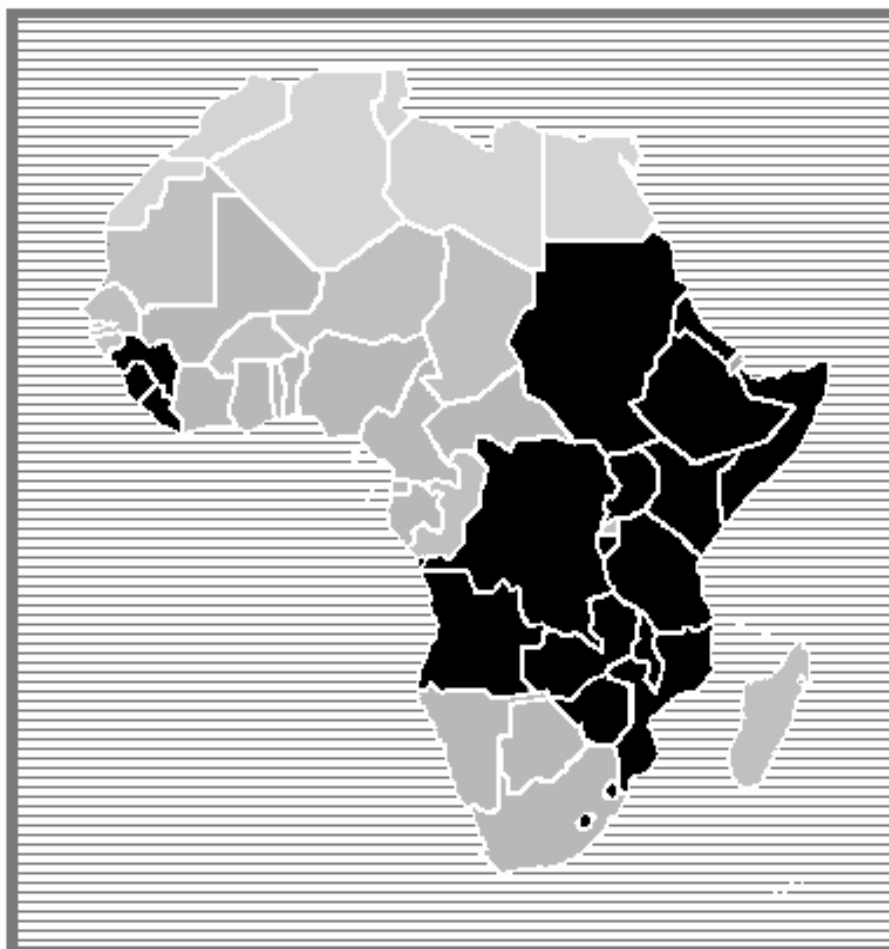


FOOD SUPPLY SITUATION AND CROP PROSPECTS IN SUB-SAHARAN AFRICA

No.1

April 2002



Countries facing exceptional food emergencies:

Angola, Burundi, Dem.Rep. of Congo, Eritrea, Ethiopia, Guinea, Kenya, Lesotho, Liberia, Malawi, Mozambique, Sierra Leone, Somalia, Sudan, Swaziland, Tanzania, Uganda, Zambia, Zimbabwe



FOOD AND AGRICULTURE ORGANIZATION OF THE UNITED NATIONS

INTRODUCTION

This is the first issue in 2002 of this quarterly report prepared by the FAO Global Information and Early Warning System (GIEWS) on the food supply situation, cereal import and food aid requirements for all countries in sub-Saharan Africa. The report is designed to provide the latest analysis and information on the food situation in these countries to governments, international organizations and other institutions engaged in humanitarian operations.

Part I focuses on the extremely tight food supply situation in most countries of southern Africa, particularly in Malawi, Zambia and Zimbabwe as well as Lesotho, Namibia, Swaziland and southern provinces of Mozambique, due to a sharp decline in the 2001 maize production, the main staple in the sub-region. It highlights the continuing need for assistance in most pastoral areas of the Horn of Africa despite the overall improved food situation in the sub-region, as well as the precarious food situation in parts of the Great Lakes region, particularly in the Democratic Republic of Congo, mainly due to civil strife. The report also draws attention to the continuing need for food assistance in Angola, Guinea, Liberia and Sierra Leone due to population displacements, refugees and insecurity.

Part II contains an assessment of crop prospects and the food supply situation by sub-region, giving the latest estimates of cereal import and food aid requirements of all four sub-regions of sub-Saharan Africa.

Part III presents the latest analysis and information on crop prospects and the food supply situation and outlook in each country. The information on food aid pledges, triangular transactions and local purchases, and on expected arrivals, is based on data transmitted to GIEWS as of late March 2002 by the following donors: Australia, Belgium, Canada, China, Denmark, EC, Germany, France, Italy, Japan, Netherlands, Sweden, Switzerland, United Kingdom, United States as well as the World Food Programme.

COUNTRIES FACING EXCEPTIONAL FOOD EMERGENCIES (Total: 19 countries)

<u>Country</u>	<u>Reasons for emergency</u>
Angola	Civil strife, population displacement
Burundi	Civil strife and insecurity
Congo, Dem.Rep.	Civil strife, IDPs and refugees
Eritrea	IDPs, returnees and drought
Ethiopia	Drought, IDPs
Guinea	IDPs and refugees
Kenya	Drought
Lesotho	Drought in parts
Liberia	Civil strife, population displacement
Malawi	Drought in parts
Mozambique	Drought in parts
Sierra Leone	Civil strife, population displacement
Somalia	Drought, civil strife
Sudan	Civil strife in the south, drought
Swaziland	Drought in parts
Tanzania	Food deficits in parts, refugees
Uganda	Civil strife in parts, IDPs
Zambia	Excessive rains, floods
Zimbabwe	Drought in parts

Since conditions can change rapidly, and published information may not always represent the most up-to-date basis for action, enquiries or corrections should be directed to Office of the Chief, Global Information and Early Warning Service (ESCG), FAO, Rome (Fax: 39-06-5705-4495, E-mail: GIEWS1@FAO.ORG).

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HIGHLIGHTS

In southern Africa, a food crisis looms over several countries following sharp falls in maize production in 2001 and unfavourable harvest prospects this year. Acute food shortages have emerged in Malawi, Zimbabwe and Zambia, where food reserves have been depleted and food prices have soared, undermining access to food for large sections of their populations. In Malawi, maize production declined by over 33 percent last year mainly due to excessive rains and floods, coupled with reduced and late delivery of agricultural inputs. The strategic grain reserve has been depleted and importation of maize is seriously constrained by transport bottlenecks. As a result, maize prices have risen by over 300 percent since July last year. The Government has declared a state of emergency and appealed to the international community for food assistance. In Zimbabwe, maize production in 2001 dropped by 28 percent compared to the previous year and was well below average, due to a combination of reduced plantings, dry spells and excessive rains. Maize stocks have been depleted and imports are severely constrained by a shortage of foreign exchange. The Government has appealed for international assistance. In Zambia, maize production in 2001 declined by a quarter from the previous year mainly due to excessive rains and flooding, coupled with drought in southern parts. As in Malawi, importation of maize is seriously constrained by transport bottlenecks. The Government has also appealed for assistance. The food situation is also serious in the southern provinces of Mozambique, and for vulnerable rural populations in Lesotho, Swaziland and Namibia affected by poor harvests last year. The situation is set to worsen in several countries in 2002/03 due to anticipated further falls in production this year.

In eastern Africa, the overall food supply situation has improved considerably compared to last year mainly due to favourable weather conditions. Grain surpluses in many areas have resulted in record low prices, severely affecting farm incomes and raising concerns over possible reductions in plantings next season. Nevertheless, acute food shortages persist in most pastoral areas of Somalia, Kenya and Ethiopia due to continuing drought conditions. In Eritrea, despite an improved harvest, large numbers of internally displaced people and refugees returning from Sudan depend on food assistance. For the sub-regions as a whole, nearly 11 million people affected by drought and/or conflict continue to depend on food assistance.

In the Great Lakes region, civil strife continues to undermine the food security of millions of people. In the Democratic Republic of Congo, the food situation of over 2 million internally displaced people continues to be of serious concern. Access to this population remains problematic, particularly in rebel-held areas where provision of relief assistance is hampered by insecurity. Elsewhere in the Great Lakes region, the food supply situation has significantly improved in Rwanda and Burundi following two successive good harvests. However, in the latter country the security situation remains volatile in some provinces, with frequent surges in violence displacing rural populations and disrupting food production.

In western Africa, the food outlook for 2002 is generally favourable, following above-average to record harvests in the Sahelian countries and satisfactory crops elsewhere. However, the food supply situation is tight in Mauritania where the harvest was below average. The situation was worsened by unseasonable heavy rains and floods last January that left hundreds of people homeless and killed an estimated 120 000 livestock. In Liberia, a resurgence of civil strife has led to fresh population displacements, with thousands of people fleeing their homes to seek safety elsewhere in the country or in neighbouring countries. In Sierra Leone, despite an improvement in the security situation, full recovery in food production is unlikely in the immediate term. These two countries will continue to rely on international food assistance for some time to come.

Sub-Saharan Africa's cereal import requirements are set to remain high in 2002, reflecting mainly the anticipated sharp drop in cereal production in southern Africa. For 2001/02, cereal import requirements of sub-Saharan Africa have been estimated at 15.9 million tonnes, including 1.7 million tonnes of food aid.

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PART I: OVERVIEW

The food outlook for sub-Saharan Africa in 2002 is generally mixed. In eastern and western Africa better cereal harvests have improved the overall food outlook, while in southern Africa the outlook is bleak due to a sharp drop in the 2001 maize harvests coupled with anticipated falls in this year's cereal production in nearly all the countries of the sub-region.

SEVERE FOOD SHORTAGES EMERGE IN SOUTHERN AFRICA

The tight food supply situation in most countries of southern Africa, following sharp falls in cereal production in 2001 due to prolonged dry spells, floods and disruption of farming activities, is set to deteriorate with the anticipated fall in cereal production for the second year running. In February 2002, FAO's Global Information and Early Warning System issued a Special Alert warning of impending serious food shortages threatening the lives of some 4 million people in the sub-region.

In **Zimbabwe**, the food supply situation is extremely tight as a result of the poor cereal harvest last year, delays in importing maize and the general economic and financial crisis prevailing in the country. Against Government plans since November 2001 to import 200 000 tonnes of maize, only 80 000 tonnes had arrived in the country by late March, mainly due to the country's severe shortage of foreign exchange. The Government has appealed for international food assistance. WFP has pledged close to US\$60 million to provide 94 000 tonnes of cereals to some 558 000 rural and urban people facing acute food shortages until November 2002. However, by late March pledges covered 30 percent of the requirement and only 5 000 tonnes had arrived to the country.

The outlook for the country's food security is bleak. The 2002 maize harvest is expected to be poor as last year due to reduced plantings and severe dry weather. The depletion of official maize reserves and the continuing deterioration of the economic situation point to a looming food security crisis in 2002/03. An FAO/WFP Crop and Food Supply Assessment Mission is scheduled to visit the country from 23 April to 11 May 2002 to assess the food situation and estimate food import requirements, including food aid needs, for 2002/03 marketing year (April/March).

In **Malawi**, the Government has declared a state of emergency in the country and has appealed to the international community for food assistance to avert famine. This is the result of a poor harvest in 2001, the depletion of the strategic grain reserve and late planning of maize imports. Deaths by starvation and acute nutritional problems have been reported. Against planned maize imports by the Government of 150 000 tonnes only 83 000 tonnes had arrived in the country by the end of March, mainly due to transport constraints. Prices of maize have increased several fold, curtailing access to food for large sections of the population. WFP is distributing relief food to the most affected households.

Prospects for this year's cereal harvest have deteriorated following a prolonged dry spell, with maize production likely to be reduced for the second consecutive year. Widespread consumption of maize in green form due to severe hunger will also reduce domestic maize supply in 2002/03 marketing year (April/March). An FAO/WFP Crop and Food Supply Assessment Mission will visit the country from 22 April to 10 May 2002 for the same purpose as for Zimbabwe.

In **Zambia**, the food supply situation is also extremely tight as a result of a poor cereal crop last season and delays in importing maize. Out of planned imports of 150 000 tonnes of maize, only about 60 percent is expected to have arrived in the country by the end of April, the close of the current marketing year. Prices of maize meal are at extremely high levels, seriously restricting access to food for large sections of the population. The Government has appealed for international food assistance for 2 million people in districts declared to be in a state of emergency. WFP started relief food distribution in late January, and pledges until the end of March covered 60 percent of the requirement. However, only some 20 000 tonnes are expected to be distributed before the next harvest.

Prospects for this year's cereal harvest are poor. A prolonged dry spell in the southern parts since late January is reckoned to have seriously reduced yields over large growing areas. An FAO/WFP Crop and Food Supply Assessment Mission is scheduled to visit the country from 6 to 24 May 2002.

In **Mozambique**, the food situation continues to be serious in the southern provinces of Maputo, Gaza and Inhambane, where the 2001 cereal harvest was significantly reduced. Emergency food assistance is being

provided to 172 000 vulnerable people in these provinces. Recent estimates indicate that as a result of a severe dry spell, 40 000 households have lost over 60 percent of the expected production. This will be the third consecutive reduced harvest for these provinces.

An FAO/WFP Crop and Food Supply Assessment Mission is scheduled to visit the country from 22 April to 10 May 2002.

In **Lesotho**, the food supply situation is also tight due to reduced cereal production in 2001 and commercial imports falling short of requirements. Food reserves are at a minimum and food shortages are being experienced by vulnerable households affected by last year's poor harvest. Relief agencies are distributing food to 36 000 most affected people. The situation is likely to worsen with the deterioration of prospects for the 2002 cereal harvest, following persistent heavy rains in recent months. Production is forecast to be below average for the third consecutive year. An FAO/WFP Crop and Food Supply Assessment Mission is scheduled to visit the country from 25 April to 4 May 2002.

In **Swaziland**, prospects for this year's cereal harvest have deteriorated as a result of a severe mid-season dry spell that adversely affected yields. This would be the third consecutive year of a below-average harvest. The food supply situation is very tight, reflecting last year's poor harvest and imports falling short of requirements. The Government is providing some food relief to vulnerable households most affected by successive poor harvests. An FAO/WFP Crop and Food Supply Assessment Mission is scheduled to visit the country from 15 to 24 April 2002.

Elsewhere in the sub-region, the food situation remains precarious in Angola, due to the long-running civil conflict, and in Namibia due to a reduced harvest last year. In Madagascar, marketing of food and non-food commodities is being adversely affected by the current political crisis. By contrast, prospects for the 2002 maize crop in South Africa, the largest producer and exporter in the sub-region, are favourable and production is anticipated to recover from last year's below average level.

IMPROVED FOOD SUPPLY SITUATION IN EASTERN AFRICA BUT DIFFICULTIES PERSIST IN PARTS

Despite improved cereal harvests in 2001/02 in most parts of eastern Africa, the effects of recent devastating droughts and past or ongoing conflicts continue to undermine the food security of an estimated 11 million people.

In **Eritrea**, despite a strong recovery in grain production during in the 2001 main cropping season, the food situation of large numbers of people affected by the recent war with neighbouring Ethiopia and drought remains precarious. Overall, nearly 1.3 million people continue to depend on emergency food assistance. Continuing drought conditions in parts of Anseba, Debub, Northern Red Sea, and Southern Red Sea zones, are also cause for concern.

In **Ethiopia**, a bumper main season grain harvest late last year preceded by a favourable short rains ("belg") crop have significantly improved the food supply outlook for 2002. An FAO/WFP Crop and Food Supply Assessment Mission in December 2001 forecast a main season ("meher") cereal and pulse harvest of 12.3 million tonnes, about 9 percent above the average for the previous five years. Consequently, cereal market prices have fallen sharply in main producing areas, resulting in severe financial difficulties for farmers. However, despite the satisfactory harvest, an estimated 5.2 million people face severe food shortages and need food assistance. Unseasonable migration of people and livestock is reported in the pastoral areas in the south-eastern parts due to persistent drought.

In **Kenya**, overall food supply has improved considerably following favourable rains in major cereal producing areas. However, a sharp decline in maize prices is negatively impacting on farmers' incomes. In northern and eastern areas, hopes of recovery for pastoralists from the effects of the recent devastating drought have once again been dashed by insufficient rains during the current season.

In **Somalia**, despite the recently harvested better than expected secondary ("Deyr") season cereal crop, up to 500 000 people are threatened by severe food shortages. Poor 2001 main ("Gu") season crops coupled with slow recovery from a succession of droughts in recent years and long-term effects of years of insecurity have undermined households' ability to withstand shocks. The continuing ban on livestock imports from eastern Africa by countries along the Arabian Peninsula has sharply reduced foreign exchange earnings and severely curtailed the country's import capacity.

In **Sudan**, food supply is generally adequate following a good 2001 main season cereal crop in both southern and northern parts of the country. Bumper harvests in central and north-eastern parts have led to a sharp decline in prices, adversely affecting farmers. By contrast, several zones in southern Sudan, particularly in Western and Eastern Equatoria and Bahr el Ghazal, face severe food shortages mainly due to population displacement and insecurity. In addition, parts of Greater Darfur and Kordofan in western Sudan have suffered crop failures due to erratic rainfall. Large numbers of people in these areas are expected to depend on emergency food assistance until the next harvest.

In **Tanzania**, the food supply situation is generally stable. However, prices of maize continue to rise in the south due to increased, largely informal, exports to neighbouring countries (Malawi, Zambia, Democratic Republic of Congo) which are facing serious food shortages. Price increases are also observed in the east coast and northern parts due to reduced "vuli" season harvests.

In **Uganda**, the overall food supply situation is favourable following recent good harvests and improved pastures. However, food difficulties persist in parts of Katakwi and Moroto Districts, due to localised drought conditions and/or insecurity.

FOOD SITUATION IN DRC REMAINS PRECARIOUS WHILE OUTLOOK IMPROVES ELSEWHERE IN THE GREAT LAKES REGION

In the **Democratic Republic of Congo**, economic and agricultural activities continue to be disrupted by the persistent civil war and consequent population displacements. The food and nutritional situation of over 2 million internally displaced people, particularly in north-eastern parts, and of over 330 000 refugees from neighbouring countries, is cause for serious concern. It has been estimated that about 64 percent of the people in the eastern provinces are undernourished. Overall, poverty is reported to have reached very high levels, with 16 million people or one-third of the country's population estimated to be seriously food insecure. While access to government-controlled regions has improved as a result of simplification of procedures for international agencies, distribution of humanitarian assistance in rebel-held areas remains constrained by insecurity and violence.

In **Burundi**, the overall food situation has improved following a satisfactory 2002 first season harvest, particularly of non-cereal crops. This reflects a relatively better security situation in most of the country and generally favourable weather during the growing season. Prices of staples in the main provincial markets have declined significantly compared to their levels a year ago. However, production was constrained by insecurity in eastern provinces and parts of Bujumbura Rural.

Despite the peace agreement reached in mid-2000, the security situation remains volatile in these provinces. Heavy fighting between government forces and rebel groups in March resulted in the displacement of large numbers of people, and it is estimated that as many as 80 000 civilians have been displaced since January 2002.

In **Rwanda**, the overall food supply situation has improved significantly as a result of a one-third increase in the 2002 first season harvests. Markets are well supplied with food staples.

Food prices, which were at their lowest levels since 1994, declined further with the arrival of the new harvest into the markets last January and have since then stabilized. Nevertheless, despite the satisfactory food supply situation, many households remain food insecure, particularly in the provinces of Gikongoro, Butare and Gisenyi.

OVERALL FOOD SUPPLY SITUATION SATISFACTORY IN WESTERN AFRICA BUT DIFFICULTIES PERSIST IN PARTS

In the nine **Sahelian** countries, the 2001 aggregate cereal production has been estimated at a record 11.7 million tonnes, some 26 percent higher than in 2000 and about 20 percent above the average of the previous five years. Records crops were harvested in Burkina Faso, Gambia and Niger, while Chad, Mali and Senegal harvested above average crops. Production in Cape Verde was lower than in the previous year but above average. However, in early January, unseasonably heavy rains and cold weather affected parts of the sub-region, causing some loss of life and leaving thousands of people homeless, especially in Senegal and Mauritania.

