been gathered in January/November 1999 which compares to the last 5-year average of 1.3 million tonnes. Sowing of the year 2000 paddy crop is underway.

### **URUGUAY (3 February)**

Harvesting of the 1999/2000 wheat crop has been completed and output collected is provisionally estimated at an above-average 545 000 tonnes. Harvesting of the 1999/2000 maize crop has started and output is tentatively forecast to be slightly below average as the crop was affected by dry weather at planting. Harvesting of the important paddy crop is due to start from March and early forecasts indicate that output should decline from 1999 record mainly as a result of reduced plantings.

### **VENEZUELA (3 February)**

**Incessant torrential rains from the beginning of December resulted in extensive mudslides and flooding. Unofficial sources estimate around 30 000 casualties and over 600 000 persons affected. It is reported that some 50 000 persons have been accommodated in temporary shelters. Nine states were declared in a state of emergency by end-December, of which the main affected were Vargas, Miranda, Falcón and Yaracuy. An assessment of damage to the sector by the international community in collaboration with the Government indicates that some 25 000 rural families have been seriously affected. Assessment for the rehabilitation of about 10 000 to 12 000 of these families has also been conducted. Emergency assistance, including food distribution from the international community to 110 000 victims, has been provided.**

## **EUROPE**

### EC (10 February)

In the EC, the wheat area for the 2000 harvest is expected to increase. Autumn planting conditions were generally favourable and the winter wheat area is estimated to be up by about 5 percent. The increase is mostly at the expense of oilseeds, reflecting large oilseed stocks and reduced producer aid for oilseed production in 2000 under the first year of the Agenda 2000 reform. Among the major producers, the overall wheat area in France is expected to rise by some 2 percent, while that in Germany could be up by as much as 10 percent. The wheat area in the United Kingdom is also anticipated to increase somewhat. With regard to the Community's coarse grains crops in 2000, early indications point to some reduction of the area given to barley and rye but a slight increase for maize.

### ALBANIA (11 February)

Generally favourable weather conditions for autumn cereal planting suggest some recovery in cereal production could be possible in 2000 after adverse weather during both the previous autumn and spring planting periods reduced overall cereal area and output in 1999. However, production potential remains limited by an absence of credit which is the major constraint on the increased use of fertilizer and other inputs.

Food assistance continues to be provided by WFP for some 60 000 persons rendered vulnerable by the Balkan crisis. WFP, in collaboration with its local Implementing Partners, has begun three Food-for-Work (FFW) initiatives while continuing distributions to targeted economically impoverished individuals adversely impacted by the refugee crisis.

### BELARUS (3 February)

Official reports indicate that the area sown to winter grains is above target at 1.155 million hectares. That sown to wheat increased by 4 percent to 240 000 hectares. Winter grains are reported to be in a satisfactory condition and more fertilizer has been applied. The government hopes that increased use of fertilizer and better weather conditions will result in grain harvest of at least 5 million tonnes in 2000. Official procurement prices for meat and milk are to be increased sharply in January/February, to enable farms to finance spring sowing.

The 1999 grain harvest is officially estimated at 3.7 million tonnes, almost 40 percent below the five-year average, and 25 percent less than the poor harvest of 1998. This record low output is the combined result of severe economic problems and adverse weather. Production could also be under-reported given the degree of market interference exercised by the government and the consequent shortages of most items in the official distribution chain. Output in agriculture has fallen sharply since 1997 in part due to the poor financial situation of the largely unreformed state farms. Extensive government credits and subsidies coupled with fixed, state controlled prices for output in a climate of rapid inflation has severely undermined farms' financial situation.

Following the second poor cereal harvest in succession, the country needs to import cereals for human consumption and animal feed. Food needs are likely to be met but the availability of foreign exchange constraints could limit the volume of feedgrain purchased. Aggregate cereal imports in 1999/2000 are tentatively estimated to increase by 500 000 tonnes to 1.2 million tonnes. On 1 January 2000, the Belarus rouble was redenominated with one new rouble replacing 1000 old Belarussian roubles.

