

FOODCROPS AND SHORTAGES

No.2

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	<p>AFRICA: In eastern Africa, massive relief assistance is required for nearly 16 million people, half of them in Ethiopia, facing severe food shortages, mainly due to drought. Pastoralists in the sub-region have been the worst affected particularly in south-eastern Ethiopia, where starvation-related deaths are being increasingly reported. Cyclone "Hudah" has devastated north-east Madagascar, already severely affected by two successive cyclones in February and March. The cyclone hit Mozambique with less intensity, but the maize crop in the important growing provinces may have been affected.</p>
	<p>ASIA: A serious food supply situation has developed in Mongolia after the worst winter weather in 30 years killed large numbers of livestock which are vital for food security. An FAOWFP Crop and Food Supply Assessment Mission has just returned from East Timor where food problems are likely to ease with the upcoming harvest of main crops. The food supply situation remains precarious in DPR Korea. Prolonged drought has seriously affected crops in Afghanistan and Iraq. In the CIS, economically vulnerable populations in Armenia, Azerbaijan, Georgia and Tajikistan continue to need food aid.</p>
	<p>LATIN AMERICA: In South America, a prolonged drought has seriously affected crops in Uruguay and Paraguay, while in Bolivia, heavy rains and flooding have affected maturing crops. In Venezuela, despite the devastating floods and mudslides last December, the food supply situation is stable. Reconstruction of infrastructure and agricultural rehabilitation programmes are underway. In the Caribbean, prolonged dry weather in Jamaica has affected minor foodcrops, mainly vegetables.</p>
	<p>EUROPE: Large-scale international aid continues to be provided in the Balkan countries, although a reduction in the number of beneficiaries in the Kosovo Province of the Federal Republic of Yugoslavia is underway, reflecting improvements in economic conditions. Displaced populations and host families in Ingushetia, as well as returnees to Chechnya continue to need considerable humanitarian assistance, including food aid, shelter, water and sanitation. In 1999/2000 the Russian Federation has received some 3 million tonnes of food aid.</p>
	<p>NORTH AMERICA: In the United States, widespread rains in late March in the main cereal producing areas, following several months of dry weather, greatly benefited developing wheat crops and improved conditions for coarse grains planting. In Canada, the bulk of the wheat and coarse grains crops are spring sown and the main sowing period is May-June. Early indications of farmers planting intentions point to a possible increase in wheat area.</p>
	<p>OCEANIA: In Australia, widespread rains in March have ensured good soil moisture for the 2000 winter crop season due to start in May. Early indications point to a possible reduction in wheat area but increased barley plantings in response to current price prospects, which are somewhat better for the latter crop.</p>



AFFECTED COUNTRIES^{1/}

UNFAVOURABLE PROSPECTS FOR CURRENT CROPS

<u>Country</u>	<u>Harvest date</u>	<u>Main contributory factors</u>
Afghanistan*	May/Jun.	Civil strife, drought
Algeria	May/Jun.	Drought
Bolivia	Apr./May	Flooding
Congo, Dem.Rep.of*	Nov./Dec.	Civil strife
East Timor	Mar./Apr.	Civil strife
Ecuador	Apr./Aug.	Reduced plantings, drought
Ethiopia*	Jun./Aug.	Drought
Honduras	Aug./Dec.	Reduced plantings, financial constraints
Iraq*	May/Jun.	Drought, lack of inputs
Jamaica	Nov./Dec.	Drought
Jordan	May/Jun.	Drought
Kenya	Aug./Nov.	Drought
Libya	May/Jun.	Insufficient rainfall
Madagascar	Apr.	Drought/cyclones
Morocco	May/Jun.	Drought
Mozambique	Mar./Apr.	Floods
Paraguay	Mar./May	Drought
Somalia*	Aug./Sept.	Drought, civil strife
Swaziland	Apr.	Excessive rains
Tanzania	May/Aug.	Insufficient rainfall
Tunisia	May/Jun.	Insufficient rainfall
Uruguay	Mar./May	Drought

COUNTRIES FACING EXCEPTIONAL FOOD EMERGENCIES (Total: 36 countries)^{2/}

<u>Country/Region</u>	<u>Reason for Emergency</u>	<u>Country/Region</u>	<u>Reason for Emergency</u>
AFRICA (16 countries)		LATIN AMERICA (7 countries)	
Angola*	Civil strife, population displacement	Cuba	Drought
Burundi*	Civil strife and insecurity	El Salvador	Adverse weather (hurricane Mitch)
Congo, Dem.Rep.*	Civil strife, IDPs and refugees	Guatemala	Adverse weather (hurricane Mitch)
Congo, Rep. of*	Civil strife	Haiti*	Structural economic problems
Eritrea*	IDPs, returnees and drought	Honduras	Adverse weather (hurricane Mitch)
Ethiopia*	Drought, IDPs	Nicaragua	Adverse weather (hurricane Mitch)
Kenya	Drought	Venezuela	Adverse weather (flooding/mudslides)
Liberia*	Past civil strife, shortage of inputs	EUROPE (2 countries)	
Madagascar	Drought/cyclones	Russian Fed.	Civil strife, vulnerable groups
Mozambique	Floods	F.Rep. Yugoslavia*	Vulnerable groups and refugees
Rwanda*	Insecurity in parts		
Sierra Leone*	Civil strife, population displacement		
Somalia*	Drought, civil strife		
Sudan*	Civil strife in the south		
Tanzania	Food deficits in several regions		
Uganda	Civil strife in parts, drought		
ASIA (11 countries)			
Afghanistan*	Civil strife		
Armenia*	Vulnerable groups and refugees		
Azerbaijan	Vulnerable groups and refugees		
East Timor	Civil strife		
Georgia*	Vulnerable groups and refugees		
Iraq*	Economic embargo, drought		
Jordan	Drought		
Korea, DPR*	Economic problems, drought		
Mongolia*	Heavy snowfall		
Syria	Drought		
Tajikistan*	Reduced harvest, poverty		

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

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

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

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

CROP AND FOOD SUPPLY SITUATION

OVERVIEW

Famine conditions are rapidly emerging in parts of eastern Africa, with over 16 million people facing serious food supply difficulties in the sub-region. A grave humanitarian situation has developed in the pastoral areas of eastern and southern Ethiopia, due to the cumulative effects of drought over the past three years and deaths from starvation are being increasingly reported from the worst affected areas. Bordering areas of Kenya, Uganda and Somalia are also seriously affected. Current crop prospects are unfavourable in eastern Africa where rainfall during the 1999/2000 secondary season has been erratic and inadequate. In North Africa, a severe drought has affected the current crop, particularly in Algeria, Morocco and Tunisia. Elsewhere, the food and health situation of internally displaced persons (IDPs) in Angola, the Democratic Republic of Congo and Burundi continues to give serious cause for concern. On 2 April cyclone "Hudah" hit northern Madagascar, previously devastated by cyclones "Eline" and "Gloria". Although Cyclone "Hudah" did not bring extremely heavy rains and floods, the high force winds of up to 300 km/hour have caused extensive damage to housing and infrastructure such as schools, hospitals and health centres, telecommunications, as well as crops, particularly tree crops. In Mozambique, although cyclone "Hudah" had dissipated before reaching the northern coast, heavy rains associated with it have affected the provinces of Zambezia and Nampular, two major maize-producing areas in the country. This may degrade the quality of the crop now reaching maturity. In Asia, the worst winter in 30 years has killed several hundred thousand livestock in Mongolia, seriously affecting the livelihood and food security of a quarter of the country's population, while food assistance continues to be needed in DPR Korea due to past natural disasters compounded by economic problems. In the Near East, harvest prospects are unfavourable in Afghanistan, Iraq and Jordan due to prolonged dry weather. In the CIS, urgent humanitarian assistance is needed in Chechnya and for refugees in neighbouring countries. In Europe weather conditions have generally been favourable for crops so far. In Latin America, the main activity currently is land preparation for the 2000/01 first season maize and bean crops in Central America and the Caribbean, and for wheat in South America.

SITUATION BY REGION

Africa

In **eastern Africa**, grave food supply difficulties have emerged, mainly due to drought-induced crop and livestock losses. An estimated 16 million people are affected by severe food shortages, with deaths from starvation being increasingly reported from some areas. Pastoralists in the sub-region have been the worst affected by a succession of poor rains which have led to losses of large numbers of their livestock. With poor rainfall forecast for the sub-region during the current season, the number of people in need of food assistance is anticipated to increase. A grave food situation has developed in Ethiopia, where more than 8 million people face severe food shortages. The situation is particularly serious in the pastoral areas of the east and south, following three consecutive years of little or no rainfall. Starvation-related deaths, particularly among children, are reported. In Eritrea, the food situation is very tight for nearly 600 000 people affected by the war with Ethiopia and the prevailing drought along the coastal areas. In Kenya, the food supply situation is alarming in the northern, eastern and north-western pastoral districts affected by successive droughts. Nearly 2.7 million people are facing severe food shortages. In Somalia, nearly 650 000 people in 6 southern regions are facing severe food shortages. Hardest hit are farmers in Huddur, Wajid and Rab-Dure districts in Bakool Region, where many have left their villages in search of food. In Tanzania, food assistance is needed for nearly 800 000 food insecure people, mainly in the regions of Dodoma, Mara, Shinyanga, Singida, Tabora, Tanga and southern Mwanza, which have suffered a third consecutive poor harvest. In Sudan, despite a stable food security situation, about 103 000 tonnes of food aid is needed for some 2.4 million people affected by drought and the long-running civil conflict. In Uganda, the food supply situation has deteriorated in Kotido and Moroto districts, with nearly 215 000 people needing urgent food assistance, while nearly 112 000 people in Bundibugyo District have been displaced by civil strife.

Prospects for the secondary 2000 cereal crops in the region are mixed. In Kenya, despite some good crops in Eastern and Coast Provinces, below-normal cumulative rainfall for the season and prolonged drought in some areas have adversely affected the maize crop. In Tanzania, the recently harvested "Vuli" season cereal crop was drastically reduced due to poor rains, and current estimates suggest a reduction of about 70 percent compared to the previous five years' average. However, production of non-cereal foodcrops has been satisfactory. In Ethiopia, a below-average "Belg" crop is anticipated, reflecting continued drought, and

shortages of draught oxen and seed. By contrast, in Somalia, the "Deyr" season cereal harvest is estimated at 108 000 tonnes, about 53 percent above the post-civil war (1993-1998) average, reflecting favourable conditions in some main growing areas. However, poor rains in Bakool Region have severely affected production. In Uganda, well distributed rains resulted in satisfactory output of the recently harvested coarse grain crops. In Sudan, harvesting of the wheat crop is underway and production is forecast at 288 000 tonnes, substantially higher than the poor crop of 1999. In Rwanda, the overall food supply situation has improved following a good 2000 A season. By contrast, in Burundi the harvest was reduced by widespread dry weather and population displacements.

In **southern Africa**, overall prospects for the sub-region's 2000 cereal crops, now being harvested, are favourable. Despite extensive damage caused by torrential rains and Cyclones Eline and Gloria in February/March, the major maize growing areas were not affected by the flooding, and the abundant rains benefited crops which had been stressed by dry weather in some parts. However, the situation varies from country to country and remains uncertain pending an assessment of the impact of the heavy rains, and also of erratic and insufficient precipitation in several areas

In South Africa, despite losses caused by floods in some provinces, the latest official forecast indicates a bumper maize crop of 9.5 million tonnes, compared to 7.1 million tonnes last year. By contrast, in Madagascar, the 2000 paddy crop has been negatively affected by dry weather earlier in the season and subsequently by three consecutive cyclones which resulted in severe floods that caused extensive crop losses. In Mozambique, the severe floods that affected the southern and central parts of the country in February/March did not affect the major growing areas of the north, which benefited from good rains in March. However, heavy rains associated with hurricane "Hudah" in northern parts may adversely affect the quality of the maize crop, now close to maturity or being harvested. In Zimbabwe, this year's maize production is anticipated to decline due to lower plantings and the heavy rains in February and March which may have caused reductions in yields. In Malawi, notwithstanding the flood-induced crop losses in the south, abundant rains from the second dekad of February improved prospects for the maize crop in central and northern parts, affected by dry weather earlier in the season. Official forecasts indicate maize production of 2.33 million tonnes in 2000, 6 percent below the record harvest of last year. In Swaziland, the outlook for the harvest is poor reflecting excessive rains in December and severe flooding in early February. Maize production is forecast to decrease by 37 percent to well below average. In Botswana, harvest prospects are uncertain reflecting heavy rains over the past two months and severe flooding in late February. In Zambia, abundant rains since mid-February have benefited the main maize crop, affected by erratic precipitation earlier in the season. In Namibia, the outlook remains uncertain; heavy rains in mid-February in the major northern growing areas have been followed by below-average precipitation in March. In Angola, the food outlook is also uncertain, reflecting below-average precipitation since February in the important central growing areas, and continuous population displacements during the growing season. In Lesotho, despite generally good rains since mid-February, coarse grain yields may have been affected by a prolonged dry spell at the beginning of the season and, subsequently, by floods in the lowlands.

In **northern Africa**, current crop prospects for 2000 are unfavourable due to prolonged dry conditions since January. With the exception of high altitude locations and the Atlantic coastline which received some light rains in March, crop growing areas in the region extending across Morocco and northern Algeria have received little rain since January. Dry conditions have also affected parts of northern and central Tunisia and northern Libya. This has resulted in total crop loss in several areas of Morocco and Algeria. The outlook is also unfavourable for livestock producers due to a shortage of fodder and water in many areas. This will have serious food security repercussions, particularly for small herders who rely mostly on livestock for their livelihood. In 1999, the drought-induced shortfall in cereal production was largely covered by large stock drawdowns. A shortfall in production in 2000 will, therefore, have to be covered largely by imports. In Egypt, by contrast, the mostly irrigated wheat crop is growing under favourable conditions so far and a good harvest is in prospect.

In **western Africa**, rains started in March in the south of the countries along the Gulf of Guinea, allowing planting of the first maize crop. In the Sahel, seasonably dry conditions prevail and there is little agricultural activity, except for cultivation of recession or off season crops whose prospects are generally excellent following the high levels reached by rivers or water reserves. However, pest infestations are threatening crops in Mauritania.

Reflecting generally favourable growing conditions during the 1999 rainy season, a record crop has been gathered in the Sahel. Following release of final production figures by several countries, aggregate cereal

production in 1999 for the nine CILSS member countries is estimated at 11.6 million tonnes, which is 8 percent higher than in 1998 and 23 percent above the average of the last five years. Record crops were harvested in Burkina Faso, Cape Verde, The Gambia, Mali, Mauritania and Senegal, while above-average output is anticipated in Chad and Niger. Output is estimated to remain below average in Guinea-Bissau due to population displacement caused by civil strife in 1998. The abundant rains also permitted satisfactory regeneration of pastures and replenishment of water reserves.

In the coastal countries along the Gulf of Guinea, cereal harvests in 1999 were generally good in Benin, Nigeria and Togo but less favourable in Côte d'Ivoire and Ghana. In Sierra Leone, an FAO crop and food supply assessment mission in December estimated paddy production at around 45 percent of pre-civil war production. The aggregate 1999 cereal output for the eight countries along the Gulf of Guinea (Benin, Côte d'Ivoire, Ghana, Guinea, Liberia, Nigeria, Sierra Leone and Togo) is estimated at around 29.8 million tonnes compared to 29.3 million tonnes in 1998 (including rice in paddy). Liberia and Sierra Leone remain heavily dependent on international food assistance despite some improvement in food production, notably in Liberia.

Following these good harvests, the food supply situation will be satisfactory in 2000 in most countries. Markets are well supplied and prices are much lower than at the same time in recent years in the Sahel. Farmers have replenished their stocks and the low prices of cereals have facilitated the replenishment of national food security stocks in several countries. Terms of trade for pastoralists are favourable. However, localised food supply difficulties are anticipated during the lean season in the areas affected by flooding, notably in Mauritania, northern Senegal and southern Chad. Local purchases and/or triangular transactions in the surplus areas for transfer to deficit areas are recommended to support domestic production.

In **central Africa**, 1999 production was above average in Cameroon and was a record in the Central African Republic. Civil strife in both the Republic of Congo and the Democratic Republic of Congo, however, continues to hamper agriculture and marketing activities. In the Republic of Congo, floods affected the north and the capital Brazzaville in November/December. In the Democratic Republic of Congo, severe food shortages and malnutrition are reported among the large number of people displaced by persistent civil strife, particularly in north-eastern Katanga and South Kivu which are largely inaccessible due to insecurity.

Asia

The Asia region accounts for some 49 percent of aggregate cereal production. In 1999 grain production in the region was around 1 013 million tonnes, about 1 percent up on the previous year. In several countries which were previously affected by serious El Niño drought 2 years ago, production has continued to recover, especially in the Philippines and Indonesia. Grain consumption in these countries is also expected to increase as the economies continue to recover after the Asian Financial Crisis in 1997/98. In particular, demand is expected to increase for wheat and maize as consumption of wheat-based products, fast foods, and poultry/meat increases. In China, the region's largest producer, the area under main cereals, wheat and maize, is forecast to decline further as price support is restricted and farmers switch to other, more lucrative crops.