Following the good harvests, the food outlook for 2002 is generally favourable. Households are expected to replenish their stocks, which had been depleted in some countries. However, access to food for some sections of the population may be difficult as above-normal grain prices have been reported in some countries due to flooding or drought. In Mauritania, a joint FAO/CILSS Crop Assessment Mission in October 2001 estimated aggregate cereal production in 2001 at some 160 000 tonnes, lower than the previous year and below average. This decrease was mostly due to inadequate availability of irrigation water. The resulting tight food supply situation has been worsened by the unseasonably heavy rains and cold weather in January which affected the regions of Brakna, Trarza and Gorgol, causing casualties and leaving thousands of people homeless and more than 120 000 head of livestock dead. Prices of cereals, which were already higher than a year ago, have risen considerably in most local markets.

In **Liberia**, the 2001 paddy crop is estimated slightly above the 144 000 tonnes produced in the previous year, reflecting generally favourable weather. However, the general security situation has deteriorated in recent months compelling the Government to declare a state of emergency on 8 February 2002. About 60 000 IDPs have been reported around Monrovia and in Bong County nearby, while at least 12 000 Liberian refugees have been registered at the Sierra Leone border town of Jendema. With frequent eruptions of violence and resulting displacement of the farming population, Liberia will continue to depend on international food assistance for the foreseeable future. WFP is currently assisting 75 000 IDPs throughout the country.

In **Sierra Leone**, cereal production in 2001 has been estimated at 348 000 tonnes, higher than the previous year, reflecting increased plantings by returning refugees and farmers previously displaced, as well as improved conditions for the distribution of agricultural inputs. The security situation is reported to be relatively calm. Over 47 000 ex-combatants, including hundreds of child soldiers, have handed in their weapons, and on 18 January the President declared the end of the disarmament process. However, Sierra Leone will continue to depend on international food assistance for some time until full recovery in food production can be realized.

In **Guinea**, the overall food supply situation is favourable following satisfactory harvests in 2000 and 2001. Aggregate 2001 cereal production is officially estimated at 1 026 000 tonnes, slightly lower than in the previous year but above average. Markets are well supplied, except in the south-east where recurrent rebel incursions from Sierra Leone continue to disrupt agricultural activities. The presence of a large refugee population and the persistent instability in neighbouring countries have exacted a heavy toll on the country. Armed clashes in and around the country have resulted in increasing numbers of internally displaced people. A UN Consolidated Inter-Agency Appeal was launched on 26 November 2001 to assist the country cope with the serious humanitarian situation.

Elsewhere in western Africa, the food supply situation is satisfactory, notwithstanding localized food deficits, such as in northern Ghana.

UPDATE ON FOOD AID PLEDGES AND DELIVERIES

With improved cereal harvests in parts, cereal import requirements in sub-Saharan Africa in 2001/02 are expected to be lower than last year but still remain high. This reflects mainly the anticipated poor crop in southern Africa in 2002 coupled with last year's significantly reduced crop. GIEWS latest estimates of 2001 cereal production and 2001/02 import and food aid requirements are summarized in Table 1. Total food aid requirement is estimated at 1.7 million tonnes, about some 36 percent less than in 2000/01. Cereal food aid pledges for 2001/02, including those carried over from 2000/01, amount to 0.9 million tonnes of which 0.8 million tonnes have so far been delivered.

AREAS OF PRIORITY ACTION

The serious food supply situation in several countries of southern Africa gives cause for serious concern. Food production is anticipated to decline for the second consecutive year, mainly due to adverse weather. In eastern Africa, despite improved food supply prospects, the effects of recent severe droughts, coupled with conflicts in parts, are still being felt, with nearly 11 million people in need of food assistance. Furthermore, civil strife continues to disrupt food production in Angola, Burundi, Democratic Republic of Congo, Guinea, Liberia, Sierra Leone, Somalia and Sudan, necessitating food assistance for the affected populations.

Against this background, the attention of the international community is drawn to the following priority areas requiring action:

First, high priority should be given to food assistance for southern African countries facing a looming food crisis, particularly Malawi, Zambia and Zimbabwe, but also Mozambique, Lesotho and Swaziland.

Second, continued food assistance is needed for populations in several countries of sub-Saharan Africa affected by conflict and adverse weather, including Angola, Burundi, DR Congo, Eritrea, Ethiopia, Kenya, Guinea, Liberia, and Sierra Leone, Somalia and Sudan.

Third, donors are urged to give priority to local purchases and triangular transactions wherever possible for their food aid programmes in sub-Saharan Africa in order to support domestic food production.

PART II : POSITION BY SUB-REGION

Harvesting of the 2001/02 cereal crops has started in southern Africa. In eastern Africa, the main season crop is maturing in Tanzania, while elsewhere in the sub-region planting of the main season crops is underway except in Ethiopia, Eritrea and Sudan, where sowing is not due to commence for one or two months. In central Africa and the coastal countries of western Africa planting has started, but in Sahelian countries it will not begin until June.

Cereal Crop Calendar

Sub-Region	Cereal Crops	
	Planting	Harvesting
Eastern Africa ^{1/}	March-June	Aug.-Dec.
Southern Africa	Oct.-Dec.	April-June
Western Africa		
- Coastal areas (first season)	March-April	July-Sept.
- Sahel zone	June-July	Oct.-Nov.
Central Africa ^{1/}	April-June	Aug.-Dec.

^{1/} Except Burundi, Rwanda and the Democratic Republic of Congo which have two main seasons and Tanzania whose main season follows the southern Africa planting calendar. For Sudan, the planting period for the staple coarse grain crop is June-July and the harvesting period is October-December.

In **eastern Africa**, harvesting of the 2001/02 secondary season cereal crops is completed, except in Ethiopia, where the "belg" crops are harvested from June. Latest FAO estimates indicate an aggregate 2001/02 cereal production of 23.3 million tonnes, 13 percent higher than the previous year. In Eritrea, the 2001 cereal crop was much larger than the previous year due to favourable rainfall during the main cropping season. Total cereal output is estimated at 220 000 tonnes, three times higher than the previous year. In Ethiopia, cereal production is forecast at an above-average 8.8 million tonnes. A bumper main "meher" crop was gathered, mainly due to favourable weather. In Kenya, reflecting abundant rains in major cereal producing areas, the aggregate 2001/02 cereal production is provisionally estimated at 3.2 million tonnes, 54 percent and 22 percent above the previous year's crop and the previous five-year average respectively. Planting of this year's main season coarse grains is underway. In Tanzania, there has been an improvement in the recently harvested secondary cereal crop, but the main season harvest was poor due to erratic rains. The aggregate 2001 cereal output is estimated at about 4 million tonnes, about 16 percent above the previous year. Prospects for the 2001/02 main maize crop in the unimodal rainfall areas are favourable, reflecting sufficient rains since the beginning of the season. In Somalia, the output of the recently harvested secondary ("deyr") season cereal crops, forecast at 140 000 tonnes, is significantly above the post-war average, reflecting improved rainfall during the season. However, the main ("Gu") season was below average at 127 000 tonnes. Latest estimates put the aggregate 2001/02 cereal production at 267 000 tonnes, about 17 percent below the previous year. In Sudan, the 2001/02 cereal harvest has recovered from the previous year due to favourable weather, and the output is estimated at about 4.8 million tonnes, about 36 percent above the previous year. Harvesting of the wheat crop is about to start and production is forecast at 315 000 tonnes, 5 percent more than last year. In Uganda, good secondary and main season cereal crops were gathered due to favourable rains. The 2001/02 aggregate cereal output is, therefore, estimated at 1.7 million tonnes, 9 percent above the previous year's crop and 3 percent above the average of the last five years.

The aggregate cereal import requirement of the sub-region in 2001/02 is estimated at 3.9 million tonnes. With commercial imports anticipated at 2.9 million tonnes, the food aid requirement is estimated at 0.96 million tonnes. Against this requirement, pledges as of late March amount to 0.3 million tonnes of which 0.3 million tonnes have been delivered.

In **southern Africa**, prospects for the 2002 cereal crops, to be harvested from April, have deteriorated in several countries following prolonged dry spells in the past month. In Zimbabwe, maize production is anticipated to be below average for the second consecutive year, due to reduced plantings and dry weather. Well below average precipitation in parts of Malawi, Zambia and Swaziland is also likely to result in poor crops this year. In Lesotho, prospects for the cereal harvest have deteriorated following excessive rains. In Mozambique, severe crop losses due to dry weather have been experienced in the southern provinces, and

reduced cereal production is expected. Overall harvest prospects are uncertain due to erratic rains in the main northern and central producing areas. By contrast, food outlook in South Africa is generally favourable following an increase in sown area and adequate precipitation in the main maize producing areas. Maize production is, therefore, expected to recover from a reduced level last year.

In the sub-region as a whole food supply is tight following the sharply reduced maize harvest in 2001 and delayed imports. Maize prices have increased sharply, particularly in Malawi, Zambia and Zimbabwe, where severe food shortages have emerged.

The aggregate cereal import requirement in the 2002/03 marketing year (April/March) is forecast to increase over the high levels of 2001/02, reflecting reduced harvests and depletion of carry-over stocks.

In **western Africa**, seasonably dry conditions prevail in the Sahel while the growing season is starting in the countries along the Gulf of Guinea. Reflecting generally favourable growing conditions, particularly from June to August 2001, above average to record crops have been gathered in all Sahelian countries except Mauritania. The 2001 rainy season started generally on time and rains were regular and well-distributed throughout the rainy season. FAO/CILSS Crop Assessment Missions in the 9 CILSS member countries estimated aggregate 2001 cereal production (including rice in paddy terms) at 11.7 million tonnes, with record crops in Burkina Faso, Gambia and Niger, and above average crops in Chad, Mali and Senegal. Production in Cape Verde was lower than the previous year but above average.

In the coastal countries along the Gulf of Guinea, the rainy season has just started and planting of the first maize crop is in progress. Cereal harvests in 2001 were generally good except in Liberia and Sierra Leone where past or current civil strife hampered agricultural activities, and in northern Ghana where unusually dry weather conditions affected crop production. Liberia and Sierra Leone remain heavily dependent on international food assistance.

Cereal import requirements of the sub-region in 2001/02 is estimated at 7.3 million tonnes. Anticipated commercial imports are estimated at 6.9 million tonnes and the food aid requirement at 0.4 million tonnes mainly in wheat and rice. Food aid pledges reported to GIEWS as of late March 2002 amount to around 0.2 million tonnes, of which 150 000 tonnes have been delivered so far. Local purchases are strongly recommended to cover ongoing or foreseen food aid programmes or for the replenishment of the national security stocks.

LOCUST SITUATION

The Desert Locust situation has remained generally calm. Insignificant numbers of adults were reported in parts of northwestern Mauritania and Niger, and on the Red Sea coast of Sudan and Eritrea.

Although very little rain fell in February, breeding conditions are likely to be favourable in southwestern Mauritania due to the unseasonable rains in January. Scattered adults have been reported near Arlit in Niger. There were also reports of a few maturing locusts at Aguelhok in Mali. No significant changes in the current situation are anticipated in the months ahead.

In Sudan scattered adults mixed with African Migratory Locust persisted in a few places in the Tokar delta on the Red Sea coast, while in Eritrea, scattered hoppers are reported on the northern coastal plains. Elsewhere the situation remains calm.

In **central Africa**, crop prospects are generally favourable in Central African Republic and Cameroun, where aggregate cereal output is anticipated to be average or above average. Agriculture is steadily recovering in the Republic of Congo following civil conflict in 1998 and 1999. However, persistent civil strife in the Democratic Republic of Congo continues to hamper agricultural and marketing activities.

For the 2001/02 marketing year, the cereal import requirement for the seven countries of the sub-region is estimated at 826 000 tonnes. Food aid pledges reported to GIEWS as of late March amount to 31 000 tonnes, of which 18 000 tonnes have been delivered.

The table below summarises sub-Saharan Africa's cereal import and food aid requirements by sub-region.

Sub-Saharan Africa: Cereal Import and Food Aid Requirements by Sub-Region (in thousand tonnes)

Sub-Region	2001 Production	2001/02 or 2002		
		Cereal import requirements	Anticipated commercial imports	Food aid Requirements
Eastern Africa	23 291	3 878	2 920	958
Southern Africa	19 269	3 918	3 586	332
Western Africa	38 497	7 299	6 911	388
Central Africa	2 844	826	780	46
TOTAL	83 901	15 921	14 197	1 724

Table 1: Cereal Imports and Food Aid Requirements in Sub-Saharan Africa, 2001/2002 or 2002 (in thousand tonnes)

Sub-Region/ Country	Marketing year	2001 Cereal production 1/		2000/01 or 2001 imports			Position for 2001/02 or 2002						
		Total	As % of average of previous 5 years	Total imports	As % of average of previous 5 years	Food aid	Cereal import require- ment 2/	Antici- pated commer- cial imports	Food aid require- ment	Commer- cial imports already made or contracted	Food aid		
											Pledges 3/	of which received so far	Uncov. food aid require- ments
Eastern Africa		23 291	107	6 121	155	1 826	3 878	2 920	958	276	328	306	664
Burundi	Jan./Dec.	232	89	110	222	46	61	41	20	-	3	3	17
Comoros	Jan./Dec.	6	100	46	103	-	46	46	-	-	-	-	-
Djibouti	Jan./Dec.	-	-	68	77	9	63	55	8	-	10	10	-
Eritrea	Jan./Dec.	220	108	335	143	270	140	75	65	-	21	21	45
Ethiopia 4/	Jan./Dec.	8 827	105	883	142	845	295	125	170	-	11	11	159
Kenya	Oct./Sept.	3 205	122	2 046	159	348	1 045	775	270	87	108	108	162
Rwanda	Jan./Dec.	236	117	175	71	31	170	100	70	-	2	2	68
Seychelles	Jan./Dec.	-	-	13	102	-	13	13	-	-	-	-	-
Somalia	Aug./July	267	100	241	93	34	320	250	70	0.4	17	12	53
Sudan	Nov./Oct.	4 745	112	1 548	240	158	1 270	1 130	140	-	22	11	118
Tanzania	June/May	3 816	100	543	147	33	330	250	80	188	112	107	-
Uganda	Jan./Dec.	1 737	103	113	117	52	125	60	65	-	23	23	42
Southern Africa		19 269	87	4 368	97	422	3 918	3 586	332	1 991	365	365	8
Angola	April/March	538	103	553	112	201	581	405	176	347	169	169	7
Botswana	April/March	12	32	255	120	-	267	267	-	120	-	-	-
Lesotho	April/March	159	83	228	118	3	181	178	3	178	3	3	-
Madagascar	April/March	1 938	104	396	240	26	205	198	7	56	29	29	-
Malawi	April/March	1 812	85	39	23	27	125	118	7	118	7	7	-
Mauritius	Jan./Dec.	2	100	290	108	-	248	248	-	-	-	-	-
Mozambique	April/March	1 518	100	427	132	156	499	387	112	274	132	132	-
Namibia	May/April	107	100	82	78	1	135	135	-	79	0.4	0.4	-
South Africa	May/April	10 279	85	1 790	96	-	1 226	1 226	-	395	-	-	-
Swaziland	May/April	74	62	87	120	-	78	77	1	77	1	1	-
Zambia	May/April	971	80	76	23	3	183	162	21	162	20	20	1
Zimbabwe	April/March	1 859	77	144	46	4	190	185	5	185	5	5	-
Western Africa		38 497	108	9 202	145	378	7 299	6 911	388	578	204	150	186
Coastal countries		27 298	104	6 581	154	176	5 225	5 012	213	480	94	88	119
Benin	Jan./Dec.	884	101	127	98	14	114	100	14	-	12	8	2
Côte d'Ivoire	Jan./Dec.	1 409	116	1 384	183	6	1 025	1 020	5	53	3	3	2
Ghana	Jan./Dec.	1 523	92	522	115	54	461	372	89	17	35	33	54
Guinea	Jan./Dec.	763	106	348	93	33	330	300	30	-	18	18	12
Liberia	Jan./Dec.	94	82	204	98	16	210	180	30	2	6	6	24
Nigeria	Jan./Dec.	21 720	104	3 629	183	-	2 770	2 770	-	408	-	-	-
Sierra Leone	Jan./Dec.	224	97	277	112	47	225	185	40	0.3	20	20	20
Togo	Jan./Dec.	681	102	91	70	6	90	85	5	-	-	-	5
Sahelian countries		11 199	121	2 621	126	202	2 074	1 899	175	99	110	62	67
Burkina Faso	Nov./Oct.	2 762	115	236	139	19	171	148	23	-	13	12	10
Cape Verde	Nov./Oct.	19	136	91	102	50	93	45	48	-	39	16	9
Chad	Nov./Oct.	1 202	116	103	135	34	68	55	13	-	1	1	12
Gambia	Nov./Oct.	186	151	164	144	1	123	119	4	3	3	3	1
Guinea-Bissau	Nov./Oct.	134	106	53	69	7	70	60	10	-	6	6	4
Mali	Nov./Oct.	2 597	117	115	102	7	90	85	5	-	1	1	4
Mauritania	Nov./Oct.	141	100	313	104	33	269	242	27	89	4	4	23
Niger	Nov./Oct.	3 132	133	652	181	30	345	315	30	-	32	8	-
Senegal	Nov./Oct.	1 026	120	895	114	22	845	830	15	7	11	11	4
Central Africa		2 844	99	898	41	75	826	780	46	8	31	18	18
Cameroon	Jan./Dec.	1 242	101	325	123	6	300	298	2	-	1	1	1
Cent.Afr.Rep.	Jan./Dec.	136	99	33	96	1	38	37	1	-	-	-	1
Congo, Dem. Rep of	Jan./Dec.	1 429	96	248	98	29	250	225	25	8	25	13	-
Congo, Rep. of	Jan./Dec.	4	100	182	137	34	125	110	15	-	-	-	15
Equat. Guinea	Jan./Dec.	-	-	18	154	2	15	14	1	-	-	-	1
Gabon	Jan./Dec.	32	103	82	103	-	88	88	-	0.2	-	-	-
Sao Tome	Jan./Dec.	1	-	11	106	5	10	8	2	-	5	5	-
TOTAL		83 901	102	20 589	132	2 701	15 921	14 197	1 724	2 854	928	839	877

Note : Totals computed from unrounded data.