#### BOSNIA-HERZEGOVINA (1 February)

The area sown to winter crops has stabilized at about 100 000 hectares, mainly wheat. The early outlook for 2000 winter crops is satisfactory. Latest indications are that the 1999 cereal harvest, at 1.1 million tonnes was about 4 percent less than in the preceding year, mainly due to adverse weather and lower wheat yields. 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 February)

In Bulgaria, the winter wheat area is estimated at 1.1 million hectares, up almost 20 percent from the previous year, and up slightly from the planned area of 1 million hectares. Weather during the sowing period and throughout the winter so far is reported to have been generally favourable.

#### CROATIA (2 February)

Indications are that the area sown to winter cereals increased following the poor harvest last year. However, economic problems will continue to hinder cereal production. The 1999 cereal harvest fell by 12 percent to 2.8 million tonnes. Good yields for maize only partially offset the 46 percent fall in wheat production to 470 000 tonnes. Economic problems, which reduced winter grain plantings, were exacerbated by poor weather.

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

#### CZECH REPUBLIC (11 February)

The winter cereal area for harvest in 2000 is officially estimated to have increased, by about 15 percent, to some 1.1 million hectares. Of the total, the wheat area increased the most, expanding by about 23 percent from the previous year to over 900 000 hectares.

#### ESTONIA (4 February)

Indications are that the area sown to winter grains remained stable and the early outlook for winter cereals for harvest in 2000 is satisfactory. Cereal production in 1999 is officially estimated at 625 000 tonnes, some 10 percent less than output in 1998 in view of reduction in the area sown. In 1999/2000, cereal imports are forecast at nearly 200 000 tonnes.

#### FORMER YUGOSLAV REPUBLIC OF MACEDONIA (11 February)

At this early stage, no significant change is expected in cereal production in 2000. Weather conditions for the winter crops are reported to have been generally favourable. Aggregate output is estimated to have reached some 750 000 tonnes in 1999 when the season was generally favourable. The major constraint on production continues to be access to credit for inputs, especially for the full-time farmers who have no secondary income sources.

A residual caseload of approximately 15 000 registered Kosovo refugees remain within the country. Approximately 12 000 of this residual caseload are currently being hosted by host families with the remainder being housed in collective centres. WFP is distributing the full basic ration to all registered refugees.

#### HUNGARY (6 February)

Favourable weather is reported to have promoted increased wheat planting last autumn and the area is tentatively estimated at about 1 million hectares, about 35 percent up from the previous year's reduced level. However, heavy flooding in January is reported to have affected several thousand hectares of winter crops which will likely have an significant impact on the yield potential of these crops.

#### LATVIA (4 February)

The early outlook for winter grains remains satisfactory. Given higher cereal prices in neighbouring countries, the area sown to winter grains could recover. The 1999 grain harvest is estimated to fall by 5 percent to 925 000 tonnes in response to an 11 percent reduction in the area sown. Private trade in grain is not encouraged and farmers feed grain on farm or sell to mills. Imports of cereals are limited to about 70 000 tonnes per annum, mainly of bread quality wheat.

#### LITHUANIA (4 February)

Indications are that the area sown to winter cereals could recover this year. Growing conditions to date have been satisfactory. The 1999 grain harvest is estimated to have fallen by almost 25 percent to 2.1 million tonnes in response to a cutback in the area sown and lower yields. 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 February)

The outlook for 2000 winter crops is uncertain. Dry conditions likely hampered winter crop establishment and a significant proportion of the area may need to be resown in the spring.

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. In the absence of exports, this year's reduced harvest would be almost 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 and there are reports of substantial, but unrecorded, exports.

#### POLAND (11 February)

In Poland, by contrast to other parts of the region, overall winter cereal sowings are officially reported to be down by 4 percent to 5.1 million hectares. Preliminary official estimates put the winter wheat area at about 1.8 million hectares, and that of rye at 2.2 million hectares.

#### ROMANIA (11 February)

In Romania, early indications suggest that the winter wheat area has declined again due to farmers financial difficulties and the depressed domestic grain market. By the end of the normal planting period last autumn, the winter wheat area was reported at just 1 million hectares while that of barley was put at about 200 000 hectares. After a reduced harvest already in 1999, there is currently some concern that wheat supplies in the country will tighten somewhat before the start of the 2000 harvest this summer. If output from the 2000 harvest is further reduced then significant imports could be required in 2000/01.