Currently, the main agricultural activities in the region include harvesting of the main winter wheat crop in India, Pakistan and Bangladesh, whilst the crop is breaking dormancy and at early development stage in China. Weather conditions have been generally favourable due to higher precipitation over winter. In spite of a 7 percent fall in area planted in China, therefore, wheat output is likely to decline less markedly from the 114 million tonnes produced in 1999. In India, area planted also fell and the crop was affected by drought in parts, though overall production is likely to be similar to last year's record of around 71 million tonnes. Prospects are most favourable in Pakistan, where production is likely to increase by almost 2 million tonnes over last year, while Bangladesh is also likely to produce a bumper crop similar to last year's record. In contrast, below normal rainfall in the Islamic Republic of Iran in January and February means that much more precipitation is still needed for the developing crop to ensure recovery following last year's seriously drought affected crop. Elsewhere in the region the main rice activities include harvesting of irrigated boro crop in Bangladesh, prospects for which are favourable. The country is projected to produce a record rice crop in 1999/2000. In Indonesia, Sri Lanka and Cambodia, harvesting of the main rice crops is underway or near completion, whilst in Vietnam, transplanting of the main winter-spring crop (one of three produced a year) is underway in northern parts, having being completed earlier in the south. In the Philippines harvesting of dry season rice will commence in the next few weeks, whilst in Thailand, it will begin in May.

The latest food emergency to emerge in the region is in Mongolia, where the worst winter weather in 30 years killed large numbers of animals which are extremely important for the food security of large numbers of nomadic householders. An estimated quarter of the population of 2.7 million people are likely to face food shortages of varying degrees in the coming months. Chronic food supply problems continue in DPR Korea due to a combination of past disasters and economic problems. In East Timor, despite the upheaval last year, the overall consequences on output are likely to be less pronounced than had been expected, especially as weather conditions have been generally favourable.

In the **Near East**, continued drought conditions have affected crop and livestock production in many parts. In Afghanistan, in addition to the adverse effects of continued civil strife and short supply of agricultural inputs, drought in much of southern and central parts affected production of 2000 winter grains, to be harvested from May. In Iraq, continued drought conditions have exacerbated the already tight food supply situation. In Jordan, despite some beneficial rains in the winter cropping season, insufficient rains have affected agricultural production in several parts. In Syria, favourable rains have enhanced prospects for cereal crops, for harvest from May. However, thousands of herders, affected by last year's prolonged drought, are still in need of assistance. In Turkey, recent favourable rains and snow cover continue to favour the developments of the wheat crop, to be harvested from June, reversing the effects of dry weather earlier in the season.

Across the eight **CIS countries** in the Asian region, in Kazakhstan, by far the largest producer in the sub-region, the bulk of the 2000 grains will not be planted until May. Elsewhere in the eight CIS countries, latest indications are that the aggregate area sown to winter grains has increased with significant declines only in Georgia and Armenia, partly due to high fuel prices. In Tajikistan, crop disease problems need to be addressed if output is to be maintained at last year's level. In Uzbekistan, and Turkmenistan the area sown to winter grains has increased. Growing conditions have been mostly satisfactory to date, and given normal weather until the completion of the harvest, winter wheat production could continue to edge upwards. Planting of spring coarse grains and cotton is underway in some areas.

In the eight countries, the 1999 aggregate grain harvest increased sharply to 24 million from 17 million tonnes in 1998. Wheat production increased by 6 million tonnes to 19 million tonnes mainly due to a sharp recovery in Kazakhstan and higher outputs in 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 2.7 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 officially put at 4.3 million tonnes (1998: 4.1 million tonnes), which includes 3.6 million tonnes of wheat. 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. Contrary to earlier indications, output in Tajikistan is officially put at 475 000 tonnes, only 5 percent less than in 1998, but above the five-year average. The improved grain harvest has reduced the import requirements of most countries. Against aggregate cereal import requirement estimated at 2.5 million tonnes, 0.4 million tonnes are pledged to be provided as food aid, with the balance to be covered by commercial imports.

In all these countries, however, aggregate statistics hide increasingly large income disparities and all countries have socially and economically vulnerable people who are barely surviving. In Armenia, Azerbaijan, Georgia and Tajikistan, countries where a sharp drop in GDP following independence was aggravated by prolonged civil strife, vulnerable populations (including refugees, and IDPs) continue to require food assistance.

Latin America

In **Central America and the Caribbean**, the main agricultural activities include fieldwork in preparation for planting of the 2000/2001 first season cereal and bean crops which is due to start with the arrival of the first rains of the season in April. Plantings in Costa Rica, El Salvador, Guatemala, and Nicaragua are expected to be close to 1999/2000 average or above-average levels. In Honduras, prospects are uncertain for the important maize crop, due to unattractive prevailing prices. The outlook is also uncertain for the paddy crop, largely as a consequence of financial and other constraints, but measures are being taken by the Government to assist producers overcome such constraints. In Mexico, harvesting of the 2000 wheat crop is about to start, while land is being prepared for planting of the important spring/summer maize crop in the main producing central-southern belt states. In the Caribbean, dry weather conditions have persisted in the last few weeks, but with no significant adverse effect reported on the developing crops in Haiti and the

Dominican Republic. In Cuba, the dry weather has benefited harvesting of the important foreign exchange earner, sugar cane. In Jamaica, prolonged dry weather has negatively affected minor foodcrops, mainly vegetables.

In the southern parts of **South America**, land is being prepared for planting of the 2000/2001 wheat crop in most countries, while harvesting of the 2000 maize crop has started. Average to above-average maize outputs are provisionally forecast in Brazil and Argentina respectively, while prospects are poor in Uruguay and Paraguay which have been affected by prolonged drought. In Chile, production of maize is expected to recover from last year's drought affected crop. In the Andean countries, harvesting of the 2000 first season wheat crop is about to start in Bolivia, while planting is underway in Peru, Ecuador and Colombia. Harvesting of the 2000 first (main) season maize crop has also started in the first two countries. In Colombia, heavy rains and flooding in March have delayed planting of the main maize crop. In Venezuela, rehabilitation and reconstruction programmes are being implemented in the states affected by mudslides and flooding in December. Planting of the main maize crop has started under rather wet conditions.

Europe

In the EC, generally favourable weather conditions over the past two months have benefited developing winter crops and early spring crop planting. The main exception has been in the Mediterranean areas where precipitation has been below normal. Latest indications continue to point to an increase in the aggregate cereal area for the 2000 harvest, largely at the expense of oilseeds. Based on analyses of the overall weather conditions for the season so far, early indications are that average yields may be somewhat higher than in the previous year. FAO tentatively forecasts this year's aggregate cereal output in the Community at about 210 million tonnes, 4 percent up on 1999.

Elsewhere in Europe, weather conditions have also remained generally favourable over the past two months. Increased cereal production is expected in several countries with planted areas and yields recovering from last year's drought-reduced levels. In the Balkan countries large-scale international assistance continues for vulnerable populations. There are currently some 1.1 million beneficiaries of food assistance in The Federal Republic of Yugoslavia (excluding Kosovo Province), including refugees, IDPs and economically and socially deprived people. In the Kosovo Province, the total beneficiary caseload is currently being phased down from 900 000 to 600 000, reflecting improvements in economic conditions in the Province. Assistance continues to be provided in Albania and the Former Yugoslav Republic of Macedonia for vulnerable people affected by the Kosovo War.

In the four CIS countries west of the Urals (Belarus, Moldova, Russian Federation, Ukraine), latest estimates indicate that the area sown to winter crops (mainly wheat and rye) for harvest this year, is larger than last year. Winter conditions have been favourable overall, with milder temperatures and adequate precipitation in most areas. In the Russian Federation, latest estimates indicate that the winter crop area increased by 4 percent to about 14.2 million hectares and winter cereal output, given normal weather, is likely to increase. In Belarus also, prospects are satisfactory to date. In Moldova and the Ukraine, the condition of the winter crop, which had a poor start, has improved with the mild winter and estimates of the area to be resown have been reduced. Nevertheless the area of winter grains for harvest is likely to be less than last year and inadequate use of inputs is likely to constrain yields.

Spring fieldwork is underway in southern parts of the region. High fuel prices and variable weather are slowing progress but the spring is early this year. In the Russian Federation, the availability of some inputs (fertilizer and fuel) is somewhat better than last year, but the availability of credit is less. High cereal prices in response to the tight supply situation in the region could lead to an increase in the area sown in the Russian Federation. Given favourable weather, the 2000 grain harvest could increase to 65-70 million tonnes compared to the 60 million tonnes in 1999. By contrast, in the Ukraine, spring plantings could be adversely affected by high fuel prices, difficult access to credit and increasingly inadequate use of inputs for the newly reorganised farms. In Belarus, pervasive economic difficulties are expected to continue to constrain yields. In Moldova, given better weather, output could recover somewhat from last year's poor level of 2.2 million tonnes.

The aggregate 1999 cereal and pulse harvest in the four CIS countries in the region, estimated by FAO at 93 million tonnes, was barely 3 percent more than the poor harvest of 1998 and well below average. As a result, the grain supply situation remains tight in all four countries and cereal prices are rising. With imports, human consumption needs are being covered, but the availability of animal feed is very constrained and livestock

production is likely to contract further in 2000. Aggregate cereal imports for these four countries are currently estimated at nearly 10 million tonnes, more than double last year's, reflecting larger imports particularly by Belarus and the Russian Federation. In the Russian Federation, despite cereal imports now estimated to rise sharply from around 3 million tonnes in 1998/99 to nearly 8 million tonnes in 1999/2000, there is still no scope to rebuild stocks drawn down in 1998/99. Between July 1999 and February 2000, nearly 6 million tonnes have already been imported. Imports of cereals by Belarus could double to 1.5 million tonnes, if adequate funds are mobilized, following last year's record low harvest of 3.6 million tonnes. The 1999 harvest in Moldova (2.2 million tonnes) is almost adequate to cover consumption needs and significant cereal imports are not anticipated. Ukraine, despite a very poor harvest in 1999 (estimated at 27 million tonnes), will remain a net exporter of up to 3 million tonnes of cereals, mainly wheat and barley.

Populations in Chechnya and surrounding republics will continue to need considerable food and non-food assistance. A UN Mission which visited Ingushetia in February found that considerable humanitarian assistance is needed over a broad spectrum of basic needs, including food, shelter, health, nutrition, water and sanitation. Some 355 000 people (including 185 000 IDPs and the balance members of host families) were found to need urgent food relief. Health remains a major problem in both Chechnya and Ingushetia, reflecting inadequate water and sanitation facilities. In Chechnya, the food outlook this year is poor, reflecting damage to infrastructure, livestock and the grape industry, and very limited availability of funds and inputs to restart production, as well as the need to first clear mines from arable land. The returning populations will need considerable humanitarian assistance in the coming months.

North America

In the United States, conditions for the developing winter wheat crops and summer coarse grains planting improved significantly in late March following widespread rains in the main producing areas, where moisture had been greatly lacking throughout the winter months. Latest official estimates put winter wheat plantings at about 17.5 million hectares, virtually unchanged from the previous year's reduced area, while early indications for spring wheat plantings point to a 5 percent reduction in area to about 7.5 million hectares. FAO currently forecasts the aggregate 2000 wheat output in the United States at 60 million tonnes, about 4 percent down from 1999. Some early coarse grains crops are already in the ground in southern parts, but the bulk of the maize planting takes place from late April. Early indications point to a slight increase for maize plantings but a decline for sorghum. Planting of this season's rice crop is underway and the area is anticipated to decline due to low price prospects and high stock levels. In Canada, the bulk of the wheat and coarse grains crops are spring sown and the main sowing period is May-June. Early indications of farmers planting intentions point to a possible increase in wheat area at the expense of canola and flaxseed because of their relatively lower prices.

Oceania

In Australia, planting of the main 2000 wheat and coarse grains crops is due to start in May. Widespread rains in March have already ensured good soil moisture availabilities for crop emergence and growth in the season to come. However, early official forecasts indicate a decline in wheat production to about 22.7 million tonnes after the 1999 record crop, based on a marginally reduced area this year and an average yield. By contrast, output of barley is expected to increase sharply in response to relatively better price prospects compared to other crops.

COUNTRY REPORTS ^{1/}

AFRICA

NORTHERN AFRICA

ALGERIA (5 April)

Prospects for the 1999/2000 winter crops, to be harvested from May, are uncertain. Prolonged dry weather has prevailed over grain growing areas since mid-January, resulting in spotty crop emergence and stunted plants. Particularly affected are crops in central and western areas while growing conditions are relatively better in the east. Moderate showers in mid-March over some areas provided much needed relief. However, more rain is needed for the remainder of the growing season to avert further decline in yields.

Indications are that this year's harvest will be below the 1999 cereal crop which, estimated at about 2 million tonnes, was some 30 percent below the previous year's harvest and below average. Cereal import requirements for the 2000/01 marketing year (July/June), mostly wheat, are likely to exceed the current year's estimated requirement of 6 million tonnes.

EGYPT (5 April)

In Egypt, prospects for the 1999/2000 winter grain crop, mostly wheat and barley, are favourable. Growing conditions have been satisfactory for the mostly irrigated wheat crop to be harvested from mid-May. The area planted is estimated at about 1 million hectares, similar to the previous year, but yields and production are anticipated to increase as a result of Government incentives to farmers to cultivate new varieties and use improved cropping practices. The 1999 cereal output is estimated at about 17.2 million tonnes, some 4 percent below the previous year but above average. This includes 6.3 million tonnes of wheat, 6.8 million tonnes of coarse grains and 4 million tonnes of rice. Nonetheless, the country needs to import about 10 million tonnes of cereals in 1999/2000 (July/June) to meet needs. This includes an estimated 6.8 million tonnes of wheat and wheat flour.

LIBYA (5 April)

Prospects for the 1999/2000 winter crops, to be harvested from May, are uncertain. Prolonged dry weather has prevailed over winter grain areas of the north and north-east, which will reduce yields. While localized showers continue to be recorded, more rain is needed for the remainder of the growing season to avert further decline in yields.

The 1999 cereal production is estimated at 251 000 tonnes, some 5 percent above the previous year's relatively good crop. The country's cereal import requirements for 1999/2000 are estimated at 2.1 million tonnes, mostly wheat.

MOROCCO (5 April)

Severe drought conditions over most of the country for the past three months have seriously affected the winter crops, due for harvest from May onwards. While the season started with widespread rains in November and December, a prolonged drought since mid-January and a heat wave in February have exhausted soil moisture, causing serious crop stress and damage to large areas of wheat and barley. Satellite images indicate that conditions may be worse than last year when production was seriously reduced by drought.

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

Except in the higher elevations and the Atlantic coastline which received some light rains in March, dry conditions continue to prevail across the country and most regions have generally received less than 100 mm of rain since mid-January. If rains are not received in the next few weeks, several producing areas could face a complete crop failure, while it may already be too late for some crops which have reached the maturity stage.

Initial indications are that this year's cereal harvest could be below the 1999 cereal crop estimated at 3.8 million tonnes, which was 42 percent below the previous year's level, also due to unfavourable weather. As a result, cereal imports in the 1999/2000 marketing year (July/June) are currently estimated at about 4.4 million tonnes, up 25 percent on the previous year. A second consecutive reduced harvest will result in increased grain imports in the 2000/01 marketing year. The subsequent increase in cereal import bill will exert further pressure on scarce foreign reserves.

The Government is preparing contingency measures, including tighter management of available water in dams for humans, livestock and crops, and emergency measures to assist farmers, many of whom were victims of last year's drought.

TUNISIA (5 April)

Prospects for the 1999/2000 winter grains to be harvested from May/June are uncertain due to prolonged dry weather in February and March. Rainfall has been erratic with a late start followed by moderate rains in December and January, and then the dry spell. Localized showers continue to be recorded in various areas but cumulative rainfall in March was below normal. More rain is needed in the next several weeks for crops to reach maturity without further reduction in yields. This would also benefit livestock producers by reducing the shortage of water and fodder.

The 1999 cereal production is estimated at 1.8 million tonnes, 9 percent above the previous year's average crop. This includes 1.4 million tonnes of wheat, which is slightly above the 1998 level. Imports of cereals in the marketing year 1999/2000 (July/June), mostly wheat and maize, are estimated at about 1.4 million tonnes, similar to the year before but much below the 1997/98 level when production was affected by drought.

WESTERN AFRICA

BENIN (29 March)

The first rains started in mid-March in the south, allowing planting of the first maize crop. The aggregate output of cereals (including rice in paddy form) in 1999 is estimated at 925 000 tonnes, which is well above average. As a result, the overall food supply situation is satisfactory. However, at the end of the last rainy season, in September/October, floods in many villages displaced thousands of people. Cereal imports, for domestic use and re-exports, during the 2000 marketing year are estimated at 145 000 tonnes and the food aid requirement is estimated at 10 000 tonnes.

BURKINA FASO (29 March)

Seasonably dry conditions prevail. The final 1999 production estimates released by the statistical services indicate that 1999 aggregate production of cereals reached a record of 2.7 million tonnes (with rice in paddy form), which is 12.9 percent above average for the last five years. Millet and sorghum production showed a decrease, while maize and rice production increased.