Table 2: Utilization of 2001/02 or 2002 Cereal Surpluses in Sub-Saharan Africa (in thousand tonnes)

Sub-Region/ Country	Cereal import requirement		Total availabilities for export and/or local purchases	of which local purchase require- ment	Surpluses utilized or committed so far			Remain- ing surpluses
	Wheat and rice	Coarse grains			Donor financed local purchases	Exports		
						Commer- cial	Trian- gular trans- actions 1/	
Eastern Africa	2 829	1 049	1 092	432	43	-	3	1 046
Burundi	26	35	-	-	-	-	-	-
Comoros	46	-	-	-	-	-	-	-
Djibouti	60	3	-	-	-	-	-	-
Eritrea	105	35	2	2	2	-	-	-
Ethiopia 2/	275	20	350	200	-	-	-	350
Kenya	645	400	110	100	4	-	1	105
Rwanda	25	145	-	-	-	-	-	-
Seychelles	7	6	-	-	-	-	-	-
Somalia	200	120	-	-	-	-	-	-
Sudan	1 180	90	400	100	10	-	-	390
Tanzania	200	130	150	30	27	-	2	121
Uganda	60	65	80	-	-	-	-	80
Southern Africa	1 927	1 991	1 670	45	45	1 018	55	552
Angola	357	224	5	5	5	-	-	-
Botswana	70	197	-	-	-	-	-	-
Lesotho	53	128	3	3	3	-	-	-
Madagascar	192	13	2	2	2	-	-	-
Malawi	37	88	16	16	16	-	-	-
Mauritius	228	20	-	-	-	-	-	-
Mozambique	367	132	162	12	12	-	-	150
Namibia	60	75	2	2	2	-	-	-
South Africa	350	876	1 450	-	-	1 018	55	377
Swaziland	40	38	-	-	-	-	-	-
Zambia	68	115	30	5	5	-	-	25
Zimbabwe	105	85	-	-	-	-	-	-
Western Africa	6 849	450	441	65	16	-	-	425
Coastal countries	5 036	189	220	-	-	-	-	220
Benin	112	2	55	-	-	-	-	55
Côte d'Ivoire	1 020	5	10	-	-	-	-	10
Ghana	379	82	25	-	-	-	-	25
Guinea	325	5	-	-	-	-	-	-
Liberia	200	10	-	-	-	-	-	-
Nigeria	2 700	70	130	-	-	-	-	130
Sierra Leone	210	15	-	-	-	-	-	-
Togo	90	-	-	-	-	-	-	-
Sahelian countries	1 813	261	221	65	16	-	-	205
Burkina Faso	170	1	65	20	1	-	-	64
Cape Verde	53	40	-	-	-	-	-	-
Chad	68	-	40	20	1	-	-	39
Gambia	122	1	-	-	-	-	-	-
Guinea-Bissau	70	-	-	-	-	-	-	-
Mali	90	-	85	10	4	-	-	81
Mauritania	240	29	1	-	-	-	-	1
Niger	175	170	25	10	6	-	-	19
Senegal	825	20	5	5	4	-	-	1
Central Africa	743	83	5	-	-	-	-	5
Cameroon	290	10	5	-	-	-	-	5
Cent.Afr.Rep.	35	3	-	-	-	-	-	-
Congo, Dem.Rep.of	190	60	-	-	-	-	-	-
Congo, Rep. of	120	5	-	-	-	-	-	-
Equat.Guinea	15	-	-	-	-	-	-	-
Gabon	85	3	-	-	-	-	-	-
Sao Tome	8	2	-	-	-	-	-	-
TOTAL	12 348	3 573	3 208	542	104	1 018	58	2 029

Note: Totals computed from unrounded data.

1/ Referring to supplying countries

2/ Includes refugee needs.

Table 3 - Triangular Transactions within Sub-Saharan Africa in 2001/02 or 2002
(in thousand tonnes) 1/

Donor	Source of supply	Recipient Country	Total by donor
EC	Côte d'Ivoire South Africa	Burkina Faso (0.5) Angola (8.2)	8.7
NGOs	Kenya	Somalia (0.3)	0.3
WFP	Kenya South Africa	Somalia (0.7), Angola (3.1), Congo, Dem. Rep. (0.4), Madagascar (0.7), Somalia (3.4), Tanzania (4.4), Zambia (12.0)	24.7
TOTAL			33.7

1/ Based on information reported by donors to GIEWS as of late March 2002.

Table 4 - Local Purchases within Sub-Saharan Africa in 2001/02 or 2002
(in thousand tonnes) 1/

Donor	Recipient Country	Total by donor
EC	Mali (0.8), Sudan (1.5)	2.3
Germany	Kenya (0.6), Malawi (1.5), Sudan (0.1)	2.2
Iran, Isl. Rep. of	Niger (0.5)	0.5
NGOs	Niger (2.4),	2.4
Netherlands	Niger (0.7)	0.7
WFP	Angola (5.2), Burkina Faso (1.0), Chad (0.8), Eritrea (1.7) Kenya (3.1), Lesotho (2.7), Madagascar (2.3), Malawi (14.6) Mali (3.6), Mozambique (11.8), Namibia (2.3), Niger (2.5), Senegal (3.8), Sudan (8.4), Tanzania (26.7), Uganda (0.4), Zambia (4.9), Zimbabwe (0.3)	96.1
TOTAL		104.2

1/ Based on information reported by donors to GIEWS as of late March 2002.

**Table 5: Availabilities for Export and Local Purchase Requirements in Cereals in Sub-Saharan Africa
in 2001/02 or 2002 (in thousand tonnes)**

Sub-Region / Country	Availabilities for export		Local Purchase Requirements	
	Total	Contracted so far	Total	Utilized so far
Eastern Africa	660	3	432	43
Eritrea	-	-	2	2
Ethiopia	150	-	200	-
Kenya	10	1	100	4
Sudan	300	-	100	10
Tanzania	120	2	30	27
Uganda	80	-	-	-
Southern Africa	1 625	1 073	45	45
Angola	-	-	5	5
Lesotho	-	-	3	3
Madagascar	-	-	2	2
Malawi	-	-	16	16
Mozambique	150	-	12	12
Namibia	-	-	2	2
South Africa	1 450	1 073	-	-
Zambia	25	-	5	5
Western Africa	376	-	65	16
Coastal countries	220	-	-	-
Benin	55	-	-	-
Côte d'Ivoire	10	-	-	-
Ghana	25	-	-	-
Nigeria	130	-	-	-
Sahelian countries	156	-	65	16
Burkina Faso	45	-	20	1
Chad	20	-	20	1
Mali	75	-	10	4
Mauritania	1	-	-	-
Niger	15	-	10	6
Senegal	-	-	5	4
Central Africa	5	-	-	-
Cameroon	5	-	-	-
TOTAL	2 666	1 076 1/	542	104

Note: Totals computed from unrounded data.

1/ Includes 1 018 000 tonnes of commercial exports and 58 000 tonnes of triangular transactions.

Table 6: Cereal Food Aid Pledges to Sub-Saharan Africa for 2001/02 or 2002 and Triangular Transactions/Local Purchases known to FAO as of late March 2002 (in thousand tonnes).

Donor	Wheat	Rice	Coarse grains	Total cereals	Of which: triangular	Local purchases
China	-	3.0	-	3.0	-	-
EC	30.6	7.5	24.0	62.1	8.7	5.2
of which:						
Community action	19.3	3.9	0.6	23.8	8.7	2.3
National action	11.3	3.6	23.4	38.3	-	2.9
Austria	-	-	3.2	3.2	-	-
Belgium	-	1.9	-	1.9	-	-
France	3.3	-	2.0	5.3	-	-
Germany	-	-	12.7	12.7	-	2.2
Italy	-	1.7	-	1.7	-	-
Luxembourg	8.0	-	-	8.0	-	-
Netherlands	-	-	5.5	5.5	-	0.7
Egypt	0.1	-	-	0.1	-	-
Iran, Islamic Rep. of	-	-	-	-	-	0.5
Japan	-	185.2	3.0	188.2	-	-
Libyan Arab Jamahiriya	4.3	4.3	-	8.6	-	-
NGOs	0.6	-	5.3	5.9	0.3	2.4
Pakistan	-	1.1	-	1.1	-	-
Qatar	1.2	1.1	-	2.3	-	-
United States	160.0	15.0	47.4	222.4	-	-
World Food Programme	49.1	30.0	354.8	433.9	24.7	96.1
TOTAL	245.9	247.2	434.5	927.6	33.7	104.2

Note: Totals computed from unrounded data

Table 7: Food Aid Pledges in Cereals for 2001/02 or 2002 by Donor and by Recipient (in thousand tonnes)

Donor/Recipient	Total	delivered	China	EC	Japan	NGOs	U.S.A.	WFP	Others
Eastern Africa	327.6	306.4	-	14.1	37.2	0.3	54.8	221.2	-
Burundi	2.7	2.7	-	2.7	-	-	-	-	-
Comoros	-	-	-	-	-	-	-	-	-
Djibouti	9.9	9.9	-	-	-	-	-	9.9	-
Eritrea	20.5	20.5	-	-	-	-	-	20.5	-
Ethiopia 1/	11.1	11.1	-	-	-	-	2.3	8.8	-
Kenya	108.2	108.2	-	0.4	-	0.3	35.0	72.5	-
Rwanda	2.1	2.1	-	-	-	-	-	2.1	-
Seychelles	-	-	-	-	-	-	-	-	-
Somalia	16.5	11.5	-	-	-	-	5.5	11.0	-
Sudan	21.8	10.8	-	11.0	-	-	7.7	3.1	-
Tanzania	111.9	106.9	-	-	37.2	-	-	74.7	-
Uganda	22.9	22.7	-	-	-	-	4.3	18.6	-
Southern Africa	365.0	365.0	-	24.5	84.2	3.2	110.7	142.4	-
Angola	168.9	168.9	-	17.8	38.4	0.4	13.1	99.2	-
Botswana	-	-	-	-	-	-	-	-	-
Lesotho	2.8	2.8	-	-	-	2.8	-	-	-
Madagascar	28.6	28.6	-	5.4	9.9	-	7.3	6.0	-
Malawi	6.6	6.6	-	1.3	-	-	5.3	-	-
Mauritius	-	-	-	-	-	-	-	-	-
Mozambique	131.9	131.9	-	-	32.9	-	85.0	14.0	-
Namibia	0.4	0.4	-	-	-	-	-	0.4	-
South Africa	-	-	-	-	-	-	-	-	-
Swaziland	1.2	1.2	-	-	-	-	-	1.2	-
Zambia	19.6	19.6	-	-	3.0	-	-	16.6	-
Zimbabwe	5.0	5.0	-	-	-	-	-	5.0	-
Western Africa	204.0	149.5	3.0	22.4	62.0	2.4	56.9	45.2	12.1
Coastal countries	93.8	87.8	-	-	32.1	0.4	29.6	31.7	-
Benin	12.0	7.7	-	-	7.7	-	4.3	-	-
Côte d'Ivoire	2.6	2.6	-	-	-	-	-	2.6	-
Ghana	35.1	33.4	-	-	10.6	-	23.7	0.8	-
Guinea	18.0	18.0	-	-	13.8	-	-	4.2	-
Liberia	6.4	6.4	-	-	-	0.4	1.6	4.4	-
Nigeria	-	-	-	-	-	-	-	-	-
Sierra Leone	19.7	19.7	-	-	-	-	-	19.7	-
Togo	-	-	-	-	-	-	-	-	-
Sahelian countries	110.2	61.7	3.0	22.4	29.9	2.0	27.3	13.5	12.1
Burkina Faso	12.7	11.8	-	0.9	8.0	-	3.8	-	-
Cape Verde	39.3	16.1	-	20.6	5.4	-	13.0	0.3	-
Chad	1.3	1.3	-	-	-	-	-	1.3	-
Gambia	3.4	3.4	-	-	-	-	-	3.4	-
Guinea-Bissau	5.7	5.7	3.0	0.6	-	-	-	2.1	-
Mali	0.9	0.6	-	0.3	-	-	0.6	-	-
Mauritania	3.7	3.7	-	-	-	-	2.1	1.6	-
Niger	32.1	8.0	-	-	7.2	2.0	7.8	3.0	12.1 2/
Senegal	11.1	11.1	-	-	9.3	-	-	1.8	-
Central Africa	31.0	18.3	-	1.1	4.8	-	-	25.1	-
Cameroon	0.9	0.9	-	-	-	-	-	0.9	-
Cent.Afr.Rep.	-	-	-	-	-	-	-	-	-
Congo, Dem.Rep.of	25.3	12.6	-	1.1	-	-	-	24.2	-
Congo, Rep.of	-	-	-	-	-	-	-	-	-
Equat. Guinea	-	-	-	-	-	-	-	-	-
Gabon	-	-	-	-	-	-	-	-	-
Sao Tome	4.8	4.8	-	-	4.8	-	-	-	-
TOTAL	927.6	839.2	3.0	62.1	188.2	5.9	222.4	433.9	12.1

1/ Includes refugee needs.

2/ Includes 8.6 from Libya, 1.1 from Pakistan, 2.3 from Qatar, 0.1 from Egypt.

**PART III : CROP PROSPECTS AND FOOD SUPPLY POSITION
IN INDIVIDUAL COUNTRIES**

(situation as of late March 2002)

ANGOLA

Area:	1 247 000 sq.km
Climate:	Coastal desert, south-west semi-arid, rest tropical wet-dry. Rainy season: Sept.-May
Population:	13.76 million (2001 estimate), G.N.P. per caput US\$240 (2000)
Specific characteristics of the country:	Low-income food-deficit country; infrastructure devastated by prolonged civil strife
Logistics:	Inadequate port, rail and road facilities
Major foodcrops:	Roots, tubers, maize, plantains
Marketing year:	April/March; Lean season: January-April
Share of cereals in total calorie intake:	35 percent

CURRENT SITUATION

Abundant rains during the growing season have benefited development of the 2002 cereal and non-cereal foodcrops. However, despite favourable crop conditions, this year's production will continue to be affected by reduced plantings as a result of insecurity at sowing time.

After 27 years of civil war, a cease-fire agreement has been signed in early April between the Government and rebel groups. Distribution of food aid to large number of internally displaced and vulnerable population has improved with the better peace prospects and the de-escalation of the military conflict in many parts of the country. The opening of roads previously closed due to insecurity has also allowed a significant decrease of the costly airlift operations.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	5	7	510	522
Previous five years average imports	266	95	177	538
<u>2001/02 Domestic Availability</u>	<u>30</u>	<u>10</u>	<u>528</u>	<u>568</u>
2001 Production (rice in paddy terms)	5	7	528	540
2001 Production (rice in milled terms)	5	5	528	538
Possible stock drawdown	25	5	-	30
<u>2001/02 Utilization</u>	<u>280</u>	<u>117</u>	<u>752</u>	<u>1 149</u>
Food use	276	114	647	1 037
of which: local purchase requirement	-	-	5	5
Non-food use	4	3	84	91
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	21	21
<u>2001/02 Import Requirement</u>	<u>250</u>	<u>107</u>	<u>224</u>	<u>581</u>
Anticipated commercial imports	250	107	48	405
Food aid needs	-	-	176	176
<u>Current Aid Position</u>				
Food aid pledges	18	38	112	169
of which: delivered	18	38	112	169
Donor-financed purchases	-	-	5	5
of which: for local use	-	-	5	5
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>20</u>	<u>8</u>	<u>47</u>	<u>75</u>
<u>Indexes</u>				
2001 Production as % of average:				103
2001/02 Import requirement as % of average:				108

BENIN

Area:	111 000 sq.km
Climate:	Tropical wet-dry; two rainy seasons in south (Mar.-Jul. and Oct.) and one in north (May-Oct.)
Population:	6.43 million (2002 estimate); G.N.P. per caput US\$380 (2000)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports, roads, rail adequate; gateway to Niger
Major foodcrops:	Roots and tubers, maize
Marketing year:	January/December; Lean season: April-June
Share of cereals in total calorie intake:	37 percent

CURRENT SITUATION

Planting of the first maize crop is underway in the south and will progress northwards following the onset of the rains. The first official estimate of aggregate 2001 cereal production, mostly maize and sorghum, is 904 000 tonnes, some 100 000 tonnes lower than the record of the previous year but slightly above average.

The overall food supply situation remains satisfactory; markets are well supplied and prices have decreased slightly. Cereal imports for domestic use and re-exports during the 2002 marketing year are estimated at 144 000 tonnes including 14 000 tonnes of food aid.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	34	855	889
Previous five years average imports	53	97	4	154
<u>2002 Domestic Availability</u>	<u>53</u>	<u>131</u>	<u>859</u>	<u>1043</u>
2001 Production (rice in paddy terms)	-	49	855	904
2001 Production (rice in milled terms)	-	29	855	884
Possible stock drawdown	-	-	55	55
<u>2002 Utilization</u>	<u>58</u>	<u>113</u>	<u>912</u>	<u>1 083</u>
Food use	52	81	647	780
of which: local purchase requirement	-	-	-	-
Non-food use	1	7	210	218
Exports or re-exports	5	25	55	85
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>58</u>	<u>84</u>	<u>2</u>	<u>144</u>^{1/}
Anticipated commercial imports	55	75	-	130
Food aid needs	3	9	2	14
<u>Current Aid Position</u>				
Food aid pledges	3	9	-	12
of which: delivered	-	8	-	8
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>8</u>	<u>13</u>	<u>101</u>	<u>121</u>
<u>Indexes</u>				
2001 Production as % of average:				102
2002 Import requirement as % of average:				94

^{1/} Includes 5 000 tonnes of wheat and 25 000 tonnes of rice for re-exports.

BOTSWANA

Area:	567 000 sq.km
Climate:	South-western part arid (Kalahari desert); rest semi-arid with some rains in Dec.-Feb.
Population:	1.66 million (2001 estimate); G.N.P. per caput: US\$3 300 (2000)
Specific characteristics of the country:	East; swamps in the northern parts; desert in the west
Logistics:	Imports through South Africa
Major foodcrops:	Sorghum, pulses, vegetables
Marketing year:	April/March; Lean season: January-March
Share of cereals in total calorie intake:	55 percent

CURRENT SITUATION

Harvesting of the 2002 cereal crops, mainly sorghum, is about to start. Prospects are uncertain. Despite adequate precipitation in recent months, a prolonged dry spell in January is likely to have affected yields, in particular those of maize crop.

The overall food supply situation remains favourable. The country imports most of its food requirements.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	1	-	33	34
Previous five years average imports	65	-	165	230
<u>2001/02 Domestic Availability</u>	=	=	16	16
2001 Production (rice in paddy terms)	-	-	12	12
2001 Production (rice in milled terms)	-	-	12	12
Possible stock drawdown	-	-	4	4
<u>2001/02 Utilization</u>	70	=	213	283
Food use	63	-	211	274
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	2	2
Exports or re-exports	7	-	-	7
Possible stock build up	-	-	-	-
<u>2001/02 Import Requirement</u>	70	=	197	267
Anticipated commercial imports	70	-	197	267
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	38	=	127	165
<u>Indexes</u>				
2001 Production as % of average:				35
2001/02 Import requirement as % of average:				116

BURKINA FASO

Area:	274 000 sq.km
Climate:	Tropical wet-dry in south, semi-arid in north; rainy season: May-October
Population:	11.74 million (2002 estimate); G.N.P. per caput: US\$230 (2000)
Specific characteristics of the country:	Low-income food-deficit country; Sahelian land-locked country
Logistics:	Roads inadequate during rainy season; adequate rail link to Abidjan (Côte d'Ivoire)
Major foodcrops:	Millet, sorghum, pulses, maize
Marketing year:	November/October; Lean season: July-September
Share of cereals in total calorie intake:	73 percent

CURRENT SITUATION

Seasonably dry conditions prevail. Off-season crops are about to be harvested. The 2001 aggregate cereal production has been estimated by a joint FAO/CILSS Crop Assessment Mission at 2.80 million tonnes, 22 percent higher than the previous year and 15 percent above average.

The overall food supply situation is satisfactory. Markets are well supplied. However, above-normal cereal prices have been reported and localized food shortages may persist in areas which had poor crops due to the early end of the rains.

Cereal import requirement in 2001/02 (November/October), mostly rice and wheat, is forecast at 171 000 tonnes, including 23 000 tonnes as food aid.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	98	2 330	2 428
Previous five years average imports	63	110	19	192
<u>2001/02 Domestic Availability</u>	<u>63</u>	<u>208</u>	<u>2 696</u>	<u>2 967</u>
2001 Production (rice in paddy terms)	-	100	2 696	2 796
2001 Production (rice in milled terms)	-	66	2 696	2 762
Possible stock drawdown	-	12	-	12
<u>2001/02 Utilization</u>	<u>60</u>	<u>188</u>	<u>2 697</u>	<u>2 945</u>
Food use	59	176	2 115	2 350
of which: local purchase requirement	-	-	20	20
Non-food use	1	12	416	429
Exports or re-exports	-	-	45	45
Possible stock build up	-	-	120	120
<u>2001/02 Import Requirement</u>	<u>60</u>	<u>110</u>	<u>1</u>	<u>171</u>
Anticipated commercial imports	50	98	-	148
Food aid needs	10	12	1	23
<u>Current Aid Position</u>				
Food aid pledges	-	12	1	13
of which: delivered	-	12	-	12
Donor-financed purchases	-	-	1	1
of which: for local use	-	-	1	1
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>5</u>	<u>15</u>	<u>180</u>	<u>200</u>
<u>Indexes</u>				
2001 Production as % of average:				115
2001/02 Import requirement as % of average:				89

BURUNDI

Area:	25 700 sq.km
Climate:	Highland rainy climate with moderate temperature (20°C); two rainy seasons: Feb.-May and Sept.-Nov.
Population:	6.8 million (2002 estimate); G.N.P. per caput: US\$110 (2000)
Specific characteristics of the country:	Low-income food-deficit country; land-locked country
Logistics:	Ports: Mombasa (Kenya) and Dar es Salaam (Tanzania); rail and road connections inadequate
Major foodcrops:	Pulses, plantains, roots, tubers, maize and sorghum
Marketing year:	January/December; Lean season: November-December
Share of cereals in total calorie intake:	34 percent

CURRENT SITUATION

Planting of the 2002 second-season foodcrops is completed. The early outlook is favourable reflecting abundant rains at sowing, that encouraged an expansion of the area planted, as well as normal precipitation in March. The output of the 2002 first season crops was good, mainly of non-cereal foodcrops, which increased significantly from the 2001 same season. Production of cereals and beans remained unchanged. Food prices that declined at harvest time in December/January remained stable.