## **RUSSIAN FEDERATION (15 February)**

The early outlook for the winter grains in 2000 is satisfactory. The area sown to winter crops (13.9 million hectares) includes some 12.6 million hectares sown to grains. This is below target, and some 600 000 hectares less than in the preceding year, but the condition of the crop is significantly better. The proportion of winter grain area in total grain area is increasing steadily as the latter declines but, nevertheless, it accounted for less than 30 percent in 1999. The outlook for the overall harvest indicates that only 60 percent of the area to be planted in the spring has been ploughed, increasing spring farm work. Some seed shortages are also reported. On the positive side, the sector as a whole worked at a profit for the first time in 4 years, with a profit of 6 billion roubles comparing favourably with the loss of 36 billion roubles in 1998. In part, this reflects increased demand for domestic food produce, following sharp rouble devaluation in 1998, which made imported food more expensive. The government hopes that the 2000 grain harvest will reach 75 million tonnes, i.e. 15-20 million tonnes more than the official estimate (54.7 million tonnes) for 1999, and enough to cover domestic requirements and replenish stocks somewhat.

FAO estimates the 1999 grain harvest at 60 million tonnes, some 5 million tonnes more than the drought reduced output of 1998, but still below average. FAO's estimate is higher than the official estimate reflecting official and unofficial statements that the harvest has been underestimated by at least 5 million tonnes and possibly by up to 15-20 percent. Output of wheat is now estimated by FAO at 34 million tonnes, 4 million tonnes more than in 1998. However, the proportion of food quality wheat, at 62 percent, was lower than in 1998 (76 percent). Coarse grain production is estimated by FAO to have increased by 2.5 million tonnes to 24.6 million tonnes, while production of rice increased by 6 percent to 444 000 tonnes. The pulse harvest is estimated at about 1 million tonnes.

Despite the somewhat larger harvest, the overall supply situation remains tight and there is no scope to rebuild stocks drawn down in 1998/99. At the aggregate level, human consumption needs are expected to be covered, but the availability of livestock feed is likely to remain constrained pointing to a further reduction in livestock numbers and output. Restrictions on the movement of grain by regional authorities are aggravating the supply situation. Cereal prices, which remained stable until the beginning of this year, are also rising in response to a 15 percent increase in the cost of rail transport of grain from Kazakhstan, a major supplier.

Total cereal utilization in 1999/2000 is estimated to decline by 3 million tonnes to 71 million tonnes, including 21 million tonnes for direct food use, 0.5 million tonnes for export to neighbouring republics, and the balance for seed, feed, losses, industrial processing and (minimum) closing stocks. Against this requirement, domestic availability of cereals (production and stocks) is estimated at 65 million tonnes, leaving a minimum import requirement of 6 million tonnes. Food aid pledges in the 1999/2000 marketing year to date have been limited to 300 000 tonnes of wheat (plus another 200 000 tonnes of wheat and processed commodities for targeted distribution). In addition, the adjusted food aid pledges carried forward from 1998/99 amount to 2.8 million tonnes, leaving a balance of just under 3 million tonnes to be covered by commercial imports. A larger volume of cereal was imported commercially in 1996/97 and 1997/98. The commercial import capacity has improved since the financial meltdown in August 1998 and the country has a substantial balance of trade surplus.

The plight of many of the 300 000 or so people displaced in Chechnya or in neighbouring countries continues to deteriorate and is desperate for those living in refugee camps. Many are short of adequate shelter, food, clothing, heating and medical supplies. Bitterly cold winter conditions in the mountains and poor shelter is leading to disease. The government of Ingushetia, a small country of 300 000 inhabitants, which is hosting around 200 000 refugees, has requested international assistance to feed and shelter refugees. The difficult security situation is impeding the transport and distribution of assistance.

**The food security of the civilian population trapped in Chechnya and particularly in the capital, Grozny, is rapidly deteriorating and the outlook for winter grain and fodder crops is bleak. Reports indicate that only a small fraction of the arable area is either sown to winter crops or ploughed. The situation in agriculture is critical, with severe damage inflicted to the livestock and grape growing industry.**

**SLOVAK REPUBLIC (11 February)**

In the Slovak Republic, favourable weather conditions for the winter cereal planting season point to a recovery in winter cereal plantings and output in 2000 after last year's reduced crop.