The overall food supply situation is satisfactory. Markets are well supplied and prices of local millet and sorghum are lower than in previous several years. However, some populations may be vulnerable to food shortage, notably in the provinces of Boulkiemdé, Samnatenga and Sanguié, following successive below-average harvests. The cereal import requirement for the 1999/2000

marketing year is estimated at 155 000 tonnes, mainly wheat and rice. Emergency food assistance has been distributed in the provinces of Bouliké, Kouritenga, Passoré, Poni, and Yatenga to 12 000 Burkinabe who fled from Tebou in south-west Côte d'Ivoire in early November following land tenure disputes in cocoa plantations. Around 4 000 people have been identified as particularly vulnerable.

CAPE VERDE (29 March)

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 the average of the last five years.

Following this record crop, the overall food supply situation has improved in rural areas affected by several successive poor crops. With normal cereal imports, markets are well supplied and prices are stable. However, the areas of Ribeira Grande and Paúl in Santo Antão island are reported as vulnerable. The bumper 1999 production will cover only about a quarter of consumption requirement, but available stocks and planned commercial imports or food aid for the year 2000 will be sufficient to cover the deficit. The cereal import requirement for the 1999/2000 marketing year is estimated at 70 000 tonnes of which 50 000 tonnes are expected to be received as food aid. About 37 000 tonnes of food aid have been received so far.

CHAD (29 March)

Seasonably dry conditions prevail. Off-season crops are growing satisfactorily and prospects are good for berbéré (recession sorghum) in Chari Baguirmi, Mayo Kebbi and Salamat Prefectures as well as for off-season maize and wheat crops in the Lake Chad polders despite some flooding. Following the release of final production estimates by the national statistical services, the aggregate 1999 cereal production is put at 1 230 000 tonnes (with rice in paddy form), which is 9 percent below the 1998 record but 16 percent above the average of the last five years.

The overall food supply situation is satisfactory. Prices of cereals remain stable and are lower than previous years. Farmers have reconstituted stocks for the second consecutive year or sold cereals to compensate for low cotton incomes and poor groundnut production. Some areas were flooded in Moyen Chari and Logone Oriental prefectures. Food supply difficulties could be experienced in northern Lac province and in some areas of Batha, Biltine, Kanem (notably in Mao and Nokou sub-prefectures) and Tandjilé. The cereal import requirement for the 1999/2000 marketing year is estimated at 67 000 tonnes, including 12 000 tonnes of food aid.

COTE D'IVOIRE (29 March)

Rains have started in the south and the centre in mid-March allowing planting of the first maize crop. Production of rice in 1999 increased compared to 1998 due to good rains and larger plantings. The aggregate output of cereals in 1999 is estimated at almost 1.8 million tonnes (with rice in paddy form), which is slightly above the 1998 level.

The overall food supply situation is satisfactory. The cereal import requirement for the 1999/2000 marketing year is estimated at 655 000 tonnes, mainly rice and wheat. The number of Liberian refugees is decreasing due to repatriation. However some 100 000 Liberian refugees and 1 500 Sierra Leoneans are still present in the west.

THE GAMBIA (29 March)

Seasonably dry conditions prevail. Following the release of final production figures by national statistical services, the aggregate 1999 cereal production is estimated at a record of 155 600 tonnes (with rice in paddy form), which is 36 percent above 1998 and 48 percent above the average of the last five years.

The overall food supply situation is satisfactory and markets are well supplied. However, some areas have been affected by substantial flooding, especially in Lower, Central and Upper Baddibous, Fulladu West in the Central River Division and in Sandu, Wulli and Kontora in the Upper River Division. Cereal imports for domestic use and re-export during the 1999/2000 marketing year are estimated at 114 000 tonnes.

GHANA (29 March)

Substantial first rains have been registered in the south and the centre during the second dekad of March, allowing land preparation and planting of the first maize crop. Severe floods in September 1999 devastated three areas in the Northern Regions as major rivers burst banks. Some 332 000 people were made homeless by the floods which destroyed 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 (with rice in paddy form) which is slightly below the output in 1998 and the average of the last five years.

The food supply situation is tight for the population 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. Cereal imports for domestic use and re-export during the 2000 marketing year are estimated at 485 000 tonnes and the food aid requirement at 46 000 tonnes.

GUINEA (29 March)

First rains have been registered in the extreme south in March. Reflecting favourable growing conditions, the output of cereals in 1999 is estimated at a record 1.04 million tonnes (with rice in paddy form).

The overall food supply situation is satisfactory except for refugees. Markets are well supplied both in urban and rural areas. Surpluses are available in the Guinée Maritime and Guinée Forestière regions. Some 488 000 refugees remain in the country (120 000 from Liberia and 366 000 from Sierra Leone). They are located mainly in Gueckédou (360 000), Forécariah (60 000) and N'Zérékore (60 000). They are receiving food assistance and are considered at moderate nutritional risk. The cereal import requirement for the 2000 marketing year is estimated at 350 000 tonnes of wheat and rice.

GUINEA-BISSAU (29 March)

Seasonably dry conditions prevail. A joint FAO/CILSS Crop Assessment Mission estimated 1999 cereal production at 138 700 tonnes (with rice in paddy form), 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.

The overall food supply situation has improved. However, some population groups are still facing food supply difficulties, notably in urban areas and in Catio, Fulakunda and Bambadinca areas.

LIBERIA* (29 March)

First seasonal rains were received in early March. 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 remained depressed in Maryland, Sinoe and Grand Kru due to poor roads rendering access to farms difficult. With the exception of Lofa County, relative peace in most areas has exerted a positive influence on farming activities. The cultivated area in 1999 is anticipated to be substantially higher than in 1998, with rice production expected to reach around 80 percent of pre-civil war level and cassava recovering to normal levels. Although a shortage of basic agricultural inputs was a limiting factor for farmers, it was alleviated 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 lower than in 1998. Food supply in rural areas continues to be tight. Rehabilitation programmes are allowing 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 reportedly deteriorated. It is estimated that there are around 500 000 refugees, internally-displaced persons and returnees in Liberia, including 90 000 refugees from Sierra Leone. The country continues to rely heavily on food aid.

MALI (29 March)

Seasonably dry conditions prevail. Harvesting of rice is underway in the Niger River areas where fish catches are also reported to be 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 form). This exceeds the 1998 record by 16 percent and is 28 percent above the average of the last five years. 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 several wadis of Timetrine. About 1 700 hectares were treated out of 2 575 hectares infested. Locusts escaping control may persist and mature in a few wadis of Adrar des Iforas.

Following two successive bumper crops, the overall food situation is satisfactory. Markets are well supplied and cereal prices declined sharply following harvest and are much lower than in the previous few years. These very low prices, due to large cereal surpluses, may cause economic difficulties for farmers in some areas. There are good opportunities for local purchases and transfer of surplus cereals to neighbouring countries or even outside West Africa. The national early warning system (SAP) estimated that only 2 arrondissements out of the 173 it monitors in the centre and the north (namely Baye in the Bankass cercle and Diankabou in the Koro cercle), are moderately at risk of food shortages following floods which destroyed rice crops. The cereal import requirement for the 1999/2000 marketing year is estimated at 100 000 tonnes of wheat and rice. No food aid is required.

MAURITANIA (29 March)

Abundant precipitation during the rainy season filled dams, enabling much larger areas to be sown with recession (walo) or "bas-fonds" crops. Therefore, prospects for off-season and recession crops are excellent. They were anticipated to be the best in 30-40 years in many areas. However, substantial pest infestations have been reported recently. The high level reached by the Sénégal river also 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 estimated aggregate cereal production in 1999/2000 at 250 900 tonnes (with rice in paddy form) which is 28 percent above the 1998/99 production and well above average. Desert Locusts have been reported in March in the extreme north near Big Moghrein. A total of 340 hectares were treated by ground teams during March. Hatching is likely to come to an end by early April in north-western Tiris-Zemmour but hoppers will continue to develop, forming groups and bands.

The food situation improved in rural areas following a good harvest, except in the flooded areas. Food distributions of 2 240 tonnes of cereals for the affected populations have recently been completed in Brakna, Gorgol, Tagant and Trarza. Markets are well supplied and prices of cereals declined substantially following harvest. Some areas of Aftout and Affolé, Tagant, southern Assaba and the two Hodhs are also vulnerable. The cereal import requirement for the 1999/2000 marketing year is estimated at 260 000 tonnes (excluding re-exports) and the food aid requirement at 25 000 tonnes.

NIGER (29 March)

Seasonably dry conditions prevail. Prospects for off-season irrigated crops are excellent. Following release of final production figures by national statistical services, the aggregate production of cereals in 1999 is estimated at 2.87 million tonnes (with rice in paddy form), about 4 percent below the previous year's record crop but 25 percent above the average of the last five years. The niebe production is estimated at 420 000 tonnes. Low densities of Desert Locust adult populations have been reported on the eastern side of Aïr mountain during March. High densities of gregarious hoppers were also observed at one site. Desert Locusts had already been reported in south-eastern Aïr in February. A total of 700 hectares were sprayed in the area of wadi Tafidet.

The overall food supply situation remains satisfactory. Markets are well supplied and prices of cereals are low. The assessments by the National Early Warning System indicate that no emergency assistance is needed by the country. However, some areas in Aguié, Guidan Roudji, Illéla, Keita, Matameye and Mayahi as well as some urban populations may be somewhat vulnerable. The national security stock has been reconstituted at a level of 14 577 tonnes of millet and 2 132 tonnes of sorghum.

NIGERIA (29 March)

Substantial rains started in the south during the second dekad of March, allowing land preparation and planting of the first maize crop. The 1999 cereal production is estimated at 23.2 million tonnes (with rice in paddy form).

The overall food supply situation is satisfactory. However, due to heavy rains, three hydroelectric dams released water in the Kaduna, Benue and Niger rivers in early October, causing flooding of villages located along the river banks. 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 Niger). 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 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 will no longer be involved in the importation and distribution of fertilizer.

SENEGAL (29 March)

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. The national statistical services released new production figures. The aggregate production of cereals in 1999 is now estimated 1 256 000 tonnes (with rice in paddy form), which is 63 percent above 1998 level and 34 percent above the average for the last five years.

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, although they started to increase in March. However, in Casamance, in some areas of the departments of Diourbel, Kaffrine, Gossas, M'Backé and in the flooded areas of the Sénégal river valley (Dagana, Podor, Matam and Bakel), localized food supply difficulties are likely. The cereal import requirement for the 1999/2000 marketing year is estimated at 760 000 tonnes, including 450 000 tonnes of rice. The food aid requirement is estimated at 10 000 tonnes.

SIERRA LEONE* (29 March)

An FAO Crop Assessment Mission which visited the South West, Southern and part of Eastern regions in December 1999 found that the agricultural sector has been extensively disrupted by civil war throughout the country, even in 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. Practically all the farmers are dependent on Government and NGOs for the supply of seeds, and thus planted areas are 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 percent below the 1998 estimate of 328 310 tonnes. The 1999 paddy production is around 45 percent of the pre-civil 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 planted area and yield decreased from the previous year. In the east, about 2 500 refugees returned from Liberia between January and March. About 485 000 Sierra Leonean refugees are still in neighbouring countries, mainly in Guinea and Liberia.

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. Over the civil 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.

The country continue to rely heavily on food aid. A WFP emergency operation for a Disarmament, Demobilization and Reintegration Programme for operation for refugees, IDPs and returnees was approved in late March.

TOGO (29 March)

First seasonal rains were received in the south and the centre during the second dekad of March, allowing land preparation and planting of the first maize crop. Reflecting widespread and above-normal rains during the 1999 growing season, the aggregate output of cereals in 1999 is estimated at a record 748 000 tonnes (with rice in paddy form) which is 27 percent above 1998 level. Maize production increased sharply, notably in Savanes, Plateaux and Kara regions. Production of tubers and beans also increased.

Following this record crop, the overall food supply situation is satisfactory. However, floods affected the regions of Kara (in the north), Plateaux (in the west), Maritime (in the south) and Savanes (in the extreme north). The worst affected region 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 (29 March)

Planting of the first maize crop started in the south. Reflecting favourable growing conditions, 1999 cereal production was above average. Heavy 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. Cereal imports for domestic use and re-export during the 2000 marketing year are estimated at 290 000 tonnes, mostly wheat and rice. About 1 000 Congolese refugees arrived in northern Cameroon in December 1999.

CENTRAL AFRICAN REPUBLIC (29 March)

The seasonal rains reached the south of the country in early March. Reflecting abundant rains and favourable growing conditions, cereal production in 1999 is estimated at a record of 161 000 tonnes which is 9 percent above 1998.

Following successive good crops, the food supply situation is satisfactory. The cereal import requirement for the 2000 marketing year is estimated at 29 000 tonnes, mainly wheat.

CONGO, DEMOCRATIC REPUBLIC OF* (29 March)

The food supply situation remains tight in most parts of the country as a result of persistent civil war. In particular, severe food shortages and malnutrition are reported among large numbers of 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, many others have died of illnesses or epidemics due to inadequate access to drinking water or medical care.

Among the population most affected by the crisis, are those in urban areas, particularly 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 due to a serious erosion of the 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 for additional contributions.

CONGO, REP OF* (29 March)

Following the December 1999 ceasefire signed between the government and opposition parties, the security situation has improved in the Pool region over recent months but remains fragile. The rate of return of displaced people to the cities is rising fast; about 600 000 of the estimated 810 000 displaced people have returned. Over 50 000 IDPs are still in the Mossendjo area of Niari region and they need assistance. Severe malnutrition is affecting the displaced population. Nutrition centres have been opened to help malnourished people. Some 2 500 Rwandan refugees have also been integrated in several villages of the Loukolela region following closure of the Loukolela refugee camp in February. The food supply situation should improve in Brazzaville once the railway link Pointe-Noire to Brazzaville reopens, which is scheduled for late April. The cereal import requirement for the 2000 marketing year is estimated at 140 000 tonnes, mostly wheat and rice.

EQUATORIAL GUINEA (29 March)

Rainfall remained low during the 1999 season but this is unlikely to have a serious affect on foodcrop production as the staple crops are sweet potatoes, cassava and plantains. The cereal import requirement for the 2000 marketing year is estimated at 9 000 tonnes of rice and wheat.

GABON (29 March)

The main foodcrops are cassava and plantains but some maize is also produced (around 25 000 tonnes). The country commercially imports the bulk of its cereal requirement, estimated at around 82 000 tonnes in 2000. In a census conducted in November and December 1999 in Libreville, about 13 500 Congolese refugees were registered in Haut-Ogooue in the east and Nyanga in the southwest, the two provinces bordering Congo. Congolese refugees in two other provinces, Ngounie and Ogooue-Lolo, are estimated between 3 000 and 4 000. There are also about 1 500 people from other countries such as Angola, Chad, DRC, Equatorial Guinea and Rwanda. Food supplies for the refugees ran out in mid-February. WFP will provide some 12 000 refugees with 1 200 tonnes of food for six months.

EASTERN AFRICA

BURUNDI* (29 March)

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 people, as a result of the escalation of the civil conflict, occurred immediately after the beginning of the rains, contributing to a further 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 at 62 000 tonnes some 17 percent down. Production of roots/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 continues to deteriorate following a succession of reduced harvests and the persistent population displacement. Food prices have increased sharply from a year ago, mainly for beans, the crop most affected by the dry weather. An estimated 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 people (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 most remain 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, after the suspension of all UN operations in mid-October.

ERITREA* (7 April)

Grain production in 1999 is lower compared with the bumper crop in 1998 due to drought and delayed sowing. The drought in coastal areas was particularly severe affecting crops and pasture. In addition, in areas affected by armed conflict with neighbouring Ethiopia, production was seriously affected by population displacement.

The food situation is very tight for nearly 600 000 people affected by the war with Ethiopia and prevailing drought along the coastal areas. Prices of cereals are unseasonably high. In January 2000, prices of red sorghum, white wheat and barley were respectively higher by about 15, 27 and 23 percent compared to January 1999. Total cereal import requirement in 2000 is estimated at 290 000 tonnes of which food aid amounts to 100 000 tonnes.

The UN Country Team has appealed in January 2000 for US\$42.7 million to assist some 372 000 war-affected and over 211 000 drought affected people. Total pledges by the end-March amounted to about 47 000 tonnes.

ETHIOPIA* (7 April)

Prospects for the 2000 secondary "Belg" season crops, to be harvested from June, are unfavourable reflecting continued drought. The Belg crop accounts for around 8 to 10 percent of annual cereal and pulse production but in some of the northern parts of the country, it provides important amounts of the annual grain production. The failure of last year's Belg season has severely affected the food supply situation of large number of people and were exacerbated by the continued drought through the 1999 main season in these areas. The 1999/2000 main "Meher" season grain harvest was estimated by an FAO/WFP Crop and Food Supply Assessment Mission in November/December at 10.7 million tonnes, some 6 percent below the previous year's outturn but 22 percent higher than the poor year of 1997. The most important factors affecting production were the poor Belg rains, the late start of the Meher rains.