Food assistance continue to be required for 432 000 internally displaced people due to insecurity in parts. Intensified fighting between Government and rebel groups in the past month has resulted in fresh waves of population displacement, in particular 4 800 families in Rushubi town in Bujumbura Rural province.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	9	52	213	274
Previous five years average imports	22	4	38	64
<u>2002 Domestic Availability</u>	<u>9</u>	<u>41</u>	<u>230</u>	<u>280</u>
2002 Production (rice in paddy terms)	9	61	230	300
2002 Production (rice in milled terms)	9	41	230	280
Possible stock drawdown	-	-	-	-
<u>2002 Utilization</u>	<u>34</u>	<u>42</u>	<u>265</u>	<u>341</u>
Food use	32	33	231	296
of which: local purchase requirement	-	-	-	-
Non-food use	2	6	32	40
Exports or re-exports	-	-	-	-
Possible stock build up	-	3	2	5
<u>2002 Import Requirement</u>	<u>25</u>	<u>1</u>	<u>35</u>	<u>61</u>
Anticipated commercial imports	25	1	15	41
Food aid needs	-	-	20	20
<u>Current Aid Position</u>				
Food aid pledges	1	-	2	3
of which: delivered	1	-	2	3
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>5</u>	<u>5</u>	<u>34</u>	<u>43</u>
<u>Indexes</u>				
2002 Production as % of average:				109
2002 Import requirement as % of average:				95

CAMEROON

Area:	465 000 sq.km
Climate:	North: tropical wet-dry, south: tropical wet; length of rainy season declines from 11 months in south to 4 months in extreme north
Population:	15.9 million (2002 estimate); G.N.P. per caput: US\$570 (2000)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports and roads adequate; gateway to Chad
Major foodcrops:	Roots and tubers, coarse grains, fruit
Marketing year:	January/December; Lean season: June-August
Share of cereals in total calorie intake:	39 percent

CURRENT SITUATION

Planting of the first maize crop for harvest from July is underway in the south. Reflecting overall favourable growing conditions, 2001 cereal production is estimated to be similar to the previous year's average crop.

The overall food supply situation is satisfactory. Cereals imports for the 2002 marketing year are estimated at 310 000 tonnes, virtually same as in the previous year.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	86	1 183	1 269
Previous five years average imports	191	106	10	307
<u>2002 Domestic Availability</u>	<u>-</u>	<u>59</u>	<u>1 183</u>	<u>1 242</u>
2001 Production (rice in paddy terms)	-	86	1 183	1 270
2001 Production (rice in milled terms)	-	59	1 183	1 242
Possible stock drawdown	-	-	-	-
<u>2002 Utilization</u>	<u>220</u>	<u>139</u>	<u>1 193</u>	<u>1 552</u>
Food use	206	128	938	1 273
of which: local purchase requirement	-	-	-	-
Non-food use	4	10	250	264
Exports or re-exports	10	-	5	15
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>220</u>	<u>80</u>	<u>10</u>	<u>310^{1/}</u>
Anticipated commercial imports	220	78	10	308
Food aid needs	-	2	-	2
<u>Current Aid Position</u>				
Food aid pledges	-	1	-	1
of which: delivered	-	1	-	1
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>13</u>	<u>8</u>	<u>59</u>	<u>80</u>
<u>Indexes</u>				
2001 Production as % of average:				100
2002 Import requirement as % of average:				101

^{1/} Includes 10 000 tonnes of wheat for re-exports.

CAPE VERDE

Area:	4 000 sq.km
Climate:	Semi-arid; rainfall increases with altitude; rainy season: July-December
Population:	457 000 (2002 estimate); G.N.P. per caput: US\$1 330 (2000)
Specific characteristics of the country:	Low-income food-deficit country; archipelago
Logistics:	Port capacity and roads adequate
Major foodcrops:	Maize, rice, pulses
Marketing year:	November/October; Lean season: n.a. since 90 percent of requirements covered by imports
Share of cereals in total calorie intake:	57 percent

CURRENT SITUATION

Seasonably dry conditions prevail. Production of maize (virtually the only cereal produced in the country) in 2001 has been estimated by a joint FAO/CILSS Crop Assessment Mission in mid-October at 18 680 tonnes. This is 23 percent lower than the previous year but some 5 000 tonnes higher than average. In early January 2002 the country experienced unseasonable heavy rains and floods which caused damage to infrastructure and farmland.

In anticipation of a tight food supply situation in several areas, the Government has appealed for international food assistance, as well as agricultural inputs.

Cereal import requirement in 2001/02 marketing year is forecast at 93 000 tonnes, with food aid accounting for more than 50 percent. Pledges amount to 39 000 tonnes, of which 16 000 tonnes have been delivered so far.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	-	14	14
Previous five years average imports	21	31	38	90
2001/02 Domestic Availability	21	31	19	19
2001 Production (rice in paddy terms)	-	-	19	19
2001 Production (rice in milled terms)	-	-	19	19
Possible stock drawdown	-	-	-	-
2001/02 Utilization	23	30	59	112
Food use	23	30	51	104
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	3	3
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	5	5
2001/02 Import Requirement	23	30	40	93
Anticipated commercial imports	5	20	20	45
Food aid needs	18	10	20	48
Current Aid Position				
Food aid pledges	11	7	21	39
of which: delivered	4	5	7	16
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
Estimated Per Caput Consumption (kg/year)	50	66	111	227
Indexes				
2001 Production as % of average:				134
2001/02 Import requirement as % of average:				103

CENTRAL AFRICAN REPUBLIC

Area:	623 000 sq.km
Climate:	North: tropical wet-dry, south: tropical wet; rainy season: March-November
Population:	3.75 million (2002 estimate); G.N.P. per caput: US\$290 (2000)
Specific characteristics of the country:	Low-income food-deficit country; land-locked country
Logistics:	Roads inadequate during rainy season; river transport important
Major foodcrops:	Roots and tubers, tree nuts, coarse grain, fruit
Marketing year:	January/December; Lean season: May-July
Share of cereals in total calorie intake:	21 percent

CURRENT SITUATION

The main 2002 maize crop to be harvested from July is being sown. Reflecting normal to above normal rains and favourable growing conditions, cereal production in 2001 is estimated at the average level of about 143 000 tonnes, fractionally higher than the 2000 harvest.

The food supply situation is satisfactory.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	18	125	143
Previous five years average imports	27	4	3	34
<u>2002 Domestic Availability</u>	<u>27</u>	<u>22</u>	<u>128</u>	<u>157</u>
2001 Production (rice in paddy terms)	-	18	125	143
2001 Production (rice in milled terms)	-	12	125	136
Possible stock drawdown	-	-	-	-
<u>2002 Utilization</u>	<u>30</u>	<u>16</u>	<u>128</u>	<u>174</u>
Food use	29	14	109	152
of which: local purchase requirement	-	-	-	-
Non-food use	1	2	18	22
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>30</u>	<u>5</u>	<u>3</u>	<u>38</u>
Anticipated commercial imports	30	5	2	37
Food aid needs	-	-	1	1
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>8</u>	<u>4</u>	<u>29</u>	<u>41</u>
<u>Indexes</u>				
2001 Production as % of average:				100
2002 Import requirement as % of average:				112

CHAD

Area:	1 259 000 sq.km
Climate:	From north to south: arid, semi-arid and tropical wet-dry; rainy season: May-Oct.
Population:	7.76 million (2002 estimate); G.N.P. per caput: US\$200 (2000)
Specific characteristics of the country:	Low-income food-deficit country; land-locked Sahelian country.
Logistics:	Roads inadequate during rainy season
Major foodcrops:	Millet and sorghum, roots and tubers, tree nuts
Marketing year:	November/October; Lean season: August-September
Share of cereals in total calorie intake:	52 percent

CURRENT SITUATION

Seasonably dry conditions prevail. Reflecting above-average rains in September, prospects for the secondary sorghum recession crop are good and pastures are abundant.

Favourable growing conditions in 2001 resulted in an excellent cereal crop, estimated by a joint FAO/CILSS Crop Assessment Mission at 1.24 million tonnes, more than one-third higher than the previous year and 16 percent above average.

As a result, the overall food supply situation is satisfactory, specially in the chronically food deficit areas in the Sahelian zone which harvested poor crops in 2000. However, some 143 000 people in the Sudanian zone are at risk of food shortages following floods that affected 144 0000 hectares of arable land.

Import requirement of cereals (wheat and rice) in 2001/02 marketing year (November/October) is estimated at 68 000 tonnes including 13 000 tonnes of food aid.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	3	112	959	1 074
Previous five years average imports	57	11	14	82
<u>2001/02 Domestic Availability</u>	<u>9</u>	<u>77</u>	<u>1 122</u>	<u>1 207</u>
2001 Production (rice in paddy terms)	4	112	1 122	1 237
2001 Production (rice in milled terms)	4	77	1 122	1 202
Possible stock drawdown	5	-	-	5
<u>2001/02 Utilization</u>	<u>62</u>	<u>92</u>	<u>1 122</u>	<u>1 275</u>
Food use	61	78	861	1 000
of which: local purchase requirement	-	-	20	20
Non-food use	1	13	211	225
Exports or re-exports	-	-	20	20
Possible stock build up	-	-	30	30
<u>2001/02 Import Requirement</u>	<u>53</u>	<u>15</u>	<u>-</u>	<u>68</u>
Anticipated commercial imports	45	10	-	55
Food aid needs	8	5	-	13
<u>Current Aid Position</u>				
Food aid pledges	-	-	1	1
of which: delivered	-	-	1	1
Donor-financed purchases	-	-	1	1
of which: for local use	-	-	1	1
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>8</u>	<u>10</u>	<u>111</u>	<u>129</u>
<u>Indexes</u>				
2001 Production as % of average:				115
2001/02 Import requirement as % of average:				83

COMOROS

Area: 2 200 sq.km
Climate: Tropical wet-dry; one hot rainy season with cyclone probability; June-October dry and cool
Population: 0.815 million (2002 estimate); G.N.P. per caput: US\$380 (2000)
Specific characteristics of the country: Low-income food-deficit country; archipelago of four small islands
Logistics: -
Major foodcrops: Rice, roots, tubers, bananas and coconuts
Marketing year: January/December
Share of cereals in total calorie intake: 44 percent

CURRENT SITUATION

Most of the country's agricultural land is planted to cash crops, bananas and root crops. Only one-quarter of the cereal requirement is produced locally and, consequently, there is a structural deficit of some 46 000 tonnes of cereals, fully covered by commercial imports.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	3	4	7
Previous five years average imports	6	40	-	46
<u>2002 Domestic Availability</u>	<u>6</u>	<u>43</u>	<u>4</u>	<u>53</u>
2001 Production (rice in paddy terms)	-	3	4	7
2001 Production (rice in milled terms)	-	2	4	6
Possible stock drawdown	-	-	-	-
<u>2002 Utilization</u>	<u>6</u>	<u>42</u>	<u>4</u>	<u>52</u>
Food use	6	40	2	48
of which: local purchase requirement	-	-	-	-
Non-food use	-	2	2	4
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>6</u>	<u>40</u>	<u>-</u>	<u>46</u>
Anticipated commercial imports	6	40	-	46
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>7</u>	<u>49</u>	<u>3</u>	<u>59</u>
<u>Indexes</u>				
2001 Production as % of average:				100
2002 Import requirement as % of average:				100

CONGO, DEMOCRATIC REPUBLIC OF

Area:	2 268 000 sq.km
Climate:	Tropical wet climate in the central basin, tropical wet-dry in the extreme north and south
Population:	47.59 million (2002 estimate); G.N.P. per caput: US \$ 100 (1998)
Specific characteristics of the country:	Low-income food-deficit country; tropical country with access to sea
Logistics:	Roads inadequate
Major foodcrops:	Roots and tubers, coarse grains, fruit
Marketing year:	January/December; Lean season: October (north), November-December (south)
Share of cereals in total calorie intake:	15 percent

CURRENT SITUATION

The agricultural activities continue to be disrupted by the persistent civil conflict, particularly in the eastern Kivu provinces. In spite of adequate rains, planting of the 2002 second season crops has been negatively affected by intensification of fighting in these areas in the past months, particularly in the Hauts Plateaux of South Kivu Province. Recent reports indicate about 64 percent of undernourishment among the population of eastern DRC, where most of the 2.2 million internally displaced persons (IDPs) are located. Overall, it is estimated that 16 million people, or 33 percent of the DRC population has critical food needs as a result of prolonged displacement and other factors. While access to the vulnerable population has improved in Government's controlled areas, due to the simplification of procedures for international humanitarian agencies, the situation remains desperate in the Kivu provinces and northern Katanga, where insecurity and violence continue to hamper distribution of assistance.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	18	353	1 234	1 605
Previous five years average imports	145	50	52	247
<u>2002 Domestic Availability</u>	<u>18</u>	<u>220</u>	<u>1 194</u>	<u>1 432</u>
2001 Production (rice in paddy terms)	18	326	1 194	1 538
2001 Production (rice in milled terms)	18	217	1 194	1 429
Possible stock drawdown	-	3	-	3
<u>2002 Utilization</u>	<u>158</u>	<u>270</u>	<u>1 254</u>	<u>1 682</u>
Food use	150	228	990	1 367
of which: local purchase requirement	-	-	-	-
Non-food use	8	43	264	315
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>140</u>	<u>50</u>	<u>60</u>	<u>250</u>
Anticipated commercial imports	140	50	35	225
Food aid needs	-	-	25	25
<u>Current Aid Position</u>				
Food aid pledges	-	1	24	25
of which: delivered	-	-	13	13
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>3</u>	<u>5</u>	<u>21</u>	<u>29</u>
<u>Indexes</u>				
2001 Production as % of average:				96
2002 Import requirement as % of average:				101

CONGO, REPUBLIC OF

Area:	342 000 sq.km
Climate:	Tropical wet climate in north, tropical wet-dry in south with main rainy season in October-April
Population:	3.11 million (2002 estimate); G.N.P. per caput: US\$630 (2000)
Specific characteristics of the country:	Low-income food-deficit country; tropical coastal country
Logistics:	Ports adequate; roads inadequate during rainy season
Major foodcrops:	Roots and tubers, fruit
Marketing year:	January/December; Lean season: September-November
Share of cereals in total calorie intake:	19 percent

CURRENT SITUATION

The overall food supply situation has improved. Most of the population displaced by the civil war have returned home and following an improvement of the security situation all areas are now accessible to humanitarian agencies. More than 27 500 refugees from the Democratic Republic of Congo and the Central African Republic are reported to be in Betou. The WFP Emergency operation initially scheduled to end on 31 March has been extended until 31 May 2002.

Cereal imports for the 2002 marketing year as estimated at 125 000 tonnes, mostly wheat and rice.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	1	3	4
Previous five years average imports	116	38	5	159
<u>2002 Domestic Availability</u>	<u>25</u>	<u>7</u>	<u>4</u>	<u>36</u>
2001 Production (rice in paddy terms)	-	1	4	5
2001 Production (rice in milled terms)	-	-	4	4
Possible stock drawdown	25	7	-	32
<u>2002 Utilization</u>	<u>110</u>	<u>42</u>	<u>9</u>	<u>161</u>
Food use	108	40	7	155
of which: local purchase requirement	-	-	-	-
Non-food use	2	2	2	6
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>85</u>	<u>35</u>	<u>5</u>	<u>125</u>
Anticipated commercial imports	80	25	5	110
Food aid needs	5	10	-	15
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>35</u>	<u>13</u>	<u>2</u>	<u>50</u>
<u>Indexes</u>				
2001 Production as % of average:				125
2002 Import requirement as % of average:				79

COTE D'IVOIRE

Area:	318 000 sq.km
Climate:	Tropical wet-dry; two rainy seasons (March-July and September-December) in south and one in north (May-Oct.)
Population:	15.32 million (2002 estimate); G.N.P. per caput: US\$660 (2000)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports and roads adequate; gateway to Burkina Faso and Mali
Major foodcrops:	Roots and tubers, fruit, rice, maize
Marketing year:	January/December; Lean season: April-July
Share of cereals in total calorie intake:	40 percent

CURRENT SITUATION

Planting of the first maize crop is underway in the south and progressing northwards with the arrival of the rains. The aggregate output of cereals (mostly maize and rice) in 2001 is estimated at 1.86 million tonnes, slightly more than the previous year and above average.