**SLOVENIA (11 February)**

Early indications point to a recovery in cereal output in 2000 from last year's harvest which was reduced by adverse weather. This season's winter grain planting is reported to have been completed within the optimal time period and weather conditions for crop establishment were favourable.

**THE UKRAINE (4 February)**

The area sown to winter crops in the public sector reached 7.3 million hectares, marginally less than in the preceding year. However, crop establishment was hindered by late sowing and dry soils and up to 1.5 million hectares of the 7 million hectares sown to winter cereals may need to be replanted in the spring. This is twice the area affected by winterkill for the 1999 harvest and will adversely affect the harvest outcome. Heavy snowfall in January helped replenish moisture reserves. Early Indications are that spring plantings could increase somewhat.

The aggregate 1999 grain harvest is estimated by FAO at 27 million tonnes, some 2 million tonnes less 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. Output of wheat is estimated by FAO at 15 million tonnes, about 2 million tonnes less than last year, and that of coarse grains at 11.3 million tonnes compared to 11.4 million tonnes in the preceding year. Many regions placed controls to the free movement of grain and efforts by the government and regional authorities to recover debts owed by farms have resulted in understatement in actual yields. The validity of this year's harvest estimates may also have been affected by persistent rumours of hryvnia devaluation after the elections and well-publicized moves by the government to regulate grain exports. For these reasons, FAO's estimate is about 10 percent higher than the official estimates (24.4 million tonnes, including 13.5 million tonnes of wheat and 10.2 million tonnes of coarse grains).

Following the second poor harvest in succession and large exports (5.8 million tonnes in 1998/99 and of 2.7 million tonnes between in the first half of the current marketing year), some grain deficit areas in the country may need to import cereals. To ensure the availability of an adequate quantity of wheat, the government has passed a law waiving the import duty on up to 1.5 million tonnes of cereals provided they are imported before 1 September 2000. Imports are to be financed from regional resources. The presence of hidden stocks of cereals and financial considerations are likely to keep imports well below this level. Indications are that in 1999/2000 food needs will be covered but that the availability of animal feed will remain constrained. Despite the tight domestic situation, exports have continued, fuelled by rumours that the government intends to introduce a 30 percent export duty on cereals. (It has already imposed an export duty of 23 percent on sunflowerseed). FAO tentatively forecasts 1999/2000 cereal exports at 3.2 million tonnes, including 2.1 million tonnes of wheat.

**YUGOSLAVIA, FED. REP. OF (SERBIA AND MONTENEGRO)\* (3 February)**

**Shortages of inputs, working capital and delays in harvesting the 1999 crop have prevented the ambitious winter crop sowing target of 1.1 million hectares being met. Current indications**

are that the area sown to winter crops could remain close to last year's level of about 840 000 hectares. Latest reports indicate that 730 000 hectares, only 3 percent more than last year, have been sown to wheat, the major winter grain. Growing conditions to date have been mostly satisfactory but rapid inflation and the shortage of inputs are likely to keep yields low. Shortages of fuel and fertilizer, following the damage incurred during the conflict last year, have led to sharply higher prices for these commodities.

In 1999, a record maize harvest of 7.5 million tonnes offset the poor wheat harvest of only 2.1 million tonnes, and aggregate output is officially estimated at just over 10 million tonnes, about 14 percent above average. The country has an exportable surplus of up to 1 million tonnes of maize in 1999/2000.

The country is in a state of acute economic crisis in the wake of the conflict over Kosovo and several years of economic sanctions. There are 1.1 million refugees, internally displaced and economically and socially deprived people who require targeted food assistance through the winter. The food needs for these populations were included in the recent UN Consolidated Appeal for South East Europe. Against WFP's request for 188 000 tonnes of food aid, less than 30 000 tonnes have been pledged to date.

An FAO Crop Assessment Mission visited the Kosovo Province in early January and estimated the winter wheat area to be 79 000 hectares, 36 percent more than the area planted in 1998 but about 10 percent less than the normal area before the civil disturbances of the past two years.