The food supply situation in pastoral areas of the east and south, particularly the Somali Region, which have had three consecutive years of little or no rainfall, is critical. Large numbers of livestock have perished due to drought and a number of starvation-related deaths, particularly among children, are being reported. People have started migrating en masse to towns and feeding centres in search of water and food. In the country as a whole, more than 8 million people, including 400 000 displaced by the border war with Eritrea, are facing severe food shortages. With bleak prospects for the Belg crop in 2000, the number of people in need of assistance is anticipated to increase. Relief food aid requirement in 2000 is

currently estimated at 652 000 tonnes but is likely to increase if the Belg season fails. An Emergency Operation worth US\$136.8 million was jointly approved by FAO and WFP in February 2000 to assist some 2.3 million people for a period of nine months. This is part of an appeal for US\$190 million launched by the UN Country Team to avert a major humanitarian crisis in the country.

KENYA (7 April)

The 2000 main "long rains" cropping season has began and the outlook is uncertain due to continued drought conditions in most regions so far.

Harvesting of the 1999/2000 secondary "short rains" cereal crop, accounting for some 20 percent of annual production, is complete. 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 October 1999, 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-western pastoral districts and parts of Central, Coast and Rift Valley provinces affected by drought during the 1999/2000 "short rains" season. In the pastoral areas, the short rains season are crucial for the replenishment of water supplies and pastures after the long dry season, while in agricultural areas, crops from the short rains provide the bulk of food supplies. Worst affected districts include Turkana, Mandera, Moyale, Garissa, Kajiado, Machakos, Mbeere, Kitui, Wajir, Mwingi, Tana River, Marsabit, Isiolo, Baringo, Samburu, West Pokot, Makueni, and Tharaka Nithi. Prices of maize, the key staple in the country have increased sharply in most parts affecting access to food for a large number of people. In January, maize prices were up to 50 percent higher than the average for the previous five years. Increased malnutrition and health problems were also reported in the affected areas. Official reports have recently indicated that the country has an import requirement of more than 2.5 million tonnes of maize in the year 2000.

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 also appealed in February for about US\$62 million to combat the looming food shortage and distributed some 57 000 tonnes of maize in the last eight months.

RWANDA* (29 March)

The output of the recently harvested 2000 A season crops 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 on the previous year. A substantial increase in area planted compared to the 1999 A season, as well as generally favourable rains, contributed to an 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, indicates a chronic malnutrition rate of 56 percent and a severe malnutrition rate of 2.5 percent.

SOMALIA* (7 April)

Harvesting of the 1999/2000 secondary "Deyr" cereal crop, normally accounting for some 25 percent of annual cereal production, is completed, while planting of the 2000/01 main season cereal crop is about to start. The total cereal production for the 1999/2000 Deyr season is estimated at about 108 000 tonnes, 53 percent above the post-war (1993-1998) average. However, 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.

Despite expected food supply improvement in parts of southern Somalia with a better Deyr harvest in February 2000, nearly 650 000 people in 6 regions are facing severe food shortages. Hardest hit are, Bakool, Gedo, Bay and Hiran Regions where the Deyr harvest has failed and the risk of famine is serious for nearly 425 000 people. With a bleak forecast for the main "Gu" rainy season, which accounts for about three-quarters of annual crop production, the situation is very alarming.

Elsewhere, in north-western Somalia (Somaliland) and north-eastern Somalia (Puntland), despite a relatively stable livestock and food supply conditions, the fast depletion of pasture and water due to a high influx of pastoralists from neighbouring Ethiopia is cause for serious concern. Overall some 200 000 people are also facing food and water shortages.

Food aid deliveries continue to be hindered by insecurity and in February 2000 only about 3 600 tonnes were distributed in southern Somalia. It is also getting harder to provide intended levels of food aid to target beneficiaries.

SUDAN* (7 April)

The outlook for the 2000 irrigated wheat crop, the harvest of which has started, remains favourable, reflecting abundant irrigation water supplies. Total cereal production in 1999 is estimated at about 3.8 million tonnes comprising 3.05 million tonnes of sorghum, 499 000 tonnes of millet, 167 000 tonnes of wheat and 65 000 tonnes of maize (mainly produced in the south). At this level, cereal production is about 37 percent below the 1998 bumper crop.

Despite generally favourable weather, low sorghum prices for most of 1999, which in some cases have fallen below production costs, 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.

Lower harvests of 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 above stated 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 (7 April)

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 particularly poor in Arusha, Kilimanjaro and Tanga Regions.

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 increased by nearly 13 percent to 3.3 million tonnes.

Overall, despite lower cereal production in 1999/2000, 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 January 2000, maize prices in several markets of the country were up to 56 percent lower than at the same period a year earlier and bean prices were up to 41 percent lower. 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 April)

Harvesting of the 1999/2000 second season cereal crops is completed. 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 improved security earlier 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 in 1999 was below average due to a prolonged drought experienced in various parts of the country. Cereal production in 1999 is estimated at about 9 percent below average at 1.7 million tonnes.

The food supply situation is adequate in most parts of the country. Prices of maize and beans in January and February were below the last three years average as supplies from last season's harvest continue to arrive in the markets. Nevertheless, the food supply situation has deteriorated in Kotido and Moroto 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* (29 March)

Growing conditions have deteriorated somewhat with below-average precipitation in the past month in the major growing areas of the central provinces. The output of the 1999/2000 cereal crops, about to be harvested, is uncertain. Continuous displacements of population during the growing season, due to the civil war, have disrupted agricultural activities in several areas. In recent months, the escalation of the conflict has resulted in fresh waves of population movement along the borders with Namibia and Zambia. Security conditions have continued to deteriorate with serious fighting in early March reported in the central highlands province of Huambo, in Uige in the north, in parts of Malanje in the northwest and in Benguela in the south.

The food situation remains extremely critical for about 2 million internally displaced people. Recent nutritional surveys indicate increased malnutrition among these populations. In the provinces of Benguela, in the northern districts of Ganda and Balomba, malnutrition was estimated at 7.4 percent among resident children and 23.1 percent for IDP children, including 6.2 percent of severe malnutrition. However, the persistent insecurity is hampering distribution of emergency food assistance in several parts. Food aid is being provided to some 1.1 million persons.

An FAO/WFP Crop and Food Supply Assessment Mission is scheduled to visit Angola from mid-April to review foodcrop production and the food supply situation and estimate cereal import and food aid requirements for the 2000/01 marketing year (April/March).

BOTSWANA (29 March)

Cyclone Eline in late February aggravated the already serious humanitarian situation caused by flooding earlier in the month which destroyed some 10 000 homes and affected 73 000 people. The Government had estimated the flood damage at US\$8.5 million and appealed for international assistance to deal with the emergency.

An assessment of crop losses in the eastern growing areas is not yet available. However, there is concern about the effect of the floods on livestock, which is of great importance to farmers' food security. Overall, abundant rains of the past February and March have likely benefited the main sorghum crop, to be harvested from mid-April.

LESOTHO (29 March)

Normal to above-normal rains in February and March improved growing conditions for the 2000 cereal crops to be harvested from May. However, the outlook is uncertain. Crops have been affected by a prolonged dry spell at the beginning of the season and by heavy rains and floods in early December, particularly in the lowlands. In these areas, maize production is expected to be reduced.

The overall food supply situation remains satisfactory, reflecting adequate commercial imports so far.

MADAGASCAR (11 April)

Cyclone "Hudah", one the most powerful registered in the Indian Ocean, struck northern Madagascar on 2 April with wind speeds of up to 300 km/hour. The most affected areas are the north-eastern districts of Maroantsetra, Andapa and Antalaha, which had already suffered severe damage from Cyclone "Eline" in mid-February and Tropical Storm "Gloria" two weeks later. Floods are also reported around the town of Befandriana on the northwestern coast. Although the cyclone did not bring extremely heavy rains, it soaked areas that had not yet

dried out from previous floods and the high force winds caused further damage to infrastructure, housing and crops, especially tree crops. Particularly affected are the town of Antalaha and surrounding areas, where houses, schools, health centres, airport and telecommunication facilities, have been destroyed.

Preliminary reports indicate 17 deaths, 100 000 people left homeless and 308 000 persons having experienced damage to housing and means of subsistence, as well as crop losses. This adds to 560 000 people already affected by previous storms. The extent of the damage to agriculture is not yet fully known. The region is the main vanilla producing area in the country and is also an important coffee and clove growing region. Severe losses to these crops and serious damage to the paddy crop are reported. Food stocks in warehouses and household granaries have been destroyed and therefore serious food shortages are expected in the affected areas. Most villages are isolated by floodwaters, landslides, fallen trees and damaged roads. About 100 000 persons are estimated to be in need of emergency food and other humanitarian assistance. Persistent rains are hampering relief operations as well as assessment of the damage. The United Nations has launched an appeal for US\$15.5 million to provide emergency humanitarian assistance to the affected population.

An FAO/WFP Crop and Food Supply Assessment Missions is scheduled to visit the country shortly to assess the extent of crop damage and its impact on the overall national food supply situation for the months ahead.

MALAWI (29 March)

Heavy rains in mid-March in southern areas bordering Mozambique resulted in severe damage to housing and infrastructure, and crop and livestock losses. Preliminary estimates indicate that 10 000 people have been displaced by the floodwaters. Worst affected areas are those along the Lower Shire Valley, particularly the districts of Nsanje and Chikwawa. Emergency food and non-food assistance is urgently required for these populations.

Despite the crop losses in the Southern Region, the abundant rains from the second dekad of February have generally benefited cereal crops in central and northern parts, affected by dry weather earlier in the season. Overall crop prospects are rated favourable. Official forecast indicates a 2000 maize production of 2.33 million tonnes, only 6 percent below the record harvest of last year.

The overall food supply remains satisfactory following the bumper cereal crop of 1999, which resulted in exportable surplus and a substantial increase in maize stocks.

MOZAMBIQUE (29 March)

Cyclone "Hudah", which devastated north-east Madagascar, hit central and northern areas of Mozambique on 9 April but with less intensity. Previously flooded southern areas were not affected. Substantial damage to infrastructure and housing is reported, mainly in the coastal town of Pebane. An assessment of the agricultural damage is not yet available. However, rains and winds associated with the Cyclone are likely to have negatively affected the maize crop at the late maturing stage in the important growing provinces of Zambeisa and Nampula. Yield reductions in these areas would result in a deterioration of the overall harvest prospects, already worsened by crop losses in the South. Southern areas were not affected by Cyclone Hudah. Southern provinces ravaged by floods account for some 13 percent of the total cereal production, and those affected in the central region for an additional 20 percent. Therefore, about one third of national cereal production has been affected by losses and yield reductions. An FAO/WFP Crop and Food Supply Assessment Mission will be fielded in mid-April to review the outcome of the 2000 cropping season and estimate the cereal import and food aid needs for the new marketing year 2000/01 (April/March). International assistance

will also be needed for the reconstruction of housing and infrastructure, severely damaged by the floods.

Rains until mid-March hampered relief operations but the levels of the rivers have progressively decreased. In general, access to 350 000 persons still in camps has improved substantially. Food aid and agricultural support is now needed for the flood-affected people returning to their fields. Preliminary estimates indicated that 1.9 million have been affected by the disaster, and that some 126 000 hectares in the southern and central provinces of Maputo, Gaza and Inhambane, Manica and Sofala have been lost to the floods. Substantial livestock losses are also reported. In these traditionally food-deficit provinces, the sharp reduction in cereal production in 2000 will be compounded by loss of farmers' food and seed stocks in household granaries. However, a full assessment of the damage is not yet possible.

NAMIBIA (29 March)

Prospects for the 2000 cereal crops, mainly sorghum, have deteriorated. Heavy rains in mid-February in the major northern growing areas have been followed by below-average precipitation until the second dekad of March. More rains are needed to avoid yield reductions. Elsewhere in the country, the abundant rains during the season have improved pastures and livestock conditions.

SOUTH AFRICA (29 March)

Abundant rains and floods in the second dekad of March have resulted in loss of life and isolated several areas in the KwaZulu-Natal province. Heavy precipitation also affected parts of Northern and Mpumalanga provinces, already hit by severe flooding in February. Torrential rains and floods in these provinces in February severely damaged housing and infrastructure. Crop losses in the Northern Province were estimated at some R70 million (US\$11 million), mainly pulses, maize and vegetables. Serious damage to the irrigation infrastructure included destruction of 16 dams. The Government has provided emergency assistance in the affected areas and has announced special credit facilities for the rehabilitation of the agricultural and tourism sectors.

In the major maize growing areas, however, good rains in the past two months improved growing conditions for the crop, now at the maturing stage. Despite serious crop losses in the Northern Province, the maize belt was only marginally affected by the floods. The overall outlook for this year's maize harvest is favourable reflecting an increase of 14 percent in the area planted and generally adequate weather conditions. Latest forecasts indicate a bumper maize crop of 9.3 million tonnes compared to 7.7 million tonnes last year. At this level, production will be sufficient to replenish stocks and cover import requirements of other countries in the sub-region.

SWAZILAND (29 March)

Prospects for the 2000 cereal crops are poor. This mainly reflects excessive rains in December and severe flooding in early February, which also resulted in extensive damage to infrastructure and housing. Preliminary official forecast indicate a decline of 37 percent in this year's maize production to a below average level of 72 000 tonnes. Other crops that have been seriously affected by the heavy rains are beans and sweet potatoes.

The overall food supply position remains satisfactory. Cereal import requirement of 72 000 tonnes for the marketing year 1999/2000 (May/April) have already been covered by commercial imports.

ZAMBIA (29 March)

Heavy flooding due to the overflow of the Zambezi River in early March made nearly 10,000 people homeless and resulted in the closure of roads in the river basin. Serious losses to maize and other crops, as well as to livestock are reported in the Lower Zambezi Valley, bordering Mozambique.

Worst affected area is the Luangwa district. Emergency food assistance is being distributed to the affected population.

Despite the localized crop losses, the abundant rains since mid-February have benefited the main maize crop, affected by erratic precipitation earlier in the season. As a result, overall prospects for this year's cereal crop remain satisfactory.

ZIMBABWE* (29 March)

Heavy rains in the second dekad of March aggravated the situation in southern and eastern provinces severely affected by floods in late February, following Cyclone Eline. Latest estimates of the Cyclone damage indicate that 100 persons died, 96 000 have been directly affected, including 20 000 displaced people sheltered in camps, and some 500 000 people who have been indirectly affected. Floods also resulted in serious damage to infrastructure. Worst affected areas are the lowlands along the Save and Tanganda rivers, particularly the district of Chipinge, in the province of Manicaland, where 90 000 persons, or one quarter of the population is in need of food assistance. Flooding has extensively damaged crops along river valleys and water channels in the affected provinces. In particular, in the semi-arid southern Matabeleland province, production in irrigated areas will be reduced by the damage to infrastructure, including farm dams. However, a detailed assessment of the crop losses is not yet available

Although floods have not affected the main maize growing areas of the northeast, where the bulk of cereal crops are produced, this year's maize production is forecast to decrease due to a reduction in the area planted. Heavy rains since mid-February may also result in yield reductions.

ASIA

AFGHANISTAN* (17 March)

Prospects for the 2000 winter grains, for harvest in May/June, are unfavourable, following extended drought conditions in much of southern and central parts of the country. The drought is particularly severe in the south-western provinces of Kandahar and Helmand, with only four days of rain reported in the annual rainy season, November 1999 – February 2000. In addition, adverse effects of continued civil strife and short supply of agricultural inputs continue to take their toll on overall agricultural activities. Large number of livestock were also reported to have died in the rural areas of Kandahar and Zabul provinces from lack of water and pasture.

In 1999, total cereal production was an estimated 3.24 million tonnes (with rice in paddy form), about 16 percent below the previous year's bumper output, due to low level of precipitation and outbreak of pests. An FAO/WFP Crop and Food Supply Assessment Mission is planned to visit the country from end-April to assess overall food supply conditions and estimate cereal import requirements in 2000/01, including food aid.

The food situation is tight for a large number of displaced people. Recent reports indicate that nearly 350 000 internally displaced people in Kabul alone are being targeted by WFP while more than 200 000 people are receiving food assistance in Kandahar and Zabul.

ARMENIA* (3 April)

The target for the 2000 grain (cereal and pulse) harvest is 315 000 tonnes. However, indications are that the winter crop area has been further reduced in response to uncompetitive yields and higher fuel prices. The 1999 grain harvest is officially estimated at 301 000 tonnes, some 8 percent less than the 326 000 tonnes harvested in 1998. Wheat output declined to 210 000 tonnes, mainly reflecting import competition and below-normal autumn and winter precipitation.

In 1999/2000 the cereal import requirement is estimated at nearly 370 000 tonnes, including 350 000 tonnes of wheat. Against this requirement food aid pledges of 87 000 tonnes have been made. The balance is expected to be imported commercially.