The overall food supply situation is satisfactory. The cereal import requirement for the 2002 marketing year is estimated at 1 025 000 tonnes, mainly rice and wheat. There are some 120 000 Liberian refugees still in the country, mainly in the west.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	1 011	730	1 741
Previous five years average imports	279	638	9	926
<u>2002 Domestic Availability</u>	<u>279</u>	<u>679</u>	<u>730</u>	<u>1 409</u>
2001 Production (rice in paddy terms)	-	1 132	730	1 862
2001 Production (rice in milled terms)	-	679	730	1 409
Possible stock drawdown	-	-	-	-
<u>2002 Utilization</u>	<u>270</u>	<u>1 429</u>	<u>735</u>	<u>2 434</u>
Food use	265	1 259	561	2 086
of which: local purchase requirement	-	-	-	-
Non-food use	5	170	164	338
Exports or re-exports	-	-	10	10
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>270</u>	<u>750</u>	<u>5</u>	<u>1 025</u>
Anticipated commercial imports	270	745	5	1 020
Food aid needs	-	5	-	5
<u>Current Aid Position</u>				
Food aid pledges	-	3	-	3
of which: delivered	-	3	-	3
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>17</u>	<u>82</u>	<u>37</u>	<u>136</u>
<u>Indexes</u>				
2001 Production as % of average:				107
2002 Import requirement as % of average:				111

DJIBOUTI

Area: 23 000 sq.km
Climate: Arid climate
Population: 0.641 million (2002 estimate); G.N.P. per caput: US\$840 (2000)
Specific characteristics of the country: Low-income food-deficit country
Logistics: Djibouti is one of the three gateways of Ethiopia
Major foodcrops: Vegetables
Marketing year: January/December
Share of cereals in total calorie intake: 52 percent

CURRENT SITUATION

The agricultural sector in Djibouti accounts for less than 3 percent of the gross domestic product. The population is mostly urban and is concentrated in the capital. Agricultural production is marginal and most of the food is imported. The economy of the country is dominated by its trade activity based on a port and airport infrastructure.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	-	-	-
Previous five years average imports	39	24	3	66
<u>2002 Domestic Availability</u>	<u>±</u>	<u>±</u>	<u>±</u>	<u>±</u>
2001 Production (rice in paddy terms)	-	-	-	-
2001 Production (rice in milled terms)	-	-	-	-
Possible stock drawdown	-	-	-	-
<u>2002 Utilization</u>	<u>40</u>	<u>20</u>	<u>3</u>	<u>63</u>
Food use	40	20	2	62
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	1	1
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>40</u>	<u>20</u>	<u>3</u>	<u>63</u>
Anticipated commercial imports	35	20	-	55
Food aid needs	5	-	3	8
<u>Current Aid Position</u>				
Food aid pledges	8	1	-	10
of which: delivered	8	1	-	10
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>62</u>	<u>31</u>	<u>3</u>	<u>97</u>
<u>Indexes</u>				
2001 Production as % of average:				-
2002 Import requirement as % of average:				95

EQUATORIAL GUINEA

Area:	28 000 sq.km
Climate:	Tropical wet climate
Population:	475 800 (2002 estimate); G.N.P. per caput: US\$1 170 (1999)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports and roads inadequate
Major foodcrops:	Cassava, sweet potatoes, bananas
Marketing year:	January/December; Lean season: September-November
Share of cereals in total calorie intake:	12 percent

CURRENT SITUATION

The staple crops are sweet potatoes, cassava and plantains. Cereal import requirement for 2002 is estimated at 15 000 tonnes including 10 000 tonnes of rice and 5 000 tonnes of wheat.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	-	-	-
Previous five years average imports	8	6	-	14
<u>2002 Domestic Availability</u>	<u>8</u>	<u>6</u>	<u>-</u>	<u>14</u>
2001 Production (rice in paddy terms)	-	-	-	-
2001 Production (rice in milled terms)	-	-	-	-
Possible stock drawdown	-	-	-	-
<u>2002 Utilization</u>	<u>10</u>	<u>5</u>	<u>-</u>	<u>15</u>
Food use	10	5	-	15
<i>of which: local purchase requirement</i>	-	-	-	-
Non-food use	-	-	-	-
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>10</u>	<u>5</u>	<u>-</u>	<u>15</u>
Anticipated commercial imports	10	4	-	14
Food aid needs	-	1	-	1
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
<i>of which: delivered</i>	-	-	-	-
Donor-financed purchases	-	-	-	-
<i>of which: for local use</i>	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>21</u>	<u>11</u>	<u>-</u>	<u>32</u>
<u>Indexes</u>				
2001 Production as % of average:				-
2002 Import requirement as % of average:				107

ERITREA

Area:	124 320 sq.km
Climate:	Highland areas: tropical wet/dry with unreliable rains. Lowlands: semi-arid to arid
Population:	3.3 million (2002 estimate); G.N.P. per caput: US\$170 (2000)
Specific characteristics of the country:	Low-income food-deficit country
Logistics:	Roads inadequate, gateway to northern Ethiopia
Major foodcrops:	Sorghum, teff, millet, maize, pulses
Marketing year:	January/December; Lean season: August-November
Share of cereals in total calorie intake:	73 percent

CURRENT SITUATION

The final outcome of the 2001 cereal crop, harvested until last December, is now put at about 220 000 tonnes. This is more than three times the war and drought affected harvest the previous year and about average. Furthermore, the favorable climate outlook forecast for the March-May period in major cereal producing areas is anticipated to encourage planting of long-cycle cereal crops.

The overall food supply situation, however, remains tight reflecting the displacement of farmers by the recent war with Ethiopia and lingering effects of drought. A UN Consolidated Inter-Agency Appeal for 2002 for US \$120 million was launched in November 2001 and includes assistance for medium and long-term programmes, particularly those targeting the return of internally displaced persons (IDPs). Although the number of IDPs in camps is gradually declining (currently about 60 000), food assistance is also required for refugees returning from Sudan, demobilized soldiers, resettled IDPs in the TSZ and drought impacted people in the Sahel regions of the country. During 2001, WFP has distributed about 150 000 tonnes of food commodities to 1 million beneficiaries and expects to distribute about 130 000 tonnes to 800 000 people in 2002.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	13	-	191	204
Previous five years average imports	213	5	77	295
<u>2002 Domestic Availability</u>	<u>100</u>	<u>-</u>	<u>210</u>	<u>310</u>
2001 Production (rice in paddy terms)	10	-	210	220
2001 Production (rice in milled terms)	10	-	210	220
Possible stock drawdown	90	-	-	90
<u>2002 Utilization</u>	<u>190</u>	<u>15</u>	<u>245</u>	<u>450</u>
Food use	180	15	219	414
of which: local purchase requirement	-	-	2	2
Non-food use	10	-	19	29
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	7	7
<u>2002 Import Requirement</u>	<u>90</u>	<u>15</u>	<u>35</u>	<u>140</u>
Anticipated commercial imports	30	15	30	75
Food aid needs	60	-	5	65
<u>Current Aid Position</u>				
Food aid pledges	10	-	11	21
of which: delivered	10	-	11	21
Donor-financed purchases	-	-	2	2
of which: for local use	-	-	2	2
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>54</u>	<u>5</u>	<u>66</u>	<u>125</u>
<u>Indexes</u>				
2001 Production as % of average:				108
2002 Import requirement as % of average:				47

ETHIOPIA

Area:	976 680 sq.km
Climate:	Northern coastal area and lowlands in south and east are semi-arid to arid; rest of country has a highland rainy climate with mild winter.
Population:	66.5 million (2002 estimate); G.N.P. per caput: US\$100 (2000)
Specific characteristics of the country:	Low-income food-deficit country
Logistics:	Land-locked country, roads inadequate
Major foodcrops:	Maize, teff, barley, sorghum, wheat, pulses, enset (false banana)
Marketing year:	January/December; Lean season: August-November
Share of cereals in total calorie intake:	69 percent

CURRENT SITUATION

Planting of the 2002 secondary "belg" grain crops is underway. The belg crop accounts for some 10 percent of total grain production but in some areas it provides important amounts of the annual grain production.

The 2001 main "meher" season grain harvest was estimated by FAO/WFP Crop and Food Supply Assessment Mission late last year at 88 million tonnes, 5 percent below the 2000 post-harvest estimate but about 5 percent above the average of the previous five years. The increase was mainly due to favourable rains and a low incidence of pests and diseases. The bumper harvest has resulted in sharply falling grain prices in most markets, negatively impacting on farmers' income. The price fall could negatively affect next year's production. On the other hand, the low prices offer an opportunity for a significant build-up of stocks at all levels. Export possibilities to neighbouring countries will be restricted because of good harvests in neighbouring Kenya and Sudan.

The overall good harvest masks the existence of food deficient communities in most parts of the country due to localized drought, population displacement and limited purchasing power. Emergency food requirements in 2002 are projected at about 560 000 tonnes targeting some 5.2 million people. The Mission strongly recommended local purchases to the extent possible for donors wishing to give food aid to the country. (For more details, the Mission Report can be found at the address <http://www.fao.org/gIEWS/english/alertes/2002/SRETH202.htm>)

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	1 211	-	7 230	8 441
Previous five years average imports	697	13	58	768
2002 Domestic Availability	1 800	-	7 527	9 327
2001 Production (rice in paddy terms)	1 400	-	7 427	8 827
2001 Production (rice in milled terms)	1 400	-	7 427	8 827
Possible stock drawdown	400	-	100	500
2002 Utilization	2 060	15	7 547	9 622
Food use	1 920	15	6 502	8 437
of which: local purchase requirement	-	-	200	200
Non-food use	140	-	895	1 035
Exports or re-exports	-	-	150	150
Possible stock build up	-	-	-	-
2002 Import Requirement	260	15	20	295
Anticipated commercial imports	110	15	-	125
Food aid needs	150	-	20	170
Current Aid Position				
Food aid pledges	8	-	3	11
of which: delivered	8	-	3	11
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
Estimated Per Caput Consumption (kg/year)	29	0	98	127
Indexes				
2001 Production as % of average:				105
2002 Import requirement as % of average:				38

GABON

Area: 258 000 sq.km
Climate: Tropical wet climate; most rainfall: October-May
Population: 1.30 million (2002 estimate); G.N.P. per caput: US\$3 180 (2000)
Specific characteristics of the country: Coastal country
Logistics: Ports and roads adequate
Major foodcrops: Roots and tubers
Marketing year: January/December; Lean season: September-November
Share of cereals in total calorie intake: 19 percent

CURRENT SITUATION

The main foodcrops are cassava and plantains but some maize is also produced (around 31 000 tonnes). The country imports commercially the bulk of its cereal requirement, estimated at around 88 000 tonnes for 2002.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	1	31	32
Previous five years average imports	44	34	2	80
<u>2002 Domestic Availability</u>	<u>-</u>	<u>1</u>	<u>31</u>	<u>32</u>
2001 Production (rice in paddy terms)	-	1	31	32
2001 Production (rice in milled terms)	-	1	31	32
Possible stock drawdown	-	-	-	-
<u>2002 Utilization</u>	<u>50</u>	<u>36</u>	<u>34</u>	<u>120</u>
Food use	49	36	26	110
of which: local purchase requirement	-	-	-	-
Non-food use	1	-	8	9
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>50</u>	<u>35</u>	<u>3</u>	<u>88</u>
Anticipated commercial imports	50	35	3	88
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>38</u>	<u>28</u>	<u>20</u>	<u>85</u>
<u>Indexes</u>				
2001 Production as % of average:				100
2002 Import requirement as % of average:				110

GAMBIA

Area:	10 000 sq.km
Climate:	Tropical wet-dry climate; rainy season: May-October
Population:	1.50 million (2002 estimate); G.N.P. per caput: US\$330 (2000)
Specific characteristics of the country:	Low-income food-deficit country; coastal Sahelian country
Logistics:	Port capacity and roads adequate
Major foodcrops:	Rice, millet and sorghum
Marketing year:	November/October; Lean season: July-September
Share of cereals in total calorie intake:	63 percent

CURRENT SITUATION

Seasonably dry conditions prevail. The country harvested a record cereal crop for the second consecutive year. A joint FAO/CILSS Crop Assessment Mission estimated the aggregate 2001 cereal output at 198 600 tonnes, 13 percent above 2000 and 49 percent above the average of the last five years. The increase in production was due to generally favourable growing conditions and a significantly larger area planted to cereals. Increased production is also reported for the major cash crops. Groundnut output increased 8 percent to some 149 600 tonnes.

Following three consecutive years of bumper harvests, the overall food supply situation is satisfactory and markets are well supplied.

Cereal import requirement for the marketing year 2001/02 (November/October) is forecast at 123 000 tonnes.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	29	104	133
Previous five years average imports	42	84	2	128
<u>2001/02 Domestic Availability</u>	<u>5</u>	<u>23</u>	<u>163</u>	<u>191</u>
2001 Production (rice in paddy terms)	-	36	163	199
2001 Production (rice in milled terms)	-	23	163	186
Possible stock drawdown	5	-	-	5
<u>2001/02 Utilization</u>	<u>45</u>	<u>105</u>	<u>164</u>	<u>314</u>
Food use	29	91	121	241
of which: local purchase requirement	-	-	-	-
Non-food use	1	5	28	33
Exports or re-exports	15	10	-	25
Possible stock build up	-	-	15	15
<u>2001/02 Import Requirement</u>	<u>40</u>	<u>82</u>	<u>1</u>	<u>123</u>
Anticipated commercial imports	40	79	-	119
Food aid needs	-	3	1	4
<u>Current Aid Position</u>				
Food aid pledges	-	3	1	3
of which: delivered	-	3	1	3
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>19</u>	<u>60</u>	<u>81</u>	<u>160</u>
<u>Indexes</u>				
2001 Production as % of average:				149
2001/02 Import requirement as % of average:				96

GHANA

Area:	230 000 sq.km
Climate:	Tropical wet-dry; two rainy seasons in south and one in north
Population:	19.4 million (2002 estimate); G.N.P. per caput: US\$350 (2000)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports and roads inadequate
Major foodcrops:	Roots and tubers, coarse grain, rice
Marketing year:	January/December; Lean season: April-June
Share of cereals in total calorie intake:	27 percent

CURRENT SITUATION

In the early February, a joint FAO/WFP crop and food assessment mission visited Ghana where unusually dry weather conditions affected crop production in the northern regions from September onwards. The mission estimated the 2001 cereal production at 1.52 million tonnes, which is below average. However the overall food supply situation is close to normal as the reduction in the production of cereals in northern regions will be covered by adequate availability of other foodcrops, anticipated commercial imports and food aid already pledged. Pasture and livestock conditions are only marginally worse than normal for the time of year.

The mission estimated total cereal import requirements at 461 200 tonnes including 89 000 tonnes of food aid. Worst affected areas and vulnerable groups will require food assistance estimated at about 5 000 tonnes to compensate for their reduced harvests.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	212	1 523	1 735
Previous five years average imports	225	216	41	482
<u>2002 Domestic Availability</u>	<u>10</u>	<u>171</u>	<u>1 352</u>	<u>1 533</u>
2001 Production (rice in paddy terms)	-	256	1 352	1 608
2001 Production (rice in milled terms)	-	171	1 352	1 523
Possible stock drawdown	10	-	-	10
<u>2002 Utilization</u>	<u>214</u>	<u>346</u>	<u>1 434</u>	<u>1 994</u>
Food use	211	312	1 209	1 732
of which: local purchase requirement	-	-	-	-
Non-food use	3	34	196	232
Exports or re-exports	-	-	25	25
Possible stock build up	-	-	5	5
<u>2002 Import Requirement</u>	<u>204</u>	<u>175</u>	<u>82</u>	<u>461</u>
Anticipated commercial imports	138	167	67	372
Food aid needs	66	9	15	89
<u>Current Aid Position</u>				
Food aid pledges	15	13	7	35
of which: delivered	15	11	7	33
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>11</u>	<u>16</u>	<u>62</u>	<u>89</u>
<u>Indexes</u>				
2001 Production as % of average:				93
2002 Import requirement as % of average:				96

GUINEA

Area:	246 000 sq.km
Climate:	Tropical wet-dry; rainy season: March/June to October/November
Population:	7.57 million (2002 estimate); G.N.P. per caput: US\$450 (2000)
Specific characteristics of the country:	Low-income food-deficit country; mountainous coastal country
Logistics:	Ports and roads inadequate
Major foodcrops:	Rice, roots and tubers, coarse grains
Marketing year:	January/December; Lean season: July-September
Share of cereals in total calorie intake:	52 percent

CURRENT SITUATION

The overall food supply situation is satisfactory following satisfactory harvests in 2000 and 2001. The first official estimate of aggregate 2001 cereal production is 1 026 000 tonnes, slightly lower than previous year but above average. Markets are well supplied, except in the south-east where recurrent rebel incursions from Sierra Leone have severely affected agricultural and marketing activities.

The presence of a large refugee population and the persistent instability in the sub-region have exacted a heavy toll on the country. Armed clashes in and around the country have also resulted in increasing numbers of internally displaced persons (IDPs). A UN Consolidated Inter-Agency Appeal was launched on 26 November 2001 to assist the country to cope with the serious humanitarian situation.

The cereal import requirement for the 2002 marketing year is estimated at 330 000 tonnes.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	769	215	984
Previous five years average imports	114	232	3	349
<u>2002 Domestic Availability</u>	-	546	237	783
2001 Production (rice in paddy terms)	-	789	237	1 026
2001 Production (rice in milled terms)	-	526	237	763
Possible stock drawdown	-	20	-	20
<u>2002 Utilization</u>	110	761	242	1 113
Food use	107	636	197	940
of which: local purchase requirement	-	-	-	-
Non-food use	3	115	45	164
Exports or re-exports	-	10	-	10
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	110	215	5	330
Anticipated commercial imports	100	200	-	300
Food aid needs	10	15	5	30
<u>Current Aid Position</u>				
Food aid pledges	-	14	4	18
of which: delivered	-	14	4	18
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	14	84	26	124
<u>Indexes</u>				
2001 Production as % of average:				104
2002 Import requirement as % of average:				95

GUINEA-BISSAU

Area:	28 000 sq.km
Climate:	Tropical wet-dry; rainy season: May-October
Population:	1.20 million (2002 estimate); G.N.P. per caput: US\$180 (2000)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Roads inadequate, particularly during the rainy season; river transport important
Major foodcrops:	Rice, coarse grains, oils and fats, roots and tubers
Marketing year:	November/October; Lean season: May-August
Share of cereals in total calorie intake:	64 percent

CURRENT SITUATION

Seasonably dry conditions prevail. A joint FAO/CILSS Crop Assessment Mission estimated 2001 cereal production at some 164 000 tonnes, 3 percent lower than the previous year but 3 percent above average.

Cereal import requirement in 2001/02 (November/October) is forecast at 70 000 tonnes, including 10 000 tonnes of food aid.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	91	60	151
Previous five years average imports	9	60	2	71
<u>2001/02 Domestic Availability</u>	-	61	76	136
2001 Production (rice in paddy terms)	-	88	76	164
2001 Production (rice in milled terms)	-	59	76	134
Possible stock drawdown	-	2	-	2
<u>2001/02 Utilization</u>	10	121	76	206
Food use	10	105	64	179
of which: local purchase requirement	-	-	-	-
Non-food use	-	11	12	22
Exports or re-exports	-	5	-	5
Possible stock build up	-	-	-	-
<u>2001/02 Import Requirement</u>	10	60	-	70
Anticipated commercial imports	5	55	-	60
Food aid needs	5	5	-	10
<u>Current Aid Position</u>				
Food aid pledges	-	5	1	6
of which: delivered	-	5	1	6
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	8	87	53	149
<u>Indexes</u>				
2001 Production as % of average:				108
2001/02 Import requirement as % of average:				99

KENYA

Area:	570 000 sq.km
Climate:	North-east is semi-arid to arid; mountainous central and south-western areas have two rainy seasons: March-May and November-December.
Population:	31.61 million (2002 estimate), GNP per caput US\$360 (2000)
Specific characteristics of the country:	Low-income food-deficit country; regular importer and occasional exporter of grain.
Logistics:	Good port (Mombasa) and extensive rail and road network. Gateway to Burundi, Rwanda and Uganda
Major foodcrops:	Maize, wheat, pulses, roots and tubers
Marketing year:	October/September; Lean season: June-July
Share of cereals in total calorie intake:	56 percent

CURRENT SITUATION

The 2002 main "long rains" cropping season has begun and the outlook is favourable due to the forecasted near normal rainfall in major producing areas. Exceptions are Turkana, western Marsabit, northern coastal districts and areas around the shores of Lake Victoria.

Harvesting of the 2001/02 secondary "short rains" cereal crop, which accounts for some 15 percent of annual production, is complete. favourable rains during the season in main producing areas have helped improve yields. This crop provides the main source of food in parts of Central and Eastern provinces. The 2001 main "long rains" cereal crop was significantly higher than in 2000, mainly reflecting abundant and well distributed rains in the main producing area of the Rift Valley Province. Maize production has been estimated at 2.34 million tonnes for the season, an increase of about 20 percent over the previous year. The aggregate 2001/02 maize production is now estimated at 2.7 million tonnes. Reflecting the good maize crop and carryover stocks, prices have declined sharply in recent months, prompting the Government to appeal to donors to increase local purchases.

Despite an overall improvement in food supply, food supply difficulties persist in pastoral areas, particularly in Turkana, Mandera and parts of Marsabit Districts.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	230	52	2 357	2 639
Previous five years average imports	553	78	920	1 551
<u>2001/02 Domestic Availability</u>	<u>300</u>	<u>36</u>	<u>3 089</u>	<u>3 425</u>
2001 Production (rice in paddy terms)	230	55	2 939	3 224
2001 Production (rice in milled terms)	230	36	2 939	3 205
Possible stock drawdown	70	-	150	220
<u>2001/02 Utilization</u>	<u>840</u>	<u>141</u>	<u>3 489</u>	<u>4 470</u>
Food use	807	120	3 079	4 006
of which: local purchase requirement	-	-	100	100
Non-food use	33	21	400	454
Exports or re-exports	-	-	10	10
Possible stock build up	-	-	-	-
<u>2001/02 Import Requirement</u>	<u>540</u>	<u>105</u>	<u>400</u>	<u>1 045</u>
Anticipated commercial imports	470	105	200	775
Food aid needs	70	-	200	270
<u>Current Aid Position</u>				
Food aid pledges	38	-	71	108
of which: delivered	38	-	71	108
Donor-financed purchases	-	-	5	5
of which: for local use	-	-	4	4
for export	-	-	1	1
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>26</u>	<u>4</u>	<u>97</u>	<u>127</u>
<u>Indexes</u>				
2001 Production as % of average:				122
2001/02 Import requirement as % of average:				67

LESOTHO

Area:	30 000 sq.km
Climate:	Highland rainy climate with mild winter. Rainy season: Oct.-April. Cool temperatures in May-September with frost hazard
Population:	2.19 million (2001 estimate); G.N.P. per caput: US\$540 (2000)
Specific characteristics of the country:	Low-income food-deficit country; land-locked
Logistics:	All imports through South Africa
Major foodcrops:	Maize, sorghum, vegetables
Marketing year:	April/March; Lean season: February-April
Share of cereals in total calorie intake:	75 percent

CURRENT SITUATION

Prospects for the 2002 main season cereal harvest, about to start, have deteriorated with persistent heavy rains in the past months. Excessive precipitation since the beginning of the rainy season in October, coupled with hailstorm and pest infestations in parts, has adversely affected yields of maize, wheat and sorghum crops. Preliminary production forecast indicate a reduced harvest for the third consecutive, which is likely to aggravate the already precarious food security situation in several areas.