WFP continues to provide food assistance for a caseload of about 600 000 persons in the Province and other organizations for about 400 000. During the spring and early summer (April-June) however, the number of people in need of food aid within Kosovo is likely to decrease as business and employment opportunities (both formal and informal) and household incomes improve. It is anticipated that most of the existing IDPs will return to their homes at the end of winter; those that do not return will be reclassified as short-term social cases as their primary need will be to access employment or other income generating opportunities. Depending upon the speed and scale of recovery of the non-agricultural sectors of the economy, an overall caseload reduction to a total of 620,000 beneficiaries is expected from April.

## **NORTH AMERICA**

### **CANADA (11 February)**

Latest estimates put the 1999 wheat output at some 26.8 million tonnes, 11 percent up from the previous year and above the average of the past five years. Regarding the 2000 wheat crop, the bulk of which will be sown in the spring, latest official forecasts point to a possible increase in area at the expense of canola and flaxseed because of their relatively lower prices. Aggregate output of coarse grains in 1999 is estimated at 26.9 million tonnes, virtually unchanged from the previous year and above average.

### **UNITED STATES (11 February)**

The final official estimate of the 1999 wheat crop is 62.7 million tonnes, 9.5 percent down from 1998 and below the average of the past five years. The decrease mostly reflects reduced plantings and a lower ratio of harvested to planted land than in the previous year. The winter wheat area for the 2000 crop has declined for the fourth year in succession, by 1 percent, to an estimated 17.4 million hectares. Farmers are reported to have responded to continuing low price prospects for wheat at planting time last autumn. While it is expected that some of the unused wheat area will be planted with feed grains or non-cereal crops this spring, some will likely remain fallow, especially in the drier areas of the Southern Great Plains. Regarding growing conditions for the winter wheat, dry weather

during the autumn of 1999 delayed emergence and affected the crop in several parts of the Great Plains as it entered the winter season. According to the last official Crop Progress report of the 1999 season in late November, overall, only 43 percent of the winter wheat crop was rated good to excellent, 29 percentage points below the ratings at the same time in 1998. Since then, continuing dry conditions throughout most of the Great Plains have largely precluded any improvement in crops conditions, and in some cases a deterioration has been noted.

The final estimate of the 1999 coarse grains crop is 264 million tonnes, about 3 percent down from the previous year's crop but still above the average of the past five years. Of the total, maize is estimated to account for about 240 million tonnes.

Harvesting of the 1999 paddy crop is complete in all states. Output is estimated at a record 9.5 million tonnes, about 12 percent up from last year. In addition to the 7 percent expansion in area, favourable growing conditions boosted yields by 3 percent to about 6.6 tonnes per hectare.

## **OCEANIA**

### **AUSTRALIA (10 February)**

The 1999 winter wheat harvest, which has recently been completed, is provisionally estimated at a bumper 22.8 million tonnes, 8 percent up from the previous year and well above the average of the past five years. The increase mostly reflects higher yields as a result of very favourable weather conditions during the season. The winter coarse grain crops (mostly barley and oats) also benefited from favourable growing condition during the season but reflecting smaller plantings of barley, output may be down somewhat from the previous year. Thus despite good 1999 summer coarse grain crops of sorghum and maize, aggregate coarse grains production in 1999 is now forecast at 8.4 million tonnes, compared to 8.9 million tonnes in 1998. Harvesting of the 2000 paddy crop is due to start from late February. Output is officially forecast to contract by 7 percent from the previous season to 1.3 million tonnes due to a reduction in area.

Prospects for the developing 2000 summer coarse grains crops are generally satisfactory after heavy January rains in the main-producing areas of New South Wales and Queensland. However, output is provisionally forecast to fall somewhat reflecting reduced plantings. Because of an excess of animal feed pressuring the market many farmers chose to leave land fallow or reduced the area sown to sorghum, the main summer coarse grain crop. Output of sorghum is tentatively forecast at about 570 000 tonnes and 810 000 tonnes respectively in New South Wales and Queensland respectively, compared with 780 000 tonnes and 880 000 tonnes respectively in the previous year.