Despite increasing per caput GDP in recent years, household purchasing power remains low and at times insufficient to cover the cost of the minimum consumption basket. Living standards, as measured by protein intake, declined somewhat in 1999 reflecting the decrease in workers remittances from the Russian Federation. As a result, average household expenditure on food reached 67 percent in 1999 compared to 57 percent in 1998. In total, some 170 000 vulnerable people will be covered by WFP food assistance, including some 110 000 refugees and vulnerable persons being provided with relief food aid, while 60 000 will be reached through community based food-for-work activities, supporting economic and social development. The programme is planned for three years and will be reviewed annually.

AZERBAIJAN (3 April)

The early outlook for the 2000 grain harvest is satisfactory. The area sown to winter crops (mainly wheat) increased compared to that sown for the 1999 harvest. Nevertheless, it remains well below the average up to 1997, in response to import competition from imported wheat following liberalization of the grain trade and greater profitability from livestock, potato and vegetable production.

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 have severely limited investment in the agri-food sector and domestic producers' access to the growing urban markets.

GDP increased by 7.4 percent in 1999 in local currency terms. The volume of agricultural output rose by 7 percent. The livestock population is increasing by about 9 percent annually (except pigs -20 percent). Meat and milk production increased by about 5 percent and output of eggs by 3 percent.

Grain production in 1999 increased by 15 percent to reach 1 093 000 tonnes, but remained 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. In 1999/2000 imports of cereals are estimated at 607 000 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 (21 March)

Unseasonable rain in mid-February, further favoured prospects of the current, boro, rice crop, harvesting of which will commence from around mid April. The boro crop is almost entirely irrigated as normally no rainfall is received in the period November, when the monsoon ends, to March. Favourable production expected from the crop and that attained from the previous Aus and Aman crops harvested last year, indicate that 1999/2000 rice production may be a record.

Current estimates indicate that milled rice production in 1999/2000 will be around 20.6 million tonnes, similar to the previous year and some 8 percent higher than the average of the last five

years. As a result of higher production, providing conditions remain satisfactory, wheat production in 2000 is forecast to be similar to the record 1.9 million tonnes in 1999. Wheat imports in the next 2000/2001 marketing year are forecast to be similar to the 1.6 million tonnes imported in 1999/2000

The grain situation has eased considerably since severe floods in 1998. Favourable domestic rice and wheat production last year and early this year, together with large stocks, following large imports in 1998/99 mean that the overall food situation remains satisfactory. Imports, particularly rice, this year are likely to fall further as Government imports are expected to be comparatively small, whilst a five percent levy has been introduced to discourage private rice imports.

CAMBODIA (21 March)

The dry season for rice is reported to have progressed more slowly than the previous year, whilst in areas where a recession crop was planted there were delays due to the slow withdrawal of water along the Mekong and Bassac rivers. Dry season and flood recession rice account for a relatively small proportions of aggregate production in the country, the bulk coming from the wet season which extends from September/October to December/January. Overall 1999/2000 paddy production is officially estimated at 4 million tonnes, up 12 percent on the previous year.

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. In 2000, WFP will assist approximately 1.5 million beneficiaries in targeted food-insecure communes in 24 provinces, providing on average two months of basic food needs, primarily through food-for-work activities.

CHINA (21 March)

In China, despite a fall of around 7 percent in the area planted in winter wheat compared to last year, favourable weather and precipitation over winter, in main growing areas in the north east, suggest higher yields and a smaller reduction in output than forecast earlier. Winter wheat accounts for about 85 percent of aggregate wheat production in the country, the remainder coming from spring wheat planted in March/April. Output this year is currently forecast at around 111 million tonnes, down from 114 million tonnes in 1998/1999. Winter wheat accounts for about 85 percent of aggregate output. The decline in domestic production and draw down of stocks mean that more will be imported to meet demand.

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.

CYPRUS (27 March)

Prospects for the 2000 wheat and barley crops, to be harvested from May/June, seem to be favourable. The aggregate area sown was about 60 000 hectares, similar to the previous year. Production of cereals in 1999, mainly barley, 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 (12 April)

An FAO/WFP Crop and Food Supply Assessment Mission visited East Timor between 30 March and 7 April to assess current crop and food supply prospects for the 2000/2001

marketing year (April/March). This mission follows an earlier FAO/WFP assessment last November, which followed intense violence and large-scale population displacement in the aftermath of the referendum for independence on 30 August. At that time, it was estimated that many people were killed whilst almost the entire population was either internally displaced or exiled as refugees to West Timor. Infrastructure, essential services and property were also severely damaged, seriously affecting commercial and economic activities. In the agriculture sector the main repercussions of the civil unrest were the direct loss of food and seed stocks, loss of productive assets and displacement of the farming population. These in turn affected planting of main season crops in November/December.

The March/April mission observed, that although these factors did affect agricultural operations, especially in delaying planting, the overall consequences on output are likely to be less pronounced than may have been expected given the level of disruption that had occurred to the sector. Although maize planting was later, this season, compared to the optimum planting date, the delay itself will not seriously affect yields, especially as overall rainfall has been favourable due to La Niña. In addition, there was no major delay in rice planting, as the planting period can span from January to March, depending on the rainfall regime in a given year and locality. However to some extent there were additional constraints in rice planting compared to normal, due to lack of animal and mechanised draft power and a labour constraint as farmers had to complete maize planting before they could commence with rice. This however, is unlikely to affect productivity given favourable rains overall, and an extended season as rainfall is still continuing. In view of these factors, the output of maize and rice is expected to be satisfactory and certainly better than the severely reduced crop in 1997/98, due to El Niño drought.

Despite a reasonably satisfactory food supply situation overall, the disruption to the economy, especially markets, and the loss of productive assets and income generating activities will leave large numbers of people vulnerable to food insecurity over the next year. The problems of internal disruption in marketing, destruction of roads and transport, being heavily compounded by the sudden cessation of access to trading, distribution and supply routes to West Timor and the rest of Indonesia. Hitherto, these were essential for a wide range of economic functions, such as wage labour, input supply and trading. The loss of this economic interaction, will particularly affect the livelihood of people in cities such as Suai, Maliana, and Ermera in the western region. Moreover, in rice marketing the end of BULOG (the former National Logistics Agency), has left a large vacuum in the way rice is procured and traded, whilst at village level a large number of traders, who bought from farmers and sold to local markets, have now left. Consequently, there are already concerns that producers will have considerable problems in marketing and storing surpluses of rice and, in particular maize, which this year, will be more susceptible to storage losses. The withdrawal of subsidised rice through BULOG as well as other historical social-safety nets will also increase vulnerability to food shortages. This will be compounded by the significant reduction in formal employment, particularly in the public sector, which was of considerable importance in the past. Food assistance, therefore, will continue to be needed for the most vulnerable sectors of society until there is more economic stability and increased purchasing power. In addition, significant international assistance is still required to rehabilitate agriculture and allied services such as marketing and input delivery. With appropriate interventions, there is considerable scope to increase productivity in agriculture which remains highly underdeveloped. The FAO/WFP Crop and Food Supply Assessment Report is being finalised.

GEORGIA* (23 March)

Weather conditions for the 2000 grain crop have been satisfactory to date. However, the area planted to winter crops (mainly wheat but also barley) fell further (to 110 000 hectares), partly due to the sharp increase in the price of fuel during the planting period, but also as a result of area diversion to more profitable crops (sunflower, potatoes, vegetables and maize) and due to competition from imports of wheat. A donation of 20 000 tonnes of diesel fuel could assist

farmers to increase or maintain the spring grain area. The grain production target in 2000 is 0.75-0.8 million tonnes.

Despite a reduction in the area sown to wheat, the 1999 grain harvest is estimated by FAO at 800 000 tonnes, some 20 percent higher than in 1998. 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 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.

There is no shortage of food in rural or urban markets. Any shortfall in domestic production is offset by imports. The existence of sizeable unregistered flows of cereals (particularly wheat and flour) into the country and transshipment to other neighbouring countries make analysis of the supply and demand situation difficult. In 1999/2000, domestic cereal utilization is estimated at nearly 1.3 million tonnes of cereals, including 815 000 tonnes for human consumption, 100 000 tonnes for seed/processing/losses and the balance for feed. Given domestic production of 791 000 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 90 000 tonnes have been reported to date. The balance is expected to be imported commercially.

Food constitutes a large proportion of household expenditures, and a considerable percentage of the population remains 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, terminating on 30 June 2000, with a total food commitment of 18 190 tonnes and a total WFP cost of about US\$10 million. 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. Another PRRO for a period of two years to start in July is under preparation.

INDIA (21 March)

Harvesting of winter rabi wheat is well advanced. In view of around a 3 percent decline in area planted this year from 26.9 million hectares to 26.2 million hectares and drought and erratic rains in parts, overall 2000 production is estimated to be around 70 million similar to the revised estimate for 1999. Nonetheless production still remains some 5 percent above the average of the last five years. Wheat is the major component of the winter crop and contributes around 40 percent to national food grain production. The drought mostly affected crops in Gujarat and Rajasthan, though crops in the main producing states of Punjab and Haryana and the largest producing states, Madhya Pradesh and Uttar Pradesh, remained satisfactory and will offset the decline in western parts of the country.

In 1999/2000, the country received a normal monsoon, the 12th in succession, though distribution in parts remained erratic. Based on latest reports, overall rice output in 1999/2000, is projected at a record 87.5 million tonnes, with 75.5 million tonnes from last year's kharif crop and around 12 million tonnes from the irrigated rabi crop, harvesting of which has commenced.

As a result of favourable domestic production and large grain stocks, the food supply situation remains satisfactory. At the end of the current 1999/2000 marketing year in March, wheat stocks with FCI were projected at around 14 million tonnes, well up on minimum buffer requirements. In addition to wheat, as a result of large rice procurement from last year's kharif crop rice stocks also remain at comfortable levels. In view of food grain production in 1999/2000 and satisfactory stock levels, the Government has already imposed a duty to restrict wheat imports, which are likely to remain low in the next marketing year and is also considering a the levy to place on rice to restrict imports.

INDONESIA* (21 March)

The main wet season rice harvest is underway in the main producing areas in Java, and depending on location will continue till around May/June in parts. Dry sunny conditions during March, benefited maturing crops and harvesting in Java. Overall, the season progressed satisfactorily, with adequate rain and inputs, and current estimates indicate production in 2000 of around 50 to 51 million tonnes of paddy, which is about average for the last five years and similar to 1999.

The current rice position in the country is reported to be satisfactory despite the 30 percent import duty placed on rice imports, introduced in January this year. Recent reports indicate that despite pressure from producers to raise import duties further (40 – 50 percent) to restrict imports and maintain domestic prices that the Government is unlikely to do so before a review in August.

Public stocks at 1.2 million tonnes at the end of February were below normal levels, which is considered to be a part of a strategy by the National Logistics Agency (BULOG), to reduce costs.

IRAN, ISLAMIC REPUBLIC OF (21 March)

Rainfall during January and February continued to be below normal over most parts of the country and more is needed to ensure adequate recovery in this year's cereal production. Below-normal rainfall follows a devastating drought in 1999 which seriously reduced domestic production of the main staples wheat and barley, which is very important for the livestock sector. Rainfall at critical stages of crop development such as crop heading, therefore, will be crucial. The serious drought last year reduced the wheat and barley crops by 27 and 42 percent respectively compared to 1998. This has meant that wheat imports during the current 1999/2000 marketing year will be a record of around 6.5 million tonnes.

In the current season, the area under wheat increased by around 22 percent and barley by some 25 percent. Harvesting of wheat will commence around late May and extend to July. Although much will depend on weather over the coming weeks, current forecasts put wheat output at around 10.1 million tonnes, whilst the barley crop, currently being harvested is projected at 2.8 million tonnes.

IRAQ* (27 March)

Prospects for the 2000 cereal harvest in May/June remain unfavourable. Extended drought has substantially reduced cultivated area and adversely affected growing conditions. In addition, serious shortages of essential agricultural inputs are also constraining production.

Total cereal output in 1999 is estimated at 1.6 million tonnes, nearly 40 percent below the previous five year's average due to a severe drought and widespread incidence of pests and weeds. The drought has 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. In March 2000, the oil spare parts allocation was doubled from US\$300 million to US\$600 million to help the replacement of aging equipment. 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 and will persist unless the requirements for the economic rehabilitation and development of the whole country are met.

ISRAEL (17 March)

The prospects for the 2000 wheat and barley crops, to be harvested from April/May, are favourable, reflecting favourable rains during the growing season. Domestic production of wheat in normal years covers less than one-fifth of total requirement, the rest being imported commercially.

Production of the wheat crop in 1999 was estimated at 152 000 tonnes, about 10 percent below the previous year, due to the severe drought that affected several countries in the Near East. Imports of cereals in 1999/2000 (July/June) are forecast at some 2.6 million tonnes.

JAPAN (22 March)

Due to improved yields, total 1999 rice production increased some 2.4 percent over the 8.11 million tonnes (milled basis) in 1998. Total rice harvested area was 1.8 million hectares in 1999 in keeping with the Government's rice production adjustment program. The area under rice has progressively been declining in the 1990s under the adjustment programme and in 1999 was some 16 percent lower than that in 1995.

JORDAN (27 March)

Despite some beneficial rains at the beginning of the year, 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, resulting in the decline of aggregate wheat and barley output by 88 percent to 13 000 tonnes. The livestock sector was also affected and many sheep farms were seriously affected as costs increased and products diminished in quality and quantity.

Total cereal import requirements for the 1999/2000 marketing year (July/June) are estimated at 1.94 million tonnes. About 80 percent of the requirement is expected to be covered commercially, leaving a deficit of 387 000 tonnes to be covered by food aid. An Emergency Operation was approved by WFP in July 1999 for food assistance to 180 000 vulnerable people, worth some US\$4 million for a period of eight months.

KAZAKHSTAN (23 March)

The bulk of the cereals will be planted in May. Winter grains account for a very small proportion of the total harvest. It is hoped to expand the aggregate area sown to 12 million hectares. Failing a repeat of last year's optimum harvest weather, the area to be harvested may not increase beyond 1999's 10.9 million hectares. Moreover, infestation of locusts, inadequately treated last year, could threaten this year's crop.

The 1999 grain harvest is officially estimated at 14.3 million tonnes cleaned weight, i.e. more than double the poor 1998 harvest. The markedly better outcome is due to timely rains during the growing season and good harvesting weather which allowed 96 percent of the sown area to be harvested.

The country exported 2.5 million tonnes of cereals in 1998/99 and has an export availability of up to 7-8 million tonnes in the current marketing year. However infrastructure and logistical considerations are likely to limit exports which are tentatively estimated at around 5.2 million tonnes in 1999/2000 are, mainly to other CIS countries. Between July and December 1999, in excess of 3 million tonnes of cereals, mainly wheat, have been exported.

KOREA, DEMOCRATIC PEOPLE'S REPUBLIC OF* (21 March)

The main agricultural activity currently revolves around the double crop of the winter and spring wheat and barley crops, which have gained in importance in recent years in view of chronic food and feed supply problems. These crops, which will be harvested in late May/early June, after which planting of the main maize or rice crop will commence. In view of

harsh climatic conditions and topography, which basically restricts 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.

Although 1998 and 1999 saw some recovery and stability in agricultural production, current production trends 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 remains well below minimum needs due to serious lack of investment and essential inputs into agriculture. FAO has however supplied agricultural inputs (fertilizer) for the winter double cropping programme 1999/2000 and the current spring double cropping programme, which should contribute to an increased food production during the lean period from June to September 2000.

In view of economic and agricultural constraints, chronic food supply problems are likely to persist, which in turn will affect the nutritional status and health of the population, problems of which have been compounded by lack of resources, drugs and essential supplies.

In the current marketing year WFP has so far 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.

KOREA, REPUBLIC OF (21 March)

Demand for grains for food and feed is increasing as economic recovery continues following the Asian financial crisis. Wheat and maize are almost entirely imported, whilst the country on average produces around 5 million tonnes of rice (milled) per annum, during the main season which extends from around May to October. Last year, despite heavy flooding the rice crop was around 5.2 million tonnes, from an area of approximately 1.06 million hectares. The level of production was around 146 000 tonnes or almost 3 percent above output in 1998. In general, the number of productive farms and rice acreage is declining in the country as more land is made available to infrastructure and urban development. Any future expansion will come mainly from marginal and reclaimed land, including land subject to flooding.

KYRGYZ REPUBLIC (23 March)

The area sown to winter grains (mainly wheat) for harvest in the summer of 2000 could remain fairly stable. In total, 291 000 hectares have been sown to winter crops, including grains, only 2 200 hectares less than in the preceding year.

The 1999 grain and pulse harvest is officially put at 1.621 million tonnes, about the same as in the preceding year despite a 5 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 107 000 tonnes, in 1999/2000 are estimated at nearly 206 000 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.

LAOS* (21 March)

Dry, sunny weather in the region during March, favoured developing second season rice. The second rice crop is largely irrigated and contributes around 15 percent of average annual paddy production of around 1.7 million tonnes.

Project food aid continues to be needed to support well-targeted project interventions for vulnerable groups 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 (27 March)

The prospects for the 2000 winter harvest in June/July remain favourable. Aggregate production of wheat and barley crops in 1999 is estimated at 62 000 tonnes, about the same as the previous year.

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

MALAYSIA (21 March)

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. Normally a third of domestic consumption requirements of rice are imported into the country, whilst wheat and maize are almost entirely imported. In view of economic recovery in the country, following slow-down after the Asia crisis, imports of both wheat and maize are anticipated to increase to meet increasing demand.

MONGOLIA* (21 March)

The worst winter weather in thirty years has killed several hundred thousand livestock, seriously threatening the livelihood and food security of up to a quarter of the population of 2.7 million people, who depend entirely on animal rearing. Official reports indicate that as many as 1.7 million livestock have already died and many more are likely to be lost in the coming weeks as harsh conditions persist. The worst affected areas are in central, western and north-western parts where 142 of the country's 360 counties are located. Areas that have been particularly hard hit include Dundgobi, Ovorkhangai, Uvs, Zavkhanto and Bayankhongor.

The livestock sector plays an extremely important part in the Mongolian economy providing the main source of household income, for many, and contributing a major source of foreign exchange. In addition, given vast distances and the lack of access to alternative food sources, animals also play a vital role in household food security, providing essential nutritional needs through meat and milk. Available estimates indicate that normally animals provide around 92 kg of meat and 130 kg of milk-products per caput annually. Large losses, therefore, will have direct and severe impact on household food security of large numbers of herders, especially those in remote inaccessible areas. Nutritional problems, are likely to be compounded by problems of access to basic medical assistance as transport systems remain highly constrained by the lack of horses.

The food situation, amongst vulnerable groups including women and children, could deteriorate appreciably in the next few months particularly as essential winter food reserves of dried meat milk and dairy products, become depleted. Already there is evidence of the most vulnerable sectors of the nomadic population migrating to towns in search of employment. This will exacerbate existing food supply problems in some areas, which have developed over the last 10 years, due to general economic problems.

As thousands of hectares of pastures remain buried under heavy snow, there is urgent need to provide surviving animals with supplementary feed. However, the Government's capacity to do so is highly constrained due to limited resources, its declining role in agriculture and the lack of contingency stocks of feed and food. The problem of feed supply is being exacerbated by transport constraints and the repercussions of a serious drought last crop season which reduced the quality of pastures and production of hay, which is normally reserved for feed during critical winter months. Consequently even before the current crisis, the health of large numbers of livestock was already poor.

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

The Government of Mongolia has appealed for international assistance, including food, clothes, medicines, and fodder for the surviving livestock. In response the UN is preparing to launch an appeal to the international community in addition to the donations for the relief effort already made.

MYANMAR (21 March)

Unseasonable rainfall in the region increased irrigation reserves for dry season rice, harvesting of which is due to commence from April. The main wet/monsoon crop harvest is normally completed by February.

Total 1999/2000 paddy production is estimated at an average 17.5 million tonnes, marginally below average and around 2 percent below the previous year.

NEPAL (21 March)

Harvesting of wheat will commence later this month and extend into May. In 1999, the country produced a slightly above-average wheat crop of around 1.1 million tonnes. The 1999 paddy crop, which is harvested around October/November, was around 3.6 million tonnes, 4 percent above average and 6 percent higher than 1998.

PAKISTAN (21 March)

In view of favourable weather during the season, a slight extension in planted area, in response to an increase of 25 percent in support prices, and improved provision of irrigation and inputs, a bumper/record wheat crop is in prospect. The crop is currently being harvested and the forecast is that 20 million tonnes will be produced some 11 percent above 1999 and 15 percent above the average of the last five years. In view of higher production, imports are projected to decline in 2000/2001. The rice crop (milled) this year is forecast at around five million tonnes, similar to last year.

PHILIPPINES (21 March)

A volcanic eruption from the Mayon volcano in late February, affected an area of around 12 km from the crater and resulted in the displacement of several thousand. No casualties are reported, though the damage to agriculture and crops is estimated at around US \$ 2.65 million, mostly through losses of paddy rice, maize, vegetables and fruit. Agricultural losses assessed so far do not include damage to coconut plantations which are also important in the area. As a result of these losses

several localities in the area are likely to suffer serious food shortages in the coming months. In 1993, 77 people died as a result of a previous eruption from the volcano.

Following the financial crisis in Asia, which reduced demand, food and feed grain consumption this year is projected to increase due to growth in the economy and the recovery in the agricultural sector, after serious El Niño drought in 1997/98.

Harvesting of the dry season rice and maize crops, planted in October/December will commence in the next two to three weeks and continue into 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 12.1 million tonnes this (2000) calendar year, similar to last year's record 11.9 million tonnes. This however, will depend on weather and the performance of the main rice crop which is planted in May/June for harvest in October/November. Record production in 1999, was around 38 percent higher than 1998, which was severely affected by El Niño related weather anomalies.

1999 maize output was 4.6 million tonnes, around 9 percent above the average of the last five years 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 (27 March)

Prospects for the 2000 wheat crop, for harvest in April/May, are unfavourable due to drought, despite some good rains at the beginning of the season. 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 in January 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 (21 March)

Harvesting of the main (Maha) rice crop, which is planted in October to December, has commenced. This crop contributes approximately two thirds of aggregate rice 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 average of the last five years 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 (27 March)

Unfavourable weather at the beginning of the 1999/2000 cropping season, from October, was followed by adequate rainfall which provided ample moisture for a normal crop development. In some important grain producing areas of the north-east, rainfall levels during December and January were about three times the quantity during the same period last year. Prospects for the 2000 crops, to be harvested from mid-May, are, therefore, favourable and output is expected to improve on last year's drought reduced harvest.

In 1999, barley production was about 380 000 tonnes, around 72 percent below the average of the last five years, while wheat production, at 2.74 million tonnes, was about 28 percent below average. The drought had also led to a significant increase in sheep mortality rates that seriously affected household incomes.

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.

TAJKISTAN* (23 March)

Systematic and timely data on crop production is seriously lacking. Latest (partial) reports indicate serious problems in mobilizing inputs to sow 2000 winter crop. Shortages of seed, fuel and machinery have reportedly slowed planting operations and the area sown to winter crops on the large farms is thought to be less than last year. In addition, the amount of land which is becoming affected by salinity is increasing. Since 1997 there is a steady decline in the average cereal yield due to weather conditions, deteriorating irrigation facilities, disease and lack of funds to procure the necessary inputs on time. However, despite reports of a disease-ridden poor 1999 grain harvest, the final outcome is officially put at 475 000 tonnes, only 5 percent less than in 1998 and above average.

Production of cotton, the major cash crop, is officially reported to be 16 percent less at 316 000 tonnes and well below average, although a part of the crop may have been diverted by local authorities.

In 1999/2000, the cereal import requirement is estimated to increase to 458 000 tonnes, of which 68 000 tonnes have been pledged as food aid. Total cereal imports between July and December 1999 totalled almost 300 000 tonnes. The overall food supply situation remains problematical, as poverty is endemic in the country. About 1 million people are poor and destitute and experience acute or chronic food insecurity. Nutrition surveys confirm a high degree of malnutrition amongst the vulnerable and children under five. Humanitarian assistance to vulnerable populations and assistance to develop agriculture will continue to be necessary.

THAILAND (21 March)

In the second and third dekad of March, dry weather prevailed over most parts of the country. The harvest of the second season rice crop will commence from May and continue through June. The bulk of rice production, some 80 percent comes from the main crop from June to October/November. Outcome of the current (second) crop is forecast 4.3 million tonnes of paddy, which together with the 18.9 million tonnes produced in the main season will bring aggregate 1999/2000 production to around 23.3 million tonnes. At this level, output will be some 2 percent above the 22.8 million tonnes produced in 1998/99 and almost 3 percent above average for the previous five years.

A total of around 6.7 million tonnes of rice were exported in 1999, 5 percent above 1998. In the period from the beginning of January to the middle of March, rice exports totalled around 1.4 million tonnes, around 2.6 percent up on the previous year.

TURKEY (27 March)

Overall prospects for the 2000 winter crops, to be harvested from June, are favourable reflecting recent good rains and snow cover in the agriculturally important areas which reversed the effects of dry weather earlier in the season. 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.

This year's grain support prices are expected to be announced in May. The government is planning to set 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 oil seeds.

Turkey's state grain board (TMO) bought from farmers in 1999 a total of 5.5 million tonnes of cereals, including 4.2 million tonnes of wheat, 820 000 tonnes of barley and 380 000 tonnes of maize.

TURKMENISTAN (23 March)

The outlook for the 2000 grain harvest remains satisfactory. 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, some 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. To achieve these targets, 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. Final reports indicate that the area sown to grains remained stable at 635 000 hectares, but imports of high quality seed and increased use of fertilizer raised yields. Given the difficult foreign exchange situation and the large 1999 harvest, cereal imports in 1999/2000 are expected to remain very low. Despite the increased grain harvest, flour and bread shortages are reported to be common in both urban and rural areas, without, however, becoming persistent in any area.

UZBEKISTAN (23 February)

The area sown to winter crops on the large state farms (mainly wheat) increased by 4 percent to 1.36 million hectares, at the expense of cotton. In addition, farmers also have to plant wheat on their household plots, which would bring the aggregate area sown to wheat up to an estimated 1.47 million hectares. The winter grain production target is 4.1 million tonnes. The area to be sown to cotton is to be reduced by 80 000 hectares,

The 1999 wheat and barley crop is officially estimated at 3.7 million tonnes (clean weight), some 120 000 tonnes above 1998, and the total grain harvest (including maize and rice) at 4.321 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 335 000 tonnes, and to include 44 000 tonnes of food aid in wheat.

VIET NAM (21 March)

Central and southern parts of the country received scattered light rain during the second dekad of March, while heavy showers across the Red River Delta in northern parts led to localized flooding slowing transplanting of winter- spring rice transplanting in the north of the country. In the south transplanting was completed by the end of February, though this year was retarded by slow drainage of flood water in the Mekong River delta. 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. 1999/2000 paddy production, consisting of last year's 10th month crop, and this year's winter-spring and summer autumn crops is estimated at around 32 million tonnes, some 3 percent above 1998/99. The final outcome, however, will depend on weather conditions and the harvest of the last two crops, though current estimates indicate that some 8.5 million tonnes came from the 10th, 15 million will come from the winter-spring and the remainder from the summer autumn crop.

The rice export target for the current year is 4.3 million tonnes compared to 4.6 million tonnes exported last year. However rice exports in the first quarter of the year were appreciably lower than the target of 1 million tonnes.

YEMEN (27 March)

Winter season plantings continue under generally normal weather. The area sown to grain crops to be harvested later in the year is reported to be average. The aggregate cereal production in 1999 is estimated at 635 000 tonnes, some 23 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.

The import requirement of cereals in 2000, mainly wheat, is forecast at some 2.7 million tonnes, an increase of about 25 percent compared with the previous year.

CENTRAL
AMERICA
(including the
Caribbean)

COSTA RICA (27 March)

Land is being prepared for planting of the 2000/2001 first season cereal and bean crops to be started from April. Intended plantings of maize are expected to be close to last year's average. The area planted to paddy, the main cereal, should be slightly above average; however, production will not be enough to cover domestic demand for this important staple in the population's diet and some 90 000 tonnes to 100 000 tonnes will be required as imports in 2000 (January/December). Some 300 000 tonnes of maize, mostly yellow, will also be required as imports in 2000/2001 marketing year (July/June), similar to the previous year, in response to the steady demand from the animal feeding industry.

CUBA (27 March)

Land is being prepared, under generally dry weather, for planting of the important "spring" paddy crop to be started from April, while harvesting of the smaller "winter" crop is currently underway. Intended plantings for the spring crop are expected to be about average. Rice imports of some 400 000 tonnes will nevertheless be required to meet domestic demand. Harvesting of potatoes and other minor foodcrops is also underway and average outputs are anticipated. Harvesting of the sugar crop continues. Development of this crop has been somewhat affected by the scarcity of rains in the first two months of the year, but output in year 2000 is still expected to improve from last year's 3.8 million tonnes. Some 4 million tonnes are anticipated.

DOMINICAN REPUBLIC (27 March)

Planting of year 2000 first season rainfed maize and sorghum crops has started under normal weather conditions, although dry weather is reported in isolated areas in the south and northwest of the country. Average plantings are intended, a considerable increase from 1999 below-average levels, when the area planted to both crops was severely affected by the impact of hurricane "Georges" at the end of 1998. Harvesting of the important irrigated paddy crop is due to start from May, and early forecasts point out to a slightly above-average output but not enough to meet domestic demand.

Maize imports in 2000/2001 marketing year (July/June) are forecast to be about 650 000 tonnes, largely to meet the strong demand from the poultry feeding industry, while rice imports in 2000 (January/December) are anticipated to be about 70 000 tonnes.

EL SALVADOR (27 March)

Fieldwork in preparation for planting of the 2000/2001 first season cereal and bean crops has started under generally dry weather conditions. Sowing should start with the arrival of the first rains which are expected in April. Intended plantings for maize, the main cereal, should be slightly above average while the area planted to sorghum is likely to be below the average of the last 5 years. Average plantings of paddy and beans are anticipated. Food assistance from the international community is still distributed as a component of the various reconstruction projects (food for work) implemented in the country following the passage of hurricane "Mitch" at the end of 1998.

Imports of wheat and maize in marketing year 2000/20001 (August/July) are provisionally forecast to remain close to the previous year's 180 000 tonnes and 175 000 tonnes respectively.

GUATEMALA (27 March)

Land is being prepared under generally dry weather for planting of the 2000/2001 first season cereal and bean crops to be started from April. Plantings of maize, the main cereal, are anticipated to be close to 1999/2000 slightly above-average level. The area planted to sorghum and paddy is also expected to be about average. Sowing of the important bean crop is due to start from May and average plantings are expected. Food assistance continues to be distributed through reconstruction projects (food for work) to hurricane "Mitch" affected population.

Wheat imports in marketing year 1999/2000 (November/October) are forecast to decrease from some 407 000 tonnes in the previous year to about 380 000 tonnes while maize imports (July/June) should remain close to the same 1998/99 level of 500 000 tonnes.

HAITI* (27 March)

Planting of the 2000/2001 rainfed maize and paddy crops has started under generally dry weather conditions, while sowing of the important irrigated paddy crop is underway. Average plantings are intended for maize and paddy respectively. Planting of the mountain-grown bean crop is also underway. Food assistance from the international community continues to be distributed through development projects to some sectors of the population. About 35 000 tonnes have been delivered so far against pledges of 97 000 tonnes.

Maize commercial imports in the 2000/2001 marketing year (July/June) are provisionally forecast to increase slightly from the 70 000 tonnes imported 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 (27 March)

Harvesting of the 1999/2000 third season "apante" crop has been recently completed and land is being prepared, under generally dry weather, for planting of the 2000/2001 first season cereal and bean crops to be started from April. Intended plantings of maize, the main cereal, are provisionally forecast to be close to the 1999/2000 below-average level of 370 000 has. This is mainly the result of unattractive prices to the producer. The outlook is also uncertain for the paddy crop although efforts are being conducted by the Government to assist producers increase plantings. By contrast, the planted area to beans is expected to be similar to the satisfactory level of the 1999/2000 season when the crops experienced a significant recovery from hurricane "Mitch" affected crop in late 1998. Food assistance from the international community continues to be distributed to the hurricane affected population.

JAMAICA (27 March)

A prolonged drought has affected foodcrops, mainly vegetables, in most of the country parishes and particularly in the southern parish of St. Elizabeth, where most of the vegetables are grown. Emergency measures are being implemented by the Government including water rationing to the population. Water supplies in the country main reservoirs are reported at far below capacity levels. The drought, by contrast, has benefited harvesting of the sugar cane crop although yields are considered below average due to the lack of rain.

MEXICO (27 March)

Harvesting of the 2000 irrigated wheat crop is about to start in the main producing northwestern states of Sonora, Sinaloa and Baja California, as well as in Guanajato in the centre of the country. Prospects have slightly improved, following the adverse weather at planting, and preliminary forecasts point out to an about near-average of 3.3 million tonnes. Land is being prepared under dry weather conditions for planting of the important spring/summer maize crop in the large producing states of Jalisco, México, Michoacán, Chiapas and Puebla, where the bulk of the crop is grown. The area planted to maize is expected to decline from last year's slightly above-average level, but would nevertheless remain about average. Plantings would also largely depend upon the timely arrival and precipitation level of the rains. The dry spell has recently worsened in the north, where a state of emergency has been declared in some states.

Wheat imports in 2000/2001 marketing year (April/March) are expected to remain close to those in 1999/2000 at some 2.5 million tonnes in response to an anticipated growth in domestic demand. Maize imports (October/September) are also expected to increase slightly from the previous year's 5.2 million tonnes.

NICARAGUA (27 March)

Harvesting of the 1999/2000 third season or "apante" crop has been completed. Maize and bean outputs were less than expected as a consequence of poor soil moisture at planting. Land is being prepared for sowing of the 2000/2001 first season cereal and bean crops to be started with the arrival of the first rains in April. The area planted to maize, the main cereal, is expected to decline from last year's above-average level but would nevertheless remain about average. Above-average plantings are intended for the paddy crop while the area planted to the important beans crop should be average. Food assistance from the international community continues to be provided to hurricane "Mitch" affected population.

SOUTH AMERICA

ARGENTINA (27 March)

Improved weather conditions have benefited the developing 1999/2000 maize crop, following a period of prolonged dry weather. Harvesting has started in the main producing areas and early production forecasts indicate an above-average output between 15 million and 15.5 million tonnes. Above-average yields are expected in the province of Cordoba, in particular, and other main growing areas. This will help offset the below-average yields which are however expected as a result of drought in the northern province of Entre Ríos and bordering areas with Santa Fe. Below-average yields are also being obtained in isolated areas in the central eastern areas of the main producing Buenos Aires province. The paddy crop, currently being planted, has been affected by the lack of rains in the northern parts, where the bulk of the crop is grown; in addition, plantings were reduced with respect to the previous year as a consequence of unattractive prices. Output is presently forecast at a slightly below-average 1 million tonnes which compares to 1.7 million tonnes in 1999.

BOLIVIA (27 March)

Heavy rains and flooding in January in the south-eastern province of Tarija affected the developing cereal, potato and other crops planted at the end of last year. Serious damage to farmers' housing was also incurred. Emergency relief assistance from the international community has been provided in collaboration with the authorities. Flooding is also reported in the large producing eastern areas of the Department of Santa Cruz where harvesting of the 2000 first (main) season cereal crops is about to start. Production of wheat is expected to decrease from last year to a below-average level. Dry weather conditions are reported in other producing areas. Despite the adverse weather conditions, production of maize, the main cereal, is expected to increase from last year's about average level to a bumper 705 000 tonnes. By contrast, the wheat crop has been affected by the rains and a below-average output is expected. An average sorghum output is also anticipated.

BRAZIL (27 March)

Planting of the 2000 wheat crop has started under normal weather conditions following a period of prolonged drought in the main producing southern states. Intended plantings in the states of Parana, Santa Catarina and Rio Grande do Sul are forecast to be close to 1999 average level. Harvesting of the 2000 first (main) season maize crop has resumed following some delays due to excessive rains. Around 40 percent of the area planted has been harvested compared to 55 percent by the same time the year before. Production (both crops) is provisionally forecast at a near-average 32.2 million tonnes. However, aggregate output will largely depend upon outturns from the second season crops as lower than normal yields are being obtained from the first season crop, the result of the scarcity of rains during the developing period. Planting of the second season maize crop has already started in the north and north-eastern areas and is about to start in the central producing states under normal weather conditions. Harvesting of the paddy crop is underway and latest forecasts indicate that production should decline from last year near-record 11.6 million tonnes to some 11.4 million tonnes which is still above average.

CHILE (27 March)

Harvesting of the 2000 wheat crop has been recently completed and output is provisionally estimated at 1.2 million tonnes, similar to 1999 below-average production. A larger output had been earlier estimated but excessive rains at harvesting in late January damaged the crops. The excessive rains and winds, by contrast, did not affect the maize crop currently being harvested. A recovery from last year's drought affected crop is anticipated.

COLOMBIA (5 April)

Heavy rains in early March followed by heavier rains and flooding at the end of the month have delayed planting of the 2000 first season cereal crops. Above-normal rains are forecast for the next weeks. Intended plantings of maize are nevertheless forecast to be close to 1999 average level. Production, however, is not enough to meet domestic demand, particularly from the animal feeding industry and imports of 1.5 million tonnes, similar to the previous year, will be required. The area planted to paddy is also expected to be close to the average level of the previous year. The number of internally displaced persons continues to increase. A relief programme in collaboration with the international community is being prepared by the Government.

ECUADOR (27 March)

Planting of the 2000 first season maize (yellow)crop is well advanced in the main producing coastal areas for harvesting from May. The area planted is provisionally forecast at a near-average level. Weather conditions have benefited the crop so far and satisfactory yields are anticipated and production is expected to increase from last year's average output. The rains arrived late, however, for planting of the paddy crop and the area planted was

consequently reduced. Harvesting is due from April and production is expected to be below average. Farmers were also discouraged by financial constraints and relative low prices.

PARAGUAY (27 March)

A persistent drought has affected for months the northern areas of the country, in particular the departments of Concepción, San Pedro and Chaco Central. Some rains have resumed but irregular and ill distributed. A state of emergency has been declared by the government in former first state, where about 11 300 hectares of small farm crops have been damaged. It is reported that the water shortage affects not only farming but also human consumption. Relief assistance is being provided by the government and the international community.

PERU (27 March)

Planting of the 2000 wheat crop has been virtually completed and harvesting is due to start from May. Production is provisionally forecast at a slightly above-average 160 000 tonnes. Weather conditions have benefited planting of the 2000 first season maize (white and yellow) crop, although heavy rains in central-southern highlands have resulted in mudslides, leaving a number of victims in small isolated villages. Harvesting is underway and satisfactory yields are being obtained so far. Above-average outputs are anticipated provided beneficial weather conditions remain. The bulk of harvesting operations of the important irrigated paddy crop are due to start from May. Water reservoir levels are reported adequate and an above-average output is anticipated.

URUGUAY (27 March)

Light to modest rains, although erratic and irregularly distributed, have resumed following a prolonged drought which has severely affected the 1999/2000 main cereal crops in the country. Harvesting of the wheat and barley crops have been recently completed and outputs are provisionally estimated at a low 373 000 tonnes and 99 000 tonnes respectively, which compares to earlier production estimates at planting of about 522 000 tonnes and 249 000 tonnes. The outlook is also poor for the maize crop, currently being harvested, and preliminary forecasts put production at a maximum 79 000 tonnes, against a previous forecast of 162 000 tonnes. Production of sorghum should also decline from a previous estimate of 106 000 tonnes to a maximum 20 000 tonnes. Harvesting of the important paddy crop has only started and production is provisionally forecast at 1.1 million tonnes, some 10 percent lower than formerly expected. Pertinent measures have been undertaken by the Government to cope with the serious losses incurred by the affected farmers.

VENEZUELA (27 March)

Rehabilitation and reconstruction programmes continue to be implemented in the states affected by the heavy incessant rains resulting in mudslides, landslides and flooding in December. The disaster caused about 30 000 victims and more than 68 000 homeless, apart from huge damage to the infrastructure of the country. Principally affected were the capital of Caracas and the urban areas of the state of Vargas in the north, as well as other urban areas in several northern states. The agricultural sector was also affected, particularly the states of Miranda, Falcón and Yaracuy, and to a lesser extent in Zulia, Táchira, Cojedes, Trujillo and some farm areas in Vargas. Damage to cereal crops was not significant as harvesting had already been completed, but important foodcrops for the rural population such as roots, tubers and plantains were affected. Export crops such as cocoa and coffee were also affected. The food supply situation is stable although food aid from the international community continues to be distributed and technical assistance projects for the immediate rehabilitation of the agricultural sector are being discussed with the Government. The projects will directly benefit 6 000 affected rural families. Planting of the 2000 first (main) season maize and paddy crops should start from April.

EUROPE

EC (5 April)

Weather conditions for developing winter crops and for early spring crop planting are reported to have been generally satisfactory so far, with the exception of the Mediterranean areas where precipitation has been below normal in the past two months. Latest indications continue to point to an increase in the aggregate cereal area for the 2000 harvest, largely at the expense of oilseeds. The overall wheat area is forecast to increase by about 4 percent to some 17.6 million hectares and, based on the overall weather conditions for the season so far, early indications suggest that average yields may be somewhat higher than in the previous year. Yields are expected to increase especially in France, Germany and the United Kingdom, while dry conditions in Italy, Portugal and Spain could limit the potential in these countries. FAO forecasts this year's aggregate wheat output in the Community at about 105 million, 7 percent up from 1999. For coarse grains, while conditions for the winter barley crops in the northern latitudes are reported to be good so far, much will depend still on the outcome of spring/summer planting, which is only just starting. At this early stage, FAO tentatively forecasts the Community's aggregate coarse grains crop in 2000 at about 104 million tonnes, marginally up from 1999. The paddy season is getting underway among the producing countries, and the area is expected to remain at about 400 000 hectares, the level at which it has stabilized since 1996. Assuming normal weather, output is also expected to remain close to the normal for the past few years at about 2.6 million tonnes.

ALBANIA (6 April)

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 who have been rendered vulnerable by the Balkan crisis.

BELARUS (23 March)

Despite upbeat official reports on the outlook for winter grains, the overall situation in agriculture is very problematic. 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. Growing conditions have been favourable to date and winter grains are reported to be in a satisfactory condition. The outlook for spring grain plantings, however, is clouded by shortages of working capital, fuel, fertilizer, pesticides and operational machinery. The country's agricultural system is still largely unreformed and is being strangled by government-controlled input and output prices in an economic context of budget deficits and rapid inflation. The government hopes that increased use of fertilizer and better weather conditions will result in a grain harvest of at least 5 million tonnes in 2000.

In 1999, agricultural output fell by 10 percent and over one third of agricultural enterprises worked at a loss. Severe economic problems and adverse weather reduced the grain harvest to 3.6 million tonnes, almost 40 percent below the average of the last five years, and 25 percent less than the poor harvest of 1998. Production could 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 of livestock products also decreased, significantly in the case of milk. Over 80 percent of the population have salaries below the poverty line.

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 foreign exchange constraints could limit the volume of feedgrains purchased, pointing to a further decline in livestock production in 2000. Aggregate cereal imports in 1999/2000 could double to 1.5 million tonnes.

BOSNIA-HERZEGOVINA (23 March)

Latest indications are that the area sown to winter crops is trending downwards, reflecting poor profitability of wheat. The early outlook for 2000 winter crops is satisfactory. By contrast, the area sown to maize continues to increase. 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 low wheat prices. 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. Some 800 000 people remain displaced throughout Bosnia.

BULGARIA (6 April)

Latest information points to a recovery in wheat production this year from the reduced crop in 1999. The winter wheat area (which accounts for all of the wheat crop) is estimated at 1.1 million hectares, virtually unchanged from the previous year's level, but weather during the sowing period and throughout the winter so far is reported to have been very favourable. In fact, analyses of the weather conditions so far this season indicate a strong likelihood of higher yields than in the previous year. This is reflected in the latest official forecast which puts 2000 wheat output at 3.2 million tonnes, compared to 3.1 million tonnes last year. Early indications also suggest that the quality of the 2000 wheat crop will improve compared to 1999 reflecting the better weather and increased use of inputs. Following a poor quality wheat harvest in 1999, Bulgaria is allowing unlimited duty-free imports for wheat for this year and for wheat flour for the period 1 March–30 July. Early indications for the spring sown coarse grains (mainly maize) point to a similar area and output as in the previous year.

CROATIA (23 March)

The outlook for winter wheat is satisfactory and output could recover somewhat. Indications are that the area sown to winter cereals increased following the poor harvest last year. However, economic problems, and in particular shortages of chemicals and fertilizers, will continue to hinder cereal production.

The 1999 cereal harvest fell by 10 percent to 2.9 million tonnes. Good yields for maize only partially offset the 46 percent fall in wheat production to 558 000 tonnes. Economic problems, which reduced winter grain plantings, were exacerbated by poor weather.

The country has large stocks of wheat and the government has approved the export sale of 200 000 tonnes of surplus wheat.

CZECH REPUBLIC (6 April)

Winter cereal plantings in the Czech Republic are estimated up by about 15 percent from the previous year at about 1.1 million hectares, with the bulk of the increase accounted for by winter wheat. The wheat area is estimated at over 900 000 hectares. Weather conditions so far this season have been generally favourable for the winter crops and early indications suggest average yields will be similar to or slightly above those in the previous year. FAO currently forecasts wheat output in 2000 at about 4.2 million tonnes.

ESTONIA (10 April)

Winter grains have benefited from favourable growing conditions and the area sown has increased. The early outlook for a recovery cereal production in 2000 is satisfactory. Spring grain planting will start soon. Cereal production in 1999 is officially estimated to be some 15 percent less than output in 1998 in view of a reduction in the area sown. Production of livestock products fell across the board, in response to reduced import demand in the Russian Federation. In 1999/2000, cereal imports are forecast at 166 000 tonnes.

FORMER YUGOSLAV REPUBLIC OF MACEDONIA (6 April)

No significant change is expected in cereal production in 2000. Weather conditions for the winter crops are reported to have been generally favourable. Output of wheat is expected to remain at around 350 000-400 000 tonnes. Food assistance continues to be provided by WFP for 20 000 persons who were rendered vulnerable by the Balkan crisis.

HUNGARY (6 April)

Prospects remain favourable for the winter grains. The wheat area is estimated to have increased to about 1.1 million hectares, and although some 100 000 hectares are reported to have been lost due to floods earlier in the year, the final area harvested is likely to be well up from last year, when plantings amounted to only 700 000 hectares. Generally favourable weather during the past two months has benefited crops, and assuming normal conditions prevail for the remainder of the season, output of wheat should recover significantly from last year's reduced crop to in excess of 4 million tonnes.

LATVIA (24 March)

Good overwintering conditions and a recovery in the area sown to winter grains, given higher cereal prices in neighbouring countries, point to a recovery in the 2000 winter grain harvest. The 1999 grain harvest fell by 19 percent to 787 000 tonnes in response to an 11 percent reduction in the area sown. With livestock production remaining depressed, imports of cereals are limited to about 70 000 tonnes per annum, mainly of bread quality wheat.

LITHUANIA (24 March)

The outlook for 2000 winter grains is satisfactory. Early indications are that the area sown to winter cereals and yields could recover this year. Payment for produce procured by the Government in 1999 has been punctual this year, facilitating spring planting scheduled to start next month. The 1999 grain harvest fell by 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 (24 March)

The grain production target in 2000 is 2.8 million tonnes, including 1 million tonnes of wheat and 1.5 million tonnes of maize. The outlook for 2000 winter crops has improved. Dry conditions hampered winter crop establishment but good snowfall and the mild winter has improved crop conditions.

The aggregate 1999 grain harvest fell to 2.18 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 (6 April)

A decline in cereal output is in prospect in 2000, largely reflecting reduced plantings because of poor producer price prospects. Overall winter cereal sowings are officially reported to be down by 4 percent to 5.1 million hectares; the winter wheat area is estimated at about 1.8 million hectares, and that of rye at 2.2 million hectares.

ROMANIA (6 April)

In Romania, latest reports indicate that the winter wheat area has increased from the previous year's reduced level to about 1.8 million hectares. Assuming normal weather, output could increase to about 5 million tonnes (1999: 4.7 million tonnes). The milling wheat supply situation is still reported to be tight in the country after last year's reduced crop.

RUSSIAN FEDERATION (6 April)

The early outlook for winter grains in 2000 is good. The area sown to winter crops, now officially estimated at 14.16 million hectares) includes some 13.4 million hectares sown to grains, marginally more than in the preceding year. The condition of the crop is significantly better this year. The area affected by winterkill (at 7-10 percent) is expected to be below average and about half that in the preceding year. Spring fieldwork has started in southern areas. Soil moisture reserves are good, but there is a backlog of ploughing and some seed shortages are also reported. The financial situation of the sector as a whole improved in 1999 and the government has taken measures to improve access to fertilizers and plant protection chemicals. Nevertheless, shortages of inputs (credit, operational machinery, fuel and working capital) are likely to continue to constrain yields. The spring crop planting target is 60 million hectares, including 37.5 million hectares of grain.

FAO estimates the 1999 grain harvest at 60 million tonnes, some 6 million tonnes more than the drought reduced output of 1998, but still below average. 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 being covered, but livestock feed is scarce, pointing to a further reduction in output. Cereal prices, which remained stable until the beginning of this year, are also rising.

Total cereal utilization in 1999/2000 is estimated to decline by 1.0 million tonnes to 72 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 barely 65 million tonnes, leaving an import requirement of 7.9 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 4.7 million tonnes to be covered by commercial imports. In the first eight months of the current marketing year some 5.6 million tonnes have been delivered, including 2.4 million tonnes of cereals from Kazakhstan. Some humanitarian food relief is being distributed by private voluntary organizations to public institutions catering for people in need.

Strife in Chechnya has led to destruction of whole towns, villages, essential infrastructure and agriculture. The number of Internally Displaced Persons from Chechnya in Ingushetia fluctuates in accordance with the intensity of the hostilities and some people are beginning to move back. The UN during its Mission in February 2000, estimated the number at 185 000, approximately 75 percent of whom stay with host families, whose members number 70 000. The burden of the large number of IDPs in relation to the population (320 000) has exhausted the basic services which Ingushetia, itself an economically deprived region, can provide and considerable humanitarian assistance is needed over a broad spectrum including food aid, shelter, health and nutrition, water and sanitation, education, income generation and preparatory rehabilitation activities, logistics and coordination. Both the IDPs and the host families were found to need basic food relief as well as assistance with health and nutrition. WFP will assume responsibility for the food needs of the 150 000 IDPs in Ingushetia, while UNHCR will target the host families. Distribution is a challenge as refugees are living in 261 different locations in Ingushetia. Health remains a major problem in both Chechnya and Ingushetia, reflecting inadequate water and sanitation facilities.

