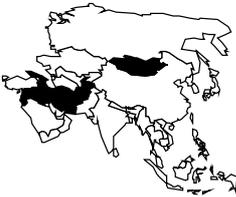


# FOODCROPS AND SHORTAGES

No.3

June 2000

	<p><b>AFRICA:</b> In eastern Africa, the war between Eritrea and Ethiopia has aggravated the drought-induced humanitarian crisis by displacing a large number of people. Over 16 million people, mainly pastoralists, in the sub-region are facing severe food shortages. In southern Africa, food aid is needed in areas affected by floods and cyclones. In northern Africa, crop outlook is unfavourable (except in Egypt) due to insufficient rainfall. In western Africa, renewed civil war in Sierra Leone hampers agricultural activities in the critical rice planting period.</p>
	<p><b>ASIA:</b> Several countries have been hit by severe drought, particularly the Islamic Republic of Iran, India and Pakistan. The food situation remains precarious in Mongolia, following excessive snowfall last winter which killed large numbers of livestock, and in DPR Korea, suggesting continued dependence on food aid. In East Timor the situation continues to ease. In the Near East, Afghanistan faces a severe food crisis due to drought and economic difficulties. Iraq and Jordan have also been affected by drought.</p>
	<p><b>LATIN AMERICA AND CARIBBEAN:</b> In South America, cereal output was poor in Uruguay and Paraguay due to prolonged drought. In Bolivia, the winter wheat crop is likely to be low due to heavy rains and floods. In Venezuela, agriculture is recovering following devastating floods and mudslides last year. In Mexico, several northern states have been declared disaster areas due to drought. In the Caribbean, minor foodcrops, vegetables and roots and tubers were severely affected by drought in Jamaica. Emergency agricultural rehabilitation programmes are being prepared.</p>
	<p><b>EUROPE:</b> Prospects remain favourable for cereal production in the EC, but drought has affected crops in several eastern European and CIS countries. Large-scale international assistance continues for vulnerable populations in the Balkans. Crisis also continues in Chechnya, with large numbers of displaced people requiring assistance. Untimely frosts and persistent dry conditions have affected crops in Moldova and southern Ukraine. Persistent cold weather and rains have seriously delayed spring planting in the Russian Federation.</p>
	<p><b>NORTH AMERICA:</b> Coarse grains planting has been virtually completed in the United States and some recent significant rains have improved growing conditions after earlier dry weather. Early indications point to an above average output, 3.5 percent up on last year. In Canada, weather conditions have been generally favourable during the main spring planting season. Wheat area is expected to change little compared to last year but that for coarse grains could increase.</p>
	<p><b>OCEANIA:</b> In Australia, favourable weather conditions have benefited winter wheat and coarse grain crops. Wheat area is expected to be unchanged from the previous year, but for coarse grains a sharp increase is anticipated. The worst locust infestation in several decades is causing concern throughout most of the major producing areas and intensive control measures in the coming months will be necessary to avert potentially damaging plagues later in the year.</p>



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

### UNFAVOURABLE PROSPECTS FOR CURRENT CROPS

<u>Country</u>	<u>Harvest date</u>	<u>Main contributory factors</u>
<u>Afghanistan*</u>	May/Jun.	Civil strife, drought
<u>Algeria</u>	May/Jun.	Drought
<u>Belarus</u>	Jul./Sept.	Adverse weather, economic constraints
<u>Bolivia</u>	Sept./Oct.	Flooding
<u>Congo, Dem.Rep.of*</u>	Nov./Dec.	Civil strife
<u>Ethiopia*</u>	Jun./Aug.	Drought
<u>Haiti</u>	Jun./Aug.	Drought
<u>Iran</u>	Jun./Jul.	Drought
<u>Iraq*</u>	May/Jun.	Drought, lack of inputs
<u>Jamaica</u>	Dec./Nov.	Drought
<u>Jordan</u>	May/Jun.	Drought
<u>Kenya</u>	Aug./Nov.	Drought
<u>Libya</u>	May/Jun.	Insufficient rainfall
<u>Madagascar</u>	Apr./Jun	Drought/cyclones
<u>Moldova</u>	Jul./Oct.	Drought, economic constraints
<u>Morocco</u>	May/Jun.	Drought
<u>Mozambique</u>	Mar./Apr.	Floods
<u>Sierra Leone*</u>	Nov./Dec.	Civil strife
<u>Somalia*</u>	Aug./Sept.	Drought, civil strife
<u>Swaziland</u>	May/Jun.	Excessive rains
<u>Syria</u>	May/Jul.	Drought
<u>Tajikistan*</u>	Jun./Sept.	Drought, economic constraints
<u>Tanzania</u>	May/Aug.	Insufficient rainfall
<u>Tunisia</u>	May/Jun.	Insufficient rainfall
<u>Yugoslavia, Fed.Rep.of*</u>	Jul./Sept.	Floods, drought, economic constraints

### COUNTRIES FACING EXCEPTIONAL FOOD EMERGENCIES (Total: 36 countries)<sup>2/</sup>

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

<sup>2/</sup> This updates information published in the June 2000 issue of Food Outlook.

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

- Mali

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

## CROP AND FOOD SUPPLY SITUATION

### OVERVIEW

Natural hazards, drought, cyclones and floods, since earlier this year, have seriously undermined the food security of millions of people around the globe and have resulted in many human deaths and forced thousands to migrate. Natural problems, moreover, have been compounded by war and civil strife in some areas, while economic problems in others continue to affect food production and supply. In Eastern Africa, some 16 million people, over half in Ethiopia, face severe food shortages mainly due to drought. Delayed rainfall and recent escalation of war are expected to increase further the number of people in need of food assistance in both Ethiopia and Eritrea. In Kenya, an estimated 3.7 million people urgently need food assistance, whilst in Somalia more than 650 000 people are in similar need, despite some improvement in food supplies. In Tanzania, Uganda and Sudan, despite a stable food supply situation overall, food assistance is needed for several hundred thousand people affected by poor harvests and/or civil conflict. In northern Africa, with the exception of Egypt, the outlook for cereal crops is mostly unfavourable due to inadequate rainfall since the beginning of the year. In contrast, in southern Africa, despite a tight food supply situation in southern Mozambique and Madagascar due to earlier floods and cyclones, overall crop prospects in the sub-region remain favourable, with aggregate production likely to be up on last year.

In the Near East and Asia, the latest food and humanitarian emergencies follow serious drought, which devastated crops and livestock in a number of countries. In Afghanistan, crop production is forecast to fall by almost half compared to reduced production last year, whilst millions of people have little access to food. Food aid is urgently needed as the situation is likely to deteriorate in the coming months as the few remaining coping mechanisms become exhausted. In the Islamic Republic of Iran drought threatens crop production, though losses are likely to be less severe than forecast earlier. In Pakistan and India, a number of areas were also hit by drought, leading to large livestock losses and out-migration of thousands in search of food and water. Much depends on the performance of monsoon rains due now. Chronic food supply difficulties persist in DPR Korea, though there are signs for optimism as concerted efforts to resolve the country's economic problems gain momentum. In Mongolia, the food situation for nomadic herders remains precarious following the worst winter in 30 years. In the CIS countries in Asia, a decline in 2000 grain production is forecast. The overall food supply situation is likely to remain stable, though concerns persist for vulnerable populations in Armenia, Azerbaijan, Georgia and Tajikistan, due to economic decline and prolonged civil strife. In addition, food production in Tajikistan has been affected by drought. The humanitarian crisis in Chechnya continues, with massive international assistance still required, which is also needed in the Balkans. The beneficiary numbers in Kosovo Province, however, are declining, reflecting improvements in economic conditions. In South American and the Caribbean countries, notwithstanding drought in parts of Mexico and Jamaica, agricultural production is expected to continue recovering from devastating natural disasters in 1998.

### SITUATION BY REGION

#### Africa

In **eastern Africa**, with poor rainfall so far for the sub-region during the current season, the early outlook for the 2000 crops is generally unfavourable, suggesting that the current critical food shortages are likely to persist well into 2001. Already some 16 million people in the sub-region face severe food shortages.

In Ethiopia, almost total failure of the "Belg" harvest is anticipated, reflecting continued drought. More than 8 million people are already facing severe food shortages. The border conflict with Eritrea continues to compound the food difficulties. The situation is particularly serious in pastoral areas in the east and south, where starvation-related deaths, particularly among children, are reported. In Eritrea, the upsurge in fighting with Ethiopia has created a humanitarian crisis, forcing an estimated 750 000 people from their homes and farms, with many crossing into neighbouring Sudan. This is on top of the 211 000 people affected by drought along the coastal areas of the country. In Kenya, the food supply situation is alarming in northern, eastern and north-western pastoral districts affected by successive droughts. The current "long rains" season has also largely failed, leading to a poor food outlook for 2000/01. The Government has recently appealed for massive international assistance, in view of the large number of people facing severe food shortages. In Somalia, despite some improvement in the food supply situation in the south where a better secondary Deyr

crop was harvested last February, more than 650 000 people still face severe food shortages. Heavy rains have also caused some flood damage in central and southern parts of the country. In Tanzania, despite a stable food supply situation overall, food assistance is needed for nearly 800 000 food insecure people, mainly in Dodoma, Mara, Shinyanga, Singida, Tabora, Tanga and southern Mwanza, which suffered a third consecutive poor harvest. In Sudan, despite a stable food supply situation overall, some 2.4 million people affected by drought and the long-running civil conflict continue to depend on food assistance. In Uganda, the food supply situation remains precarious in Kotido, Morito, Gulu and Kitgum districts in the north and Bundibugyo district in the west, mainly due to civil unrest but also due a poor harvest in the north last season.

A UN Inter-Agency appeal was launched on 6 June 2000, for US\$378 million to assist some 13.4 million drought affected people in Ethiopia, Kenya, Eritrea, Somalia and Djibouti.

In **southern Africa**, harvesting of the 2000 cereal crops is well advanced. Despite early dry weather during the growing season followed by excessive rains, cyclones and floods that caused severe infrastructure and crop damage, the sub-region's overall production is expected to be good. Latest forecasts point to an aggregate cereal crop higher than last year's level and above average. This mainly reflects favourable conditions in the major maize growing areas. However, the impact of weather conditions on this year's output varies according to countries and regions within countries. In South Africa, the main producer of the sub-region, provisional estimates indicate a maize output of 9.64 million tonnes, one-third higher than in the previous year and above average. This reflects higher plantings and yields despite serious flood damage in some provinces. The exportable surplus of maize in marketing year 2000/01 is estimated at 1.5 to 2 million tonnes. In Malawi, abundant rains from February to April led to the recovery of the maize crop, affected by early dry weather in the main growing areas. The output is estimated at 2.3 million tonnes, almost unchanged from the record level of last year. Export surpluses are anticipated for the second consecutive year. In Zimbabwe, despite improved growing conditions for the cereal crops, increasing civil disturbances since last April, coupled with severe shortages of fuel, have disrupted harvesting operations and production could be reduced. In Mozambique, severe flood damage in southern parts, and a slight reduction in yields in the main growing areas, have resulted in a decline in maize output from the good level of last year to 994 000 tonnes. While maize surpluses are estimated in northern areas, the food supply is extremely tight in southern provinces. In Zambia, despite localized floods, abundant precipitation since February allowed the recovery of the main maize crop, estimated at 918 000 tonnes, 7 percent higher than last year. In Angola, coarse grain output decreased 6 percent from last year to 500 000 tonnes. This reduction mainly reflects erratic rains during the growing season. Persistent insecurity continues to result in massive displacements of populations. The number of IDPs has increased to 2.6 million, of which 1.9 million are estimated in urgent need of emergency food assistance. In Swaziland, excessive rains and floods during the season, as well as a decline of 10 percent in plantings resulted in a sharp fall in this year's maize production. The main maize crop is estimated at 72 000 tonnes, 37 percent lower than in 1999. By contrast, in Namibia, abundant rains during the season benefited the maize and millet crops. Latest forecasts point to output of coarse grains more than doubling last year's average level. In Lesotho, production of maize is forecast at 116 000 tonnes, 7 percent below last year's about normal crop. Dry weather at the beginning of the season, followed by excessive rains from February, adversely affected yields. In Botswana, latest forecasts indicate a coarse grain output above last year's level; increased sorghum production more than compensated for a lower maize crop affected by severe floods in eastern and southern provinces.

In **northern Africa**, the outlook for the 2000 cereal crops now being harvested, is mostly unfavourable, except in Egypt. As a result of inadequate rainfall since mid-January, aggregate cereal output for the sub-region is forecast at about 22.9 million tonnes, 14 percent lower than the below-average production of last year. The wheat crop of 9.2 million tonnes is expected to be 18 percent below 1999, while coarse grains are forecast at 8.1 million tonnes, a 15 percent reduction compared to the previous year's below average output. In Algeria and Morocco, poor rainfall since mid-January coupled with abnormally high temperatures, resulted in losses in over half the area planted to wheat and barley. As a consequence, production is expected to be sharply reduced and may even be about half last year's drought-reduced output. In Tunisia, despite average planting, below normal and poorly distributed rainfall in March and April seriously affected wheat and barley yields. By contrast, reflecting satisfactory growing conditions in Egypt, wheat production is officially estimated at 6.6 million tonnes, compared to last year's good crop of 6.3 million tonnes.

In **western Africa**, the rainy season started in the Sahel in late April/May in southern Burkina Faso, Chad, Guinea Bissau and Mali, in the extreme south-west of Niger and the extreme south-east of Senegal. By early June, seasonably dry conditions prevailed in the rest of Senegal, Cape Verde, The Gambia and Mauritania.

This corresponds to the normal pattern in the Sahel, except for Niger where rains were somewhat delayed. Land preparation and plantings are in progress following the onset of the rains. Dry planting is also underway in Mauritania and Niger. Crops are emerging satisfactorily in southern Burkina Faso, Chad and Mali but improved rains are needed in coming weeks. Seed availability is generally adequate following above average to record harvests in most Sahelian countries in 1999. The pest situation is calm. A few Desert Locusts were reported in mid-April in south-eastern Air in Niger and during May in Adrar in Mauritania. Low numbers of adults are likely to appear in southern Mauritania and lay with the onset of the rains.

In the south of Benin, Cote d'Ivoire, Ghana, Nigeria and Togo, the main maize crop, planted in March, is developing satisfactorily. Reduced rains in early May were offset by abundant precipitation by the end of the month. In April/May, planting of millet and sorghum coincided with the onset of the rains in the north. In Liberia, rice planting is well underway. In Sierra Leone agricultural activities and distribution of seeds and tools were disrupted by the resurgence of civil strife in May.

In **central Africa**, recently planted maize is developing satisfactorily in Cameroon and Central African Republic. Agriculture prospects improved in the Republic of Congo following the peace agreement. By contrast, agriculture remains constrained by civil strife in the Democratic Republic of Congo where another poor B-season crop is about to be harvested.

## **Asia**

The main rice season is well advanced in countries around the Equatorial belt, whilst in many other countries land preparation and planting, of mainly rice and coarse grains, has been or is about to start to coincide with the arrival of monsoon rains. In Japan, the Philippines, the Democratic Republic of Korea and the Republic of Korea planting of the main season rice and maize crops will be completed by June, for harvest in October/November. Early prospects appear satisfactory though there are reports of excessively dry conditions in DPR Korea. In China, planting of the early and intermediate rice crops is expected to be completed soon, whilst in Thailand, Cambodia, Laos and Vietnam, planting is underway for the main wet season crops, which account for the bulk of aggregate paddy production. In the sub-continent, planting of the main Kharif rice and coarse grains will commence shortly to coincide with the arrival of the South-west monsoon rains, which began on schedule. South of the equator, harvesting of the main rice crop is near completion in Indonesia whilst planting of the second, dry season crop, will commence shortly.

The latest food and humanitarian emergencies to develop in the region follow serious drought, which has devastated crops and livestock in several countries particularly in Afghanistan, the Islamic Republic of Iran, Pakistan and India. In Afghanistan, a recent FAO/WFP Crop and Food Supply Assessment Mission found that the country is on the verge of a major food crisis with millions of people having little or no access to food due to severe drought and continuing economic problems. The cereal import requirement in the current marketing year is estimated at an unprecedented 2.3 million tonnes, more than double last year's volume of 1.1 million tonnes. In the Islamic Republic of Iran, the recurrence of drought this year again threatens domestic production in 18 of the country's 28 provinces, mostly in southern, eastern and central parts. The food supply situation amongst vulnerable groups, particularly in rural areas, is a matter of concern. In Pakistan, serious drought devastated the Baluchistan province and part of Sindh province, leading to serious water and food shortages in the worst affected areas. In addition, several million livestock remain in precarious condition. In India, several central and western states were also seriously affected by drought and the consequent shortage of water and animal feed. In Gujarat, an estimated 10 million people have been affected. Other states affected include Rajasthan, Madhya Pradesh, Andhra Pradesh and Orissa. In Orissa the drought comes on top of last year's devastating cyclone which killed several thousand people and also resulted in salination of agricultural areas. As a result, there was no winter crop this year and large numbers of the state's population continue to depend on food assistance provided by the Government.

Elsewhere, the food situation for nomadic herders in Mongolia still remains precarious following the worst winter in 30 years, which killed large numbers of livestock and destroyed the livelihood of thousands of pastoralists. The Government has requested international food and humanitarian aid for the affected population. Chronic food supply difficulties continue in the Democratic People's Republic of Korea, suggesting continued dependence on food assistance. There are, however, signs for cautious optimism as concerted efforts to resolve the country's economic problems gain momentum. The food supply situation in East Timor continues to ease due to international food aid and this year's improved maize and rice harvests which were less severely affected by last year's civil disturbances than envisaged earlier.

Across the eight CIS countries in the Asian region, wheat is now being planted in Kazakhstan, the largest producer. By early June, 11 out of 12 million hectares had been planted. Locusts present a potential threat to the crop. The harvest is expected to be less than last year's bumper harvest of 14 million tonnes. In the remaining countries, latest indications are that the aggregate area sown to winter grains has declined only in Georgia and Armenia in part due to import competition and to significantly higher fuel prices. However, hot and dry weather in April and May seriously stressed rainfed crops in the countries of Central Asia. In Tajikistan, where about half the crop is not irrigated, the outlook is poor also due to persistent shortages of inputs. In Uzbekistan, and Turkmenistan the area sown to winter grains has increased. Growing conditions have been mostly satisfactory to date for the irrigated land, and given normal weather until the completion of the harvest, winter wheat production could continue to edge upwards. Planting of paddy, spring coarse grains and cotton is nearing completion.

Overall, the early outlook is for the 2000 aggregate grain harvest in the eight CIS countries classified as Asia, to be less than the 24 million tonnes harvested in 1999. Despite the forecasts of a lower wheat harvest, the overall food supply situation is likely to remain stable, except in Tajikistan where, in response to a poor harvest, the wheat import requirement is likely to exceed that country's usual market requirement and, in view of endemic poverty, food aid needs could rise. In all these countries, aggregate statistics hide increasingly large income disparities and there are 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.

In the **Near East**, persistent drought and insecurity continue to affect crop and livestock production in many parts. In Iraq, two consecutive years of severe drought and inadequate availability of essential agricultural inputs gravely affected agriculture, exacerbating an already tight food supply situation. In Jordan, despite some beneficial rains in the winter cropping season, overall insufficient precipitation affected agricultural production in several parts. In Turkey, recent favourable rains and snow cover continue to favour the development of wheat, to be harvested from June, reversing the effects of dry weather in some parts earlier in the season. A good wheat harvest is in prospect.