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

COUNTRY	Marketing year	1998/99 or 1999			1999/2000 or 2000			
		Actual imports			Total import requirements (excluding re-exports)	Import position		
		Commercial purchases	Food aid	Total commercial and aid		Total commercial and aid	Food aid allocated committed or shipped	Commercial purchases
<b>AFRICA</b>		<b>24 276.6</b>	<b>2 178.9</b>	<b>26 455.5</b>	<b>27 181.0</b>	<b>7 932.6</b>	<b>926.4</b>	<b>7 006.2</b>
<b>Northern Africa</b>		<b>14 362.7</b>	<b>22.9</b>	<b>14 385.6</b>	<b>14 735.0</b>	<b>6 726.1</b>	<b>50.4</b>	<b>6 675.7</b>
Egypt	July/June	10 753.0	13.0	10 766.0	10 320.0	5 376.0	50.4	5 325.6
Morocco	July/June	3 609.7	9.9	3 619.6	4 415.0	1 350.1	0.0	1 350.1
<b>Eastern Africa</b>		<b>2 027.8</b>	<b>1 335.0</b>	<b>3 362.8</b>	<b>4 450.0</b>	<b>462.1</b>	<b>397.6</b>	<b>64.5</b>
Burundi	Jan./Dec.	37.5	4.5	42.0	70.0	0.0	0.0	0.0
Comoros	Jan./Dec.	45.8	0.2	46.0	46.0	1.0	1.0	0.0
Djibouti	Jan./Dec.	75.9	4.1	80.0	80.0	0.0	0.0	0.0
Eritrea	Jan./Dec.	93.7	15.3	109.0	290.0	12.0	12.0	0.0
Ethiopia 2/	Jan./Dec.	27.3	667.5	694.8	764.0	275.2	275.2	0.0
Kenya	Oct./Sept.	688.6	101.4	790.0	1 300.0	8.9	8.9	0.0
Rwanda	Jan./Dec.	42.9	204.5	247.4	222.0	9.4	9.4	0.0
Somalia	Aug./July	223.0	38.0	261.0	310.0	27.4	27.4	0.0
Sudan	Nov./Oct.	414.1	226.4	640.5	768.0	55.8	55.8	0.0
Tanzania	June/May	379.0	73.1	452.1	600.0	72.4	7.9	64.5
<b>Southern Africa</b>		<b>1 344.2</b>	<b>387.7</b>	<b>1 731.9</b>	<b>1 761.0</b>	<b>478.3</b>	<b>306.5</b>	<b>171.8</b>
Angola	April/March	376.2	139.0	515.2	505.0	149.2	123.2	26.0
Lesotho	April/March	149.4	8.3	157.7	203.0	51.1	2.1	49.0
Madagascar	April/March	115.8	18.6	134.4	170.0	11.4	8.0	3.4
Malawi	April/March	166.9	34.1	201.0	52.0	28.2	28.1	0.1
Mozambique	April/March	106.0	155.8	261.8	325.0	223.2	141.5	81.7