Food shortages are being experienced by large groups of poor households affected by last year's poor crop. Food aid is being distributed by relief organizations to 36 000 most vulnerable people. WFP is distributing 2 200 tonnes of maize meal, beans and vegetable oil to about 7 000 families in five eastern, southeastern and northeastern districts until the next harvest.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	26	-	166	192
Previous five years average imports	57	3	148	208
<u>2001/02 Domestic Availability</u>	<u>39</u>	<u>-</u>	<u>144</u>	<u>183</u>
2001 Production (rice in paddy terms)	18	-	141	159
2001 Production (rice in milled terms)	18	-	141	159
Possible stock drawdown	21	-	3	24
<u>2001/02 Utilization</u>	<u>84</u>	<u>8</u>	<u>272</u>	<u>364</u>
Food use	83	8	242	333
of which: local purchase requirement	-	-	3	3
Non-food use	1	-	30	31
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2001/02 Import Requirement</u>	<u>45</u>	<u>8</u>	<u>128</u>	<u>181</u>
Anticipated commercial imports	45	8	125	178
Food aid needs	-	-	3	3
<u>Current Aid Position</u>				
Food aid pledges	-	-	3	3
of which: delivered	-	-	3	3
Donor-financed purchases	-	-	3	3
of which: for local use	-	-	3	3
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>38</u>	<u>4</u>	<u>110</u>	<u>152</u>
<u>Indexes</u>				
2001 Production as % of average:				83
2001/02 Import requirement as % of average:				87

LIBERIA

Area:	96 000 sq.km
Climate:	Southern half tropical wet, northern half tropical wet-dry; rainy season: March-November
Population:	3.0 million (2002 estimate); G.N.P. per caput: n.a.
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports and roads adequate
Major foodcrops:	Rice, roots and tubers, oils
Marketing year:	January/December; Lean season: July-August
Share of cereals in total calorie intake:	48 percent

CURRENT SITUATION

In Liberia, the output of the 2001 paddy crop is estimated slightly above the 144 000 tonnes produced in the previous year, reflecting generally favourable weather and a relatively calm security situation. However, the general security situation has deteriorated in recent weeks, with the Government declaring a state of emergency on 8 February 2002.

About 60 000 IDP needing urgent support have been reported around Monrovia and in Bong County nearby while at least 12 000 Liberians refugees were registered at the Sierra Leone border town Jendema in the early March. UNHCR has relocated part of refugees from Jendema to Jimi Bagbo camp in the southeastern district of Pujehun, and to temporary settlements that have housed Sierra Leoneans returning from neighbouring Guinea and Liberia.

WFP is currently assisting 75 000 IDPs throughout the country

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	115	-	115
Previous five years average imports	61	101	17	179
<u>2002 Domestic Availability</u>	<u>61</u>	<u>94</u>	<u>17</u>	<u>172</u>
2001 Production (rice in paddy terms)	-	145	-	145
2001 Production (rice in milled terms)	-	94	-	94
Possible stock drawdown	-	-	-	-
<u>2002 Utilization</u>	<u>55</u>	<u>239</u>	<u>10</u>	<u>304</u>
Food use	53	218	10	281
of which: local purchase requirement	-	-	-	-
Non-food use	2	21	-	23
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>55</u>	<u>145</u>	<u>10</u>	<u>210</u>
Anticipated commercial imports	40	140	-	180
Food aid needs	15	5	10	30
<u>Current Aid Position</u>				
Food aid pledges	5	-	1	6
of which: delivered	5	-	1	6
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>18</u>	<u>72</u>	<u>3</u>	<u>93</u>
<u>Indexes</u>				
2001 Production as % of average:				126
2002 Import requirement as % of average:				117

MADAGASCAR

Area:	582 000 sq.km
Climate:	Eastern coast is tropical wet, the rest tropical wet-dry. Rainy season: October-March; tropical cyclones
Population:	16.34 million (2002 estimate); G.N.P. per caput: US\$260 (2000)
Specific characteristics of the country:	Low-income food-deficit country
Logistics:	Dilapidated roads and lack of spare parts and tyres
Major foodcrops:	Rice, roots, tubers, maize, fruit
Marketing year:	April/March; Lean season: February/March
Share of cereals in total calorie intake:	60 percent

CURRENT SITUATION

Harvesting of the 2002 cereal crops, mainly rice, is underway. Overall prospects are satisfactory reflecting generally adequate rains and the absence of significant locust infestation during the growing season. However, production is expected to be reduced in parts. In northeastern coastal areas, affected by a prolonged dry spell in December and January, heavy rains in March may have arrived too late to avoid yield reductions of rice crop. In southeastern parts, below-average rains in March are also likely to have adversely affected maize yields.

Shortages of rice, sugar, salt and other essential non-food items, including fuel, are being experienced in Antananarivo. This reflects disruption of the transport to the capital city as a result of road blockades and destruction of bridges following the current political crisis. Prices of food staples are on the increase and the food supply situation is likely to deteriorate if the crisis is not resolved soon.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	8	2 475	169	2 652
Previous five years average imports	83	100	10	193
<u>2001/02 Domestic Availability</u>	<u>13</u>	<u>1 768</u>	<u>165</u>	<u>1 946</u>
2001 Production (rice in paddy terms)	10	2 600	160	2 770
2001 Production (rice in milled terms)	10	1 768	160	1 938
Possible stock drawdown	3	-	5	8
<u>2001/02 Utilization</u>	<u>93</u>	<u>1 880</u>	<u>178</u>	<u>2 151</u>
Food use	93	1 750	157	2 000
of which: local purchase requirement	-	-	2	2
Non-food use	-	130	21	151
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2001/02 Import Requirement</u>	<u>80</u>	<u>112</u>	<u>13</u>	<u>205</u>
Anticipated commercial imports	78	110	10	198
Food aid needs	2	2	3	7
<u>Current Aid Position</u>				
Food aid pledges	2	15	11	29
of which: delivered	2	15	11	29
Donor-financed purchases	-	-	2	2
of which: for local use	-	-	2	2
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>6</u>	<u>107</u>	<u>10</u>	<u>122</u>
<u>Indexes</u>				
2001 Production as % of average:				104
2001/02 Import requirement as % of average:				106

MALAWI

Area:	94 000 sq.km
Climate:	Tropical wet-dry climate; rainy season: November-May
Population	13.34 million (2001 estimate); G.N.P. per caput: US\$170 (2000)
Specific characteristics of the country:	Low-income food-deficit country; land-locked country; importer and exporter of grain
Logistics:	Imports/exports through Beira (Mozambique) or Dar es Salaam (Tanzania)
Major foodcrops:	Maize, pulses, roots, tubers, rice
Marketing year:	April/March; Lean season: February-March
Share of cereals in total calorie intake:	70 percent

CURRENT SITUATION

Widespread normal to above-normal rains during the third decade of March improved prospects for the 2002 cereal crops affected by a dry spell in the previous two decades. Despite normal cumulative rainfall since the beginning of the season, yields may have been negatively affected by a late start of the rainy season and erratic precipitation, with prolonged dry spells and floods in parts.

The food supply situation is extremely tight following last year's reduced maize harvest, depletion of strategic reserves and delayed imports. More than 300 people are reported to have died by starvation in the past months according to civic and church groups. As a result of the food shortages, maize of this year's season is being consumed green in the fields, which is likely to affect supplies later in marketing year 2002/2003 (April/May). WFP launched in February an Emergency Operation aiming to distribute 11 400 tonnes of food aid to assist a population of 301 000. WFP plans to distribute 3 000 tonnes before the next harvest.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	2	78	2 084	2 164
Previous five years average imports	41	1	85	127
<u>2001/02 Domestic Availability</u>	<u>3</u>	<u>45</u>	<u>1 901</u>	<u>1 949</u>
2001 Production (rice in paddy terms)	2	61	1 770	1 833
2001 Production (rice in milled terms)	2	40	1 770	1 812
Possible stock drawdown	1	5	131	137
<u>2001/02 Utilization</u>	<u>40</u>	<u>45</u>	<u>1 989</u>	<u>2 074</u>
Food use	40	32	1 761	1 833
of which: local purchase requirement	-	-	16	16
Non-food use	-	12	228	240
Exports or re-exports	-	1	-	1
Possible stock build up	-	-	-	-
<u>2001/02 Import Requirement</u>	<u>37</u>	<u>-</u>	<u>88</u>	<u>125</u>
Anticipated commercial imports	35	-	83	118
Food aid needs	2	-	5	7
<u>Current Aid Position</u>				
Food aid pledges	2	-	5	7
of which: delivered	2	-	5	7
Donor-financed purchases	-	-	16	16
of which: for local use	-	-	16	16
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>3</u>	<u>2</u>	<u>132</u>	<u>137</u>
<u>Indexes</u>				
2001 Production as % of average:				85
2001/02 Import requirement as % of average:				98

MALI

Area:	1 220 000 sq.km
Climate:	From north to south: arid, semi-arid and tropical wet-dry; rainy season: May-October
Population:	10.68 million (2002 estimate); G.N.P. per caput: US\$240 (2000)
Specific characteristics of the country:	Low-income food-deficit country; land-locked Sahelian country
Logistics:	Roads inadequate during rainy season; river transport important; rail link to Dakar (Senegal)
Major foodcrops:	Millet, sorghum, rice, maize
Marketing year:	November/October; Lean season: July-September
Share of cereals in total calorie intake:	75 percent

CURRENT SITUATION

Seasonably dry conditions prevail. Prospects for off-season irrigated or recession crops are favourable and pastures are abundant. Reflecting adequate growing conditions, the aggregate 2001 cereal production was estimated by a joint FAO/CILSS Crop Assessment Mission at 2.87 million tonnes, 20 percent more than the previous year and significantly above average. Maize production almost doubled compared with 223 000 tonnes harvested in the previous year, while sorghum and paddy outputs increased by 17 percent and 13 percent respectively to 695 000 tonnes and 840 000 tonnes.

The overall food situation is satisfactory. Markets are well supplied and prices are stable.

Import requirement in cereals in 2001/02 (November/October) is estimated at 90 000 tonnes, including 5 000 tonnes of wheat as food aid.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	5	678	1 752	2 435
Previous five years average imports	49	59	4	112
<u>2001/02 Domestic Availability</u>	<u>11</u>	<u>571</u>	<u>2 016</u>	<u>2 599</u>
2001 Production (rice in paddy terms)	9	840	2 016	2 866
2001 Production (rice in milled terms)	9	571	2 016	2 597
Possible stock drawdown	2	-	-	2
<u>2001/02 Utilization</u>	<u>61</u>	<u>611</u>	<u>2 016</u>	<u>2 689</u>
Food use	60	436	1 635	2 131
of which: local purchase requirement	-	-	10	10
Non-food use	1	105	306	413
Exports or re-exports	-	50	75	125
Possible stock build up	-	20	-	20
<u>2001/02 Import Requirement</u>	<u>50</u>	<u>40</u>	<u>-</u>	<u>90</u>
Anticipated commercial imports	45	40	-	85
Food aid needs	5	-	-	5
<u>Current Aid Position</u>				
Food aid pledges	1	-	-	1
of which: delivered	1	-	-	1
Donor-financed purchases	-	-	4	4
of which: for local use	-	-	4	4
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>6</u>	<u>41</u>	<u>153</u>	<u>200</u>
<u>Indexes</u>				
2001 Production as % of average:				118
2001/02 Import requirement as % of average:				80

MAURITANIA

Area:	1 025 000 sq.km
Climate:	Mostly a Saharian country; semi-arid fringe in extreme south with rains in June-September
Population:	2.80 million (2002 estimate); G.N.P. per caput: US\$370 (2000)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Port capacity adequate, though storms during January-March sometimes cause difficulties
Major foodcrops:	Wheat, rice, millet and sorghum
Marketing year:	November/October; Lean season: July-September
Share of cereals in total calorie intake:	54 percent

CURRENT SITUATION

In Mauritania, a joint FAO/CILSS Crop Assessment Mission in October 2001 estimated aggregate cereal production in 2001 at some 160 000 tonnes, lower than both the previous year and average. This decrease was mostly due to inadequate availability of irrigation water due to the low water level in the Senegal River which reached the flood level only in early September. By contrast, production in low-lying areas has increased compared to 2000 as all operational dams reached over 70 percent of capacity.

The tight food supply situation has been worsened by unseasonably heavy rains and cold weather which affected the regions of Brakna, Trarza and Gorgol on 9-11 January, causing casualties and leaving thousands of people homeless. More than 120 000 head of livestock died and at least 6 000 tonnes of rice just harvested were damaged. Prices of cereals, which were already higher than a year ago, have risen considerably on most markets. Already, 79 communes in Gorgol, Brakna, Tagant, Adrar, Trarza and Hodh El Chergoui have been identified as at risk of food shortages and civil distress has been reported in most of these regions.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	82	86	168
Previous five years average imports	245	59	9	313
<u>2001/02 Domestic Availability</u>	<u>55</u>	<u>39</u>	<u>102</u>	<u>196</u>
2001 Production (rice in paddy terms)	-	58	102	160
2001 Production (rice in milled terms)	-	39	102	141
Possible stock drawdown	55	-	-	55
<u>2001/02 Utilization</u>	<u>235</u>	<u>114</u>	<u>131</u>	<u>480</u>
Food use	200	98	114	412
of which: local purchase requirement	-	-	-	-
Non-food use	20	15	16	51
Exports or re-exports	15	1	1	17
Possible stock build up	-	-	-	-
<u>2001/02 Import Requirement</u>	<u>180</u>	<u>75</u>	<u>29</u>	<u>284</u>^{1/}
Anticipated commercial imports	170	60	27	257
Food aid needs	10	15	2	27
<u>Current Aid Position</u>				
Food aid pledges	1	1	2	4
of which: delivered	1	1	2	4
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>71</u>	<u>35</u>	<u>41</u>	<u>147</u>
<u>Indexes</u>				
2001 Production as % of average:				95
2001/02 Import requirement as % of average:				91

^{1/} Includes 15 000 tonnes of wheat for re-export.

MAURITIUS

Area:	1 850 sq.km
Climate:	No dry months, most rainfall in November-July; tropical cyclones
Population:	1.15 million (2002 estimate); G.N.P. per caput: US\$3 800 (2000)
Specific characteristics of the country:	Cereal consumption covered almost entirely by imports
Logistics:	Inadequate port handling capacity; road system good
Major foodcrops:	Vegetables
Marketing year:	January/December
Share of cereals in total calorie intake:	48 percent

CURRENT SITUATION

The bulk of the cultivated area is normally devoted to sugar cane and most of the remainder to fruit and vegetables. As a consequence, the country is virtually dependent on imports to meet its cereal needs. Cereal import requirements estimated at 248 000 tonnes, will continue to be met through commercial channels.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	-	2	2
Previous five years average imports	151	78	26	255
<u>2002 Domestic Availability</u>	<u>151</u>	<u>78</u>	<u>22</u>	<u>251</u>
2001 Production (rice in paddy terms)	-	-	2	2
2001 Production (rice in milled terms)	-	-	2	2
Possible stock drawdown	-	-	-	-
<u>2002 Utilization</u>	<u>150</u>	<u>78</u>	<u>22</u>	<u>250</u>
Food use	104	78	3	185
of which: local purchase requirement	-	-	-	-
Non-food use	6	-	19	25
Exports or re-exports	40	-	-	40
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>150</u>	<u>78</u>	<u>20</u>	<u>248</u>
Anticipated commercial imports	150	78	20	248
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>90</u>	<u>68</u>	<u>3</u>	<u>161</u>
<u>Indexes</u>				
2001 Production as % of average:				100
2002 Import requirement as % of average:				97

MOZAMBIQUE

Area: 784 000 sq.km
Climate: Tropical wet-dry; coast is semi-arid
Population: 17.67 million (2002 estimate); G.N.P. per caput: US\$210 (2000)
Specific characteristics of the country: Low-income food-deficit country; exposed to tropical storms and cyclones
Logistics: Dilapidated rail and road transport fleet; lack of fuel and spares; poor roads; substantial Deliveries by coastal vessels
Major foodcrops: Roots, tubers, maize
Marketing year: April/March; Lean season: February-April
Share of cereals in total calorie intake: 53 percent

CURRENT SITUATION

Harvesting of the 2002 cereal crops is about to start. Prospects are mixed. In the main maize growing northern areas, a good harvest is expected reflecting adequate precipitation during the growing season. However, prolonged dry spells in and in the Southern provinces Maputo, Gaza and Inhambane, as well as in southern parts of the Central Provinces of Manica, Sofala and Tete are expected to result in a reduced cereal production. In the three Southern provinces is estimated that up to 40 000 hectares of various food crops were lost to dry weather, seriously affecting 50,000 households. In general, yields are anticipated to be reduced for the third consecutive year in these areas. Emergency food aid is currently being distributed by WFP to 190 000 most affected people.

Prices of maize that had sharply increased from last year's levels, further rose in March. This reflects increased import demand from neighbouring countries. The highest rise in prices was registered in the province of Manica, close to Zimbabwe.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	2	170	1 407	1 579
Previous five years average imports	180	73	53	306
<u>2001/02 Domestic Availability</u>	<u>2</u>	<u>118</u>	<u>1 406</u>	<u>1 526</u>
2001 Production (rice in paddy terms)	2	165	1 406	1 573
2001 Production (rice in milled terms)	2	110	1 406	1 518
Possible stock drawdown	-	8	-	8
<u>2001/02 Utilization</u>	<u>229</u>	<u>258</u>	<u>1 538</u>	<u>2 025</u>
Food use	214	242	1 220	1 676
of which: local purchase requirement	-	-	12	12
Non-food use	10	16	168	194
Exports or re-exports	-	-	150	150
Possible stock build up	5	-	-	5
<u>2001/02 Import Requirement</u>	<u>227</u>	<u>140</u>	<u>132</u>	<u>499</u>
Anticipated commercial imports	165	130	92	387
Food aid needs	62	10	40	112
<u>Current Aid Position</u>				
Food aid pledges	85	46	1	132
of which: delivered	85	46	1	132
Donor-financed purchases	-	-	12	12
of which: for local use	-	-	12	12
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>12</u>	<u>14</u>	<u>69</u>	<u>95</u>
<u>Indexes</u>				
2001 Production as % of average:				100
2001/02 Import requirement as % of average:				163

NAMIBIA

Area:	823 000 sq.km
Climate:	Mostly arid (south-west and coast) or semi-arid. Only north and north-east gets regular rainfall in November-April
Population:	1.92 million (2002 estimate); G.N.P. per caput: US\$2 050 (2000)
Specific characteristics of the country:	Arid to semi-arid country; cereal production mainly in the north
Logistics:	Good road and railway network
Major foodcrops:	Millet, maize, sorghum, wheat
Marketing year:	May/April;
Share of cereals in total calorie intake:	48 percent

CURRENT SITUATION

Normal to above-normal rains in February and March benefited the developing 2002 cereal crops. However, precipitation arrived too late to avoid yield reductions of maize crop affected by a prolonged dry spell in January and below normal and erratic precipitation from October to December. The area planted to sorghum and maize was reduced due to insufficient rains at planting time. Latest estimates indicate an area planted to cereals of 216 000 hectares, comprising 195 400 hectares of sorghum and 20 600 hectares of maize. This is 20 percent lower than the reduced level of last year. The output is forecast at 82 000 tonnes, 11 percent below the cereal crop of 2001. The already tight food supply of farmers who gathered a reduced harvest last year, and of vulnerable groups in urban areas, is expected to deteriorate in marketing year 2002/2003 (May/April).