In Chechnya itself, authorities are distributing food in some Russian controlled areas. Steps are being taken to provide inputs to plant some 80 000 hectares of the 190 000 hectares of land suitable for cropping. However, both the security situation and timely arrival and distribution of the necessary funds and inputs remain problematic. The outlook for food production in Chechnya in the current year is poor, due also to the extent of the damage to the existing infrastructure, livestock and grape industry and the need to first clear mines from arable land.

When the security situation improves, returning populations, without immediate prospects of harvest and employment, will need considerable help.

SLOVAK REPUBLIC (6 April)

Cereal output in 2000 is expected to recover somewhat after drought reduced production in 1999. The wheat area is tentatively estimated at about 400 000 hectares and output should recover to in excess of 1.5 million tonnes.

SLOVENIA (6 April)

A recovery in cereal output is expected in 2000 after last year's drought-reduced harvest. This season's winter grain planting was completed within the optimal time period and weather conditions for crop establishment were favourable.

THE UKRAINE (27 March)

The area sown to winter crops reached 7.9 million hectares. Although crop establishment was hindered by late sowing and dry soils, good overwintering conditions have improved crop conditions and less than the earlier envisaged 1.1 million hectares may need to be resown. Heavy snowfalls have replenished soil moisture reserves.

The outlook for spring grain plantings, just underway in some southern areas, is uncertain. Reorganization of the former state farms in the wake of a government decree of 3 December 1999, without proper resolution of the problem of debts to private input providers, has left between one quarter and one half of farms with little sound basis for negotiating credit for inputs. The Government has allocated funds for up to 50 percent interest compensation but due to the proven high risks, banks and many input providers are wary of lending to producers. Shortages and the high price of fuel have recently been relieved by imports, without duty or taxes, but even so fuel dealers want up to 4.7 tonnes of wheat in exchange for 1 tonne of diesel on credit. Overall, the high risks/costs associated with credit and the poor solvency of farms could compromise this year's harvest.

The aggregate 1999 grain harvest is estimated by FAO at 27 million tonnes, some 2 million tonnes less than the preceding year's 29 million tonnes. Current indications are that poor solvency of farms may not result in a 2000 grain harvest which is significantly higher. Following the second poor harvest in succession and large exports (5.8 million tonnes in 1998/99 and 2.5 million tonnes up to January 2000), FAO tentatively forecasts 1999/2000 cereal exports at 3.1 million tonnes, including 2.1 million tonnes of wheat, and cereal imports at less than 0.5 million tonnes, mainly wheat and rice.

YUGOSLAVIA, FED. REP. OF (SERBIA AND MONTENEGRO)* (6 April)

Poor returns for 1999 crops, shortages of inputs, working capital and delays in harvesting the 1999 crop have kept winter crop planting below target. Latest reports indicate that only 730 000 hectares, 3 percent more than last year, have been sown to wheat, the major winter grain. Growing conditions to date have been mostly satisfactory but the high prices and shortage of inputs are likely to keep yields low. Finance and input problems could also

prevent the spring sowing target of 1.55 million hectares (including 1.37 million hectares of maize) being met.

In 1999, a record maize harvest of 6.1 million tonnes offset the poor wheat harvest of only 2 million tonnes, and aggregate output is officially estimated at an about average 8.6 million tonnes. Early indications are that the 2000 grain harvest may remain close to this level. The country has exported 150 000 tonnes of wheat as well as maize in 1999/2000.

The country is in a state of acute economic crisis in the wake of the conflict over Kosovo and several successive years of economic sanctions. WFP currently continues to provide food assistance for nearly 1 million beneficiaries in Serbia (excluding Kosovo Province) and Montenegro, including refugees and economically and socially deprived people. Other organizations are providing assistance for a further 200 000 IDPs in Serbia.

In the Kosovo Province, latest information on the developing wheat crop generally confirms earlier estimates made by an FAO Crop Assessment Mission in January. The wheat area is estimated to be about 80 000 hectares, well up from the previous year but still somewhat below the normal level before the civil disturbances. Weather conditions so far this season are reported to have been generally favourable with good soil water reserves now available for crop development, but there remains considerable uncertainty over farmers access to nitrogenous fertilizer and herbicides for spring applications, especially in the southern and western parts of the Province. Land preparation for the summer crops is reported to be well under way and availability of seeds and fertilizer for the maize crop is reported to be good.

The total beneficiary caseload in the Province, included in the UN Consolidated Appeal for South East Europe, is currently being phased down from 900 000 to 600 000, as anticipated in the Appeal, reflecting improvements in economic conditions in the Province.

NORTH AMERICA

CANADA (6 April)

The bulk of the 2000 wheat crop is due to be sown from May to June. The area planted is expected to increase somewhat as producers shift land out of oilseeds in response higher returns expected for wheat. However, a return to average yields after the bumper levels in 1999, is expected to offset the area increase, and overall output of wheat is tentatively forecast at about 26 million tonnes, compared to 26.8 million tonnes in 1999. The bulk of the coarse grains crops will be sown in May-June. Early indications point to a marginal increase in barley area.

UNITED STATES (6 April)

In the United States, wheat output could fall somewhat further in 2000 after a sharp decline already in 1999. Latest official estimates put winter wheat plantings at about 17.5 million hectares, virtually unchanged from the previous year's reduced area. Conditions for crops improved significantly in late March following widespread rains in the U.S. Plains, where moisture had generally been greatly lacking since planting time. In fact, in the USDA April Crop Progress Report, 12 percent of the winter wheat crop was reported to be in excellent condition, 48 percent good, and 26 percent fair, figures which indicate just a marginally worse condition overall than in the previous year. Nevertheless, in some areas where the winter drought was most severe, damaged wheat crops will likely be replaced with other cereals this spring. Early indications for spring wheat plantings in the USDA Prospective Planting Report point to a 5 percent reduction in area to about 7.5 million hectares. Assuming the forecast spring wheat area materializes, and normal weather conditions prevail for the rest of the season, FAO currently forecasts the aggregate 2000 wheat output in the United States at about 60 million tonnes.

Some early coarse grains crops are already in the ground in southern parts, but the bulk of the maize planting in the Corn Belt states takes place from late April. Early indications in the USDA Prospective Planting Report point to a slight increase of 1 percent in maize plantings but a 3 percent decline for sorghum. Despite some widespread rains in late March across the Corn Belt States, more precipitation is still needed to ensure conditions are satisfactory for coarse grains planting. Planting of this season's rice crop is underway. Given the low prices and high level of stocks, the area under rice is anticipated to decline by about 5 percent from the previous season.

OCEANIA

AUSTRALIA (6 April)

Planting of the main 2000 wheat and coarse grains crops is due to start in May. Weather conditions so far are reported to have been very favourable, with the widespread rains in March already ensuring good soil moisture availabilities for crop emergence and growth in the season to come. However, early official forecasts indicate a decline in wheat production to about 22.7 million tonnes after the 1999 record crop, now estimated at just over 24 million tonnes. The forecast is based on expected plantings of 11.8 million hectares, just marginally down from 11.95 million hectares in the previous year, and an assumption of average seasonal weather conditions overall, giving an average yield of about 1.9 tonnes/hectare (2.01 tonnes/hectare in 1999). Regarding barley, the major winter coarse grain crop, early forecasts point to a sharp increase in production from 4.3 million tonnes in 1999 to 5.3 million tonnes in response to relatively better price prospects compared to other crops.

Harvest of the minor 1999 summer coarse grains crop, mainly sorghum and maize, is underway. Output of sorghum is forecast at about 1.3 million tonnes compared to 1.7 million tonnes in 1999, reflecting reduced plantings. Harvesting of the 2000 paddy crop is in progress. Output is officially forecast to contract by over 20 percent from the previous season to about 1.1 million tonnes. This is largely attributed to a decline in area planted as concerns about the availability of irrigation water induced a shift out of rice cultivation.

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

COUNTRY	Marketing year	1998/99 or 1999			1999/2000 or 2000			
		Actual imports			Total import requirements (excluding re-exports)	Import position		
		Commercial purchases	Food aid	Total commercial and aid		Total commercial and aid	Food aid allocated committed or shipped	Commercial purchases
AFRICA		24 789.4	2 341.4	27 130.8	27 436.0	10 467.9	1 309.3	9 158.6
Northern Africa		14 400.4	23.0	14 423.4	14 535.0	7 975.0	46.6	7 928.4
Egypt	July/June	10 883.0	13.0	10 896.0	10 120.0	6 187.5	46.6	6 140.9
Morocco	July/June	3 517.4	10.0	3 527.4	4 415.0	1 787.5	0.0	1 787.5
Eastern Africa		2 168.4	1 449.9	3 618.3	4 729.0	1 039.7	744.9	294.8
Burundi	Jan./Dec.	38.2	4.5	42.7	65.0	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.	120.8	13.2	134.0	105.0	0.0	0.0	0.0
Eritrea	Jan./Dec.	87.2	23.8	111.0	290.0	46.6	46.6	0.0
Ethiopia 2/	Jan./Dec.	21.3	705.8	727.1	840.0	529.4	529.4	0.0
Kenya	Oct./Sept.	713.8	146.7	860.5	1 590.0	178.1	31.5	146.6
Rwanda	Jan./Dec.	35.3	213.3	248.6	210.0	22.3	22.3	0.0
Somalia	Aug./July	276.8	42.5	319.3	310.0	60.9	49.3	11.6
Sudan	Nov./Oct.	414.1	226.4	640.5	823.0	55.8	55.8	0.0
Tanzania	June/May	415.1	73.5	488.6	450.0	145.6	9.0	136.6
Southern Africa		1 332.4	438.4	1 770.8	1 825.0	703.1	252.0	451.1
Angola	April/March	366.1	139.0	505.1	505.0	168.7	116.1	52.6
Lesotho	April/March	149.4	14.5	163.9	203.0	103.8	3.0	100.8
Madagascar	April/March	124.1	18.6	142.7	170.0	61.0	5.8	55.2
Malawi	April/March	156.1	44.9	201.0	116.0	116.0	58.1	57.9
Mozambique	April/March	104.0	191.1	295.1	325.0	188.5	63.8	124.7
Swaziland	May/April	75.0	0.0	75.0	72.0	57.6	0.0	57.6
Zambia	May/April	357.7	30.3	388.0	434.0	7.5	5.2	2.3
Western africa		6 276.8	393.9	6 670.7	5 629.0	711.2	251.4	459.8
Coastal countries		4 560.3	180.2	4 740.5	3 804.0	544.9	137.7	407.2
Benin	Jan./Dec.	116.0	9.0	125.0	115.0	9.1	9.1	0.0
Cote d'Ivoire	Jan./Dec.	750.6	37.1	787.7	655.0	34.1	2.6	31.5
Ghana	Jan./Dec.	451.7	23.3	475.0	485.0	87.4	34.8	52.6
Guinea	Jan./Dec.	333.7	24.3	358.0	350.0	6.8	0.0	6.8
Liberia	Jan./Dec.	137.9	57.4	195.3	200.0	67.4	67.4	0.0
Nigeria	Jan./Dec.	2 382.0	0.0	2 382.0	1 600.0	314.0	0.3	313.7
Sierra Leone	Jan./Dec.	264.9	25.1	290.0	329.0	22.1	19.5	2.6
Togo	Jan./Dec.	123.5	4.0	127.5	70.0	4.0	4.0	0.0
Sahelian countries		1 716.5	213.7	1 930.2	1 825.0	166.3	113.7	52.6
Burkina faso	Nov./Oct.	136.7	33.4	170.1	155.0	12.7	10.4	2.3
Cape Verde	Nov./Oct.	30.1	60.1	90.2	70.0	71.6	71.6	0.0
Chad	Nov./Oct.	60.0	15.9	75.9	67.0	6.7	6.7	0.0
Gambia	Nov./Oct.	123.3	3.8	127.1	94.0	3.2	3.2	0.0
Guinea Bissau	Nov./Oct.	55.0	21.1	76.1	99.0	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	260.0	12.5	12.5	0.0
Niger	Nov./Oct.	306.7	25.7	332.4	220.0	0.4	0.4	0.0
Senegal	Nov./Oct.	674.2	20.8	695.0	760.0	56.5	6.2	50.3
Central Africa		611.4	36.2	647.6	718.0	38.9	14.4	24.5
Cameroon	Jan./Dec.	237.4	2.6	240.0	280.0	19.1	2.8	16.3
Cent.Afr.Rep.	Jan./Dec.	28.0	1.2	29.2	29.0	0.6	0.6	0.0
Congo, Dem.Rep.	Jan./Dec.	231.8	18.2	250.0	250.0	9.5	9.5	0.0
Congo, Rep.	Jan./Dec.	91.5	13.5	105.0	140.0	9.1	0.9	8.2
Eq. Guinea	Jan./Dec.	14.0	0.0	14.0	9.0	0.4	0.4	0.0
Sao Tome	Jan./Dec.	8.7	0.7	9.4	10.0	0.2	0.2	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
ASIA		33 271.2	4 632.9	37 904.1	35 954.0	19 326.1	3 016.6	16 309.5
Afghanistan	July/June	668.4	74.9	743.3	1 127.0	121.9	98.5	23.4
Armenia	July/June	348.0	20.0	368.0	368.0	325.0	87.0	238.0
Azerbaijan	July/June	648.0	26.0	674.0	607.0	418.1	22.3	395.8
Bangladesh	July/June	2 886.9	1 313.1	4 200.0	2 600.0	1 565.1	765.1	800.0
Bhutan	July/June	18.8	1.2	20.0	22.0	0.7	0.0	0.7
Cambodia	Jan./Dec.	47.9	12.1	60.0	60.0	5.0	5.0	0.0
China 3/	July/June	8 240.1	259.9	8 500.0	9 300.0	4 731.7	148.0	4 583.7
Georgia	July/June	507.0	98.0	605.0	555.0	207.8	90.2	117.6
India	April/March	1 428.8	263.2	1 692.0	1 946.0	746.3	250.2	496.1
Indonesia	April/March	6 344.9	955.1	7 300.0	6 100.0	5 765.1	505.3	5 259.8
Korea, D.P.R.	Nov./Oct.	920.6	935.4	1 856.0	1 293.0	492.3	401.5	90.8
Kyrgyz Republic	July/June	110.0	7.0	117.0	206.0	185.9	106.8	79.1
Laos	Jan./Dec.	59.0	8.0	67.0	67.0	0.0	0.0	0.0
Maldives	Jan./Dec.	36.1	4.9	41.0	36.0	3.0	0.0	3.0
Mongolia	Oct./Sept.	132.7	60.3	193.0	203.0	15.0	15.0	0.0
Nepal	July/June	50.0	24.7	74.7	120.0	61.4	2.3	59.1
Pakistan 4/	May/April	2 725.9	195.5	2 921.4	2 521.0	903.6	267.3	636.3
Philippines	July/June	3 450.1	2.5	3 452.6	3 544.0	2 477.8	110.0	2 367.8
Sri Lanka	Jan./Dec.	1 012.3	116.5	1 128.8	1 010.0	163.6	1.9	161.7
Syria	July/June	753.1	15.9	769.0	790.0	617.1	22.2	594.9
Tajikistan	July/June	316.0	80.0	396.0	458.0	333.8	67.6	266.2
Turkmenistan	July/June	75.0	0.0	75.0	16.0	9.5	5.1	4.4
Uzbekistan	July/June	519.0	0.0	519.0	335.0	118.0	44.0	74.0
Yemen	Jan./Dec.	1 972.6	158.7	2 131.3	2 670.0	58.4	1.3	57.1
CENTRAL AMERICA		3 496.8	409.8	3 906.6	3 584.0	1 758.0	444.1	1 313.9
Cuba 5/	July/June	1 567.9	10.9	1 578.8	1 471.0	461.9	46.4	415.5
Guatemala	July/June	991.5	41.5	1 033.0	915.0	624.9	110.1	514.8
Haiti	July/June	367.7	131.8	499.5	525.0	226.6	97.1	129.5
Honduras	July/June	444.3	93.2	537.5	515.0	240.0	87.7	152.3
Nicaragua	July/June	125.4	132.4	257.8	158.0	204.6	102.8	101.8
SOUTH AMERICA		1 063.9	176.1	1 240.0	1 001.0	261.7	92.7	169.0
Bolivia	July/June	210.1	155.9	366.0	271.0	69.7	22.9	46.8
Ecuador	Jan./Dec.	853.8	20.2	874.0	730.0	192.0	69.8	122.2
OCEANIA		423.0	8.0	431.0	381.0	0.6	0.6	0.0
Kiribati	Jan./Dec.	8.0	0.0	8.0	8.0	0.0	0.0	0.0
Papua New Guinea	Jan./Dec.	360.0	8.0	368.0	318.0	0.6	0.6	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
EUROPE		500.5	121.0	621.5	675.0	167.3	163.1	4.2
Albania	July/June	249.1	25.9	275.0	355.0	12.4	8.2	4.2
Bosnia&Herzegovina	July/June	199.4	92.1	291.5	290.0	61.5	61.5	0.0
Macedonia, FYR	July/June	52.0	3.0	55.0	30.0	93.4	93.4	0.0
TOTAL		63 544.8	7 689.2	71 234.0	69 031.0	31 981.6	5 026.4	26 955.2

SOURCE: FAO

1/ Includes food deficit countries with per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. U.S.\$ 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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