Swaziland	May/April	75.0	0.0	75.0	72.0	11.6	0.0	11.6
Zambia	May/April	354.9	31.9	386.8	434.0	3.6	3.6	0.0
<b>Western africa</b>		<b>5 886.9</b>	<b>391.1</b>	<b>6 278.0</b>	<b>5 552.0</b>	<b>244.4</b>	<b>158.0</b>	<b>86.4</b>
<b>Coastal countries</b>		<b>4 239.2</b>	<b>187.5</b>	<b>4 426.7</b>	<b>3 644.0</b>	<b>152.0</b>	<b>65.6</b>	<b>86.4</b>
Benin	Jan./Dec.	116.0	9.0	125.0	110.0	4.2	4.2	0.0
Cote d'Ivoire	Jan./Dec.	700.4	18.0	718.4	625.0	1.4	1.4	0.0
Ghana	Jan./Dec.	448.7	26.3	475.0	365.0	46.1	31.7	14.4
Guinea	Jan./Dec.	413.5	18.2	431.7	380.0	0.0	0.0	0.0
Liberia	Jan./Dec.	101.1	88.9	190.0	155.0	8.5	8.5	0.0
Nigeria	Jan./Dec.	2 120.0	0.0	2 120.0	1 600.0	72.3	0.3	72.0
Sierra Leone	Jan./Dec.	262.9	27.1	290.0	329.0	19.5	19.5	0.0
Togo	Jan./Dec.	76.6	0.0	76.6	80.0	0.0	0.0	0.0
<b>Sahelian countries</b>		<b>1 647.7</b>	<b>203.6</b>	<b>1 851.3</b>	<b>1 908.0</b>	<b>92.4</b>	<b>92.4</b>	<b>0.0</b>
Burkina faso	Nov./Oct.	106.1	33.4	139.5	190.0	3.6	3.6	0.0
Cape Verde	Nov./Oct.	30.2	56.5	86.7	70.0	61.2	61.2	0.0
Chad	Nov./Oct.	60.0	10.0	70.0	67.0	6.7	6.7	0.0
Gambia	Nov./Oct.	123.3	3.8	127.1	114.0	3.2	3.2	0.0
Guinea Bissau	Nov./Oct.	54.5	21.0	75.5	102.0	0.0	0.0	0.0
Mali	Nov./Oct.	116.2	5.7	121.9	100.0	2.7	2.7	0.0
Mauritania	Nov./Oct.	214.3	27.2	241.5	275.0	8.5	8.5	0.0
Niger	Nov./Oct.	306.7	25.7	332.4	230.0	0.4	0.4	0.0
Senegal	Nov./Oct.	636.4	20.3	656.7	760.0	6.1	6.1	0.0
<b>Central Africa</b>		<b>655.0</b>	<b>42.2</b>	<b>697.2</b>	<b>683.0</b>	<b>21.7</b>	<b>13.9</b>	<b>7.8</b>
Cameroon	Jan./Dec.	237.2	2.8	240.0	240.0	10.4	2.6	7.8
Cent.Afr.Rep.	Jan./Dec.	28.0	1.2	29.2	34.0	0.5	0.5	0.0
Congo, Dem.Rep.	Jan./Dec.	224.0	26.0	250.0	250.0	5.5	5.5	0.0
Congo, Rep.	Jan./Dec.	148.5	11.5	160.0	140.0	5.3	5.3	0.0
Eq. Guinea	Jan./Dec.	9.0	0.0	9.0	9.0	0.0	0.0	0.0
Sao Tome	Jan./Dec.	8.3	0.7	9.0	10.0	0.0	0.0	0.0