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	5	-	102	107
Previous five years average imports	48	-	95	143
<u>2001/02 Domestic Availability</u>	<u>5</u>	<u>-</u>	<u>118</u>	<u>123</u>
2001 Production (rice in paddy terms)	5	-	102	107
2001 Production (rice in milled terms)	5	-	102	107
Possible stock drawdown	-	-	16	16
<u>2001/02 Utilization</u>	<u>65</u>	<u>-</u>	<u>193</u>	<u>258</u>
Food use	61	-	182	243
of which: local purchase requirement	-	-	2	2
Non-food use	3	-	11	14
Exports or re-exports	-	-	-	-
Possible stock build up	1	-	-	1
<u>2001/02 Import Requirement</u>	<u>60</u>	<u>-</u>	<u>75</u>	<u>135</u>
Anticipated commercial imports	60	-	75	135
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	2	2
of which: for local use	-	-	2	2
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>32</u>	<u>-</u>	<u>95</u>	<u>127</u>
<u>Indexes</u>				
2001 Production as % of average:				100
2001/02 Import requirement as % of average:				94

NIGER

Area:	1 267 000 sq.km
Climate:	Northern part arid, southern part semi-arid with rains in June-October
Population:	10.67 million (2002 estimate); G.N.P. per caput: US\$180 (2000)
Specific characteristics of the country:	Low-income food-deficit country; land-locked Sahelian country
Logistics:	Roads inadequate during rainy season
Major foodcrops:	Millet and sorghum, pulses, roots and tubers
Marketing year:	November/October; Lean season: July-September
Share of cereals in total calorie intake:	70 percent

CURRENT SITUATION

Seasonably dry conditions prevail. Reflecting favourable growing conditions and availability of agricultural inputs, cereal production in 2001 was estimated by a joint FAO/CILSS Crop Assessment Mission at a record 3.2 million tonnes, 48 percent higher than the poor crop in the previous year and about one-third more than average. Most of the increase came from millet which increased by some 0.75 million tonnes to 2.4 million tonnes.

The overall food supply situation is satisfactory. However, an untimely sharp rise of cereal prices on all markets across the country has been reported, which makes access to food difficult. The above-normal cereal price is mainly due to the activities of speculators and the purchase of cereals in Niger markets by businessmen from Nigeria.

Cereal import requirement in 2001/02 (November/October) is estimated at some 345 000 tonnes, almost half the volume imported in the previous year.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	8	65	2 316	2 389
Previous five years average imports	50	113	279	442
<u>2001/02 Domestic Availability</u>	<u>6</u>	<u>60</u>	<u>3 077</u>	<u>3 142</u>
2001 Production (rice in paddy terms)	6	76	3 077	3 159
2001 Production (rice in milled terms)	6	50	3 077	3 132
Possible stock drawdown	-	10	-	10
<u>2001/02 Utilization</u>	<u>62</u>	<u>179</u>	<u>3 247</u>	<u>3 487</u>
Food use	56	169	2 530	2 755
of which: local purchase requirement	-	-	10	10
Non-food use	1	9	472	482
Exports or re-exports	5	-	15	20
Possible stock build up	-	-	230	230
<u>2001/02 Import Requirement</u>	<u>56</u>	<u>119</u>	<u>170</u>	<u>345</u>
Anticipated commercial imports	50	95	170	315
Food aid needs	6	24	-	30
<u>Current Aid Position</u>				
Food aid pledges	6	25	2	32
of which: delivered	-	8	-	8
Donor-financed purchases	-	-	6	6
of which: for local use	-	-	6	6
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>5</u>	<u>16</u>	<u>237</u>	<u>258</u>
<u>Indexes</u>				
2001 Production as % of average:				132
2001/02 Import requirement as % of average:				78

NIGERIA

Area:	911 000 sq.km
Climate:	Mostly tropical wet-dry, south-west tropical wet, extreme north semi-arid
Population:	116.8 million (2002 estimate); G.N.P. per caput: US\$260 (2000)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports adequate, roads inadequate during rainy season
Major foodcrops:	Roots and tubers, coarse grains, rice
Marketing year:	January/December; Lean season: April-May
Share of cereals in total calorie intake:	43 percent

CURRENT SITUATION

Land preparation and the sowing of the first maize crop are underway in the south. Production of cereals (including rice in paddy terms) in 2001 is estimated at some 23 million tonnes, higher than both the previous year and the average.

The food supply situation is tight in several areas notably in the states of Benue, Nasarawa and Taraba as a result of communal conflicts. As these are some of the most important food producing areas, the adverse situation could seriously threaten national food security.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	48	3 301	18 837	22 186
Previous five years average imports	1 583	788	87	2 458
<u>2002 Domestic Availability</u>	<u>48</u>	<u>2 200</u>	<u>19 572</u>	<u>21 820</u>
2001 Production (rice in paddy terms)	48	3 500	19 572	23 120
2001 Production (rice in milled terms)	48	2 100	19 572	21 720
Possible stock drawdown	-	100	-	100
<u>2002 Utilization</u>	<u>1 748</u>	<u>3 200</u>	<u>19 642</u>	<u>24 590</u>
Food use	1 696	2 780	15 099	19 575
of which: local purchase requirement	-	-	-	-
Non-food use	52	420	3 913	4 385
Exports or re-exports	-	-	130	130
Possible stock build up	-	-	500	500
<u>2002 Import Requirement</u>	<u>1 700</u>	<u>1 000</u>	<u>70</u>	<u>2 770</u>
Anticipated commercial imports	1 700	1 000	70	2 770
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>15</u>	<u>24</u>	<u>129</u>	<u>168</u>
<u>Indexes</u>				
2001 Production as % of average:				104
2002 Import requirement as % of average:				113

RWANDA

Area:	25 000 sq.km
Climate:	Highland rainy climate with moderate temperature (20°C); two rainy seasons: February-May and September-November
Population:	8.36 million (2002 estimate); G.N.P. per caput: US\$230 (2000)
Specific characteristics of the country:	Low-income food-deficit country; land-locked country
Logistics:	Ports: Mombasa (Kenya) and Dar es Salaam (Tanzania); roads and railway inadequate
Major foodcrops:	Roots, tubers, pulses, plantains, sorghum, maize
Marketing year:	January/December; Lean season: November-December
Share of cereals in total calorie intake:	25 percent

CURRENT SITUATION

Planting of the 2002 second-season foodcrops is completed. Abundant rains in January and February provided adequate soil moisture for sowing operations, while normal precipitation in March allowed a good establishment of the sorghum and beans crops. The early outlook is favourable. The output of the 2002 first season foodcrops was estimated at 3.7 million tonnes, 28 percent higher than the level of last year's first season, with the largest increases in non-cereal crops, banana, sweet potatoe and cassava.

The overall food supply situation remains satisfactory. Prices of the main food staples have declined significantly.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	5	9	190	204
Previous five years average imports	15	14	167	196
<u>2002 Domestic Availability</u>	<u>6</u>	<u>12</u>	<u>234</u>	<u>252</u>
2002 Production (rice in paddy terms)	6	18	234	258
2002 Production (rice in milled terms)	6	12	234	252
Possible stock drawdown	-	-	-	-
<u>2002 Utilization</u>	<u>21</u>	<u>22</u>	<u>419</u>	<u>462</u>
Food use	21	21	337	379
of which: local purchase requirement	-	-	-	-
Non-food use	-	1	82	83
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>15</u>	<u>10</u>	<u>145</u>	<u>170</u>
Anticipated commercial imports	-	-	100	100
Food aid needs	15	10	45	70
<u>Current Aid Position</u>				
Food aid pledges	-	-	2	2
of which: delivered	-	-	2	2
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>3</u>	<u>3</u>	<u>40</u>	<u>45</u>
<u>Indexes</u>				
2002 Production as % of average:				126
2002 Import requirement as % of average:				87

SAO TOME AND PRINCIPE

Area:	960 sq.km
Climate:	Tropical wet; rainfall increases with altitude and towards southern parts of the islands
Population:	153 300 (2002 estimate); G.N.P. per caput: US\$290 (2000)
Specific characteristics of the country:	Low-income food-deficit country; archipelago
Logistics:	Ports and roads adequate
Major foodcrops:	Bananas, breadfruit, cocoyam
Marketing year:	January/December
Share of cereals in total calorie intake:	36 percent

CURRENT SITUATION

The staple foodcrops are roots, plantains and tubers. The country will import 10 000 tonnes of cereals in 2002.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	-	1	1
Previous five years average imports	3	5	2	10
<u>2002 Domestic Availability</u>	<u>3</u>	<u>5</u>	<u>1</u>	<u>1</u>
2001 Production (rice in paddy terms)	-	-	1	1
2001 Production (rice in milled terms)	-	-	1	1
Possible stock drawdown	-	-	-	-
<u>2002 Utilization</u>	<u>3</u>	<u>5</u>	<u>3</u>	<u>11</u>
Food use	3	5	3	11
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	-	-
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>3</u>	<u>5</u>	<u>2</u>	<u>10</u>
Anticipated commercial imports	3	3	2	8
Food aid needs	-	2	-	2
<u>Current Aid Position</u>				
Food aid pledges	-	5	-	5
of which: delivered	-	5	-	5
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>20</u>	<u>33</u>	<u>20</u>	<u>72</u>
<u>Indexes</u>				
2001 Production as % of average:				100
2002 Import requirement as % of average:				100

SENEGAL

Area:	193 000 sq.km
Climate:	Semi-arid in north, tropical wet-dry in south, with rains in June-October
Population:	10.00 million (2002 estimate); G.N.P. per caput: US\$500 (2000)
Specific characteristics of the country:	Low-income food-deficit country; coastal Sahelian country
Logistics:	Port capacity adequate; gateway to Mali.
Major foodcrops:	Millet and sorghum, rice, maize, wheat
Marketing year:	November/October; Lean season: August-September
Share of cereals in total calorie intake:	61 percent

CURRENT SITUATION

Unseasonably heavy rains and cold weather which affected the northern regions of Saint Louis and Louga between 9-11 January caused casualties and left thousands of people homeless. In addition, more than 2 000 hectares of arable land was damaged and an estimated 470 000 head of livestock died. Significant losses of food, including rice and vegetables, are also reported. On 17 January the Government launched an international appeal for assistance to meet the immediate needs of the population in the affected regions.

Overall, the food situation is satisfactory following above average 2001 cereal crop and substantial imports late last year. The markets are well supplied and prices of millet and sorghum have decreased with the arrival of fresh produce on the markets.

Cereal import requirements in 2001/02 (November/October) are forecast at 845 000 tonnes, some 50 000 tonnes less than actual imports in the previous year.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	200	737	937
Previous five years average imports	224	520	47	791
<u>2001/02 Domestic Availability</u>	<u>3</u>	<u>187</u>	<u>860</u>	<u>1 049</u>
2001 Production (rice in paddy terms)	-	267	840	1 107
2001 Production (rice in milled terms)	-	187	840	1 026
Possible stock drawdown	3	-	20	23
<u>2001/02 Utilization</u>	<u>253</u>	<u>762</u>	<u>880</u>	<u>1 894</u>
Food use	248	680	741	1 669
of which: local purchase requirement	-	-	5	5
Non-food use	5	42	138	185
Exports or re-exports	-	-	-	-
Possible stock build up	-	40	-	40
<u>2001/02 Import Requirement</u>	<u>250</u>	<u>575</u>	<u>20</u>	<u>845</u>
Anticipated commercial imports	250	560	20	830
Food aid needs	-	15	-	15
<u>Current Aid Position</u>				
Food aid pledges	-	11	-	11
of which: delivered	-	11	-	11
Donor-financed purchases	-	-	4	4
of which: for local use	-	-	4	4
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>25</u>	<u>68</u>	<u>74</u>	<u>167</u>
<u>Indexes</u>				
2001 Production as % of average:				118
2001/02 Import requirement as % of average:				107

SEYCHELLES

Area:	455 sq.km
Climate:	Tropical wet; rains throughout the year, peaking in October-May
Population:	78 000 (2002 estimate); G.N.P. per caput: US\$7 310 (2000)
Specific characteristics of the country:	Consists of about 100 islands scattered over more than 1 million sq.km. Tourism provides 50 percent of G.D.P.
Logistics:	-
Major foodcrops:	Coconuts, fruit, vegetables
Marketing year:	January/December
Share of cereals in total calorie intake:	49 percent

CURRENT SITUATION

The cultivated area of only some 6 000 hectares is used mainly for coconuts, cinnamon and tea. Other crops, of secondary importance, include fruit and vegetables. The cereal needs for human consumption and feed are all imported commercially. Cereal import requirements estimated at 13 000 tonnes, will continue to be met through commercial channels.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	-	-	-
Previous five years average imports	2	5	6	13
<u>2002 Domestic Availability</u>	<u>2</u>	<u>5</u>	<u>6</u>	<u>13</u>
2001 Production (rice in paddy terms)	-	-	-	-
2001 Production (rice in milled terms)	-	-	-	-
Possible stock drawdown	-	-	-	-
<u>2002 Utilization</u>	<u>2</u>	<u>5</u>	<u>6</u>	<u>13</u>
Food use	2	5	1	8
<i>of which: local purchase requirement</i>	-	-	-	-
Non-food use	-	-	5	5
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>2</u>	<u>5</u>	<u>6</u>	<u>13</u>
Anticipated commercial imports	2	5	6	13
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
<i>of which: delivered</i>	-	-	-	-
Donor-financed purchases	-	-	-	-
<i>of which: for local use</i>	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>26</u>	<u>64</u>	<u>13</u>	<u>102</u>
<u>Indexes</u>				
2001 Production as % of average:				-
2002 Import requirement as % of average:				100

SIERRA LEONE

Area:	72 000 sq.km
Climate:	Mostly tropical wet-dry; extreme south tropical wet; rainy season: March-October
Population:	5.15 million (2002 estimate); G.N.P. per caput: US\$130 (2000)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Roads inadequate
Major foodcrops:	Rice, roots and tubers
Marketing year:	January/December; Lean season: July-August
Share of cereals in total calorie intake:	57 percent

CURRENT SITUATION

Cereal production in 2001 is estimated at 348 000 tonnes, reflecting increased plantings by returning refugees and farmers previously displaced, as well as improved conditions for the distribution of agricultural inputs.

The security situation is reported to be relatively calm. On 18 January the President declared the end of the disarmament process and announced the lifting of the curfew which had been in force for four years.

In an effort to continue helping the country, a UN Consolidated Inter-Agency Appeal was launched on 26 November 2001 by the UN Secretary General. The agricultural component of the Appeal includes five projects proposed by FAO with the aim of facilitating the transition from dependence on food aid to self-reliance in food production and enhanced food security.

Sierra Leone's cereal import requirement for 2002 is estimated at 225 000 tonnes including 40 000 tonnes food aid.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	316	40	356
Previous five years average imports	70	127	23	220
<u>2002 Domestic Availability</u>	-	186	37	224
2001 Production (rice in paddy terms)	-	311	37	348
2001 Production (rice in milled terms)	-	186	37	224
Possible stock drawdown	-	-	-	-
<u>2002 Utilization</u>	60	336	52	449
Food use	60	280	39	378
<i>of which: local purchase requirement</i>	-	-	-	-
Non-food use	-	47	9	55
Exports or re-exports	-	-	-	-
Possible stock build up	-	10	5	15
<u>2002 Import Requirement</u>	60	150	15	225
Anticipated commercial imports	35	150	-	185
Food aid needs	25	-	15	40
<u>Current Aid Position</u>				
Food aid pledges	18	-	2	20
<i>of which: delivered</i>	18	-	2	20
Donor-financed purchases	-	-	-	-
<i>of which: for local use</i>	-	-	-	-
<i>for export</i>	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	12	54	8	73
<u>Indexes</u>				
2001 Production as % of average:				98
2002 Import requirement as % of average:				102

SOMALIA

Area:	627 000 sq.km
Climate:	Semi-arid in the south; rest arid
Population:	6.37 million (2001 estimate); G.N.P. per caput; n.a.
Specific characteristics of the country:	Low-income food-deficit country
Logistics:	Inadequate port facilities; serious shortage of fuel and spare parts
Major foodcrops:	Maize, sorghum, sesame
Marketing year:	August/July; Lean season: June-August
Share of cereals in total calorie intake:	45 percent

CURRENT SITUATION

The output of the recently harvested secondary "Deyr" season cereal crop, normally accounting for some 25-30 percent of annual cereal production, is forecast at 141 000 tonnes, which is about 46 percent above the previous year's harvest.

Despite the good "Deyr" harvest, however, the food security situation in several districts including Gedo, East Sanag, Sool and parts of Bari regions gives cause for serious concern. Overall, more than 500 000 people are estimated to be facing severe food difficulties in Somalia, mainly due to poor 2001 main "Gu" season crops. Slow recovery from successive seasons of drought and long-term effects of insecurity coupled with reduced foreign exchange earnings due to the continuing ban on livestock imports from eastern Africa by countries along the Arabian Peninsula on account of Rift Valley Fever have seriously undermined household food security.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	1	2	264	267
Previous five years average imports	113	106	56	275
<u>2001/02 Domestic Availability</u>	<u>10</u>	<u>1</u>	<u>266</u>	<u>277</u>
2001 Production (rice in paddy terms)	-	2	266	268
2001 Production (rice in milled terms)	-	1	266	267
Possible stock drawdown	10	-	-	10
<u>2001/02 Utilization</u>	<u>110</u>	<u>101</u>	<u>386</u>	<u>597</u>
Food use	110	91	331	532
of which: local purchase requirement	-	-	-	-
Non-food use	-	10	40	50
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	15	15
<u>2001/02 Import Requirement</u>	<u>100</u>	<u>100</u>	<u>120</u>	<u>320</u>
Anticipated commercial imports	100	100	50	150
Food aid needs	-	-	70	70
<u>Current Aid Position</u>				
Food aid pledges	-	-	17	17
of which: delivered	-	-	12	12
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>17</u>	<u>14</u>	<u>52</u>	<u>84</u>
<u>Indexes</u>				
2001 Production as % of average:				100
2001/02 Import requirement as % of average:				116

SOUTH AFRICA

Area:	1.22 million sq.km
Climate:	Sub-tropical with rains concentrated in the summer months (November-April); occasional snow in winter over higher parts of plateau and Cape ranges; an average of 120 days frost in the interior plateau
Population:	40.86 million (2001 estimate); GNP per caput US\$3 020 (2000)
Specific characteristics of the country:	Normally net food exporter, notably maize
Logistics:	Adequate port, rail and road facilities
Major foodcrops:	Maize, wheat
Marketing year:	May/April; Lean season: February-April
Share of cereals in total calorie intake:	54 percent

CURRENT SITUATION

Prospects for the 2002 main maize crop, to be harvested from May, are favourable. This reflects generally adequate rains since the beginning of the season and an increase of 5 percent in the area planted. Official production forecasts by mid-March point to a maize crop close to 9 million tonnes, some 20 percent above last year's crop of 7.5 million tonnes. However, this forecast may be revised downwards following dry weather in parts in March.