### Latin America

In **Central America and the Caribbean**, the main agricultural activities include planting of the 2000/01 first season cereal and bean crops with the start of the rainy season in May. The area planted to maize, the main cereal, in Costa Rica, El Salvador, Guatemala and Nicaragua is expected to be average, similar to 1999/2000. In Honduras, prospects have improved from earlier forecast and maize planting is anticipated to be about average, which represents a recovery from last year. In Mexico, where several states in the north have been declared disaster areas due to prolonged drought, planting of the important spring/summer crop is underway principally in the main producing central-southern belt states. Intended plantings should be about average. In the Caribbean, a severe prolonged drought in Jamaica has affected food crops, mainly vegetables, roots and tubers. By contrast, recent normal weather benefited developing crops in the Dominican Republic, Cuba and Haiti.

In the southern parts of **South America**, planting of the 2000/01 wheat crop has started while harvesting of the 2000 maize crop is underway. Average wheat plantings are anticipated in most countries. Production of maize in Argentina is expected to be slightly above average, a significant recovery from last year. In Brazil, an average to slightly above-average output is also anticipated. Maize output in Chile is expected to recover substantially from last year's drought affected crop. In Paraguay and Uruguay, normal rains have resumed but the harvest has been low, due to severe dry spell over several months.

### Europe

The outlook for the 2000 cereal crops is generally favourable in most countries of the EC. Conditions improved significantly in southern parts in late April and early May following good rainfall. FAO now forecasts the aggregate wheat crop at 105.6 million tonnes, (1999: 97.6 million tonnes) and that of coarse grains at 105.7 million tonnes (1999: 102.2 million tonnes). Elsewhere in Europe, prospects for this year's cereal crops have deteriorated somewhat in the southeastern countries due to several weeks of persisting dry weather. Latest indications are that, in many parts, yields will likely turn out similar to last year's drought-reduced levels. In the Balkan countries large-scale international assistance continues for vulnerable populations. In The Federal Republic of Yugoslavia (excluding Kosovo Province), about 1.1 million beneficiaries continue to

receive food assistance, including refugees, IDPs and economically and socially deprived people. However, in the Kosovo Province, the total beneficiary caseload has been reduced from 900 000 to 600 000, reflecting improvements in economic conditions in the Province and reduced winter expenses. 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) the outlook has deteriorated. 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. However, spring weather has been very mixed and untimely frosts in May as well as dry conditions have damaged crops in parts of Belarus, Moldova, southern Ukraine and Russia and seriously delayed spring grain plantings in the Urals and the New Lands. This will reduce the aggregate spring grain area. Elsewhere spring planting (other than maize) is nearing completion. In view of the deterioration in crop conditions, FAO's forecast for the 2000 grain harvest has been lowered to 67 million tonnes compared to the 60 million tonnes in 1999. In the Ukraine, uncertainty about the area sown on the recently reorganised farms, difficult access to credit and increasingly inadequate use of inputs points to a harvest not significantly larger than last year's poor 27 million tonnes. In Belarus, continuing economic difficulties and adverse weather are expected to constrain yields. In Moldova, frost and dry conditions have reduced crop potential and output is forecast to be less than the poor level of 2.2 million tonnes in 1999.

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 highly 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. Imports of cereals by Belarus could reach 1.35 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. Ukraine, despite a very poor harvest in 1999 (estimated at 27 million tonnes), will remain a net exporter of up to 3.1 million tonnes of cereals, mainly wheat and barley.

Populations in Chechnya and surrounding republics will continue to need considerable humanitarian assistance over a broad spectrum of basic needs, including food, shelter, health, nutrition, water and sanitation. 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, prospects for the 2000 wheat crop remain generally favourable and aggregate (winter and spring) wheat production is officially forecast at 60.9 million tonnes, only 3 percent down from the previous year. The bulk of the coarse grain crop was planted by late May, slightly ahead of schedule, and some significant rains recently improved growing conditions following earlier dry weather. Based on the indicated areas planted, and assuming sufficient rainfall during the remainder of the season, aggregate 2000 coarse grains output in the United States is forecast at 271.3 million tonnes, 2.8 percent up from the previous year. For rice, plantings are expected to be down this year in response to the substantial decline in rice prices in the preceding season. In Canada, conditions have been generally favourable during the main spring planting season. The wheat area is expected to remain virtually unchanged from the previous year, while for coarse grains, early indications point to an increase in area.

### **Oceania**

In Australia, favourable weather conditions have benefited planting of the 2000 winter wheat and coarse grain crops. The winter wheat area is expected to be 11.8 million hectares, virtually unchanged from the previous year. As regards barley, the major winter coarse grain crop, early indications point to a sharp

recovery in plantings to almost 3 million hectares after last year's reduced area. However, although weather conditions for planting and early development of the winter grain crops are favourable, crops are threatened by an outbreak of locusts. Intensive control measures will be needed over the coming months to prevent potentially very damaging plagues later in the year.

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

### **AFRICA**

#### **NORTHERN AFRICA**

##### **ALGERIA (5 June)**

**As a result of severe drought during much of the season, 60 percent of area planted is reported to have been damaged. Cereal production in 2000 is, therefore, expected to be well below last year's harvest which was below average. The drop in output is reported to be severe even in the eastern and southern regions, which had good crops for several consecutive years.**

**Following a sharp drop in domestic output, imports of cereals in 2000/01 (July/June) are forecast to increase considerably and may exceed 7 million tonnes, compared to 6 million tonnes or less in recent years. Imports of wheat should be over 5 million tonnes.**

##### **EGYPT (5 June)**

Prospects are favourable for the 2000 winter grains being harvested. As a result of generally satisfactory growing conditions, a wheat harvest of about 6.65 million tonnes is officially estimated compared to 6.35 million last year. The increase is largely due higher yields as a result of Government incentives to cultivate new varieties and use improved cropping practices. The 2000 paddy season is underway under generally normal weather conditions but the availability of irrigation water in the next weeks will determine the final area planted.

Imports of cereals during the marketing year 2000/01 (July/June) are forecast at about 10 million tonnes, about the same level as last year. This includes 7 million tonnes of wheat and 3.5 million tonnes of coarse grains, mostly maize.

##### **LIBYA (5 June)**

**Prospects for the 2000 winter crops, currently being harvested, are unfavourable. Cereal production is anticipated to be below last year's average crop of about 320 000 tonnes, as yields have been reduced by prolonged dry weather between February and April in the north and north-east. The country's cereal import requirements for 2000/01, estimated at 2.1 million tonnes, mostly wheat and barley, will be met through commercial channels.**

##### **MOROCCO (5 June)**

**Poor rainfall since mid-January coupled with abnormally high temperatures, resulted in losses of over half of area planted to wheat and barley. As a consequence, production is expected to be sharply reduced. Initial indications point to wheat output in 2000 at some 1.1 million tonnes, about half of the 1999 drought-reduced output, while coarse grains are estimated at 1.08 million tonnes, 35 percent lower than the previous year. In reaction to the natural disaster, the government has initiated an anti-drought programme to last through next year's harvest in June 2001. The programme includes drinking water supply for people in affected areas, the protection of livestock through subsidized feeding, and the provision of wheat and barley seeds and grains to farmers at subsidized prices.**

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

**Cereal imports in 2000/01 (July/June) are forecast to increase substantially, at 3 million tonnes of wheat and 1.8 million tonnes of coarse grains, mainly barley and maize.**

#### **TUNISIA (5 June)**

Despite an average area planted, below-normal and poorly distributed rainfall in March and April have seriously affected wheat and barley yields. As a result, total cereal production is tentatively put at 1 million tonnes, compared to 1.8 million in 1999. Wheat output at about 815 000 tonnes is 42 percent below last year while the barley crop is estimated at 223 000 tonnes, a 45 percent reduction.

Imports of cereals for the 2000/01 marketing year (July/June) are forecast at 1.7 million tonnes, consisting of about 1 million tonnes of wheat and 700 000 tonnes of coarse grains, mainly barley and maize.

### **WESTERN AFRICA**

#### **BENIN (5 June)**

The first rains started in mid-March in the south, allowing planting of the first maize crop. Rains covered the entire country in late April. Rainfall was above average during the last dekad of May, benefiting planting and emergence of millet and sorghum crops in the north.

Following a well above-average cereal harvest in 1999, estimated at 925 000 tonnes (including paddy), the overall food supply situation is satisfactory. Cereal imports, for domestic use and re-exports, during the 2000 marketing year are estimated at 145 000 tonnes and food aid requirements at 10 000 tonnes.

#### **BURKINA FASO (12 June)**

The rainy season started with generally above normal rains. The first significant rains were registered in early April in the south-west and the south-east. They progressed northwards in May and were generally above normal during the first and the third dekad but the weather remained mostly dry in the north. Rains covered almost the entire country during the first dekad of June but decreased significantly, notably in the east where they were below average. Land preparation and planting of millet and sorghum is now underway in the south and the centre. More rains are needed in the east and the south in the coming weeks to avoid water stress.

Seed availability is adequate following the two successive 1998 and 1999 record harvests. No pest activity is reported.

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 (including paddy), some 13 percent above the five year average. Millet and sorghum production showed a decrease, while maize and rice production increased. Following this record crop, the overall food supply situation is satisfactory. Markets are well supplied and prices of local millet and sorghum are significantly lower than in previous several years. Traders are importing cereals from Mali in Soum, Sourou and Yatenga provinces. However, some populations will remain vulnerable during the lean season following successive below-average harvests, notably in the provinces of Boulkiemdé, Samnatenga and Sanguié. The cereal import requirement for the 1999/2000 marketing year (November/October) is estimated at 155 000 tonnes, mainly wheat and rice. Emergency food assistance has been distributed in the provinces of Boulkiemdé, Kouritenga, Passoré, Poni, and Yatenga to 12 000 Burkinabe returnees from Côte d'Ivoire.

#### CAPE VERDE (12 June)

Seasonably dry conditions prevail. Planting of maize normally starts in July with the onset of the rains on the main islands. Following a record harvest in 1999, the availability of seeds should be adequate.

1999 maize production has been estimated at a record 25 700 tonnes which is about 5 times higher than in 1998 and the last five-year average. Following this record crop, the overall food supply situation has improved in rural areas affected by several successive poor crops. With normal cereal imports, markets are well supplied and prices are stable. However, 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 405 000 tonnes of food aid have been received so far.

#### CHAD (12 June)

The growing season has started on time in the Sudanian zone. Following first sporadic rains in late March, significant rains were registered in mid-April in the extreme south. The rainy season really started in mid and late May in the south, in the Sudanian zone. Planting of coarse grains is underway in the south. Land preparation is starting in the Sahelian zone. Pastures remain good.

Seed availability is adequate following 1999 above average harvest. Grasshoppers attacks have been reported in Batha and Ouaddaï. No Desert Locusts activity is reported.

Prospects for off-season crops are favourable. Harvest of the recession berbere crop is complete and production is above average.

Following release of final production estimates by the national statistical services, the aggregate 1999 cereal production is estimated at 1 230 000 tonnes (with rice in paddy), which is 5 percent below the 1998 record but 16 percent above the five-year average. The overall food supply situation is satisfactory. Prices of cereals remain stable and are lower than previous years in both Sudanian and Sahelian zones. Farmers have replenished 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 (5 June)

Rains have started in the south and the centre in mid-March allowing planting of the first maize crop. Abundant precipitation covered the entire country during the first dekad of May. It decreased in mid-May but was well above average countrywide during the third dekad, benefiting planting and emergence of millet and sorghum crops in the north.

Production of rice in 1999 increased compared to 1998 due to good rains and larger plantings. Following a good cereal harvest in 1999, estimated at almost 1.8 million tonnes (with rice in paddy), 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. Some 100 000 Liberian refugees and 1 500 Sierra Leoneans are present in the west.

#### THE GAMBIA (12 June)

Seasonably dry conditions prevail. The rains have not yet started and farmers are currently preparing their fields. Planting is expected to start in the weeks ahead with the onset of the rains.

Following 1999 record harvest, the seed availability is adequate for cereals. However, there are indications that shortages of groundnut seeds might occur, since at least part of the stored seeds are infested.

Following release of final production figures by national statistical services, aggregate 1999 cereal production is estimated at a record 155 600 tonnes (with rice in paddy), 36 percent above 1998 and 48 percent above the five-year average. The overall food supply situation is satisfactory and markets are well supplied. However, some areas were 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 (5 June)

First rains started in the south and the centre during the second dekad of March, allowing land preparation and planting of the first maize crop. They progressed to the north in April, decreased significantly during the second dekad of May but were widespread and above average during the third dekad, allowing plantings and emergence of millet and sorghum crops in the north.

The aggregate output of cereals in 1999 is estimated at 1 686 000 tonnes (with rice in paddy) which is slightly below the output in 1998 and the average. The food supply situation is tight for populations affected by floods in 1999 in the Northern, Upper East and Upper West Regions. WFP provided emergency assistance to some vulnerable people. About 10 000 Liberian refugees remain in the country. 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 (5 June)

First rains have been registered in the extreme south in March. Rains covered the entire country and were generally above average in April. Precipitation decreased in the centre and the north in early and mid-May but improved in late May. Planting of rice and coarse grains is underway.

Following a record cereal harvest in 1999, estimated at a 1.04 million tonnes (with rice in paddy), the overall food supply situation is satisfactory. 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), 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 (5 June)

The rainy season has started in the east and the south. The first rains were registered in mid-April in the east and the south. The weather remained mostly dry in late April and during the first and second dekads of May. Precipitation resumed in the east and the south during the third dekad of May and the first one of June. Land preparation for coarse grains is underway in the east and the north. Planting of rice in seedbeds has also started. Transplanting will start in July/August after desalination of swamp rice fields with more rains.

Seed availability problems are likely in some areas following the reduced 1999 harvest. However, input distributions have been undertaken with support from FAO, UNDP and the Government of Sweden, and 120 tonnes of rice seeds have been produced and distributed in the framework of an FAO emergency project.

The 1999 cereal production, estimated at 138 700 tonnes (with rice in paddy), is 5 percent above 1998, but below the 1997/98 pre-crisis level and below average. 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\* (5 June)**

First seasonal rains were received in early March in the south, becoming widespread and abundant only in late March. Rainfall remained generally abundant and above average, except in late April in the centre. Planting of the rice crop is underway. As in previous years, input distribution has been undertaken by several NGOs in various areas. Crop production should increase in 2000 if climatic conditions are favourable. However, the main constraint faced by farmers is marketing, as processing facilities and transport infrastructure are very poor. Post-harvest losses are also reported to be high.

With the exception of Lofa County, relative peace in most areas has exerted a positive influence on farming activities. The cultivated area and therefore rice production, the staple crop, should increase. In Lofa County, several thousands farmers have been displaced from Voinjama and Kolahum camps in upper Lofa to Tarvey and Sinje in lower Lofa and have not been able to plant crops.

Food aid distributions continue but the quantities received are decreasing significantly. The two agencies providing food aid in Liberia are WFP and CRS. WFP food aid decreased from 34 120 tonnes in 1998 to 28 730 tonnes in 1999 and only 3 410 tonnes have been received so far in 2000. Similarly, CRS food aid declined from 35 000 tonnes in 1997, to 24 000 tonnes in 1998, 8 900 tonnes in 1999 and 4 000 tonnes in 2000 (+2 000 tonnes for monetisation). Activities are evolving from emergency distributions and food for work towards development programmes. WFP is also distributing food aid to Liberian returnees and to 36 000 Sierra Leonean refugees (out of the 90 000 present in Liberia before the recent civil strife upsurge in Sierra Leone). Liberian refugees are returning from Côte d'Ivoire. Their total number since 1 January now stands at 2 620. Some 32 000 Liberian refugees in Guinea have also registered with UNHCR to return home.

#### **MALI (12 June)**

The growing season has started in the south. The first significant rains were registered in the extreme south in April. They progressed northwards and were above normal during the first dekad of May but they decreased during the second dekad. Precipitation resumed during the last dekad. Rains improved and progressed northwards during the first dekad of June. Land preparation is underway and first planting of millet and sorghum has started in the south. Pastures are generally adequate.

Seed availability is good following the two successive record crops in 1998 and 1999. Low numbers of Desert Locusts may be present and are likely to persist in a few wadis in the Adrar des Iforas. Limited laying could occur once the seasonal rains commence.

Production of irrigated rice in Ségou and Mopti Regions reached record levels. Production of recession sorghum and maize is also good.

Following two successive bumper crops, the overall food situation is satisfactory. Markets are well supplied and cereal prices are much lower than previous years. They were still decreasing in March, when they normally start to increase with the arrival of the lean season. However, these very low prices, due to large cereal surpluses, may cause economic difficulties for farmers in some areas, notably in some irrigated rice 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 (12 June)

Seasonably dry conditions prevail. Planting will start following the onset of the rains in June/July. Dry plantings are underway in the south-east (Hodh El Chargui). Seed availability is generally adequate following good rainfed crop harvests in 1999 in most areas.

During the first week of May, there was an unconfirmed report of a few flying Desert Locusts groups in Adrar, east of Oudane. No other locust activity was reported during the month. Scattered residual populations may persist in the remaining green patches of vegetation along the wadis in the Bir Moghreïn and El Hank areas. As the vegetation dries out, these populations are expected to move south towards the summer breeding areas in Tagant and the two Hodhs where they are expected to mature and lay with the onset of the rains.

Recession walo crops have been severely affected by pest attacks. Aggregate cereal production in 1999/2000 was estimated at 250 900 tonnes (with rice in paddy) which is 28 percent above the 1998/99 production and well above average.

The food situation improved in rural areas following a favourable harvest in rainfed areas in 1999. Food distributions have been undertaken for populations affected by large floods in late 1999 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 (12 June)

The start of the rainy season was delayed. Following first rains in the extreme south-west in late April, the weather remained mostly dry until the third dekad of May, when rains progressed northwards in the south-west, allowing land preparation and first plantings to start. Satellite imagery indicates that cloud coverage progressed significantly northwards in the west and the centre during the first dekad of June. It is estimated that only 10 percent of the villages in Dosso department and 7 percent in Tahoua department had done their plantings as of late May. Dry plantings are also underway countrywide.

Seed availability is adequate following 1998 and 1999 bumper crops. During April, scattered Desert Locusts were seen during surveys carried out in south-eastern Aïr. Control operations treated 710 ha. Untreated adults may persist in the limited areas of green vegetation. These could have moved west towards Tamesna and lay if rainfall occurs.

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), about 4 percent below previous year's record crop but 25 percent above average. The overall food supply situation remains satisfactory. Markets are well supplied and prices of cereals are lower than average. Assessments by the National Early Warning System indicate that no emergency assistance is needed by the country. However, some areas in Aguié, Guidan Roumdji, 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 (5 June)

First rains started in the south during the second dekad of March, allowing land preparation and planting of the first maize crop. Rains progressed northwards in April. Precipitation remained well below average during the first dekad of May. Rainfall improved in the south in mid-May and in the west and the centre in late May. Seasonably dry conditions persist in the extreme north-east.

The overall food supply situation is satisfactory. Some population, however, remain vulnerable following flooding in late 1999 in five States (Sokoto, Adamwara, Borno, Kwara and Niger). New recent flooding inundated hundreds of hectares of farmland in Sokoto area in the north-west. The

government decided in 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 (12 June)

Rains are progressing in the south-east and the centre. Early rains were registered in the extreme south-east in mid or late May. They progressed towards the centre and the southwest during the first dekad of June. Land preparation and plantings of coarse grains are starting in the south. Plantings will progress northwards following the onset of the rains.

Seed availability is generally adequate following 1999 record harvest. No significant pest activity has been reported.

The national statistical services released new production figures. Aggregate cereal production in 1999 is now estimated 1 256 000 tonnes (with rice in paddy equivalent), which is 63 percent above 1998 level and 34 percent above the five-year average. The overall food situation is satisfactory. Following substantial imports of rice in late 1999 and in January 2000, 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 remain stable. 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\* (12 June)

During the first week of May, rebel Revolutionary United Front (RUF) fighters killed several UN peacekeepers and took hostage approximately 500 in a series of attacks in the north and east of the country. This dealt a serious setback to the Lome Peace Accord, which had been signed in July 1999 to formally end eight years of civil war. A rebel advance on Freetown over the weekend of May 6 and 7 created panic in the capital and caused the evacuation of most of the UN, embassy and international NGO personnel to neighbouring countries. The situation is now calm in the capital but hostilities between pro-government and rebel forces continue in the east and the north.

These civil disturbances spread out at a critical period for agriculture as planting of the rice crop, the main staple, normally takes place in May/June. Due to insecurity, input distribution was suspended and on-going relief operations were seriously disrupted, notably in the north, including Kambia, Lunsar, Makeni, and Kabala. Humanitarian assessment missions, which had recently reached as far as Kailahun and Kambia, have been blocked by rebels. Despite the current unrest, food distributions to IDPs and other vulnerable groups are continuing in accessible areas, mainly in Freetown, Bo and Kenema, in the Southern Province. However, WFP had to stop food distributions to approximately 200 000 beneficiaries and to curtail school feeding to about 30 000 children in Makeni, Lunsar and Magburaka. There are reports that civilians in towns under rebel control, such as Makeni, Lunsar, Magburaka and Fadugu, have been subjected to arduous food levies. Even if security improves in Northern and Eastern Provinces, poor road conditions, recurrent fuel shortages and inadequate logistical facilities continue to hamper humanitarian assistance. During the rainy season, road conditions worsen, impeding the delivery of relief commodities. In addition, many bridges are destroyed, and there are no operating ferries for river crossings; food commodities are currently ferried across rivers in small canoes. With the rainy season, the food supply situation is likely to deteriorate. The country will continue to suffer a chronic food deficit and to be dependent on external aid.

A total of approximately 220 000 IDPs have been registered by aid agencies. Estimates of the total number of non registered IDPs are widely divergent, ranging between 500 000 and 1.2 million. Fighting has displaced an estimated 64 000 people in May, notable from northern

areas. Thousands of civilians have sought refuge in forests in nearby Kabala due to fighting. New IDPs arriving in Freetown and Port Loko have been absorbed into existing camps or housed by relatives. An estimated 490 000 Sierra Leonean refugees also remain in neighbouring West African countries : in Guinea (360 000), in Liberia (96 000) and in other West African states (34 000). Some Sierra Leoneans have fled on foot or by boat to neighbouring Guinea to escape the recent renewed fighting. However, RUF forces are reportedly blocking many more people from crossing the border into Guinea. Liberia has not reported any significant new influx of refugees. Between November 1999 and March 2000, an estimated 10 000 refugees returned from Liberia to major towns in the Southern and Eastern Provinces of Sierra Leone. Reports indicate that most of the recent returnees are from Kenema or Kailahun Districts. UNHCR also estimated that as many as 25 000 refugees returned to Kambia District in early 2000 based on a re-registration of refugees in Forecariah Province, Guinea.

#### TOGO (5 June)

First 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. They progressed to the north in April and permitted planting of millet and sorghum. Precipitation decreased significantly over the northern half of the country during the first dekad of May but became widespread and abundant countrywide in late May.

Following a record cereal harvest in 1999, estimated at 748 000 tonnes (with rice in paddy), the overall food supply situation is satisfactory. However, some population affected by floods in the regions of Kara (in the north), Plateaux (in the west), Maritime (in the south) and Savanes (in the extreme north) remain vulnerable.

### **CENTRAL AFRICA**

#### CAMEROON (5 June)

Planting of the first maize crop started in the south in mid-May following the first significant rains. Rains progressed northwards in April but reached only in mid-May the extreme north where they permitted land preparation and plantings of millet and sorghum. Precipitation remained below average over the northern half of the country during the first dekad of May and over the entire country during the third dekad. Improved rains are needed to avoid crop stress.

Following an above average cereal harvest in 1999, the overall food supply situation is satisfactory except in some flooded areas in the north. Cereal imports for domestic use and re-export during the 2000 marketing year are estimated at 290 000 tonnes, mostly wheat and rice. Congolese refugees are present in northern Cameroon.

#### CENTRAL AFRICAN REPUBLIC (5 June)

Widespread and significant rains in late March permitted land preparation. Precipitation remained generally below average in April and early May, except in the south. Rains improved during the second dekad of May but decreased in the south and the west during the third dekad.

Following a record cereal crop in 1999, estimated at 161 000 tonnes, 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\* (12 June)

**Intensification of the civil conflict in eastern parts of the country has resulted in further population displacements and a deterioration of the food situation. Fighting in May and early**

June in Kisangani town between Rwandan and Ugandan forces resulted in the killing of civilian populations, massive damage to the city infrastructure and fresh waves of displacements. Intense fighting has been also reported in early June in parts of South Kivu between Mayi-Mayi militia and the "Rassemblement congolais pour la democratie". Killings of civilians have been reported around Uvira and Kalehe towns.

In general, the food supply situation is tight in most of the country due to the disruption of agricultural production and marketing caused by the persistent civil war. The situation is particularly serious for more than a million people internally displaced. Most IDPs have lost their homes and belongings and can not survive without humanitarian assistance. However, most of them are in conflict areas in eastern parts of the country and are not currently accessible due to insecurity and cut-off of roads. The food and health situation of these populations is reported to be critical. The situation also gives serious cause for concern in urban areas, particularly in the city of Kinshasa, where 10 percent of the 6 million inhabitants are estimated to suffer acute malnutrition.

#### **CONGO, REP OF\* (5 June)**

Following the December 1999 ceasefire between the government and opposition parties, peace now prevails throughout the country. It is estimated that some 600 000 people - out of an estimated 810 000 displaced by the war - have returned to their homes since the signing of the peace accord. In Brazzaville, the number of IDPs has declined rapidly as thousands of people move back to their home towns, as sites for displaced people close. The Mossendjo area of Niari region now hosts the country's largest remaining group of internally-displaced people, in a zone still under the control of "non-state actors". Over 50 000 IDPs are believed to be in need of assistance in Mossendjo. A one month airlift of relief supplies to northern Pool began for distribution to conflict-affected populations. A feeding centre has been set up in Kindamba for severely malnourished people. Large parts of northern Pool have been inaccessible by road since last year because of the fighting, and tens of thousands of people had spent months hiding in the forest. The cereal import requirement for the 2000 marketing year is estimated at 140 000 tonnes, mostly wheat and rice.

#### **EQUATORIAL GUINEA (5 June)**

Abundant and widespread rains have been registered from mid-March to late April. Precipitation decreased in early May but resumed in mid-May and remained abundant in late May in the west. 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 (5 June)**

Very abundant rains were registered in mid-April. Precipitation decreased in May and notably during the third dekad of the month. The main foodcrops are cassava and plantains but some maize is also produced (around 25 000 tonnes). The country commercially imports the bulk of its cereal requirement, estimated at around 82 000 tonnes in 2000.

### **EASTERN AFRICA**

#### **BURUNDI\* (5 June)**

Harvesting of the 2000 second season foodcrops has started. Prospects are uncertain reflecting a late start of the rainy season and a dry spell in April/May that may have resulted in reductions in planting and yields. Following a reduced first season foodcrop, harvested early in the year, the outturn of this season is crucial for the food security in the country.

The political situation is volatile, with occasional violent incidents between government and rebel groups, particularly around Bujumbura city. The food situation continues to be tight for a large number of people affected by a reduced harvest and for displaced people in regroupment camps. The Government has started the dismantling of these camps, where the food and nutritional situation of the population is extremely poor. However, it is estimated that some 317 000 people are still living in the camps. Emergency food assistance is being distributed to more than 250 000 affected people.

An FAO/WFP Crop and Food Supply Assessment Mission is planned to visit the country from 19 June to 1 July 2000.

#### **ERITREA\* (3 June)**

Prospects for the 2000 main season crops, about to be planted, are unfavourable following the displacement of a large number of farmers from major producing areas by the border conflict with neighbouring Ethiopia. The spring rains in March and April were also inadequate for soil moisture replenishment. The main rains are not expected until July/August. Grain production in 1999 was well below 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 the armed conflict, production was seriously affected by population displacement.

The food situation is very tight for more than a million people displaced by the war with Ethiopia and severe drought conditions in three Administrative Zones of Anseba, North Red Sea and South Red Sea. Earlier in the year, total cereal import requirements in 2000 were estimated at 290 000 tonnes of which food aid amounts to 100 000 tonnes. However, with the escalation of the conflict, food assistance requirements are expected to increase.

In January 2000, the UN Country Team appealed for US\$42.7 million to assist some 372 000 war-affected and over 211 000 drought affected people. Total pledges by end-May amounted to about 53 000 tonnes, of which 23 000 had been delivered.

#### **ETHIOPIA\* (3 June)**

Prospects for the 2000 secondary "Belg" crop, for harvest from June, are unfavourable reflecting delayed rains and erratic precipitation in some areas. The Belg crop accounts for around 8 to 10 percent of annual grain production, but in some areas it is the main harvest. Rains, which normally start in February, did not establish until late-March. Precipitation was fairly abundant in April and beginning of May in central and northern parts. However, despite heavy rains, which caused localised flooding, the severe drought conditions over southern and south-eastern Ethiopia have yet to improve. The failure of last year's Belg season has severely affected the food supply situation of large numbers of people and were exacerbated by the continued drought through the 1999 main season in these areas.

Planting of the main 2000 main "Meher" season crops is about to start. Early prospects improved with recent good rains that favoured land preparation. The 1999/2000 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. The most important factors affecting production were the poor Belg rains and 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, remains precarious. Large numbers of livestock have perished due to drought and a number of starvation-related deaths, particularly among children, are reported. People are congregating in 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 the intensification of the war with Eritrea and 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 estimated at 652 000 tonnes but is likely to increase with the poor prospects of the Belg season. 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. Total pledges by the end-May amounted to 823 000 tonnes of which 298 000 tonnes has been delivered.

#### **KENYA (3 June)**

Prospects for the 2000 main "long rains" cereal crop, to be harvested from October in the main growing areas, are unfavourable due to continued drought in most parts of the country. Rainfall that began as usual in early March in south-western parts of the country has been erratic. By late May most parts of the country recorded well below average rains and as a result, sowing of crops was delayed and area planted was considerably below average.

Output of the 1999/2000 secondary "short rains" cereal crop, harvested earlier in the year, was estimated at a reduced 315 000 tonnes, compared with the previous five year average of about 410 000 tonnes. Overall, the 1999/2000 maize output is now estimated at about 2.2 million tonnes compared to 2.44 million tonnes in 1998 and 2.5 million tonnes average over the previous five years due to drought, inadequate input supply and armyworm infestation in parts.

The food supply situation is critical in the northern, eastern and north-western pastoral districts and parts of Central, Coast and Rift Valley provinces as a result of successive crop failures due mainly to drought. 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, increased sharply in most parts affecting access to food for a large number of people. Increased malnutrition and health problems were also reported in the affected areas.

In May, the Government appealed for international food assistance amounting to US\$134.2 million, reflecting the large numbers of people faced with severe food shortages. The long drought has also drained reservoirs in dams, prompting the Government to take measures of rationing power for the next six months.

#### **RWANDA\* (5 June)**

Harvesting of the 2000 B season is underway. The outlook is uncertain. Erratic and irregular rains during the season with prolonged dry spells in mid- January and mid-May are likely to have negatively affected yields, particularly of sorghum and beans. These crops are reported in poor condition in central areas, particularly in hilly areas. By contrast, more resistant sweet potatoes and cassava are reported to be good.

Despite an overall satisfactory food supply situation, following an increased first season foodcrops harvest, serious nutritional problems persist in different areas of the country. In late April, local authorities of Kigali Rural Province launched an appeal for food assistance for people suffering from malnutrition in the food-deficit Bugesera region. This region has been affected by successive poor harvests. In the communes of Kanzenze, Ngenda, Gashora and Gikoro the number of malnourished people is estimated between 30 percent of the population (Gikoro) and 80 percent (Kanzenze). Malnutrition related deaths have already been reported. Emergency food assistance is urgently required in these areas.

#### **SOMALIA\* (13 June)**

Although good rains were received between mid-April/early-May, little or no rains were received since, adversely affecting the growing conditions for the 2000 "Gu" season. Poor rains were also received in the more vulnerable rainfed crop areas of Bakool and Gedo, while below average rains were recorded in Hiran and Bay. Some flooding was also reported in

some central and southern parts due to heavy rains. Overall, plantings and productivity of cereal crops remain constrained due to insecurity and shortages of seeds and other agricultural inputs.

Despite some improvement of the food supply situation in parts of southern Somalia with a better Deyr harvest in February 2000, more than 650 000 people are facing severe food shortages. Hardest hit are Bakool, Gedo, Bay and Hiran Regions where the Deyr harvest failed. With an uncertain prospect for the main "Gu" rainy season, which accounts for about three-quarters of annual crop production, the overall food supply situation is remains precarious.

Elsewhere, in north-western Somalia (Somaliland) and north-eastern Somalia (Puntland), food supply and pasture conditions are anticipated to improve following good and well distributed rains in April and May. However, some 200 000 poor pastoralists are reported to be facing food and water shortages.

Food aid distributed in southern Somalia in May 2000 amounted to about 1 560 tonnes.

#### **SUDAN\* (13 June)**

Harvesting of the 2000 wheat crop is complete. A recent FAO/GIEWS Crop Assessment Mission estimated wheat output at 214 000 tonnes, some 24 percent above last year's reduced crop but about 60 percent below the previous five year's average of about 532 000 tonnes. Despite near optimal weather conditions, area planted to wheat declined drastically due to the liberalisation of wheat production and the removal of Government support programmes to encourage wheat production in the Gezira, Rahad and New Halfa irrigation schemes. In 1999, Government directives for farmers to commit a proportion of their land under wheat cultivation were removed. This, together with the abolishing of the repayment arrangements for seeds and fertilizer, prompted many farmers to either drastically reduce wheat cultivation and switch to more lucrative cash crops, such as vegetables and oil seeds, or leave land fallow. As a result, area planted under wheat declined further from the reduced 355 000 feddans (149 000 ha) in the 1998/99 season to merely 243 000 feddans (102 000 ha) this year – representing a decrease of some 32 percent. However, a combination of favourable weather conditions during the growing season and relatively low incidence of pest attacks have resulted in a substantial increase in yields.

The Mission also revised down the final estimate of sorghum production for 1999/2000 to around 2.35 million tonnes compared to 3.11 million tonnes estimated by the FAO/WFP mission late last year, mainly due to lower yields and pest damage, especially sorghum midge, rats, grasshoppers and birds. At this level, the sorghum crop is some 45 percent below the previous year's bumper harvest and about 24 percent below the average for the previous five years. Final estimates of the millet production remain unchanged from the preliminary estimates of the FAO/WFP mission at 499 000 tonnes. The aggregate production of cereals in 1999/2000 is, therefore, estimated at 3.14 million tonnes, including small quantities of maize and rice. This represents a drop over last year and the previous five years of some 39 percent and 24 percent respectively.

Reflecting lower cereal harvests in 1999/2000 and the drawing down of stocks due mainly to a surge in exports during 1999, cereal prices have risen sharply since November 1999.

With an estimated cereal production of about 3.14 million tonnes, commercial cereal imports forecast at 912 000 tonnes and food assistance of about 104 000 tonnes, the country's cereal utilisation requirement estimated at about 4.7 million tonnes in 1999/2000 would require heavy draw-down of stocks. It is estimated that cereal stocks will need to be drawn down by 538 000 tonnes, resulting in their virtual depletion by the end of the current marketing year.

The food supply situation remains highly precarious in southern Sudan, mainly due to insecurity, and in some pockets in the states of Kordofan, Darfur, and Red Sea and Kessela

in the north where crop losses and population displacements have affected large number of people. The conflict between the neighbouring countries of Ethiopia and Eritrea has also resulted in tens of thousands of refugees crossing the border into Sudan adversely affecting the food supply situation in these bordering areas. The Government of Sudan has already appealed to the international community for relief and emergency assistance to the refugees.

Early prospects for the 2000/01 coarse grains, planting of which is about to start, are promising. Current high cereal prices in the country and growing export opportunities to neighbouring Eritrea and Ethiopia have prompted farmers for early preparation of land and likely increase in area sown which were also helped by early start of rains in some parts. The Government has also embarked on a strategy of early delivery of necessary agricultural inputs, including seeds, fertilisers, fuel and pesticides.

#### **TANZANIA (3 June)**

Harvesting of the 2000 main season cereal crops in the unimodal areas is underway. Poor rainfall in the last three months in Dodoma and Singida Regions is expected to severely reduce maize output. By contrast, good rains in the grain-basket southern highlands and in western Tabora and Kigoma Regions favoured crops. In the bi-modal rainfall areas of northern coastal belt and north-eastern areas, cereal crops are scheduled to be harvested from next month. Delayed plantings in Arusha, Kilimanjaro and Tanga Regions due to late onset of rains is anticipated to affect yields. However, favourable rains were recorded in Mara, Mwanza and Shinyanga Regions.

The 1999 cereal crop, mainly maize, is estimated at 4 million tonnes (including paddy), about 16 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 has 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. Maize prices in several markets of the country were below the five years average. 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 whom have now suffered their third consecutive poor harvest.

#### **UGANDA (3 June)**

Prospects for the 2000 main season cereal crops improved with favourable rains recently. However, in the eastern districts, including Katakwi, Kumi, Lira and Soroti, late and erratic rains delayed planting. The rains also improved pasture and livestock conditions in pastoral areas in the north-east.

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 to be 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 April and May have followed normal seasonal trends. Nevertheless, the food supply situation remains precarious 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 has deteriorated due to civil unrest. Furthermore, food assistance continues to be needed for nearly 112 000 people in Bundibugyo District displaced by civil unrest.

## **SOUTHERN AFRICA**

### **ANGOLA\* (5 June)**

An FAO/WFP Crop and Food Supply Assessment Mission which visited the country in April/May found that renewed fighting, massive displacements of populations and insecurity, continue to cause serious concern despite efforts by the Government and its partners to redress the situation. According to the UN Office for Coordination of Humanitarian Affairs (OCHA) in Angola, IDPs have now reached nearly 2.6 million, or 53 percent more than last year's stated figure. This increase is due both to improved Government access to more areas and to the continuing strife. At present, WFP estimates that about 1.9 million people are in urgent need of humanitarian assistance.

The Mission forecasts the 1999/2000 cereal production at 504 000 tonnes, which is about 5.5 percent lower than last year. The shortfall is essentially due to lower maize production which decreased by 8 percent, from 428 000 tonnes to 394 000 tonnes. By contrast, other crops with lower water requirements experienced production increases. Thus sorghum/millet production edged up 3 percent to 105 000 tonnes; bean and groundnut production rose by 11 and 13 percent respectively, while that of cassava and Irish potatoes was estimated to be substantially higher than was forecast last year.

The reduction in maize production is attributed to two major factors, namely unfavourable rainfall pattern and shortage of essential inputs. Although cumulative rainfall for most of the country was above average for the whole season, from September 1999 to April 2000, rains started late, particularly in the southern and central areas. In the latter, good rains arrived only in November. Excessive rains in many areas towards the end of December were then followed by an abnormally long dry spell in late January and February. Secondly, there was a general scarcity of essential inputs, coupled with late distribution and frequently poor quality of seeds. In addition, the displaced farm families had access to very limited amounts of land, if any, in their new locations and in many cases the land is of poor quality.

For the 2000/01 marketing year (April/March), domestic cereal supply, estimated at 504 000 tonnes, falls far short of national consumption requirements. With a mid-marketing year population estimate of 13 675 000, cereal import requirements for the 2000/01 are estimated at 753 000 tonnes. Of these, the Mission estimates that 420 000 tonnes will be imported commercially, leaving 333 000 tonnes to be covered by food aid. Against this requirement, pledges by the end of May amounted to 57 000 tonnes, of which 36 000 have been received.

There is urgent need to allocate fertile land in adequate amounts to IDPs, and to ensure timely delivery of the requisite inputs to the farming population for the 2000/01 cropping year.

### **BOTSWANA (5 June)**

Harvest of the 1999/2000 coarse grains, mainly sorghum, is well advanced. Heavy rains since December, aggravated by Cyclones Elaine and Felicia in February, resulted in severe flooding in eastern and southern areas, where over two thirds of the population is concentrated. The flooding resulted in damage to housing and infrastructure, the total loss of at least 2 314 hectares of food crops and yields reductions in the affected areas. Elsewhere, however, the abundant rains were beneficial to crops. Overall maize production is forecast at the same reduced level of last year but sorghum output is expected to be higher. In aggregate, coarse grain harvest is anticipated to increase from 1998/99 but to remain below the average of the past five years.

Food difficulties are anticipated for some 160 000 people who left homeless to floods. However, the overall food supply situation is forecast to be satisfactory in marketing year 2000/2001 (April/March) reflecting the country's commercial import capacity.

#### LESOTHO (5 June)

Harvest of the 2000 coarse grains is underway. Preliminary forecast point to a decline of 8 percent in this year's maize production from the about-normal level of last year. A delay in the start of the rainy season, coupled with a prolonged dry spell in January and subsequent excessive rains and floods in February, resulted in lower plantings and yields. In low-land areas severely affected by floods, the reduction in maize production is significant.

#### MADAGASCAR (1 June)

**A joint FAO/WFP Crop and Food Supply Assessment Mission that visited the country in April/May 2000 found that three successive cyclones and tropical storm in February, March and April 2000, which devastated the North-eastern and Central East Coast areas of Madagascar, affected 1.14 million hectares with varying degrees of severity. About 155 000 hectares of cereals, of which almost 80 percent were under rice and the rest under maize and cassava, were totally lost to floods and high winds. The cyclones also caused serious damage to export crops such as vanilla, coffee and cloves, with 33 000 hectares lost. This will result in reduced exports of vanilla, coffee and cloves over the next 3 years, depending on the economic life of these plantation crops. Drought in the South Region and the central Lake Alaotra region has also sharply reduced agricultural production. The main crops affected by the drought are maize, cassava and sweet potatoes.**

**Overall, the Mission estimates production of rice (paddy) at 2.19 million tonnes, maize at 0.14 million tonnes and cassava at 2.08 million tonnes for the year 2000. This represents a decrease in production of 15 percent for rice, 22 percent for maize and 18 percent for cassava, compared to last year.**

**The overall food supply situation is expected to be tight in 2000/01 (April/March). Serious food shortages are anticipated in 17 communes of the traditionally food-deficit South Region in the coming months. The total cereal (rice, maize and wheat) requirements are expected to exceed the total cereal availability by about 518 000 tonnes. With anticipated commercial imports of about 426 000 tonnes and emergency food aid for the affected people estimated at 30 000 tonnes, there is uncovered deficit of 62 000 tonnes. International food assistance will be needed to cover this remaining gap.**

**Seeds of rice and maize are also urgently required for agricultural rehabilitation in the most affected areas. Food for work programmes could be used in the rehabilitation of the damaged irrigation facilities, roads and other infrastructure.**

#### MALAWI (5 June)

Harvest of the 2000 cereal crops is underway under seasonally dry conditions. Despite floods and crop losses in northern and southern parts, latest official forecasts point to another bumper maize crop of 2.3 million tonnes, almost unchanged from last year's record level. Late and erratic rains at the beginning of the season affected germination and establishment of the crops, particularly in southern areas where planting starts earlier. However, abundant precipitation from the second dekad of February led to the recover of the crops in most of central and northern areas. Production of maize has also been supported by the "Starter Pack" and "APIP" programmes through which agricultural inputs were distribute to farmers free or subsidized.

As a result of the good harvest and large carryover stocks, the country is expected to have exportable surplus for the second consecutive year. Official stocks, mainly held by the National Food Reserve Agency are estimated at 167 000 tonnes. Prices of maize are declining and by April were below their level of a year ago. Cassava prices are also decreasing reflecting a good harvest. The overall food supply situation is anticipated satisfactory in marketing year 2000/01 (April/March). However, in the northern district of Karonga and in those of Chilkwawa, Nkhotakota and Nsanje, where production was sharply reduced by torrential rains in mid-March and dry spell early in the season food assistance is required for the affected populations.

## MOZAMBIQUE (1 June)

An FAO/WFP Crop and Food Supply Assessment Mission which visited Mozambique in the second half of April found that the area lost to this year's severe floods was estimated at 167 000 hectares, accounting for 6 percent of total foodcrop plantings of the first season. However, in the worst flood-affected provinces of Maputo and Gaza this percentage represents 41 percent and 25 percent respectively. In addition, 43 000 hectares were lost to dry weather in northern parts, raising the area lost in the first season to 7 percent of the area planted. After projecting the small second season for maize and beans, the Mission estimated the total area to cereals, cassava and other foodcrops to be harvested in 1999/2000 at 2.9 million hectares. Comparison with last year's area harvested would suggest a sharp decline of 15 percent. However, the Mission considers that a large part of this decline may be attributed to database changes in this year's estimates. Roughly accounting for these changes actual plantings are estimated slightly lower than in the previous year.

In the South and southern Central provinces, a dry spell early in the season was followed by continuous precipitation from mid-November and unprecedented floods in February and March. This led to total or partial maize and bean failure throughout these areas. A second season for grains and vegetables, based on residual moisture, is expected to allow a partial recovery of production in South and southern-Central provinces. While at national level this season represents only some 10 percent of the annual cereal and bean production, it accounts for 50 percent in Gaza and 10 to 15 in Inhambane and Maputo Provinces.

Abundant precipitation from January to April in the main Central and Northern growing areas sustained grain and cassava production. Yields in these areas are estimated around last year's level given the absence of pests and diseases.

Including the second season cereals and beans, to be harvested from mid-June, the Mission forecast the total 1999/2000 cereal production at 1.43 million tonnes, of which 994 000 tonnes, or 70 percent, is maize. Bean output is projected at 134 000 tonnes, while cassava is estimated at 4.64 million tonnes. As stated, this year's changes in the database prevent strict comparisons with production estimates for 1998/99. However, roughly accounting for these changes, the Mission estimates that production of cereals is some 6-10 percent below the good crop of the previous year. This mainly reflects area losses to floods and dry weather, and a sharp decline in yields in southern provinces.

Although production declined in Northern and Central provinces, food supply has been boosted by significant on-farm stocks following a succession of good harvests, coupled with reduced marketing opportunities. In the traditionally food deficit South, even with a good second harvest, food difficulties are anticipated in the coming months for large numbers of the population. Their coping mechanisms are few, given very limited employment opportunities outside agriculture and flooding of large farms in low-lying areas.

The skewed distribution of cereal production between the three regions is reflected in very low and declining retail maize prices in the markets in North and Central regions, while in the South there are no household stocks, supplies to markets are low to non-existent and prices are 2.5 times higher for similar quality maize. Marketing and transport will be critical issues in marketing year 2000/01.

Overall, and considering that limited quantities of maize will continue to be informally exported to deficit southern Malawi, an exportable surplus of around 39 000 tonnes of maize is forecast. However, deficits of 170 000 tonnes and 140 000 tonnes have been projected for wheat and rice respectively. These deficits are expected to be met largely by private sector imports.

The Mission estimates that 650 000 people will need emergency food assistance amounting to 60 000 tonnes. This is required for flood-affected farmers but also for those not affected by floods but who experienced crop failure. Despite maize surplus in northern areas, which is

**proving to be uncompetitive due to high transport costs, efforts should still be placed on local purchases in the North for food aid requirements in the South. WFP supports local purchases and has recently bought maize in central provinces for the current flood emergency operation.**

**NAMIBIA (5 June)**

Harvest of the 2000 coarse grains, mainly sorghum, is underway. A good crop is in prospects. Above normal to normal rains from late March allowed the recovery of grains stressed by a dry spell from late February. Latest official forecast point to coarse grains output more than doubling last year's average level of 68 000 tonnes. Widespread abundant precipitation during the season has also benefited pastures and livestock conditions.

The food supply situation is anticipated satisfactory in marketing year 2000/01 (April/May).

**SOUTH AFRICA (5 June)**

Harvesting of 2000 coarse grains is in progress under normal weather conditions. The outlook is good. Despite severe floods and crop losses in KwaZulu-Natal, Northern and Mpumalanga provinces in February and March, the maize belt was not affected and benefited from normal to above normal precipitation during the growing season. Provisional estimates put maize output at 9.64 million tonnes, one-third higher than in the previous year and above average. This reflects higher plantings and yields. Production of sorghum is also forecast to increase from 1999. Following two consecutive reduced maize harvests, this year's crop will allow the replenishment of stocks and an exportable surplus of about 1.5 to 2 million tonnes in marketing year 2000/01 (May/April).

**SWAZILAND (5 June)**

**Harvest of the 2000 maize crop is complete. Preliminary estimates indicate an output of 72 000 tonnes, 37 percent lower than the average crop last year. This reflects a late start in the rainy season followed by excessive precipitation and floods in late November/early December that swept away recently sowed crops. A dry spell in January and more floods in February further affected crop development. Beans and sweet potatoes have also been adversely affected by the erratic rains during the 1999/2000 season.**

**ZAMBIA (5 June)**

Harvesting of the 2000 coarse grains, mainly maize, is well advanced and a good maize crop is in prospects. Preliminary estimates point to an increase of 7 percent in this year's maize output to an average level of 918 000 tonnes. Despite severe floods in early March and crop losses along the Zambezi Valley, abundant rains during the season benefited this year's maize crop and resulted in higher plantings and yields. Improved use of agricultural inputs, mainly in the commercial sector, also contributed to better yields. The outlook for cassava and other foodcrops is also satisfactory.

Reflecting the increase in production, the overall food supply situation is anticipated to improve in marketing year 2000/01 (April/May).

**ZIMBABWE\* (5 June)**

Increasing political violence continues to disrupt economic and agricultural activities. Despite an improvement in growing conditions for this year's main maize crop, harvesting activities, normally undertaken from May to June, are being interrupted by the invasion of 1 500 commercial farms and the seizure without compensation of 804 by the government. Increased theft of grains is also reported. This has created a climate of fear amongst the commercial farmers, many of whom have abandoned their farms and left livestock unattended and fled to the relative safety of urban areas. A disruption of harvesting could result in a reduced maize output, with serious repercussions for food security and the economy as a whole.

Agricultural production is undertaken by two categories of farmers: large scale commercial farmers located mainly in the north and east and small scale communal farmers in the south and west. Large-scale commercial farmers, currently numbering around 4 000, contribute some 30-40 percent of maize production, surpassing communal farmers' output in drought years, such as in 1992 when they accounted for 68 percent of total production. Yields on commercial farms are on average four times higher than on communal farms, in part due to inherent differences in land quality, but mainly because of facilities for supplementary irrigation, greater use of improved technology and management practices, as well as better access to working capital. Furthermore, Zimbabwe has been over 60 percent self-sufficient in wheat, a crop produced entirely on commercial farms. These farms are also the dominant contributors to tobacco and horticultural (cut flowers) production for export, as well as livestock production for meat, milk, and other dairy products.

Currently, the country is faced with a severe economic crisis, with severe fuel shortages, due to an acute shortage of foreign exchange caused mainly by large external debt problems, the suspension of international loan disbursements for failing to adhere to agreed conditions, the involvement of the country in the DR Congo war, and falling export earnings. The shortage of foreign exchange is also seriously disrupting industrial production due to erratic power supply and inadequate supply of raw materials, due to blocking of credit lines to the country's firms. Thus, should there be a large drop in food production necessitating substantial amounts of imports, Zimbabwe's currently low import capacity would seriously constrain its ability to cover the shortfall commercially.

## **ASIA**

### **AFGHANISTAN\* (3 June)**

**A very serious food crisis has emerged in Afghanistan due to severe drought and continuing economic decline. An FAO/WFP Crop and Food Supply assessment Mission which visited the country from 26 April to 24 May 2000 observed that rainfed crops (wheat and barley) had almost totally failed, except in a few pockets in different regions. Irrigated cereal production was also severely affected by drought, resulting in an estimated reduction of (irrigated) wheat production by some 33 percent compared to 1999. The production of secondary crops (rice, maize, barley) is also estimated to have declined by 53 percent compared to 1999 and 66 percent compared to 1998. Total cereal production in 2000 is estimated at 1.82 million tonnes - down by 44 percent compared to 1999 and by 53 percent compared to 1998. As a result, the cereal import requirement in the 2000/01 marketing year (July/June) is estimated at a record high level of 2.3 million tonnes, more than double last year's volume of 1.1 million tonnes. A generous estimate of commercial cereal imports of about 1 million tonnes, some 31 percent higher than the estimate for last year, leaves a huge gap of 1.3 million tonnes. WFP emergency food aid, in pipeline and under mobilisation, amounts to 225 000 tonnes, leaving an uncovered gap of over 1.0 million tonnes. A shortfall of this magnitude, if unmet, could have disastrous implications for the population.**

**Millions of Afghans of all categories - sedentary, transhumant and nomad - have little or no access to food through markets and their access to food through self production has been severely undermined by drought. Their purchasing power has been seriously eroded by the lack of employment opportunities within and outside agriculture, decline in cash crop production such as onions, potatoes, almonds, apricots and poppy (that provides employment for many even though for a short period of time) and the poor condition and high rates of mortality of livestock. The situation is likely to worsen in the coming months as the few remaining coping mechanisms are exhausted. In Afghanistan, rains normally start in October/November. Even if precipitation improves in the next season, wheat harvests will not be available until May/June 2001. However, if rains fail again the magnitude and dimensions of the needs for 'life saving' alone would be enormous. The Mission stressed that the positive move this year in terms of reduced acreage under poppy, as a result of the efforts of the international community backed by Afghan authorities and facilitated by the drought, may be reversed next year unless people get assistance to have access to food and to find viable alternative economic opportunities, which are becoming increasingly scarce.**

#### **ARMENIA\* (5 June)**

A Joint FAO and WFP Crop and Food Supply Assessment Mission in May found that the outlook for the 2000 grain harvest is good. The area sown to winter grains is officially estimated at about 100 000 hectares, mostly wheat. This is somewhat less than last year, reflecting diversion of land to more valuable crops, un-competitive yields and higher fuel prices. Good snowfall this winter minimised crop damage and helped replenish soil and irrigation water reserves after last year's dry conditions. Providing weather conditions remain favourable until the harvest, 2000 cereal output is officially forecast at 320 000 tonnes, somewhat more than last year (301 000 tonnes), despite lower spring grain plantings.

In 2000/01 cereal imports are estimated at 368 000 tonnes, including 350 000 tonnes of wheat. The bulk is expected to be commercial; humanitarian food aid needs, for targeted distribution and food for work programmes are estimated at 25 000 tonnes.

There is more food in the market than the population can purchase. Despite financial stability and economic growth, a large proportion of the population remains effectively under or unemployed and poor. Transport and access to markets remain a major obstacle to increasing agricultural production, employment and incomes. Without export markets, the country lacks adequate solvent markets for much of its agricultural production, as well as the economies of scale for investment in agro-processing and manufacturing. Solvent market opportunities are limited resulting in seasonal and/or localized surpluses of foodstuffs and low returns per hectare, limiting farmers' ability to invest in inputs to increase yields.

Income distribution is very uneven and living conditions precarious for many households. Purchasing power remains low and at times insufficient to cover the cost of the minimum consumption basket. 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 June)**

The early outlook for the 2000 grain harvest remains satisfactory. Spring grain planting has progressed satisfactorily. The area sown to winter crops (mainly wheat) increased compared to that sown for the 1999 harvest but remained well below the average up to 1997, in response to import competition from imported wheat and greater profitability from livestock, potato and vegetable production.

The outlook for significantly increasing cereal (mainly wheat) production in the short term is poor but, by contrast, livestock production is continuing to rise.

Provided FAO's projection of 2000 grain production (1.06 million tonnes) materializes, imports of cereals in the 2000/01 marketing year are estimated at 734 000 tonnes, close to the level of imports in the marketing year drawing to an end. The bulk of this will be covered commercially, though vulnerable groups, including the internally displaced, still need targeted food assistance. WFP continues to support 485 000 beneficiaries through a 3-year Protracted Relief and Recovery Operation which started in July 1999. Total food commodities committed for the life of the project amount to 47 880 tonnes of food aid. The current programme supports IDPs with supplementary assistance, relief support to socially vulnerable groups, resettlement of refugees/returnees and recovery through food-for-work and food-for-training.

#### **BANGLADESH (5 June)**

In recent days, heavy rains, storms and flash floods resulted in a number of deaths and the loss of a large number of homes. The worst affected areas are reported to be around Magura, Jhenaidah,

Bariasal and Shariatpur. Some 500 families have been evacuated from areas prone to further danger. Weather experts are predicting heavy rains this monsoon season, which may increase the incidence of flooding.

The main crop currently being planted is aus paddy the smallest of the country's three rice crops. Harvesting will be in August/September. Last year's aus crop was around 1.73 million tonnes, compared to a target of 1.8 million tonnes. Overall due to an increase in area planted, favourable weather and adequate input supplies, 1999/2000 rice production is put at a bumper 22 million tonnes some 2.4 million tonnes above the previous year and some 13 percent above the five year average for 1995-1999. In addition to the 1.73 million tonnes from the aus crop, aggregate production also comprised around 10.56 million tonnes from the main aman (monsoon) crop and 9.7 million tonnes from this year's irrigated boro crop. Due to a decline in area planted, by some 10 percent, the 2000 wheat crop is expected to decline to 1.8 million tonnes, around 100 000 tonnes lower than the 1999 bumper crop. Government cereal stocks of the end of April amounted to around 1.3 million tonnes, including 606 000 tonnes of rice and 707 000 tonnes of wheat

#### CAMBODIA (12 June)

Serious incidences of the livestock diseases Black leg - Haemorrhagic septicaemia and foot and mouth diseases are reported from 15 provinces. Large numbers of animals are reported to have died as a result. The main agricultural activities include harvesting of dry season crops and planting transplanting of main wet season rice for harvesting from October/November onwards. Total 1999/2000 paddy production was a record estimated at a 4 million tonnes, some 500 000 tonnes or 14 percent above the previous year. Following bumper production and poor demand from neighbouring countries, which also had favourable dry season production this year, rice prices are reported to have fallen to a nine-year low. Most, around 83 percent, of paddy production is from the wet season crop, and the remainder from flood recession and dry season production. Rice also accounts for some 84 percent of annual food crop production and is planted on around 90 percent of cropped area, mainly in the Central Mekong Basin and Delta and the Tonle Sap Plain. Despite a satisfactory food supply situation overall, a sizeable section of the population remains vulnerable to food shortages, due to wide variation in grain production in surplus and deficit areas, poor marketing infrastructure and inadequate employment opportunities. In part some of these needs are being met through a WFP Protracted Relief and Recovery Operation, largely using local purchases of rice. 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 (12 June)

Despite some light relief recently from scattered rain showers in the north eastern plains, which benefited filling rainfed winter wheat, serious drought is again reported to have affected large wheat areas in main producing provinces. The drought is officially estimated to have affected around 12.7 million hectares of crops and created a temporary shortage of drinking water for several million people. In general continuous dry weather and strong winds since February, significantly reduced soil moisture levels affecting crops at critical stages of growth. Crop production was also affected by high irrigation cost in parts, which will affect overall prospects as an estimated 70 percent of the crop is irrigated to some extent. Spring wheat production, for harvest in late June/July, only accounts for a small proportion of aggregate output, with output this year likely to decline further due to a reduction in area planted and unattractive prices. In addition to drought crop production this year, was also affected by serious attack by locusts, which are reported to have damaged and destroyed almost a million hectares of farm land in Shandong, Henan, Hebei, Anhui, Shanxi and Shaanxi provinces. In addition a further 2 million hectares were affected in Xinjiang Uygur Autonomous Region in the northwest China. The Government is mobilising large quantities of pesticides and man power to combat the attack. This year's locust outbreak is directly attributable to a warm winter and prolonged drought. Even though rainfall improved last week, many reservoirs remain dry and water tables are extremely low. In view of these problems, although final production will depend on the output of the spring wheat crop, current indications now put aggregate 2000 wheat production at 105 million tonnes, some 7 percent below last year and around 6 million tonnes below the five year average.

Planting of the early rice crop, the smallest of country's three rice crops, has been completed, though the area is reported to fallen by 6 percent. Planting of the intermediate crop is expected to be completed soon. Overall rice area in 2000/2001, is expected to contract by some 2 percent. Total 1999/2000 paddy production is put at 197.5 million tonnes, or 135.2 million tonnes in rice equivalent. Due mainly to a decrease in area planted of around 1.5 million hectares from last year, maize production in 2000-2001 is forecast to decline to around 118 million tonnes, compared to 124 million tonnes in 1999/2000.

#### CYPRUS (3 June)

The output of the 2000 wheat and barley crops, now being harvested, is estimated at 101 000 slightly below the average for the previous five years. Imports of wheat and barley in 2000/01 (May/April) are forecast at 500 000 tonnes slightly above last year.

#### EAST TIMOR (5 June)

The main maize and rice harvest this year was less affected by the disruption to the agriculture sector following last year's disturbances than had been envisaged in the months following the crisis. Although maize planting was later, compared to the optimum planting date, the delay itself did not seriously affect yields. Overall rainfall was also favourable during the 1999/2000 crop season. An FAO/WFP evaluation mission in April estimated maize and rice production for the 2000/01 (April/March) marketing year at around 94 600 and 30 500 tonnes (milled) respectively. Allowing for stocks and pipe line food aid pledges the overall (net) deficit, in relation to utilisation needs, was estimated 14 100 tonnes, part of which was expected to be covered by commercial/private imports and the rest by additional food aid pledges.

Latest reports by aid agencies indicate that, except for small pockets, the nutritional status of the population is satisfactory, with lower levels of malnutrition than would normally be expected among recently displaced persons. Partly this is attributed to a very successful seed distribution programme last year by humanitarian agencies, which allowed a large proportion of farmers to plant crops. Nonetheless vulnerable groups still continue to need food assistance. Current estimates indicate that some 161 000 of the 250 000 refugees who fled to West Timor last August have so far returned.

#### GEORGIA\* (13 June)

The outlook for the 2000 grain crop remains satisfactory to date. Spring crop planting is underway. The target is to plant 535 000 hectares with spring crops but by end-April (latest data available) only 60 percent had been ploughed and 172 000 hectares sown. The area planted to winter crops (mainly wheat and barley) fell 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 competition from imports. The grain production target in 2000 is 0.75-0.8 million tonnes.

The 1999 grain harvest is estimated by FAO at 800 000 tonnes, some 20 percent higher than in 1998. Production of potatoes, vegetables, sunflower seed and tea has also increased sharply in response to good weather 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. In 1999/2000 and the coming marketing year, domestic cereal utilization is estimated to remain stable at around 1.3 million tonnes of cereals, including some 800 000 tonnes for human consumption, and aggregate cereal imports at 555 000 tonnes. The bulk is likely to be imported commercially.

**Food constitutes a large proportion of household expenditures, and a considerable percentage of the population remains poor. Increasing malnutrition among children is being observed. In all, several hundred thousand people still need humanitarian assistance, including the 182 000 receiving assistance from the WFP under a 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 (12 June)

Following serious drought and water shortages earlier in several states, the situation is being eased by the timely arrival of the monsoon rains in southern, eastern and south western parts. This also improved prospects for Kharif (summer) crops, with planting of oilseeds, coarse grains and groundnuts having commenced. Rice planting has also begun in the states of Kerala, Tamil Nadu, Maharashtra and West Bengal. Overall, an increase in rice area compared to last years is being forecast. In normal years, the monsoon usually reaches the south western coast on 1 June, extending to the central and eastern areas before culminating in the north west. Some 80 percent of annual rainfall is received during the monsoon season. Rains should bring relief to the drought affected central western parts in the early part of July as the rains progresses north.

The government target for paddy production in 2000/2001 (Kharif and Rabi) has been set at 135 million tonnes, up 2 million tonnes on the previous year. Yields, however, could be affected by the recent removal of subsidies on fertilizer and reduced application rates. Overall 1999/2000 food grain production is likely to be similar to the 203 million tonnes (including pulses) harvested in 1998/99.

This year's drought affected some 50 million people, whilst thousands of cattle died in the western states of Rajasthan, Gujarat, the central state of Madhya Pradesh and the southern state of Andhra Pradesh. In addition, the shortage of water and animal feed have led to the loss of several thousand livestock in these states. In Gujarat, the worst drought in 100 years left more than half the 18 000 villages with serious water shortages, affecting an estimated 10 million people. In addition, the majority of reservoirs in the north and western parts become dry, whilst water levels in tubewells dropped considerably. As a result, there are now reports of sizeable out-migration of people and livestock from the worst affected areas. Due to a poor monsoon in 1999 in the state, both Kharif (monsoon) and Rabi (winter) crop production in the state are likely to fall by around 30 percent. The largest decrease in production will be in rainfed coarse grains, groundnuts and lentils, which are expected to decline by 50 percent or more. In Rajasthan cereal and oilseed production are expected to fall by 23 percent and 17 per cent respectively, whilst 26 of the total 32 districts are reported to be facing shortages of drinking water and food, as well as feed for cattle. In Madhya Pradesh, the problem appears to be comparatively less severe though 7 of the 45 districts, particularly those adjoining Rajasthan and Gujarat, have been affected. In Andhra Pradesh, 18 of the 23 districts have been affected, the worst being in Telengana and Rayalaseema regions. Border areas of Orissa state, have also been affected. The problem being exacerbated by the salination of agricultural areas caused by tidal waves following last year's devastating cyclone. As a result, there was no rabi crop this year and large numbers of the state's population continue to depend on food assistance provided by the Government.

From a national perspective, however, the drought is not expected to affect overall food production significantly as many of the areas affected were not in main grain producing areas. Despite the drought, the 2000/01 wheat crop, which is largely irrigated and was recently harvested, is currently estimated at around 70 million tonnes, similar to last year's record crop. This is mainly due to higher output in main producing states (Punjab, Haryana and Uttar Pradesh), where weather conditions were generally favourable, off-setting the decline in drought affected states. In addition, the overall food situation remains favourable in view of sizeable stocks following favourable harvests in recent years.

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#### NDONESIA\* (12 June)

On 4 June, a powerful earthquake and strong aftershocks struck the island of Sumatra, killing at least 100 people and injuring hundreds more. Relief operations are being impeded by damage to infrastructure, especially a cut in electricity supply. The initial quake measured 7.9 on the Richter scale, with an epicentre 70 miles (112 km) from Bengkulu off the west coast of Sumatra. Official reports, however, indicate that the effect on commodities will not be high, as the affected area is not a main producer of plantation crops (coffee, rubber and palm oil)

Earlier, prolonged heavy rain over several days, resulted in floods after the main river in West Timor, the Benanain, over flowed. An estimated 160 people, many children, were killed, though the overall death rate could be higher as several villages still remain inaccessible due to flood waters. Many of the victims were refugees from East Timor, some 250 000 of whom fled the civil disturbances and violence last August. In addition some 10 000 homes were also lost.

Elsewhere, dry weather eased earlier wet conditions and favoured harvesting of main season rice to be completed in June. Planting of second season rice and dry season maize will commence in late June and continue into July.

Paddy production this year is put at around 49 million tonnes of, which is about average for the last five years, but a million tonnes lower than 1999 and 2 million tonnes below target.

#### IRAN, ISLAMIC REPUBLIC OF (12 June)

Following a devastating drought last year, which saw wheat production fall by over 3 million tonnes, or around 25 percent, compared to the previous year, a recurrence of widespread drought this year again threatens crop production, though the impact on wheat is likely to be less pronounced than envisaged earlier. It is estimated that some 18 of the country's 28 provinces are affected, mostly in southern, eastern and central parts. Those hardest hit include Sistan-Baluchestan, Yazd, Fars, Kohkiluyeh Boyer-ahmad, Bushehr, Hormuzgan, Kerman and Khuzestan, in much of which agriculture is largely rainfed and where there are large numbers of livestock.

The impact of this year's drought is likely to be exacerbated by already low water reserves in dams and reservoirs, following the severe water shortage last year. Moreover, the effects of the drought may be worse than last year, which was already the worst rainfall year in 30 years, as official reports indicate that the amount of rainfall in the seven months to April was some 25 percent down on the same period in 1998/99. The country has been affected by drought in 13 of the last 25 years.

Consequently, latest prospects suggest that wheat production will decline to around 9 million tonnes, slightly above production in 1999. Wheat is normally planted in October/November and harvested in June/July. In addition to wheat, the outlook is also unfavourable for barley, currently being harvested, which is of considerable importance in livestock production on which large segments of the population depend. This, in turn, will have a serious impact on vulnerable groups, particularly in rural areas, who have limited alternative sources of income and incurred heavy losses last year. Already many villagers have begun panic selling of livestock and are reportedly leaving their homes.

In 1999/2000 the country was one of the largest importers of wheat in the world, with imports reaching almost 7 million tonnes, similar to record imports in 1996/97, which was also affected by drought. The absence of significant recovery in wheat production this year means that imports are likely to remain high, though below last year.

The Government has implemented a number of measures to counter the effects of drought, including direct assistance, amounting to US\$183 million, to farmers. The country also requires international assistance in various areas, including, the provision of drinking water and in rehabilitation of the livestock and irrigation sectors.

#### **IRAQ\* (13 June)**

Two consecutive years of severe drought and inadequate availability of essential agricultural inputs have severely affected the Iraqi agriculture. Reflecting a substantial reduction in plantings and yields, cereal production in 2000 is estimated to be substantially below the 1999 poor harvest. In the most affected centre/south areas, not only were the plantings reduced, but also some 75 percent of the cropped area under wheat and barley was heavily damaged and mostly used as grazing area for livestock. Cereal yields in 2000 were reduced to all time low levels. In northern Governorates, insufficient and erratic rainfall continued during much of 1999/2000 crop season, with only one-third of the normal rainfall received in parts.

Drought conditions also drastically reduced the water resources in rivers, dams, lakes and canals, some of which have virtually dried up. As a result, prospects are unfavourable for the upcoming irrigated summer crops. Shortage of imported feed, overgrazing, and inadequate veterinary services are the major constraints to the normal development of the livestock sector. Fish production has also decreased drastically. However, a positive and a notable progress has been made in the rehabilitation of the poultry sector since 1998, which has benefited from substantial Government interventions with funds generated from the oil-for-food deal. Production of chicken and eggs are expected to increase significantly this year compared to last year and 1998.

Cereal imports since 1997/98 under the oil-for-food deal has led to significant improvements in the food supply situation. However, per capita cereal food consumption in 2000/01 is estimated to decline from the 1997/98 level. Furthermore, problems of delays in the flow of food imports continue to be reported, leading to repeated cases of low levels of MOU commodity stocks. There is need to ensure urgent and timely delivery of imports under MOU contracts, including food items but also agricultural inputs, such as appropriate seeds for the next season, failing which a production recovery will not be achieved.

#### **ISRAEL (3 June)**

The outlook for the 2000 wheat crop, being harvested, is unfavourable due to drought that also affected several other countries in the region. In 1999, wheat output was estimated at 152 000 tonnes, about 3 percent above average.

Imports of cereals in 1999/2000 (July/June) are forecast at some 2.6 million tonnes, about 2 percent higher than last year.

#### **JAPAN (5 June)**

Planting of the main rice crop is underway for harvest in October/November. The Government has announced a 2.7 percent reduction in the support price of rice to 252 yen/kg, but no change in the land targeted for diversification. Since 1995, as part of the country rice area adjustment programme, area has declined by some 16 percent. As a consequence domestic (milled) rice production has declined from some 11 million tonnes in 1994 to an average of around 9 million tonnes in the last five years.

#### **JORDAN (3 June)**

Prospects for the 2000 wheat and barley crops, being harvested, are poor due to a prolonged drought that delayed sowing. This is in the wake of a severe drought in 1999 that also seriously affected cereal and horticultural crops, and resulted in a decline of 88 percent in aggregate wheat and barley output to only 15 000 tonnes. The livestock sector was also severely affected, with sheep farmers the hardest hit.

An Emergency Operation worth some US\$4 million was jointly approved by FAO and WFP in July 1999 for food assistance to 180 000 affected people, for a period of eight months.

KAZAKHSTAN (9 June)

Spring grain planting is virtually completed; some 11 million hectares had been sown as of 5 June. Moisture conditions since the autumn for spring crop development has been satisfactory. It is hoped to expand the aggregate area sown to 12.3 million hectares (including 11.6 million hectares of spring grains), but the area harvested may not change significantly given normal weather and the shortages of harvesting machinery, cash and credit. Locusts continue to pose a potential threat to this year's harvest on up to 6 million hectares. Despite significant changes in the organisation of grain production and distribution in the past year, a return to normal weather conditions and the persistence of economic problems on farm, could result in a 2000 grain harvest less than the 14.3 million tonnes harvested in 1999. Some 20 large companies provide inputs and manage farm operations on about 6 million hectares in exchange for a proportion of the grain produced.

The country is forecast to export some 5.7 million tonnes of cereals in 1999/2000 mainly to other CIS countries. Official exports between 1 July 1999 and March 2000 reached 4.8 million tonnes.

**KOREA, DEMOCRATIC PEOPLE'S REPUBLIC OF\* (12 June)**

**Harvesting of double crop wheat and barley and potatoes is ongoing and should be completed in the coming weeks, when planting of the main maize and rice crops will also commence. Reports from the country, however, indicate that agricultural areas have been affected by drought, with rivers and reservoirs drying up and rice planting delayed in many areas. Rainfall in some areas is reported to be 20 to 30 percent below normal, whilst temperatures are up significantly.**

**Double crop wheat and barley and potatoes have gained in importance in recent years. Overall, however, although 1998 and 1999 saw some recovery and stability in agricultural production, current production trends mean that the country can simply not produce sufficient food to meet needs. 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.**

**In general, notwithstanding the devastation of recurring natural disasters since 1995, a major factor leading to chronic food supply problems in DPR Korea is severe economic contraction and stagnation, particularly since the break-up of its economic alliance with the former USSR and Eastern Bloc countries. Hitherto such relations were essential to maintaining intensive agricultural systems, which were imperative given serious land and climatic limitations that still restrict what and how much can be produced. The country has extremely limited arable land, in relation to population and needs, and, effectively, only one main cropping season per year from May to October. Any natural setbacks or disasters during these months, as in 1995 to 1997, seriously undermines food production and security.**

**At present, therefore, there is little doubt that DPR Korea's crucial food aid safety net cannot be removed without dire consequences. The latest (1999/2000) food emergency operation for US\$202 million, jointly approved by the Director General of FAO and the Executive Director of WFP, aims to save lives and counter the emergence of famine and improve the health of vulnerable groups particularly children. In keeping with previous EMOPs the international response has been generous, with over 80 percent of food requirements already met. However, as the country enters the difficult lean season, with the main harvest several months away, continued international support, for the remaining part of the operation, will be imperative, despite conflicting demands from other disaster and famine stricken countries, particularly in the Horn of Africa. International assistance is also needed for rehabilitation of agriculture through the UN Agricultural Rehabilitation Environmental Protection Programme, (AREP) which continues to be constrained by the lack of resources.**

**Although humanitarian assistance will continue to be vital in the short term, in the longer term, economic recovery and a stronger trading position in the world, will be essential to improving food security. In this regard, there have recently been signs for cautious optimism,**

**which suggest an improvement in the foreseeable future. These include the partial relaxation of sanctions and the resumption or improvement in diplomatic relations. Much will also depend on the scheduled peace talks between DPR Korea and the Republic of Korea in June, which could significantly improve the overall environment for investment and economic recovery.**

#### KOREA, REPUBLIC OF (12 June)

Rice planting is underway for harvest in October/November. The Government target for paddy production has been set at 7 million tonnes in 2000, some 3 percent lower than output last year. Prospects of economic recovery and growth, in the aftermath of the financial crisis in Asia, are continuing to improve signalling stronger demand for grains for food and feed. Wheat and maize are almost entirely imported, whilst the country on average produces around 5 million tonnes of rice (milled) per annum, during the main season which extends from around May to October. Last year, despite heavy flooding the rice crop 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 (3 June)

The target grain area for harvest in 2000 is 625 000 hectares, close to last year's (621 000). The production target for wheat is 1.261 million tonnes, cleaned weight, compared to the 1999 output of 1.1 million tonnes. The aggregate 1999 grain and pulse harvest is officially put at 1.63 million tonnes, about the same as in the preceding year despite a 5 percent reduction in the area sown. Wheat production remained stable 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 266 000 tonnes, mainly wheat. Duty on imports of wheat, in small quantities, for personal use 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\* (5 June)

Favourable weather during the dry season, benefited developing the second rice crop, which accounts for around 15 percent of average annual production of around 1.7 million tonnes. Project food aid continues to be needed to support well-targeted project interventions for vulnerable groups.

#### LEBANON (3 June)

The output of 2000 wheat and barley, now being harvested, is expected to be about 62 000 tonnes, about the same as last year. Imports of wheat in 1999/2000 (July/June) are forecast at some 510 000 million tonnes.

#### MALAYSIA (5 June)

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.

Wheat imports are projected to increase somewhat to around 1.2 million tonnes in 2000 due higher demand as a result of economic growth and favourable export projections for processed food such as noodles and biscuits.

#### **MONGOLIA\* (12 June)**

Earlier this year winter snows killed several hundred thousand livestock and covered pastures for extended periods. As a result, the livelihood and food security of large number of nomadic herders, who depend entirely on animal rearing, was seriously threatened. The worst affected areas were in central, western and north-western parts where 142 of the country's 360 counties are located.

The livestock sector plays an extremely important part in the economy providing the main source of household income and contributing a major source of foreign exchange. The heavy loss of livestock and the consequent reduction in meat supplies, have also meant that there has been a large increase (up to 40 percent) in livestock prices. This in turn has had a knock-on effect on inflation and the cost of living further exacerbating the food security of the poor and vulnerable groups. In addition to meat there is also serious shortage of milk, especially in rural areas, further restricting an important source of protein and nutrients in the diet. It has also been very difficult for nomadic herd families to find alternative sources of income, as most are poorly educated and trained for alternative employment. Nonetheless many have migrated to towns and urban centres compounding existing problems of unemployment and vulnerability to food shortages.

The current food emergency, follows several years in which nutritional standards have been falling due to significant changes in economic circumstance of large sectors of the population as the economy has been reoriented from one which was centrally planned to one which is market driven. This in particular has left many groups who were formally dependent on state employment and welfare exposed to economic uncertainties due to limited alternative earning potential. Various reports in the mid 1990s indicated that those most affected by poverty and food insecurity, included the unemployed, the elderly, female headed households, children, pensioners and small herders. Another consequence of restructuring has been the sharp decline in domestic grain production, with wheat output last year, which was also affected by adverse weather, almost half that in 1994.

The Government earlier appealed for international assistance, including food, clothes, medicines, and fodder for the surviving herd.

#### **MYANMAR (5 June)**

Planting of main season rice will commence shortly to coincide with the arrival of the south-west Monsoon rains. Harvesting will commence in October/November. Main season rice normally accounts for around 85 percent of aggregate production the remaining 15 percent coming from the second, or dry season crop. Although much will depend on the performance of the monsoon and the availability of agricultural inputs, based on projections for planting, paddy (unmilled rice) production is forecast to be around 17.5 million tonnes in the 2000/01 marketing year. To encourage rice production and export, the Government has allowed private companies, reclaiming fallow and wet lands, to export 50 percent of production. So far, however, there have been no exports from the private sector. Official estimates, indicate that the country has approximately 18.22 million hectares of cultivable land, of which 9.31 million hectares have been utilised and the remainder possible for reclamation.

Rice exports fell sharply in 1999, totalling 63 700 tonnes, some 43 percent below 1998. The drop is attributed to stronger domestic demand.

#### **NEPAL (5 June)**

Official estimates from the Ministry of Agriculture indicate that food production, mainly rice, wheat, maize and millet, grew by over 8.4 percent in 1999/2000 and was around 6.98 million tonnes. The increase is attributed to better availability of agriculture inputs including fertilizer, expansion in cultivated land area, good monsoon rainfall in 1999 and low incidence of disease.

#### PAKISTAN (5 June)

Latest official reports from the Ministry of Agriculture, indicate that the recently harvested wheat crop is expected to be a bumper 22 million tonnes. This would be significantly higher than the target of 20 million tonnes and over 4 million tonnes above 1999. If this level of production materialises, imports are likely to decline further and exports, particularly to neighbouring Afghanistan, are likely to increase. Increased production is largely attributed to higher than target output in Punjab province, the largest producers, where a combination of higher support prices and increased use of fertilizer and other inputs increased area and yields. Average wheat production in the five years between 1995 and 1999 was around 17.5 million tonnes compared to food requirements of around 18.5 million tonnes.

Wheat production was not seriously affected by a serious drought which devastated the country's largest province, Baluchistan, in the west and Sindh Province in the south. About 85 percent of the wheat crop is irrigated, and although yields were affected by dry conditions and lack of assured irrigation in parts, particularly in Sindh province, wheat production in the main wheat producing province of Punjab, which accounts for around 75 percent of aggregate output, was favourable and above target. However, the drought could negatively impact rice production in affected province due to shortages of water for nursery preparation and transplanting.

#### PHILIPPINES (5 June)

Several thousands hectares of rice and property were damaged following typhoon Bering at the end of May. The full extent of the damage, however, is still being assessed.

Planting of main season rice and maize is underway and will be completed in June. Harvesting will commence in August for maize and October/November for rice. An increase in area planted and higher expected yields, indicate that paddy production could be around 12.5 million tonnes in the (2000) calendar year, some 4 percent above the previous year. However, civil unrest in the southern island of Mindanao, which accounts for between 20-30 percent of aggregate production, could affect output.

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.

#### SAUDI ARABIA (3 June)

Production of wheat in 2000 is forecast at 1.5 million, about 9 percent below average, due to drought. Similarly, despite a production quota of 1 million tonnes offered by the Saudi Grain Silos and Flour Milling Organization (GSFMO), this year's barley crop is expected to be much below average, due to high production costs. In the 1999/2000 marketing year (July/June), barley imports are estimated to increase to 5 million tonnes due to erratic rains and the continued growth of livestock numbers. Saudi Arabia is the world's largest importer of barley, accounting for nearly one-third of the world barley trade.

#### SRI LANKA (5 June)

Pre-monsoon rain showers are expected in the next few days. Land preparation and planting of the largely irrigated Yala dry season crop are underway for harvest in August/September. The dry season crop accounts for around 33 percent of aggregate rice production in the country the bulk coming from the Maha crop planted in October/November to coincide with the main (north-west monsoon) rainy season. Paddy production has averaged around 2.5 million tonnes in the last five years from 1995 to 1999. In addition to rice, the country's main staple, some 850 - 900 000 tonnes of wheat are imported annually to meet demand, for bread and other wheat based products.

The Government recently informed a donor briefing that food and medicine supplies were adequate for some half a million people on the Jaffna peninsula, which has been affected by long standing civil strife.

#### **SYRIA (3 June)**

Despite favourable rains in some important grain producing areas of the north-east during December 1999 and January 2000, prospects for the 2000 cereal crops, about to be harvested, have deteriorated due to extended dry conditions. The barley crop, which is almost entirely rainfed, has been particularly affected but rainfed wheat has also experienced severe damages in parts.

In 1999, the worst drought for decades reduced barley production to 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.

#### **TAJIKISTAN\* (13 June)**

Below-normal precipitation since February, coupled with hot weather in April and May, has stressed non-irrigated grain crops and increased irrigation water requirements. Cereal yields are also undermined by persistent shortages of inputs and working capital associated with the incomplete land privatization process and the transition to a market economy (very limited availability of credit, inadequate maintenance of the irrigation system, obsolete machinery, poor access to food seeds and fertilizers, etc.). Contrary to earlier reports, indications now are that the area sown to 2000 winter grain crops remained stable. While wheat on irrigated lands is officially reported to be in good condition (even if some of the so called "irrigated lands" are, in practice, not or insufficiently irrigated), that on dry-land farms, notably in the main growing areas of northern Leninabad, southern Khatlon, and the Karategin valley has been affected by drought. The outlook for cotton, the main irrigated crop, is also good.

However, any objective quantitative forecast of the 2000 cereal, in particular of the wheat harvest, is difficult. Systematic and timely data on the cropped area, the irrigated areas and crop production is seriously lacking and when available, is conflicting. Indications are that the amount of land being planted to cereals (mainly wheat) has increased steadily until 1998 when, according to official statistics, it stabilized at around 400 000 hectares. In 1999/2000 the area sown to grain is also reported to be around 400 000 hectares. Between 1993 and 1998 the area of rainfed wheat expanded rapidly as upland pastures, virgin land and most other spare plots of land were brought into utilization. The increase in area was due to the chronic shortage of bread, and other basic foods following independence and the civil strife (1992-97) and the practice of paying salaries on large farms in wheat, in view of the lack of cash and high inflation. In 1995 and 1996 (the last data available) the irrigated area sown to cereals was 150 000 and 155 000 hectares respectively. Cereal (mainly wheat) plantings in 2000 have remained at this level, with diversion of land to cotton about 140 000 hectares.

This irrigated wheat is officially reported to be good; however systematic disaggregated data on the average yield of wheat from irrigated and non-irrigated land is not available. An FAO Mission in 1996 found that official yields, particularly of wheat, have been badly understated : on reasonable areas of irrigated land the average yield was found to be of the order of 1.5-2.5 tonnes /hectare and could reach 3 tonnes a hectare in a good year such as 1997. By contrast, the yield of rainfed wheat was found to be significantly lower, 1 tonne/hectare or less.

Given the current drought, the chronic shortages of working capital and inputs, and official reports that the irrigated wheat harvest is in good condition, FAO tentatively estimates the irrigated output at 210 000 tonnes of wheat (i.e 1.5 tonnes/hectare from 140 000 hectares, the lower end of the range) and some 18 000 tonnes of rice from 10 000 hectares of irrigated land). On the estimated rainfed area the yield of winter crops, is officially estimated to be only 25 percent of average in some regions, i.e 0.25 tonnes per hectare on the remaining wheat area. On the basis of these calculations the 2000 wheat harvest could be in the range of 260 000-300 000 tonnes, and the total harvest, including spring sown wheat and maize, 330 000-380 000 tonnes. The worst case scenario, 330 000 tonnes, would be 150 000 tonnes or almost one third less than the official estimate of production in 1999 of 475 000 tonnes) and only 75 percent of the 1994-1999 average. Spring crop plantings have progressed well and the area sown has increased. At higher altitudes a small amount of spring wheat is sown.

Based on the official production estimates in recent years and reflected import data, cereal utilization has been in the range of 900 000-950 000 tonnes per annum, of which some 730 000 tonnes were estimated for direct human consumption, 70 000-110 000 used for feed and about 110 000 tonnes for other uses (mainly seed and losses). In the 2000/01 marketing year, domestic cereal utilization is estimated at 920 000 tonnes, close to that of 1999/2000. Against this requirement, domestic production, (including rice in milled equivalent and excluding pulses) is estimated at 319 000 tonnes, leaving, in the worst case scenario an import requirement of 600 000 tonnes. This compares to estimated imports of nearly 490 000 tonnes in the 1999/2000 marketing year, of which some 66 000 tonnes were food aid. Commercial imports have averaged roughly 300 000 tonnes between 1995/96 and 1999/2000 and reached an estimated 423 000 tonnes in 1999/2000. The worst case estimated import requirement - of 600 000 tonnes, of which nearly 500 000 is wheat - is well above the usual market requirement of the past five years. In view of the drought situation, and the low output and prices of cotton in 1999/2000 (one of the major exports earners), immediate consideration needs to be given to an adequate response to effects of the drought, both in the form of non-market disruptive food aid and related non-food items and in the form of inputs and technical assistance to ensure a better crop next year.

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. Coping mechanisms are exhausted and the crop loss will result in a further decline of the living standard of the vulnerable population, who do not have income to purchase wheat at the already rising prices at the local markets. Nutrition surveys confirm a high degree of malnutrition amongst the vulnerable and children under five. The expected low crop will increase the risk of severe malnutrition, which has been rising over the past few years with global chronic malnutrition rates of more than 40 percent.

Humanitarian assistance to vulnerable populations and assistance to develop agriculture will continue to be necessary. A further 98 050 people may need food aid in addition to the 370 000 beneficiaries currently receiving food aid through WFP's Protracted Relief and Recovery Operation (PRRO). The additional beneficiaries are situated in Khatlon (65 000), Karategin (12 950) and Leninabad (20 000). The additional food needs for one year (until the next harvest) amount to 7 157 tonnes of wheat flour, 536 tonnes of vegetable oil and 360 tonnes of sugar.

#### THAILAND (12 June)

Planting of the 2000/2001 main season rice and maize crops has begun and will continue till August. Maize will be harvested from August and rice from November onwards. During the last dekad of May, widespread showers slowed harvesting of second season rice, but increased irrigation supplies for main crops. Total paddy production in 2000/2001 is forecast at around 23.3 million tonnes, comprising some 19 million tonnes from the main and 4 million tonnes from the second crops.

Rice exports during the period 1 January to the beginning of June 2000, totalled some 2.48 million tonnes, some 4 percent higher than during the same period in 1999.

#### TURKEY (3 June)

Output of the 2000 wheat crop is forecast at 19 million tonnes about 5 percent above last year's drought reduced crop, but about average. Maize production is also forecast to increase by nearly 8 percent to 2.2 million tonnes compared to the average. Wheat imports in the current 1999/2000 (July/June) marketing year are expected to be around 900 000 tonnes, about 40 percent of 1998/99. Maize imports are projected at 750 000 tonnes, some 80 000 tonnes higher than in the previous year.

#### TURKMENISTAN (13 June)

The outlook remains satisfactory, but any plantings of cereals on unirrigated virgin land have likely suffered severe moisture stress following hot and dry weather since April. Nevertheless, by 12 June 0.9 million tonnes of grains had been harvested, well in advance of last year's progress. In an attempt to increase cereal, notably wheat, production, the area sown to winter crops has reportedly increased by almost 100 000 hectares, to 680 000 hectares, bringing some virgin land into production. The winter grain production target (mostly wheat) is 1.645 million tonnes compared to actual production of 1.45 million tonnes in 1999. In addition, substantial resources are to be allocated to farmers to expand rice production to 200 000 tonnes per annum in the coming three years. Indications are that 70 000 hectares have been sown to rice and nearly US\$10m million allocated to the purchase of quality seed, in an attempt to raise yield. Larger areas sown are being supported by the import of agricultural machinery.

The aggregate 1999 grain harvest is officially estimated at a record 1.5 million tonnes, nearly 300 000 tonnes above 1998. 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 one area. Official reports indicate that 438 000 tonnes of flour were produced last year, well short of the officially estimated requirement of 720 000 tonnes. Nevertheless, given the difficult foreign exchange situation and the large 1999 harvest, cereal imports in 1999/2000 are expected to remain very low.

#### UZBEKISTAN (13 June)

Growing conditions for grains on irrigated land have been satisfactory. Hot dry weather in April and May benefited cotton sowing and development, but any rainfed crops have likely suffered yield loss. Temperatures have now returned to normal. 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 to 1 425 000 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 in the face of falling returns for cotton. Cereal imports in 1999/2000 are estimated to fall to about 336 000 tonnes.

#### VIET NAM (12 June)

Heavy rainfall in the last dekad of May, slowed late harvesting of winter-spring rice, which is normally planted from December/February and harvested in April/May. Preparations for planting the main 10<sup>th</sup> month rice crop are underway and a 4 percent reduction in area this year is being forecast.

The south, including the Mekong Delta, is estimated to have harvested more than 9.34 million tonnes of paddy from the winter-spring crop, up 8.6 percent from last year. The increase is attributed an increase in area planted and higher yields. Overall production from the winter-spring paddy crop is officially forecast at a bumper 15.5 million tonnes. Favourable production is attributed to higher yields in important growing areas, whilst an expansion of harvested area in northern provinces more than off-set reductions planted area and lower yields in South Central provinces. The rice export

target for this year is 4.3 million tonnes compared to 4.56 million tonnes last year. In the first five months 1.08 million tonnes were exported.

#### YEMEN (3 June)

Total cereal output in 2000 is forecast at 721 000 tonnes, about 4 percent above last year's crop but about average. Isolated adults of Desert Locusts may persist on the northern Red Sea coastal plains near the Saudi Arabian border and breed if additional rains fall.

Imports of cereals in 2000 - mainly wheat - are estimated at some 2.67 million tonnes.

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

#### BARBADOS (2 June)

Growing conditions of vegetables and other minor foodcrops are reported normal. Harvesting of the important foreign exchange earner sugar crop has been virtually completed and production is provisionally estimated at a satisfactory 57 000 tonnes, up from 1999 crop, which was disrupted by domestic labour problems.

#### COSTA RICA (2 June)

Planting of the 2000/01 first season cereal crops continues under normal weather conditions. Average maize plantings are expected. The area planted to paddy is also anticipated to be average, but production will not be enough to meet domestic demand and between 90 000 to 100 000 tonnes of rice will need to be imported in marketing year 2 001 (January/December). Some 300 000 tonnes of maize, mostly yellow, will also be required as imports in 2000/01 marketing year (July/June), similar to the previous year, to meet demand from the animal feed industry.

#### CUBA (2 June)

**Normal to above-normal rains have been reported in May, benefiting developing minor foodcrops, as well as cash crops such as coffee and cocoa. Planting and harvesting of spring (mostly irrigated) and winter (rainfed) paddy respectively, have not been disrupted by the rains, and slightly above-average paddy output is anticipated for this year. About 400 000 tonnes of rice will nevertheless be required as imports in year 2001 (January/December) to meet the domestic demand. Harvesting of the important sugar cane crop has been completed and production is provisionally estimated at some 4 million tonnes, which compares to last year's 3.8 million tonnes. Sugar quality is officially reported to be satisfactory. International food assistance continues to be distributed in the extreme eastern provinces, affected by the previous severe drought.**

#### DOMINICAN REPUBLIC (2 June)

Harvesting of the 2000/01 first season coarse grain and paddy crops has started under normal weather conditions. The dry spell in the first quarter of the year did not affect crops and average output is anticipated, which represent a recovery from the 1999/2000 season in particular for maize, following the severe impact of hurricane "Georges" at the end of 1998. A two-year protracted relief recovery operation is being implemented to assist affected populations. Food assistance is being provided under this operation.

Wheat imports in 2000/01 marketing year (July/June) are expected to be between 270 000 and 280 000 tonnes, close to the previous year. Maize imports are anticipated to decline from last year's

700 000 tonnes to some 650 000 tonnes. Rice imports in year 2001 (January/December) should be close to this year's imports of some 70 000 tonnes.

#### **EL SALVADOR (2 June)**

Planting of the 2000/01 first season cereal and bean crops has started with the arrival of the first rains from mid-April. Above-normal rains have been reported, particularly in southern and central areas. Intended plantings of maize, the main cereal, should be close to last year's average level, while the area planted to sorghum should be slightly higher than the level reached in the previous year. Plantings of beans are also expected to be similar to 1999/2000. A series of measures have been officially adopted for the benefit of the agriculture sector. These include improvements to be made to the inland infrastructure, enlargement of credit facilities to small rural enterprises and the establishment of a watershed rehabilitation programme in the Department of San Miguel in the south-east. Food assistance from the international community is still being distributed as a component of various reconstruction projects (food for work), following hurricane "Mitch" at the end of 1998.

Wheat and maize imports in 2000/01 marketing year (August/July) should remain close to the previous year's levels of 180 000 tonnes and 175 000 tonnes respectively. Rice imports in 2001 (January/December) are expected to be about 20 000 tonnes, similar to the last two years.

#### **GUATEMALA (2 June)**

Planting of the 2000/01 first season cereal and bean crops has started with the arrival of the first rains in April. Intended plantings of maize (white) are expected to remain average or slightly above 1999/2000 in response to higher domestic demand. However, the area planted to yellow maize is likely to decline in anticipation of lower priced imports. Intended plantings of sorghum are also expected to decline with respect to last year but should nevertheless remain about average. Food assistance continues to be distributed through reconstruction projects (food for work) following hurricane "Mitch".

Wheat imports in marketing year 2000/01 (November/October) are forecast to be about 380 000 tonnes, similar to the previous year. Maize imports are also anticipated to be about the same level of 550 000 tonnes of the previous year.

#### **HAITI\* (2 June)**

Harvesting of the 2000/01 first season maize and bean crops has only just started following weeks of dry weather, particularly in the northern parts of the country as well as in the central plains. Harvesting of the important irrigated paddy crop has also started while planting of the rainfed crop has been recently completed. Overall, prospects are uncertain as a consequence of the adverse weather and a decline in production is likely in the most affected areas. Food assistance from the international community continues to be distributed through development projects to some sectors of the population. About 41 000 tonnes have been delivered so far against pledges of 101 000 tonnes.

Wheat imports in marketing year 2000/01 (July/June) are anticipated to be about 285 000 tonnes, similar to 1999/2000. Commercial maize imports in the 2000/01 marketing year (July/June) should be about 75 000 tonnes, slightly above the previous year. Rice imports in year 2001 (January/December) should be similar to this year's level of 170 000 tonnes.

#### **HONDURAS (2 June)**

Planting of the 2000/01 first season cereal and bean crops has recently started with the arrival of the rainy season in April. Prospects for the maize crop, the main cereal, have improved with respect to last year and earlier estimates, and intended plantings are anticipated to be about average. The outlook is also better for the paddy crop. The area

planted to beans should be similar to satisfactory production in 1999/2000. Food assistance from the international community continues to be distributed to hurricane "Mitch" affected population.

Wheat imports in marketing year 2000/01 (July/June) should increase slightly from last year's 205 000 tonnes to some 210 000 tonnes. Maize imports are expected to decline from the previous year's 250 000 tonnes to some 190 000 tonnes.

#### **JAMAICA (2 June)**

Normal rains have recently resumed following a persistent long drought which severely affected the country since October last year. Official figures indicate that some 2 800 hectares of growing foodcrops, such as roots and tubers, plantains, fruits and vegetables have been lost. Between 2 500 and 3 000 rural families have been seriously affected. At the onset of the rainy season, the majority had no seedlings to plant and almost no farm inputs. Emergency rehabilitation projects from the international community to assist the small farmers struck by the drought are being prepared in response to the appeal made by the Government.

#### **MEXICO (2 June)**

Harvesting of the 2000 irrigated wheat crop, particularly in the northwest main growing areas, is complete. Production is provisionally estimated at some 3.2 million tonnes, compared to the average of 3.4 million tonnes in the last five years. This reflects adverse weather at sowing and a prolonged dry spell which sharply reduced water reservoirs and thus contributed to below-normal plantings. The drought continues to prevail in the northern areas, although normal to above-normal rains have been reported in the north and south-eastern parts. Despite 14 states officially declared as disaster areas, and forest fires reported in some of these states, official reports indicate no substantial damage to crops and livestock. The recent rains restored soil moisture, principally in the large maize producing southern belt areas, where planting of the important spring/summer crop is underway. Sorghum production this year is also expected to be average to slightly above average, as the important spring/summer crop grown in the large producing central state of Guanajato was not affected by the drought and the recent above-normal rains in the state of Tamaulipas, the other main sorghum producing state, have helped restore moisture to the soil for planting of the next fall/winter crop.

#### **NICARAGUA (2 June)**

Planting of the 2000/01 first season cereal and bean crops has started with the arrival of the rainy season in April/May. The area planted to maize, the main cereal, is expected to be close to average. Intended plantings of sorghum are also anticipated to be about average, while paddy area is expected to increase compared to last year. The area planted to the important beans crop should be about average. Food assistance continues to be provided to hurricane "Mitch" affected population.

Wheat imports in marketing year 2000/01 (July/June) are forecast to be about 100 000 tonnes, similar to the previous year, while maize imports are anticipated to slightly increase from some 30 000 tonnes to about 35 000 tonnes.

### **SOUTH AMERICA**

#### **ARGENTINA (2 June)**

Planting of the 2000 wheat crop has started in the main producing Buenos Aires province, following weeks of heavy rains and days of high winds. Early official forecasts indicate that plantings should increase slightly from 1999 average level.

Harvesting of the 1999/2000 maize crop, currently underway, has been frequently disrupted because of the adverse weather. By end-May, about 60 percent of plantings had been harvested compared to 69 percent by the same time the year before. Reduced yields and quality are anticipated. Production of maize is provisionally forecast at about 14.7 million tonnes which compares to the last 5-year average of 14 million tonnes; however, the final outturn will largely depend upon the weather pattern. Harvesting of this year's paddy crop continues and production is expected to decline significantly from last year's record. This is the result of anticipated reduced exports to neighbouring countries. A slightly below-average one million tonnes is forecast.

#### **BOLIVIA (2 June)**

**Planting of the 2000 winter wheat crop is about to start in the largest producing Department of Santa Cruz, in the east. The outlook is poor as a result of the heavy rains and flooding that have affected the area. Reduced plantings with respect to the 1999 winter crop are provisionally forecast. Sowing of the 1999/2000 second season coarse grain and potato crops has only started and average plantings are provisionally forecast. Wheat imports in marketing year 2000/01 (July/June) are expected to increase from the 1999/2000 level to compensate the loss in production.**

#### **BRAZIL (2 June)**

Planting of the 2000 wheat crop continues in the main producing states of Parana, Rio Grande do Sul and Santa Catarina. Dry weather is reported, following weeks of intensive rains that lasted until early May. The area planted is expected to increase slightly from last year's average level due to higher domestic prices and government guaranteed credit, coupled with a higher cost for imported wheat due to currency devaluation. Harvesting should start from August and early production forecasts point to an average output. Harvesting of the 2000 first (main) season maize crop has been virtually completed, following various disruptions caused by the heavy rains, while planting of the second season crop in the large producing states of Parana and Sao Paulo was completed some weeks ago. A satisfactory output has been obtained from the first crop and aggregate maize production (both crops) is provisionally forecast at some 33.8 million tonnes which compares to 32.2 million tonnes in 1999 and an average of 32.6 million tonnes. Harvesting of the 2000 paddy crop has been recently completed and output is provisionally estimated at some 11 million tonnes, a decrease of about 600 000 tonnes from last year but some 10 percent above the five year average.

#### **CHILE (2 June)**

Planting of the 2000/01 wheat crop continues under generally dry weather. Area is expected to increase over last year. The 1999/2000 crop was affected by heavy rains during development and harvesting. Harvesting of the 2000 maize crop has been virtually completed and production is provisionally estimated at a near average 840 000 tonnes, an improvement over the previous year's crop of only 625 000 tonnes.

Wheat imports in marketing year 1999/2000 (December/November) are expected to increase to offset the loss in production. Imports for some 750 000 tonnes are forecast, compared to some 710 000 the year before. Maize imports in marketing year 2000/01 (February/January) should decline from the previous year's 1.1 million tonnes to some 850 000 tonnes due to the recovery in production.

#### **COLOMBIA (2 June)**

Heavy rains and flooding, with resulting land and mudslides, continue to afflict various areas of the country. A state of emergency has been officially declared in the provinces of Huila, Cauca, Nariño, Putumayo and Valle and a state of alert has been placed in various other provinces. A number of victims is reported and about 100 000 people have been affected by the extensive flooding. Damage to housing and infrastructure is also reported. No detailed assessment of damage to the agricultural sector is available yet.

Planting of the 2000 first season cereal crops is underway. Maize and paddy area is expected to be average despite disruptions caused by the heavy rains.

Wheat imports in marketing year 2001 (January/December) should remain similar to this year's. Maize and rice imports should also be closely similar to this year's.

#### ECUADOR (2 June)

Heavy rains and flooding, resulting in deadly landslides, continue to be reported in various areas of the country, in particular in the capital and surrounding areas. A number of victims and serious damage to housing is reported. Harvesting of the yellow maize crop is underway while planting of the white maize crop has only started. Despite the heavy rains, an above-average output (white and yellow maize) for the whole year is anticipated. Prospects are poor however for the paddy crop, currently being harvested. Below-average plantings are reported largely as a result of unattractive prices coupled with financial constraints to the producer. The abnormal rain pattern also contributed to the reduced plantings.

Wheat imports in marketing year 2000/01 (July/June) should be closely similar to 1999./2000 imports of 490 000 tonnes. Maize imports are expected to decrease considerably from last year's 170 000 tonnes in anticipation of the recovery in production. Paddy imports are anticipated to increase from last year's 40 000 tonnes to some 50 000 tonnes.

#### PARAGUAY (2 June)

Relief assistance continues to be provided by the government and the international community to the drought affected population in the northern parts of the country. Particularly affected are the departments of Concepción, San Pedro and Chaco Central.

Normal rains are expected to resume shortly with the beginning of the rainy season in June.

#### PERU (2 June)

Wheat harvesting continues under generally dry weather. Early forecasts point out to a decline in production from 1999 but output would still remain above average. Harvesting of the yellow maize crop is underway and output collected in the first quarter of the year is slightly above last year's level. Output for the whole year is provisionally forecast at a much higher level. By contrast, production of paddy in the first quarter is below the quantity collected in 1999 for the same period, and output for the whole year 2000 is anticipated to be also smaller, but still above the average of the last 5 years.

Wheat imports in marketing year 2000/01 (January/December) are expected to be about 1.2 million tonnes, similar to 1999/2000. Maize imports are also anticipated to remain at the same level of this year's 950 000 tonnes.

#### URUGUAY (2 June)

Normal rains have resumed in various parts of the country following months of a severe drought which affected the main 1999/2000 cereal crops. Harvesting of maize, sorghum and paddy, were recently completed and output is provisionally estimated at extremely low levels. The important paddy crop has also declined from last year's well above-average level, but production is still slightly above average.

Planting of the 2000/01 wheat and barley crops has started with the arrival of the rains and average plantings are forecast, assuming normal weather patterns prevail.

## **VENEZUELA (2 June)**

Planting of the 2000 first (main) season cereal crops, as well as other minor foodcrops, has started under normal weather conditions. Intended plantings for maize should be closely similar to last year's average, while those for sorghum are slightly below average mainly as a result of lower priced imports. Import regulations, however, virtually guarantee the acquisition of the whole sorghum crop by the animal feeding industry. The intended area to paddy is expected to be average. Food aid from the international community continues to be distributed to the population that was affected last December by the heavy rains, and resulting flooding and deadly mudslides, particularly in the northern departments of the country. Technical assistance for the immediate rehabilitation of the agricultural sector is also being provided by the international community.

## **EUROPE**

### **EC (2 June)**

The outlook for the 2000 cereal crops is generally favourable in most countries throughout the EC. Conditions improved significantly in southern parts in late April and early May following good rainfall. Latest information confirms expectations of a significant increase in aggregate wheat output in the Community after planted area increased in many member states at the expense of oilseeds. FAO forecasts the aggregate crop in 2000 at 105.6 million tonnes, compared to 97.6 million tonnes in 1999. A larger coarse grains crop is also expected this year. Oilseeds have been displaced in favour of barley, the major coarse grain crop. Following recent improvement in moisture conditions in the south, maize planting is also expected to increase. FAO forecasts the Community's aggregate coarse grains output in 2000 at 105.7 million tonnes compared to 102.2 million tonnes in 1999. Rice planting in Italy, the largest producer in the EC, has been completed under generally favourable weather conditions. The area is estimated at about 221 000 hectares, similar to last year's. However, elsewhere in the Community, the conditions have not been as favourable. Earlier drought conditions in southern parts of Portugal and Spain may lead to depressed plantings. Overall, output for the EC is forecast to decline slightly from the previous year.

### **ALBANIA (2 June)**

Aggregate cereal production is expected to be about average this year at between 550 000 to 600 000 tonnes. Food assistance continues to be provided by WFP for some 60 000 persons who have been rendered vulnerable by the Balkan crisis.

### **BELARUS (3 June)**

Untimely frost in May, with temperatures falling as low as -16°C reportedly caused crop damage on 14 percent of the winter crop area, 5 percent of the spring crop area, to perennial grasses and 566 hectares of vegetables. Indications are that 200 000 hectares of the targeted 2.7 million hectares to be sown to grains have been affected. 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. Reflecting, in addition, pervasive economic problems in the sector and inadequate use of fertilizer and other inputs, the production target of at least 5 million tonnes in 2000 may not be met.

In 1999, agricultural output fell by 10 percent, over one third of agricultural enterprises worked at a loss and the grain harvest fell 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. Output of livestock products also decreased, significantly in the case of milk and the government has issued orders for the procurement and stockpiling of food products for the population in the coming winter. 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 are now estimated at about 1.4 million tonnes.**

**BOSNIA-HERZEGOVINA\* (3 June)**

The downward trend in winter grain plantings is continuing, reflecting poor profitability of wheat in both BiH and Rep. Srpska. By contrast, the area sown to maize continues to increase. To meet consumption demand, wheat imports have increased steadily and in the 2000/01 marketing year are projected to increase beyond the 300 000 tonnes imported in 1999/2000. The economy has been negatively affected by civil unrest in the region but indications are that the crop and overall food supply situation have not been unduly disrupted.

**BULGARIA (2 June)**

Weather conditions are reported to have been generally favourable so far for this season's cereal crops and wheat output in 2000 is forecast at about 3 million tonnes, similar to production in 1999. Regarding maize, the major coarse grain crop, latest indications rule out the likelihood of an area increase as was earlier expected. The area planted by mid-May was reported to be some 300 000 hectares, and with the normal planting period ending by late May, the final area is likely to reach about 550 000 to 600 000 hectares, similar to the previous year.

**CROATIA (3 June)**

The early outlook the 2000 food crop harvests is satisfactory. The area sown to winter cereals recovered in response to a 38 percent increase in wheat plantings to a record 234 000 hectares in the wake of the poor harvest last year. The budget allocation for farm support has been increased by 10 percent. Subsidies per hectare for arable crops have increased by varying amounts, ranging from 30 percent for wheat production and 100 percent for barely. New subsidies have been introduced for maize and livestock farming. Nevertheless, economic problems on farm persist.

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.

**CZECH REPUBLIC (2 June)**

The winter wheat area is estimated to have increased this year by about 15 percent to over 1 million hectares. However, yield prospects are somewhat uncertain after unseasonably high temperatures and drought conditions set-in in early May. It is too early to know the extent of the damage so far, but if significant rainfall doesn't arrive soon, sharp yield reductions will be likely. The spring-sown crops, which are in the early stages of development, are expected to be the worst affected.

**ESTONIA (3 June)**

The outlook is for some recovery in cereal production in 2000. The area sown to winter crops has increased; with grains overwintering well and benefiting from warm spring temperatures. Spring planting is well advanced. Grain production in 1999 is officially estimated at almost 500 000 tonnes, some 15 percent lower than output in 1998 in view of a reduction in the area sown. Production of livestock products fell in response to reduced import demand from the Russian Federation. The country has become a member of the WTO and signed an agreement with the EU aimed at further liberalizing trade between the two countries prior to full accession. Since 1995, the country has become a net food importer. Exports include dairy products, livestock, fish and beverages while imports consist mostly of high value added food products including grains, fruit and vegetables. Recently imports of beef, poultry and pork have increased. Cereal imports have fluctuated between 200 000 to 250 000 tonnes per annum.

FORMER YUGOSLAV REPUBLIC OF MACEDONIA (2 June)

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 about 20 000 persons rendered vulnerable by the Balkan crisis.

HUNGARY (2 June)

In Hungary, prospects for the 2000 cereal crops have deteriorated over the past few weeks due to a period of unusually hot and dry weather. Although it is still too early to know the full extent of the damage, it is now uncertain if the expected output of 4.5 million tonnes will be achieved. Also the maize crop that has been sown on an estimated area of about 1 million hectares, is affected by the hot and dry weather, and yields will fall well below average if no significant precipitation arrives soon.

LATVIA (3 June)

Early indications are that the 2000 cereal harvest could recover from the low level of 787 000 tonnes in 1999. The area sown to winter grains increased, over wintering and spring growing conditions were mostly satisfactory. Spring grain sowing is well underway. Restrictions on pork imports have been lifted; in compensation pig farmers are to receive subsidies. With livestock production remaining depressed, imports of cereals in recent years are limited to about 50 000-70 000 tonnes per annum, mainly of bread quality wheat.

LITHUANIA (3 June)

The outlook for 2000 grain harvest is satisfactory to date. The aggregate area to be sown, at 1.1 million hectares, is expected to remain about average. Good growing conditions to date and some slow but steady improvements in yields as farmers adjust to farming under in a market economy, are likely. 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.

MOLDOVA (13 June)

**The outlook for the 2000 grain harvest has been compromised by untimely frosts and persistent dry conditions which have affected grains, fodder, fruit and grape production. Wheat production initially targeted at 1 million tonnes could be up to 50 percent less and barley yields are also affected. The outlook for the recently planted maize crop, targeted to reach 1.5 million tonnes, is uncertain at this stage, but official forecasts are pessimistic. FAO tentatively forecasts the 2000 grain harvest at 1.65 million tonnes, only two-thirds of average and 25 percent below last year's harvest.**

**The aggregate 1999 grain harvest fell to 2.18 million tonnes, (from 2.5 million tonnes in 1998) in response to a 6 percent reduction in the area sown to wheat and dry conditions, which affected spring grains. In an attempt to ensure domestic supplies, and limit the need for imports of wheat, the government has banned exports of wheat and flour until 31 August 2000. The country exported 330 000 tonnes of cereals in 1999, including 158 000 tonnes of wheat.**

POLAND (2 June)

Latest indications point to a likely reduction in cereal output in 2000, after an about-average crop of 26 million tonnes in 1999. Preliminary official estimates indicate that the overall area of winter and spring cereals planted for the 2000 harvest has shrunk by about 1 percent compared to the previous year. Moreover, an assessment of the crop conditions in mid-May points to lower yields than in 1999, largely reflecting drought conditions this spring.

#### ROMANIA (2 June)

The area sown to winter wheat is estimated at 1.9 million hectares, about 12 percent up from the 1999 reduced level. However, yield prospects are uncertain as much of the crops was reported to have been planted after the optimum date and fertilizer applications and other normal husbandry are expected to be generally less than adequate because of farmers' lack of funds. Moreover, unusually hot and dry weather recently, which prevailed in a large part of the central European area, is expected to limit yields. FAO tentatively forecasts the 2000 wheat crop at about 4.0 million tonnes, down slightly from the previous year, despite the larger area, as a reflection of lower average yields projected. However, if the recent exceptionally dry weather continues, yield potential will be reduced even further and a downward revision of the production forecast will be likely. Information is still lacking on the full extent of spring sowings, but as of early May, fieldwork was reported to be progressing on schedule. Nevertheless, as for the winter cereals, the potential spring crop output in 2000 will remain limited by farmers' lack of funds for inputs.

#### RUSSIAN FEDERATION (15 June)

**The outlook for the 2000 grain harvest has deteriorated somewhat. The outlook for winter grains in 2000 remains satisfactory but untimely frost and cold weather in May caused some crop damage and slowed spring grain planting. Warmer weather has now returned. Of the 14.16 million hectares sown to winter crops, (including some 13.4 million hectares sown to grains) latest indications are that 1.5 million hectares have been damaged. This is markedly less than in the preceding year, when 1.9 million hectares were damaged. Roughly half of the winter crop area (6.3 million hectares), and more than last year, has been fertilized and winter grain yield expectations are satisfactory to date. Spring grain plantings progress has been slow, delayed by cold weather, shortages of seeds as well as rain and snowfalls particularly in the New Lands. The area sown is some 10 million hectares less than in the preceding year. That sown to spring grains, 27.9 million hectares in the State sector by 6 June, is at least 10 percent less than at the corresponding time last year. Spring grain planting progress could pick up if the weather improves but late planted crops remain at risk of late season dryness and frost in the Urals, Siberia and Povol'sk regions and of poor weather at harvest time. Indications are that the spring grain area could be less than last year, and below target.**

Current indications area that the 2000 grain harvest could be about 10 percent higher than the 60 million tonnes (FAO estimate) harvested last year. The overall food supply situation remains tight but imports of up to 8 million tonnes of cereals in 1999/2000 helped ensure human consumption needs. The country will remain a net imported of cereals in 2000/01. The livestock feed situation is easing with the advent of spring, but feedgrain prices remain high.

In Chechnya, the outlook for agricultural production in the current year remains poor due damage to the existing infrastructure, livestock and grape industry and the need to first clear mines from arable land. Nevertheless, reports indicate that some land has been sown with spring crops. The security situation and timely arrival and distribution of necessary funds and harvesting machinery remain problematic. Food distribution to populations in Chechnya is underway. 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 co-ordination, both for people living in Chechnya and for IDPs and the host families in neighbouring Ingushetia. Health remains a major problem in both Chechnya and Ingushetia, reflecting inadequate water and sanitation facilities.

#### SLOVAK REPUBLIC (2 June)

Recent hot dry weather has affected developing cereal crops. With early season weather conditions reported to be generally favourable, previous indications pointed to a recovery in cereal output in 2000 from the sharply reduced level in 1999. However, the outcome of the coming harvest is now somewhat uncertain. One report based on crop conditions in early May indicates that average wheat

yields may be down by about 25-30 percent from normal, and those for barley down by about 30-50 percent from normal.

#### SLOVENIA (2 June)

In Slovenia, cereal output is expected to rise by some 20-30 percent this year from the 1999 reduced crop. Weather conditions were generally favourable for winter crops and spring sowings were virtually complete by the beginning of May. The aggregate cereal crop in 2000 is forecast at about 560 000 tonnes.

#### THE UKRAINE (7 June)

The outlook for the 2000 grain harvest has deteriorated. The reorganisation of 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 the number 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. In addition to the difficult financial situation on farm, persistent hot, dry weather is compromising the yield of both winter and spring grains in the south.

The area sown to winter crops, prior to the farm reorganisation reached 7.9 million hectares; crop conditions are better than expected earlier and latest indications are that only 0.750 million hectares required reseeding after winter. Spring crop sowing with the exception of maize is virtually complete but information on the area sown is conflicting. The estimate of the Office of Statistics (11.1 million hectares including 4.3 spring grains) is substantially lower than that of the Ministry of Agriculture (12.7 million hectares, including 4.78 million hectares to spring grains excluding maize).

Whatever the area sown, frosts, and dry conditions in April and most of May in southern Ukraine, have lowered yield potential and the outlook is for a harvest of cereals no more than that of 1999, estimated by FAO at 27 million tonnes. Following the second poor harvest in succession and large exports (5.8 million tonnes in 1998/99 and 3.0 million tonnes up to April 2000), FAO tentatively forecasts 1999/2000 cereal exports at 3.1 million tonnes, including 2.0 million tonnes of wheat, and cereal imports at only 0.3 million tonnes, mainly wheat and rice.

#### YUGOSLAVIA, FED. REP. OF (SERBIA AND MONTENEGRO)\* (5 June)

**The 1999/2000 agricultural year is proving very difficult. Agricultural production has been more resilient than other sectors of the economy but nevertheless, the effect of sanctions over the years, the damage caused during the war last year, rapid inflation and price controls on basic foodstuffs has severely undermined the sector's potential and destabilised the livestock industry.**

**The outlook for 2000 food crops, and particularly those for which marketing is affected by government regulation, is not good. Low official prices for wheat, payment delays, poor returns for 1999 crops, shortages of fuel and fertilizer, working capital and delays in harvesting the 1999 crop have kept winter crop planting well below target. Latest reports indicate that, contrary to expectations, the area sown to winter wheat fell further to only 640 000 hectares from a below average 702 000 hectares in the preceding year. Growing conditions for the crop have been mixed. Flooding and waterlogging in parts of the Vojvodina were followed by hot and dry conditions in April/May which are compromising yields of maize and oilseeds. Fertilizer use has likely remained low in response to a sharp increase in prices on the black market and the fact that it is only released by the government against payment of wheat in kind after the harvest. Quality seed has also been very expensive. All indications point to another poor wheat harvest in 2000.**

**The State still officially controls prices for five staple products, - bread, milk, meat, sugar and vegetable oil. However, with rapid inflation, price controls are ineffective and apply only to goods sold in the state sector shops, which are frequently short of supplies, while much**

higher priced goods are available in the private sector. In an attempt to keep retail prices low, flour, and the fuel and energy used by bakeries, is subsidized.

In 1999, a record maize harvest of 6.1 million tonnes offset the poor wheat harvest of only 2 million tonnes, and aggregate cereal output is officially estimated at an about average 8.6 million tonnes. Early indications are that the 2000 grain harvest could be lower. The country has exported 150 000 tonnes of wheat as well as maize in 1999/2000. However, agri-food exports in the first three months of this year was one third lower than at the corresponding time of 1999 last year trade, although trade in fruit and vegetables, production of which is almost entirely in the private sector, remains strong.

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. In 1999 food prices doubled, while salaries fell. WFP is providing 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, prospects for the 2000 cereal crop remain generally satisfactory. Wheat harvesting is about to start and early indications point to a crop of about 200 000 to 250 000 tonnes. As earlier anticipated, the amount of food assistance being provided in the Kosovo Province has been scaled down in the second quarter of 2000, in line with increased employment opportunities as the economy gradually recovers, and thus improvements in household incomes, and also as winter expenditures decrease. The total estimated caseload of beneficiaries in the April-June period is estimated at 620 000 of which WFP is covering 330 000 and CRS/MCI 290 000.

## **NORTH AMERICA**

### **CANADA (2 June)**

The official March seeding intentions report pointed to virtually no change in this year's overall wheat area. A sharp increase expected in the area sown to durum wheat would be offset by reduction plantings of other spring wheat. Planting conditions have been generally favourable, and as of end-May, planting was reported to be nearing completion in some areas after progressing at normal to ahead-of-normal pace across most of the main growing areas in the past few weeks. For coarse grains, early indications point to an increase in area. The barley area is expected to increase by 22 percent to 5.4 million hectares, while that of maize, by 14 percent, to over 1.3 million hectares. Reflecting this significant expansion in area, aggregate coarse grains output in 2000 is forecast at some 29 million tonnes, about 9 percent up from 1999.

### **UNITED STATES (2 June)**

Aggregate (winter and spring) wheat production in 2000 is officially forecast at 60.9 million tonnes, 3 percent down from the previous year. The area of winter wheat to be harvested in 2000 is now forecast at about 14 million hectares, 2 percent down from 1999 and the smallest area since 1971. However, good yields, close to last year's record levels are expected again. Regarding spring wheat, planting was virtually complete by late May and, if early indications in the USDA's March 31 Prospective Plantings Report materialise, the area will be down by about 5 percent from 1999 to 7.5 million hectares.

With regard to coarse grains, according to the Prospective Plantings Report, no major changes are expected in the areas sown to the main coarse grains crops this year compared to last. A slight increase is expected for Maize, but a decrease for sorghum. Maize planting was reported to be virtually complete by May 22, well ahead of the average pace reflecting favourable dry conditions. By the end of the month most of the crop had emerged, and significant rainshowers in several parts

of the Corn Belt had somewhat relieved earlier concerns over insufficient moisture availability. In the USDA May 30 Crop Progress Report the bulk of the crop was rated in fair to good condition (fair: 24 percent fair, good: 55 percent), virtually the same as the ratings for the crop a year earlier. However, with large subsoil moisture deficits recorded in many parts after the early season dry weather, much more good rainfall will still be needed in the coming weeks. Based on the indicated areas planted, and assuming sufficient rainfall during the remainder of the season, aggregate 2000 coarse grains output in the United States is forecast at 271.3 million tonnes, 2.8 percent up from the previous year.

Planting of the 2000/01 rice crop is almost complete. According to the Prospective Plantings report, farmers intend to cut the area under rice to about 1.38 million hectares. This would be down by over 5 percent from the previous season, in response to the substantial decline in rice prices in the preceding season that has fostered a farmers' switch to more lucrative crops. Based on intended area, rice/paddy output in 2000/01 is officially forecast at 9.1 million tonnes.

## **OCEANIA**

### AUSTRALIA (2 June)

Planting of the 2000 winter wheat and coarse grain crops is underway. Good rainfall in early May, adding to ample existing sub-soil moisture after an unusually wet summer and early autumn, ensured planting conditions were generally ideal across the eastern and western grain belt. Early indications of farmers' planting intention point to a winter wheat area of 11.8 million hectares, virtually unchanged from the previous year. Given good planting conditions, and assuming normal weather for the remainder of the season, a crop of nearly 23 million tonnes is forecast. This would be above the five year average and just below the record crop of 24 million tonnes in 1999. As regards barley, the major winter coarse grain crop, early indications point to a sharp recovery in plantings to almost 3 million hectares after last year's reduced area.

However, although weather conditions for planting and early development of the winter grain crops are favourable, some uncertainty has been cast over the outcome of the 2000 harvest by an outbreak of locusts since April, reported to be the worst infestation in the past 50 years. Although some damage has already occurred to the earliest emerging cereal crops, the largest threat will be in the spring when the eggs, which are being laid this autumn, hatch. Intensive control measures will be needed over the coming months to prevent potentially very damaging plagues later in the year.

Harvesting of the rice crop is almost complete and output is officially forecast to contract by some 20 percent from the previous season to about 1.1 million tonnes. reflecting a 13 percent reduction in area in addition to lower yields.

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

COUNTRY	Marketing year	1998/99 or 1999			1999/2000 or 2000			
		Actual imports			Total import requirements (excluding re-exports)	Import position		
		Commercial purchases	Food aid	Total commercial and aid		Total commercial and aid	Food aid allocated committed or shipped	Commercial purchases
<b>AFRICA</b>		<b>25 554.2</b>	<b>2 341.0</b>	<b>27 895.2</b>	<b>27 729.0</b>	<b>14 710.7</b>	<b>1 770.4</b>	<b>12 940.3</b>
<b>Northern Africa</b>		<b>15 445.0</b>	<b>23.0</b>	<b>15 468.0</b>	<b>14 620.0</b>	<b>10 988.7</b>	<b>63.0</b>	<b>10 925.7</b>
Egypt	July/June	10 883.0	13.0	10 896.0	10 120.0	7 681.3	63.0	7 618.3
Morocco	July/June	4 562.0	10.0	4 572.0	4 500.0	3 307.4	0.0	3 307.4
<b>Eastern Africa</b>		<b>1 824.6</b>	<b>1 383.1</b>	<b>3 207.7</b>	<b>4 927.0</b>	<b>1 702.3</b>	<b>1 150.8</b>	<b>551.5</b>
Burundi	Jan./Dec.	38.2	4.5	42.7	70.0	3.9	0.9	3.0
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	0.8	0.0	0.8
Eritrea	Jan./Dec.	4.1	23.8	27.9	290.0	52.7	52.7	0.0
Ethiopia 2/	Jan./Dec.	21.3	696.3	717.6	840.0	822.8	822.8	0.0
Kenya	Oct./Sept.	709.8	146.7	856.5	1 590.0	195.5	48.9	146.6
Rwanda	Jan./Dec.	35.9	183.9	219.8	210.0	76.7	76.7	0.0
Somalia	Aug./July	276.7	42.5	319.2	310.0	66.2	54.6	11.6
Sudan	Nov./Oct.	426.7	213.6	640.3	1 016.0	99.8	70.8	29.0
Tanzania	June/May	145.3	58.4	203.7	450.0	382.9	22.4	360.5
<b>Southern Africa</b>		<b>1 332.4</b>	<b>460.5</b>	<b>1 792.9</b>	<b>1 825.0</b>	<b>968.1</b>	<b>278.0</b>	<b>690.1</b>
Angola	April/March	366.1	151.1	517.2	505.0	190.1	137.5	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	120.6	62.7	57.9
Mozambique	April/March	104.0	191.1	295.1	325.0	427.5	63.8	363.7
Swaziland	May/April	75.0	10.0	85.0	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
<b>Western africa</b>		<b>6 311.2</b>	<b>437.8</b>	<b>6 749.0</b>	<b>5 629.0</b>	<b>993.6</b>	<b>260.3</b>	<b>733.3</b>
<b>Coastal countries</b>		<b>4 555.8</b>	<b>200.3</b>	<b>4 756.1</b>	<b>3 804.0</b>	<b>807.5</b>	<b>126.9</b>	<b>680.6</b>
Benin	Jan./Dec.	116.1	9.3	125.4	115.0	9.1	9.1	0.0
Cote d'Ivoire	Jan./Dec.	750.6	37.1	787.7	655.0	175.4	2.6	172.8
Ghana	Jan./Dec.	451.7	23.3	475.0	485.0	108.3	38.8	69.5
Guinea	Jan./Dec.	328.9	29.1	358.0	350.0	6.8	0.0	6.8
Liberia	Jan./Dec.	137.9	72.4	210.3	200.0	52.6	52.6	0.0
Nigeria	Jan./Dec.	2 382.3	0.0	2 382.3	1 600.0	424.4	0.3	424.1
Sierra Leone	Jan./Dec.	264.8	25.1	289.9	329.0	26.7	19.5	7.2
Togo	Jan./Dec.	123.5	4.0	127.5	70.0	4.2	4.0	0.2
<b>Sahelian countries</b>		<b>1 755.4</b>	<b>237.5</b>	<b>1 992.9</b>	<b>1 825.0</b>	<b>186.1</b>	<b>133.4</b>	<b>52.7</b>
Burkina faso	Nov./Oct.	175.4	37.3	212.7	155.0	12.7	10.4	2.3
Cape Verde	Nov./Oct.	30.3	60.1	90.4	70.0	71.6	71.6	0.0
Chad	Nov./Oct.	60.0	15.9	75.9	67.0	10.8	10.8	0.0
Gambia	Nov./Oct.	123.3	3.8	127.1	94.0	4.5	4.5	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	5.6	121.8	100.0	2.6	2.6	0.0
Mauritania	Nov./Oct.	214.3	28.1	242.4	260.0	13.3	13.3	0.0
Niger	Nov./Oct.	306.7	35.6	342.3	220.0	0.4	0.4	0.0
Senegal	Nov./Oct.	674.2	30.0	704.2	760.0	70.2	19.8	50.4
<b>Central Africa</b>		<b>641.0</b>	<b>36.6</b>	<b>677.6</b>	<b>728.0</b>	<b>58.0</b>	<b>18.3</b>	<b>39.7</b>
Cameroon	Jan./Dec.	267.2	2.6	269.8	290.0	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	10.4	10.4	0.0
Congo, Rep.	Jan./Dec.	91.5	13.5	105.0	140.0	24.3	0.9	23.4
Eq. Guinea	Jan./Dec.	14.0	0.0	14.0	9.0	0.4	0.4	0.0
Sao Tome	Jan./Dec.	8.5	1.1	9.6	10.0	3.2	3.2	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
<b>ASIA</b>		<b>33 419.5</b>	<b>4 409.5</b>	<b>37 829.0</b>	<b>36 397.0</b>	<b>22 482.9</b>	<b>3 072.2</b>	<b>19 410.7</b>
Afghanistan	July/June	668.4	77.2	745.6	1 127.0	140.0	116.6	23.4
Armenia	July/June	254.0	20.0	274.0	368.0	330.6	11.5	319.1
Azerbaijan	July/June	648.0	26.0	674.0	734.0	603.4	31.0	572.4
Bangladesh	July/June	2 922.7	1 313.1	4 235.8	2 016.0	1 795.4	895.4	900.0
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	18.0	18.0	0.0
China 3/	July/June	8 240.1	259.9	8 500.0	9 300.0	6 585.0	192.0	6 393.0
Georgia	July/June	507.0	98.0	605.0	555.0	387.2	61.0	326.2
India	April/March	1 427.4	262.6	1 690.0	2 088.0	770.0	246.4	523.6
Indonesia	April/March	6 344.9	922.8	7 267.7	6 100.0	5 525.9	486.9	5 039.0
Korea, D.P.R.	Nov./Oct.	1 127.3	728.7	1 856.0	1 855.0	445.1	338.7	106.4
Kyrgyz Republic	July/June	110.0	7.0	117.0	266.0	186.6	107.5	79.1
Laos	Jan./Dec.	51.2	15.8	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	110.0	65.4	6.3	59.1
Pakistan 4/	May/April	2 725.9	195.5	2 921.4	2 521.0	684.2	267.3	416.9
Philippines	July/June	3 450.1	2.5	3 452.6	3 462.0	3 019.6	127.5	2 892.1
Sri Lanka	Jan./Dec.	1 012.3	116.0	1 128.3	1 155.0	445.7	48.9	396.8
Syria	July/June	753.1	15.9	769.0	890.0	794.4	22.2	772.2
Tajikistan	July/June	325.0	80.0	405.0	489.0	430.4	66.4	364.0
Turkmenistan	July/June	75.0	0.0	75.0	17.0	13.1	6.6	6.5
Uzbekistan	July/June	519.0	0.0	519.0	336.0	122.4	0.0	122.4
Yemen	Jan./Dec.	1 972.6	165.3	2 137.9	2 620.0	101.8	7.0	94.8
<b>CENTRAL AMERICA</b>		<b>3 497.1</b>	<b>404.3</b>	<b>3 901.4</b>	<b>3 629.0</b>	<b>2 072.4</b>	<b>446.6</b>	<b>1 625.8</b>
Cuba 5/	July/June	1 567.9	10.9	1 578.8	1 471.0	497.9	46.4	451.5
Guatemala	July/June	991.8	41.5	1 033.3	960.0	747.8	110.1	637.7
Haiti	July/June	367.7	131.8	499.5	525.0	324.5	101.3	223.2
Honduras	July/June	444.3	93.2	537.5	515.0	285.6	87.7	197.9
Nicaragua	July/June	125.4	126.9	252.3	158.0	216.6	101.1	115.5
<b>SOUTH AMERICA</b>		<b>1 063.9</b>	<b>176.1</b>	<b>1 240.0</b>	<b>1 001.0</b>	<b>312.7</b>	<b>92.7</b>	<b>220.0</b>
Bolivia	July/June	210.1	155.9	366.0	271.0	116.7	22.9	93.8
Ecuador	Jan./Dec.	853.8	20.2	874.0	730.0	196.0	69.8	126.2
<b>OCEANIA</b>		<b>419.8</b>	<b>8.0</b>	<b>427.8</b>	<b>381.0</b>	<b>11.1</b>	<b>0.6</b>	<b>10.5</b>
Kiribati	Jan./Dec.	8.0	0.0	8.0	8.0	0.0	0.0	0.0
Papua New Guinea	Jan./Dec.	356.8	8.0	364.8	318.0	11.1	0.6	10.5
Samoa	Jan./Dec.	17.0	0.0	17.0	17.0	0.0	0.0	0.0
Solomon Isl.	Jan./Dec.	26.0	0.0	26.0	26.0	0.0	0.0	0.0
Tuvalu	Jan./Dec.	1.0	0.0	1.0	1.0	0.0	0.0	0.0
Vanuatu	Jan./Dec.	11.0	0.0	11.0	11.0	0.0	0.0	0.0
<b>EUROPE</b>		<b>500.5</b>	<b>121.0</b>	<b>621.5</b>	<b>675.0</b>	<b>167.3</b>	<b>163.1</b>	<b>4.2</b>
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
<b>TOTAL</b>		<b>64 455.0</b>	<b>7 459.9</b>	<b>71 914.9</b>	<b>69 812.0</b>	<b>39 757.1</b>	<b>5 545.6</b>	<b>34 211.5</b>

SOURCE: FAO

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

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

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### DEFINITIONS:

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

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

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

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

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