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

COUNTRY	Marketing year	1998/99 or 1999			1999/2000 or 2000			
		Actual imports			Total import requirements (excluding re-exports)	Import position		
		Commercial purchases	Food aid	Total commercial and aid		Total commercial and aid	Food aid allocated committed or shipped	Commercial purchases
<b>ASIA</b>		<b>34 438.2</b>	<b>3 885.8</b>	<b>38 324.0</b>	<b>36 866.0</b>	<b>15 378.4</b>	<b>2 992.5</b>	<b>12 385.9</b>
Afghanistan	July/June	669.5	74.9	744.4	1 127.0	93.6	68.6	25.0
Armenia	July/June	352.0	15.0	367.0	392.0	181.0	81.0	100.0
Azerbaijan	July/June	653.0	21.0	674.0	601.0	369.0	22.3	346.7
Bangladesh	July/June	2 786.9	1 313.1	4 100.0	2 600.0	1 437.8	637.8	800.0
Bhutan	July/June	18.8	1.2	20.0	22.0	0.0	0.0	0.0
Cambodia	Jan./Dec.	46.9	13.1	60.0	60.0	0.0	0.0	0.0
China 3/	July/June	8 540.1	259.9	8 800.0	9 300.0	4 067.4	148.0	3 919.4
Georgia	July/June	507.0	98.0	605.0	555.0	177.6	80.5	97.1
India	April/March	1 427.4	263.2	1 690.6	1 800.0	576.9	189.4	387.5
Indonesia	April/March	6 561.2	738.8	7 300.0	6 500.0	4 116.0	693.6	3 422.4
Korea, D.P.R.	Nov./Oct.	1 275.5	580.5	1 856.0	1 193.0	395.7	316.0	79.7
Kyrgyz Republic	July/June	115.0	5.0	120.0	149.0	179.6	100.5	79.1
Laos	Jan./Dec.	59.0	8.0	67.0	67.0	0.0	0.0	0.0
Maldives	Jan./Dec.	30.1	4.9	35.0	36.0	3.0	0.0	3.0
Mongolia	Oct./Sept.	147.7	45.3	193.0	203.0	15.0	15.0	0.0
Nepal	July/June	50.0	24.7	74.7	79.0	52.3	2.3	50.0
Pakistan 4/	May/April	2 906.3	15.1	2 921.4	3 221.0	948.6	347.7	600.9
Philippines	July/June	3 450.1	2.5	3 452.6	3 460.0	1 707.7	61.7	1 646.0
Sri Lanka	Jan./Dec.	1 092.6	67.0	1 159.6	1 110.0	51.9	51.9	0.0
Syria	July/June	791.8	15.9	807.7	900.0	504.0	22.2	481.8
Tajikistan	July/June	316.0	80.0	396.0	455.0	412.2	147.6	264.6
Turkmenistan	July/June	316.0	80.0	396.0	11.0	9.5	5.1	4.4
Uzbekistan	July/June	514.0	0.0	514.0	355.0	78.3	0.0	78.3
Yemen	Jan./Dec.	1 811.3	158.7	1 970.0	2 670.0	1.3	1.3	0.0
<b>CENTRAL AMERICA</b>		<b>3 467.7</b>	<b>323.7</b>	<b>3 791.4</b>	<b>3 640.0</b>	<b>1 199.4</b>	<b>328.0</b>	<b>871.4</b>
Cuba 5/	July/June	1 454.6	10.9	1 465.5	1 467.0	308.8	21.4	287.4
Guatemala	July/June	999.0	34.0	1 033.0	965.0	348.8	35.8	313.0
Haiti	July/June	367.7	121.1	488.8	525.0	178.6	93.2	85.4
Honduras	July/June	487.0	51.0	538.0	525.0	156.0	58.0	98.0
Nicaragua	July/June	159.4	106.7	266.1	158.0	207.2	119.6	87.6
<b>SOUTH AMERICA</b>		<b>1 064.5</b>	<b>175.5</b>	<b>1 240.0</b>	<b>1 001.0</b>	<b>17.9</b>	<b>17.9</b>	<b>0.0</b>
Bolivia	July/June	210.7	155.3	366.0	271.0	17.9	17.9	0.0
Ecuador	Jan./Dec.	853.8	20.2	874.0	730.0	0.0	0.0	0.0
<b>OCEANIA</b>		<b>423.0</b>	<b>8.0</b>	<b>431.0</b>	<b>381.0</b>	<b>0.5</b>	<b>0.5</b>	<b>0.0</b>
Kiribati	Jan./Dec.	8.0	0.0	8.0	8.0	0.0	0.0	0.0
Papua New Guinea	Jan./Dec.	360.0	8.0	368.0	318.0	0.5	0.5	0.0
Samoa	Jan./Dec.	17.0	0.0	17.0	17.0	0.0	0.0	0.0
Solomon Isl.	Jan./Dec.	26.0	0.0	26.0	26.0	0.0	0.0	0.0
Tuvalu	Jan./Dec.	1.0	0.0	1.0	1.0	0.0	0.0	0.0
Vanuatu	Jan./Dec.	11.0	0.0	11.0	11.0	0.0	0.0	0.0
<b>EUROPE</b>		<b>525.0</b>	<b>121.0</b>	<b>646.0</b>	<b>691.0</b>	<b>14.4</b>	<b>10.2</b>	<b>4.2</b>
Albania	July/June	275.1	25.9	301.0	371.0	10.2	6.0	4.2
Bosnia&Herzegovina	July/June	197.9	92.1	290.0	290.0	0.0	0.0	0.0
Macedonia, FYR	July/June	52.0	3.0	55.0	30.0	4.2	4.2	0.0
<b>TOTAL</b>		<b>64 195.0</b>	<b>6 692.9</b>	<b>70 887.9</b>	<b>69 760.0</b>	<b>24 543.2</b>	<b>4 275.5</b>	<b>20 267.7</b>

SOURCE: FAO

1/ Includes food deficit countries with per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. U.S.\$ 1505 in 1997), which is in accordance with the guidelines and criteria agreed to by the CFA should be given priority in the allocation of food aid. 2/ Includes refugee needs.

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

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### DEFINITIONS:

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

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

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

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

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