Following large exports of maize in marketing year 2001/2002 (May/April), the supply is tight and prices remain at high levels. The country is importing 100 000 tonnes of white maize and about 290 000 tonnes of yellow maize to replenish stocks. Prospects for the 2002 main maize crop, to be harvested from May, are favourable. This reflects generally adequate rains since the beginning of the season and an increase of 5 percent in the area planted. Official production forecasts by mid-March point to a maize crop close to 9 million tonnes, some 20 percent above last year's crop of 7.5 million tonnes. However, this forecast may be revised downwards following dry weather in parts in March.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	2 222	3	9 887	12 112
Previous five years average exports	170	-	1 219	1 389
<u>2001/02 Domestic Availability</u>	<u>2 493</u>	<u>100</u>	<u>9 086</u>	<u>11 679</u>
2001 Production (rice in paddy terms)	2 493	-	7 786	10 279
2001 Production (rice in milled terms)	2 493	-	7 786	10 279
Possible stock drawdown	-	100	1 300	1 400
<u>2001/02 Utilization</u>	<u>2 843</u>	<u>100</u>	<u>9 962</u>	<u>12 905</u>
Food Use	2 480	100	4 567	7 147
of which: local purchase requirement	-	-	-	-
Non-food use	164	-	4 095	4 259
Exports or Re-exports	150	-	1 300	1 450
Possible stock build up	49	-	-	49
<u>2001/02 Import Requirement</u>	<u>350</u>	<u>-</u>	<u>876</u>	<u>1 226</u>
Anticipated commercial imports	350	-	876	1 226
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: Delivered	-	-	-	-
Donor-financed purchases	-	-	55	55
of which: for local use	-	-	-	-
for export	-	-	55	55
<u>Estimated Per Caput Consumption (kg/Year)</u>	<u>61</u>	<u>2</u>	<u>112</u>	<u>175</u>
<u>Indexes</u>				
2001 production as % of average:				85
2001/02 import requirement as % of average:				88

SUDAN

Area:	2.4 million sq.km
Climate:	From north to south, arid, semi-arid and tropical wet-dry. Rainy season: May-October
Population:	32.81 million (2002 estimate); GNP per caput: US\$320 (2000)
Specific characteristics of the country:	Low-income food-deficit country; cereal production mainly in eastern and central areas.
Logistics:	Roads, railway and river transport inadequate
Major foodcrops:	Sorghum, millet, wheat, roots and tubers, oils
Marketing year:	November/October; Lean season: September-October
Share of cereals in total calorie intake:	51 percent

CURRENT SITUATION

An FAO/WFP Crop and Food Supply Assessment Mission to the country in October-December 2001 forecast the 2001/02 total cereal production at about 4.75 million tonnes, comprising 3.77 million tonnes of sorghum, about 579 000 tonnes of millet, 315 000 tonnes of wheat (to be harvested in April/May 2002) and about 146 000 tonnes of other cereals. At this level, cereal production is about 38 percent above last year's crop and about 13 percent above the average of the last five years. Sorghum market prices have fallen below production costs in main producing areas, and this may depress planted area next year.

Nevertheless, several zones in southern Sudan will experience food shortages mainly due to population displacement and insecurity, while parts of northern Sudan have suffered crop failures due to erratic rainfall. Therefore, targeted emergency food assistance will be required in these areas. It is particularly important to facilitate the timely purchase and transfer of grains from surplus to deficit areas to support both producers and consumers.

For various interventions in the drought affected States of Kordofan, Darfur and the Red Sea, an estimated 78 000 tonnes of cereals are required. In southern Sudan, where insecurity is a major cause of food aid needs, the overall needs are estimated at 52 000 tonnes. In addition, food aid needs in the Nuba Mountains (both northern and southern sectors) amount to about 25 000 tonnes. In total, 155 000 tonnes of food aid will be required in 2002 to assist about 2 million IDPs, drought affected and vulnerable people.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	384	5	4 026	4 415
Previous five years average imports	967	31	88	1 086
2001/02 Domestic Availability	315	12	4 418	4 745
2001 Production (rice in paddy terms)	315	18	4 418	4 751
2001 Production (rice in milled terms)	315	12	4 418	4 745
Possible stock drawdown	-	-	-	-
2001/02 Utilization	1 465	42	4 508	6 015
Food use	1 384	41	3 280	4 705
of which: local purchase requirement	-	-	300	300
Non-food use	31	1	748	780
Exports or re-exports	-	-	100	100
Possible stock build up	50	-	380	430
2001/02 Import Requirement	1 150	30	90	1 270
Anticipated commercial imports	1 100	30	-	1 130
Food aid needs	50	-	90	140
Current Aid Position				
Food aid pledges	11	-	11	22.0
of which: delivered	-	-	11	11
Donor-financed purchases	-	-	10	10
of which: for local use	-	-	10	10
for export	-	-	-	-
Estimated Per Caput Consumption (kg/year)	42	1	100	143
Indexes				
2001 Production as % of average:				108
2001/02 Import requirement as % of average:				117

SWAZILAND

Area:	17 000 sq.km
Climate:	Highland rainy climate. Rainy season: October-April; cool temperatures in May- September
Population:	1.03 million (2001 estimate); G.N.P. per caput: US\$1 290 (2000)
Specific characteristics of the country:	Low-income food-deficit country; land-locked country
Logistics:	Good road network; imports through Mozambique or South Africa
Major foodcrops:	Maize
Marketing year:	May/April; Lean season: February-April
Share of cereals in total calorie intake:	55 percent

CURRENT SITUATION

The outlook for the 2002 cereal crops is poor. Following abundant rains at the beginning of the cropping season, which encouraged larger plantings of maize, a mid-season dry spell at the critical blossoming stage, seriously reduced yields. The output is forecast to be reduced for the third consecutive year.

The food situation is extremely tight as a result of two successive reduced harvests, low levels of reserves and inadequate levels of imports. The Government has appealed for emergency food aid. Worst affected areas are Lowveld, part of the Hilev and the Lubombo plateau.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	1	117	118
Previous five years average imports	40	7	26	73
<u>2001/02 Domestic Availability</u>	<u>2</u>	<u>8</u>	<u>74</u>	<u>76</u>
2001 Production (rice in paddy terms)	-	-	74	74
2001 Production (rice in milled terms)	-	-	74	74
Possible stock drawdown	2	-	-	2
<u>2001/02 Utilization</u>	<u>35</u>	<u>7</u>	<u>112</u>	<u>154</u>
Food use	35	7	100	142
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	11	11
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	1	1
<u>2001/02 Import Requirement</u>	<u>33</u>	<u>7</u>	<u>38</u>	<u>78</u>
Anticipated commercial imports	33	7	37	77
Food aid needs	-	-	1	1
<u>Current Aid Position</u>				
Food aid pledges	-	-	1	1
of which: delivered	-	-	1	1
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>34</u>	<u>7</u>	<u>97</u>	<u>137</u>
<u>Indexes</u>				
2001 Production as % of average:				63
2001/02 Import requirement as % of average:				107

TANZANIA

Area:	886 000 sq.km
Climate:	Tropical wet-dry climate with two rainy seasons in north (November-December and March-May) and one in south (November-April)
Population:	33.93 million (2001 estimate); G.N.P. per caput: US\$280 (2000)
Specific characteristics of the country:	Low-income food-deficit country; cereal surplus production in south and south-west; cereal deficit in central and north-west. Distribution difficulties
Logistics:	Serious shortage of rolling stock, fuel and spare parts
Major foodcrops:	Maize, roots, tubers, sorghum, pulses, plantains, rice
Marketing year:	June/May; Lean season: February-April
Share of cereals in total calorie intake:	60 percent

CURRENT SITUATION

Prospects for the main season coarse grains in the southern highlands are favorable due to abundant rains. In the bi-modal areas the main season maize crop is now being planted. The medium term weather forecast for March-May 2002, predicts a normal to above-normal rainfall over the northern-half of the country while normal to below-normal rains were predicted over the southern half.

Aggregate 2001/02 cereal production, mainly maize, is estimated at about 4 million tonnes, about 15.5 percent above the previous year's harvest. Consequently, the overall food supply situation remains satisfactory. However, prices of maize continued to rise in the south due increased exports to neighbouring countries which are facing crop failures. Price increases are also observed in the east coast and northern parts of the country due reduced "Vuli" season harvests.

WFP distributed about 3 800 tonnes of food aid in February and March 2002 to vulnerable people in several districts of Arusha, Kilimanjaro, and Iringa Regions.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	87	702	3 256	4 045
Previous five years average imports	167	62	55	284
<u>2001/02 Domestic Availability</u>	<u>140</u>	<u>423</u>	<u>3 513</u>	<u>4 076</u>
2001 Production (rice in paddy terms)	90	650	3 303	4 043
2001 Production (rice in milled terms)	90	423	3 303	3 816
Possible stock drawdown	50	-	210	260
<u>2001/02 Utilization</u>	<u>260</u>	<u>503</u>	<u>3 643</u>	<u>4 406</u>
Food use	251	443	3 144	3 838
of which: local purchase requirement	-	-	30	30
Non-food use	9	60	379	448
Exports or re-exports	-	-	120	120
Possible stock build up	-	-	-	-
<u>2001/02 Import Requirement</u>	<u>120</u>	<u>80</u>	<u>130</u>	<u>330</u>
Anticipated commercial imports	120	80	50	250
Food aid needs	-	-	80	80
<u>Current Aid Position</u>				
Food aid pledges	-	37	75	112
of which: delivered	-	37	70	107
Donor-financed purchases	-	-	29	29
of which: for local use	-	-	27	27
for export	-	-	2	2
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>7</u>	<u>13</u>	<u>93</u>	<u>113</u>
<u>Indexes</u>				
2001 Production as % of average:				100
2001/02 Import requirement as % of average:				116

TOGO

Area:	54 000 sq.km
Climate:	Tropical wet-dry; two rainy seasons in south (March-June and October) and one in North (May-October)
Population:	4.87 million (2002 estimate) G.N.P. per caput: US\$300 (2000)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports and roads adequate; gateway to Burkina Faso and Niger
Major foodcrops:	Roots and tubers, coarse grains, fruit
Marketing year:	January/December; Lean season: April-July
Share of cereals in total calorie intake:	40 percent

CURRENT SITUATION

Planting of the first maize crop is underway in the south and will progress northwards following the arrival of the rains. Notwithstanding irregular rains during the entire growing season, the aggregate output of cereals in 2001 is estimated at about 0.7 million tonnes, which is average. The overall food supply situation is satisfactory.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	74	612	686
Previous five years average imports	56	157	15	228
<u>2002 Domestic Availability</u>	<u>-</u>	<u>58</u>	<u>623</u>	<u>681</u>
2001 Production (rice in paddy terms)	-	86	623	709
2001 Production (rice in milled terms)	-	58	623	681
Possible stock drawdown	-	-	-	-
<u>2002 Utilization</u>	<u>60</u>	<u>158</u>	<u>623</u>	<u>841</u>
Food use	56	75	404	536
of which: local purchase requirement	-	-	-	-
Non-food use	2	13	204	219
Exports or re-exports	2	70	10	82
Possible stock build up	-	-	5	5
<u>2002 Import Requirement</u>	<u>60</u>	<u>100</u>	<u>-</u>	<u>160^{1/}</u>
Anticipated commercial imports	60	95	-	155
Food aid needs	-	5	-	5
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>12</u>	<u>16</u>	<u>83</u>	<u>110</u>
<u>Indexes</u>				
2001 Production as % of average:				103
2002 Import requirement as % of average:				70

^{1/} Includes 70 000 tonnes of rice for re-export.

UGANDA

Area:	200 000 sq.km
Climate:	North-east is semi-arid, rest of the country is tropical wet-dry; main rainy period is March-October
Population:	22.39 million (2002 estimate); G.N.P. per caput: US\$310 (2000)
Specific characteristics of the country:	Low-income food-deficit country
Logistics:	Ports: Mombasa (Kenya) and Dar es Salaam (Tanzania); roads and railways inadequate
Major foodcrops:	Roots, tubers, plantains, pulses, maize, millet, sorghum
Marketing year:	January/December; Lean season: April-May
Share of cereals in total calorie intake:	35 percent

CURRENT SITUATION

Harvesting of the 2001 secondary season crop is complete. Aggregate cereal production in 2002 is provisionally estimated at 1.7 million tonnes 9 percent and 5 percent above the 2001 and the previous five years average respectively. Scattered rains in March in many parts of the country signified the beginning of the main cropping season. The seasonal forecast for the March to May period indicates an increased likelihood of near normal to above-normal rainfall over central, western, south-western and north-western Uganda; while most eastern, south-eastern and north-eastern districts have increased likelihood of receiving near normal to below normal rainfall. An increased likelihood for the development of El-Nino during the second half of 2002 was also predicted.

The start of the rains in pastoral areas of southern and south-western regions is replenishing ground water and rejuvenating vegetation. Livestock currently, therefore, have adequate access to drinking water and pastures. Normal dry conditions in the north-eastern Karamoja region (Kotido, Moroto and Nakapiripirit Districts) have reduced availability of pasture and drinking water and limit their access by livestock.

The overall food supply situation is, therefore, satisfactory. However, some 700 000 refugees, displaced persons and victims of drought earlier remain dependent on food assistance.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	10	91	1 615	1 716
Previous five years average imports	35	41	42	118
<u>2002 Domestic Availability</u>	<u>32</u>	<u>73</u>	<u>1 712</u>	<u>1 817</u>
2001 Production (rice in paddy terms)	12	110	1 652	1 774
2001 Production (rice in milled terms)	12	73	1 652	1 737
Possible stock drawdown	20	-	60	80
<u>2002 Utilization</u>	<u>52</u>	<u>113</u>	<u>1 777</u>	<u>1 942</u>
Food use	51	113	1 496	1 660
of which: local purchase requirement	-	-	-	-
Non-food use	1	-	201	202
Exports or re-exports	-	-	80	80
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>20</u>	<u>40</u>	<u>65</u>	<u>125</u>
Anticipated commercial imports	20	40	-	60
Food aid needs	-	-	65	65
<u>Current Aid Position</u>				
Food aid pledges	4	-	19	23
of which: delivered	4	-	19	23
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>2</u>	<u>5</u>	<u>67</u>	<u>74</u>
<u>Indexes</u>				
2001 Production as % of average:				103
2002 Import requirement as % of average:				106

ZAMBIA

Area:	741 000 sq.km
Climate:	Tropical wet-dry; rainy season: November-April
Population:	10.86 million (2001 estimate); G.N.P. per caput: US\$300 (2000)
Specific characteristics of the country:	Low-income food-deficit country; land-locked country
Logistics:	Imports through Dar es Salaam (Tanzania); inadequate rail and road connections
Major foodcrops:	Maize, roots, tubers
Marketing year:	May/April; Lean season: March-May
Share of cereals in total calorie intake:	70 percent

CURRENT SITUATION

The outlook for the 2002 cereal harvest, mainly maize, has further deteriorated with dry weather in March in the southern half of the country. Rains in previous months in these areas were also below average and yields are anticipated to be low. By contrast, normal to above-normal precipitation in March in northern parts benefited maturing cereal crops. Rains in northern areas have been adequate since the beginning of the growing season and crops are reported in good conditions. Overall, the output is expected to be reduced for the second consecutive year.

Food shortages are reported from several locations as a result of last year's poor maize harvest and delayed imports. Prices of food have increased sharply since last July. WFP is currently distributing emergency food aid to 1.1 million people most affected population in 19 districts. However, it is expected that only some 20 000 tonnes out of the 42 000 tonnes required, will be distributed before the next harvest.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	72	16	1 125	1 213
Previous five years average imports	57	17	204	278
<u>2001/02 Domestic Availability</u>	<u>85</u>	<u>13</u>	<u>998</u>	<u>1 096</u>
2001 Production (rice in paddy terms)	75	19	883	977
2001 Production (rice in milled terms)	75	13	883	971
Possible stock drawdown	10	-	115	125
<u>2001/02 Utilization</u>	<u>130</u>	<u>36</u>	<u>1 113</u>	<u>1 279</u>
Food use	126	34	908	1 068
of which: local purchase requirement	-	-	5	5
Non-food use	4	2	180	186
Exports or re-exports	-	-	25	25
Possible stock build up	-	-	-	-
<u>2001/02 Import Requirement</u>	<u>45</u>	<u>23</u>	<u>115</u>	<u>183</u>
Anticipated commercial imports	45	22	95	162
Food aid needs	-	1	20	21
<u>Current Aid Position</u>				
Food aid pledges	-	-	20	20
of which: delivered	-	-	20	20
Donor-financed purchases	-	-	5	5
of which: for local use	-	-	5	5
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>12</u>	<u>3</u>	<u>84</u>	<u>98</u>
<u>Indexes</u>				
2001 Production as % of average:				81
2001/02 Import requirement as % of average:				66

ZIMBABWE

Area:	387 000 sq.km
Climate:	Centre and north-east tropical wet-dry; south and west semi-arid; rainy season: November-March
Population:	12.70 million (2001 estimate); G.N.P. per caput: US\$480 (2000)
Specific characteristics of the country:	Land-locked country; exporter and importer of grain
Logistics:	Exports and imports through Mozambique or South Africa
Major foodcrops:	Maize, wheat, millet, sorghum
Marketing year:	April/March; Lean season: February-April
Share of cereals in total calorie intake:	66 percent

CURRENT SITUATION

The outlook for the 2002 cereal crops, about to be harvested, is unfavourable. The area planted to the main maize crop is preliminary estimated at 1.26 million hectares, 3 percent above the reduced level of last year but 11 percent below that of 2000. Yields are anticipated to be reduced as a result of a prolonged dry spell in January and February. The maize output is forecast lower than the poor crop of 2001. Contrary to the high level of last year's carry-over stocks, the marketing year 2002/03 (April/March) will begin with a complete depletion of reserves. The already very tight food supply situation is anticipated to further deteriorate in 2002/03. Protracted humanitarian assistance will be necessary for the most vulnerable groups of population.

Prices of basic staple maize continued to increase in March despite the price control imposed by the Government, reflecting inadequate levels of maize imports. Food shortages are reported from several locations of the country, particularly Matabeleland South, Matabeleland North, Masvingo, Midlands, Manicaland, and parts of Mashonaland West and Central Provinces. WFP is distributing emergency food assistance to the most vulnerable populations but donor contributions fall short of requirements.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	286	-	2 141	2 427
Previous five years average imports	122	25	125	272
<u>2001/02 Domestic Availability</u>	<u>295</u>	<u>-</u>	<u>1 674</u>	<u>1 969</u>
2001 Production (rice in paddy terms)	275	-	1 584	1 859
2001 Production (rice in milled terms)	275	-	1 584	1 859
Possible stock drawdown	20	-	90	110
<u>2001/02 Utilization</u>	<u>375</u>	<u>25</u>	<u>1 759</u>	<u>2 159</u>
Food use	360	25	1 474	1 859
of which: local purchase requirement	-	-	-	-
Non-food use	15	-	285	300
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2001/02 Import Requirement</u>	<u>80</u>	<u>25</u>	<u>85</u>	<u>190</u>
Anticipated commercial imports	80	25	80	185
Food aid needs	-	-	5	5
<u>Current Aid Position</u>				
Food aid pledges	-	-	5	5
of which: delivered	-	-	5	5
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>28</u>	<u>2</u>	<u>116</u>	<u>147</u>
<u>Indexes</u>				
2001 Production as % of average:				77
2001/02 Import requirement as % of average:				70

TERMINOLOGY

"Utilisation": All elements of utilisation for wheat and coarse grains are expressed in grain equivalent. For rice, all elements are expressed in milled form. Non-food use includes post-harvest losses, seed use, feed use, industrial use for all cereals.

"Unfavourable Crop Prospects": 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 Requiring Exceptional External Assistance": Refer to an exceptional shortfall in aggregate supplies or a localised 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.

"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.

"Low-income food deficit countries" (LIFDCs): Includes all food deficit countries with per caput income below the level used by the World Bank to determine eligibility for IDA assistance (e.g. US\$1 445 in 1999), which in accordance with guidelines and criteria agreed to by the CFA should be given priority in the allocation of food aid.

The designations employed and the presentation of material in this bulletin do not imply the expression of any opinion whatsoever on the part of the Food and Agriculture Organization of the United Nations concerning the legal or constitutional status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries.