

FOODCROPS AND SHORTAGES

No.3

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	<p>AFRICA: Two successive poor harvests in Southern Africa have led to the worst food shortages in the sub-region since the devastating drought of 1992. About 13 million people are estimated to be in need of emergency food assistance. In eastern Africa, despite floods and land slides that destroyed crops in parts, prospects for current season crops are favourable. In Northern Africa, below average cereal production is anticipated in Morocco and Tunisia due to insufficient rainfall. In central and western Africa, civil strife continues to hamper agricultural production in Liberia, the Republic of Congo and the Democratic Republic of Congo.</p>
	<p>ASIA: In Afghanistan, the worst locust plague in 30 years and floods in parts have affected crop prospects. The underfunding of humanitarian operations is causing serious problems. The food situation in the West Bank and Gaza Strip also gives cause for serious concern due to the intensified market disruptions and food shortages. In Tajikistan, Uzbekistan and Georgia, shortages of irrigation water are undermining national food security. A locust invasion and floods in Tajikistan have damaged significant areas of cropland. DPR Korea and Mongolia continue to depend on international food assistance due to natural disasters and economic constraints.</p>
	<p>LATIN AMERICA AND THE CARIBBEAN: In Central America, the food supply situation remains tight in areas of Guatemala and El Salvador affected by drought last year. Declining international coffee prices have worsened the situation. Food assistance continues to be provided to the most vulnerable groups. In Jamaica and Haiti, heavy rains and flooding at the end of May caused damage to rural housing and infrastructure, as well as to crops.</p>
	<p>EUROPE: Output of wheat in the EC is forecast to increase sharply this year reflecting a significant expansion in the winter wheat area and generally favourable weather but coarse grains output could decline marginally. In eastern Europe most countries are expected to harvest cereal crops similar to or smaller than the previous year. Despite generally favourable weather in most parts, plantings have declined in some countries. In the European CIS, cereal production is estimated to decline by some 15 million tonnes due to unfavourable weather conditions in the Russian Federation and Ukraine.</p>
	<p>NORTH AMERICA: Wheat output could fall further this year in the United States as plantings decreased and drought has affected some parts. By contrast, coarse grain area and production could rise somewhat. In Canada, increased wheat and coarse grains harvests are expected after a poor output in 2001.</p>
	<p>OCEANIA: Winter grain planting in Australia has been hampered by excessively dry conditions. The final area planted will depend crucially on the amount of rains in the second half of June but it is already likely that the area sown, particularly of wheat, will decline.</p>



AFFECTED COUNTRIES^{1/}

COUNTRIES FACING FOOD EMERGENCIES (Total: 32 countries)

<u>Country/Region</u>	<u>Reason for Emergency</u>	<u>Country/Region</u>	<u>Reason for Emergency</u>
<u>AFRICA</u> (21 countries)		<u>ASIA</u> (7 countries)	
Angola*	Civil strife, IDPs	Afghanistan*	Drought, war
Burundi*	Civil strife and insecurity	Georgia	Drought, economic constraints
Congo, Dem.Rep.*	Civil strife, IDPs and refugees	Iraq*	Shortage of inputs, drought
Congo Rep. of*	Civil strife	Korea, DPR*	Adverse weather, economic constraints
Eritrea*	IDPs, returnees and drought in parts	Mongolia*	Harsh winters, economic constraints
Ethiopia*	Drought in parts, IDPs	Tajikistan*	Irrigation water shortages, economic constraints
Guinea	IDPs and refugees	Uzbekistan*	Irrigation water shortages, economic constraints
Kenya*	Drought in parts		
Lesotho	Drought in parts		
Liberia*	Civil strife, IDPs		
Malawi	Drought in parts		
Mauritania	Irrigation water shortages		
Mozambique	Drought in parts		
Sierra Leone*	Civil strife, IDPs		
Somalia*	Drought, civil strife		
Sudan*	Civil strife in the south, drought in parts		
Swaziland	Drought in parts		
Tanzania	Drought in parts, refugees		
Uganda	Civil strife in parts, IDPs		
Zambia	Drought in parts		
Zimbabwe*	Drought		
		<u>LATIN AMERICA</u> (2 countries)	
		El Salvador	Drought, earthquakes
		Guatemala	Drought, economic problems
		<u>EUROPE</u> (2 countries)	
		Russian Federation (Chechnya)	Civil strife
		F.Rep. Yugoslavia* (Serbia & Montenegro)	Refugees

COUNTRIES WITH UNFAVOURABLE PROSPECTS FOR CURRENT CROPS

<u>Country</u>	<u>Harvest date</u>	<u>Main contributory factors</u>
Afghanistan*	May/July	Conflict, shortage of inputs, adverse weather, locusts
China*	May/June	Drought at planting
Georgia	June/August	Irrigation water shortages, locusts
Morocco	May/July	Inadequate rain
Tajikistan*	June/August	Irrigation water shortages, locusts
Tunisia	June/July	Inadequate rains

PURCHASE AND DISTRIBUTION OF LOCALIZED OR EXPORTABLE SURPLUSES REQUIRING EXTERNAL ASSISTANCE:

Burkina Faso, Chad, Ethiopia, Kenya, Mali, Niger, Senegal, Sudan

^{1/} Both here and in the text, countries with unfavourable prospects for current crop and/or uncovered shortfalls are marked in **bold** and those affected or threatened by successive poor crops or food shortages are marked with an asterisk (*). Definitions can be found on the Contents page.

Note: The maps on the front cover indicate countries with unfavourable crop prospects and/or those facing exceptional food emergencies.

CROP AND FOOD SUPPLY SITUATION

OVERVIEW

As of June 2002, the number of countries facing serious food difficulties throughout the world stands at 32, of which 21 are in Africa.

In **southern Africa**, the 2002 cereal production decreased sharply for the second consecutive year in most countries. The largest falls were in Zimbabwe, Zambia and Malawi. Only South Africa and Mozambique recorded increases. A prolonged dry spell from January and excessive rains in parts, coupled with reduced plantings in Zimbabwe due to land acquisitions activities, severely reduced plantings and yields. Consumption of green maize before harvest as a result of severe food shortages in the first three months of the year, further diminished the output. Aggregate production of maize (excluding South Africa and Mozambique) is sharply lower than the 2001 poor production, and availabilities are far worse this year because stocks were depleted in all countries. About 13 million people are estimated to be in need of over 1 million tonnes of emergency food assistance. A regional emergency operation (EMOP) is currently under preparation by WFP and is expected to be launched in early July.

In **eastern Africa**, good secondary season harvests and abundant main season rainfall in most parts have further boosted food supply prospects in 2002/03. Improved livestock conditions are reported in most parts of the region due to replenished water and pasture. However, floods and landslides in parts have resulted in loss of life and destruction of crops and property. In Kenya, heavy rains, floods and landslides in April and May 2002, resulted in the death of more than 40 people and left tens of thousands homeless. Large cropped areas were also destroyed. The worst affected areas include the low-lying areas near Lake Victoria in western Kenya, where rivers burst their banks, submerging fields and washing away roads, and Tana River District in the east. Similarly, heavy rainfall in parts of southern Tanzania and western Uganda caused loss of life and localised damage to crops and property. In Somalia, recent escalation of conflict has exacerbated the already precarious food situation and disrupted agricultural activity in parts. Large numbers of people have been displaced, most of them fleeing to neighbouring countries. Insecurity and reduced foreign exchange earnings due to the continuing ban on livestock imports from eastern Africa by countries along the Arabian Peninsula continue to negatively affect the food security of large sections of the population. In Rwanda and Burundi, the harvest outlook for the 2002 second season is favourable

In **central Africa**, growing conditions are favourable so far in Cameroon and Central African Republic. However, in the Republic of Congo a resurgence of fighting in the Pool region (surrounding the capital, Brazzaville) at the end of March has led to new population displacements and a deterioration of the food supply situation. In the Democratic Republic of Congo, agricultural activities continue to be disrupted by the persistent civil conflict.

In **northern Africa**, harvesting of the 2002 winter cereal crops has only started. Early forecasts point out to below-average aggregate cereal outputs in Morocco and Tunisia, principally as a result of reduced plantings and lower than normal yields caused by insufficient rainfall in the main growing areas. In Egypt, by contrast, above-average irrigated wheat and barley outputs are anticipated. In Algeria, recent normal to above-normal rains benefited the developing crops, which had been affected by prolonged dry weather, and average to above-average outputs are provisionally forecast.

In **western Africa**, the rainy season is now well established in the countries along the Gulf of Guinea. The first maize crop is developing satisfactorily in the south and the centre while millet and sorghum are emerging in the north. However, in Liberia increasing clashes between Government forces and rebels in the north, northwest and central regions have caused new population displacements and disrupted the farming season. In the Sahel, first rains permitted land preparation and early plantings in the south of Niger, Mali, Burkina Faso, Chad and the extreme southeast of Senegal; seasonably dry conditions prevail in the rest of Senegal, Cape Verde, The Gambia and Mauritania. The start of the rainy season is delayed in Guinea Bissau. Following generally good cereal harvests in 2001, the food supply situation is satisfactory in all countries, except Mauritania, which harvested poor crops.

In **Asia**, harvesting of the winter cereal crops is completed or is well advanced in most countries while the sowing of paddy and coarse grain crops has started. Several countries in the region anticipate lower outputs this year. In China, wheat output is expected to be reduced by some 6 million tonnes from last year due to a reduction in the area sown to the important winter wheat. Paddy production is forecast at 179.5 million tonnes (123 million tonnes in milled equivalent), 8 percent lower than the 1997-2001 average. Cereal production in Indonesia is forecast to decline mainly due to the damage caused by floods earlier in the year. In Japan, paddy production in 2001 is estimated to have declined by 4 percent to 11.3 million tonnes. Shortage of irrigation water in Pakistan will result in somewhat lower cereal output. In DPR Korea, notwithstanding increased food production in 2001, domestic supplies still fall short of requirements by some 1.47 million tonnes. In Thailand, Cambodia, Laos and Vietnam planting is underway for the main wet season paddy crops which account for the bulk of aggregate paddy

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production. Good cereal harvests are expected in India, whose stocks of wheat and rice have grown to record levels reflecting consecutive bumper crops.

In the **Near East**, favourable weather conditions in most countries have boosted domestic food production. However, in Afghanistan the worst locust plague in 30 years and floods in parts have affected crop prospects. The food situation remains grave, notwithstanding the relative calm and improved delivery of food assistance. The massive return of refugees and funding shortfalls of humanitarian agencies give rise to serious concern. Years of civil strife and a succession of severe droughts have exposed millions of people to extreme hardship. The food situation in the West Bank and Gaza Strip also gives cause for serious concern due to shortages and market disruption which are further aggravated by continued military operations and the current tense political situation.

In the **Asian CIS**, several countries are facing food shortages due to below-normal snowfall, a major source of irrigation, a locust invasion and general economic decline in the past three years. The worst affected countries are Tajikistan, Georgia and Uzbekistan. Some improvements in precipitation in the region might be offset by the recent locust invasion.

In **Central America and the Caribbean**, planting of the 2002/03 first (main) season cereal and bean crops has started with the arrival of the seasonal rains. A recovery in production from last year's drought-affected crops is expected. The coffee sector, the principal foreign exchange earner, is still suffering from declining international prices. Food assistance continues to be provided to vulnerable rural groups in El Salvador and Guatemala. In Haiti, some areas in the northwest were affected by weeks of severe dry weather with consequent damage to crops, while in the south, heavy rains and flooding in the last days of May caused serious damage to rural housing and infrastructure. In Jamaica, heavy rains resulting in flooding and landslides caused damage to rural housing and infrastructure in the south and southeast of the country. Damage to crops and livestock is also reported.

In **South America**, harvesting of the 2002 maize crop is well advanced and an about average output is anticipated, the result of adverse weather. In Brazil, harvesting of the second season maize crop ("zafrinha") is underway and a bumper crop is anticipated. In Uruguay, harvesting of the 2002 important paddy crop has been completed and a below-average output is estimated. In the Andean countries, normal to abundant precipitation in Colombia is benefiting planting of the 2002/03 first season cereal crops, while in Ecuador the 2002 maize crop, currently being harvested, is forecast to increase by some 27 percent. In Perú, harvesting of the 2002 wheat, maize and paddy crops is underway and above-average outputs are forecast.

In **Europe**, output of wheat in 2002 in the EC is forecast to increase sharply following a significant expansion in the winter wheat area and good yield prospects reflecting generally favourable weather. The Community's aggregate wheat crop is forecast at almost 106 million tonnes, about 15 percent up from last year. For coarse grains, an expected decline in area could be offset by better yields this year and aggregate coarse grains output is currently forecast at 106.7 million tonnes, 2 million tonnes below last year's level. In eastern Europe most countries are expected to harvest similar or smaller cereal crops than in the previous year. Despite generally favourable weather in most parts, plantings have declined in some countries. The exception could be Bulgaria where current indications point to an increase in wheat and coarse grains output.

In the European **CIS** cereal production in 2002 is estimated to decline by nearly 15 million tonnes compared to last year. The decline is mainly due to unfavourable weather conditions in the Russian Federation and Ukraine.

In the **Balkans**, cereal production is seen to nearly match the improved harvest of the preceding year. However, torrential floods and hail, which normally occur during late spring and summer in the region, may compromise summer crops.

In **North America**, wheat production in the United States could fall further this year after another decrease in area and dry weather in some parts. Aggregate wheat output in 2002 is currently forecast at just under 50 million tonnes. For coarse grains, based on the indicated area planted, and assuming normal weather conditions for the remainder of the season, aggregate 2002 coarse grains output is forecast at about 267 million tonnes, about 2 percent up on the previous year. Maize would account for 245 million tonnes. Also, in Canada, the wheat area for the 2002 harvest is estimated down from the previous year but a return to average yields is expected after last year's poor performance and the country's aggregate wheat output is forecast to rise to about 23 million tonnes. For coarse grains, latest indications continue to point to an increase in area and output.

In **Oceania**, prospects for the 2002 winter grain crops in Australia have deteriorated in the past two months due to lack of rainfall for planting. The wheat area is forecast to fall as a result and yields are also likely to be down from the previous year and below average but, as for the planted area, the final outcome will depend crucially on the amount of rainfall in the coming weeks. Output of barley, the main coarse grain, is also forecast to fall.

COUNTRY REPORTS ^{1/}

AFRICA

NORTHERN AFRICA

ALGERIA (18 June)

Harvesting of the 2002 wheat crop, the main cereal, has only started. Normal to abundant rains in March and April helped the developing crop which had previously been affected by prolonged dry weather, with the exception of the northwestern areas which had normal rainfall at planting. Production of about 2 million tonnes of wheat is tentatively forecast which is close to the 2001 bumper crop. An above-average barley output as in the previous year, is also anticipated.

Imports of wheat in marketing year 2002/03 (July/June) are forecast at 4.6 million tonnes in response to the steady demand for this important staple. Food aid from the international community continues to be provided to refugees from Western Sahara.

EGYPT (12 June)

Harvesting of the 2002 winter grain and pulse crops has been completed. Output from the irrigated wheat crop is provisionally estimated at an above-average 6.6 million tonnes. Barley should also be above average at 277 000 tonnes. Production of maize is an average 6.2 million tonnes. Planting of this year's paddy crop is about to start and larger plantings than 2001 are anticipated.

Wheat imports in marketing year 2002/03 (July/June) are tentatively forecast to increase from 6.2 million tonnes in 2001/02 (July/June) to about 6.8 million tonnes, reflecting strong demand for this food staple.

MOROCCO (2 June)

Despite normal rains in the first half of March, moisture deficits are still reported in the main cereal growing areas, with reduced plantings and yields. Some 600 000 hectares of rainfed crops in the south and central parts are officially reported to have been affected by inadequate precipitation. By contrast, growing conditions are reported as favourable for the irrigated crops, particularly in the east and north of the country, where water reservoirs are at normal levels. Overall prospects are, however, unfavourable. Harvesting of the 2002 cereal crops has just started in the south and production of wheat is forecast at 1.7 million tonnes compared to 3.3 million tonnes in 2001 and 2.7 million tonnes average of the last five years. Barley output is also forecast to be below average.

Wheat imports in marketing year 2002/03 (July/June) are anticipated to increase from 3 million tonnes last year to about 3.5 million tonnes. Coarse grain imports, mainly maize, are also expected to increase from 1.6 to 1.8 million tonnes.

TUNISIA (12 June)

Normal rains in May benefited the 2002 cereal crops which had been seriously affected by dry weather. Aggregate cereal production is expected to decline from the average level in 2001. Harvesting has only started and production of wheat, the main cereal, is provisionally

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

forecast to decrease from last year's 1.1 million tonnes to some 500 000 tonnes. A below-average barley output is also anticipated.

Wheat imports in marketing year 2002/03 (July/June) should, nevertheless, remain close to the 1.2 million tonnes in marketing year 2001/02. The shortfall in production is expected to be met by drawing from last year's carry-over stocks.

WESTERN AFRICA

BENIN (3 June)

First rains started in the south in early April, allowing land preparation and planting of the first maize crop. They progressed to the north in April and were widespread and above average in early May, allowing planting and emergence of millet and sorghum crops in the north.

Following a cereal harvest in 2001 estimated at 900 000 tonnes, the overall food supply situation remains satisfactory. 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.

BURKINA FASO (6 June)

The rainy season has started on time. The first significant rains were registered in early April in the south-west. They progressed northwards in May and covered almost the entire country during the last dekad. However, precipitation was globally below average. Sowing of millet and sorghum is now underway in the south, west and south-west. Elsewhere, land preparation is underway.

No pest activity is reported. Seed availability is generally adequate following the 2001 record harvest.

The final 2001 production estimates released by the statistical services indicate that 2001 aggregate production of cereals reached a record of 3.11 million tonnes, 36 percent higher than the previous year and 28 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 harvested poor crops due to early cession of the rains.

CAPE VERDE (19 June)

Seasonably dry conditions prevail. Planting of maize normally starts in July with the onset of the rains on the main islands.

2001 maize production (virtually the only cereal produced in the country) has been estimated at 18 680 tonnes which 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. In early June, WFP approved an emergency operation to assist some 30 000 people throughout the country. FAO has started providing seeds and small farming tools to some 14 000 families (over 80 000 people).

Cereal import requirement in 2001/02 marketing year (November/October) is forecast at 93 000 tonnes, with food aid accounting for more than 50 percent. Pledges amount to 40 000 tonnes, of which 16 800 tonnes have been delivered so far.

CHAD (19 June)

Above-normal first rains were registered in mid-March in the extreme south and in mid April in the south-west. They decreased significantly and were below average in May, but resumed in early June.

Following release of final production estimates by national statistical services, the aggregate 2001 cereal production is estimated at a record 1.32 million tonnes, 49 percent higher than the previous year and 24 percent above average. As a result, the overall food supply situation is satisfactory, especially 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 as a result of floods that affected 144 000 hectares of arable land.

Import requirement of cereals in 2001/02 marketing year (November/October) is estimated at 71 000 tonnes, including 13 000 tonnes of food aid.

COTE D'IVOIRE (3 June)

Following the start of rains in late February, planting of the first maize crop is underway. Abundant precipitation covered the entire country during April and May, benefiting planting and emergence of millet and sorghum crops in the north.

Following an above-average cereal harvest in 2001, 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.

THE GAMBIA (3 June)

Seasonably dry conditions prevail. The rains have not started yet and farmers are currently preparing their fields. Planting is expected to start in the weeks ahead with the onset of the rains. Following a record harvest in 2001, seed availability is adequate for cereals.

With three successive bumper crops in 1999, 2000 and 2001, the overall food supply situation is satisfactory. Cereal import requirement for the marketing year 2001/02 (November/October) is forecast at 124 000 tonnes.

GHANA (19 June)

First rains in early March permitted planting of the first maize crop. Except in the extreme south, precipitation was generally well above average until early June when floods caused by heavy rains displaced more than 2 000 people in the capital, Accra, and in the second largest central city of Kumasi. Planting of coarse grains is underway in the north.

In early February, a joint FAO/WFP crop and food assessment mission visited northern Ghana where unusually dry weather conditions had affected crop production. The mission estimated the 2001 cereal production at 1.52 million tonnes, which was below average. However the overall food supply situation is close to normal as reduced cereal production in northern regions will be covered by adequate availability of other foodcrops, anticipated commercial imports and food aid already pledged.

The mission estimated total cereal import requirements in 2002 (January/December) 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.

GUINEA (3 June)

The first rains were registered in the south in March where they permitted land preparation and first plantings. However, the weather remains mostly dry in the centre and the north. The overall food supply situation is satisfactory following satisfactory harvests in 2000 and 2001. 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). UNHCR is preparing to open a new camp for Liberian refugees in Laine, about 76 km from the border after the two other camps had become full.

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

GUINEA-BISSAU (3 June)

The rains have not yet started. The weather remained mostly dry until the first dekad of June. This situation may seriously affect crop production as the growing season usually starts in late April/early May. The unseasonably dry weather has reportedly been causing many difficulties for local communities. Several wells have dried up, farm animals are dying and more than 40 percent of children under the age of five are suffering from malnutrition.

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

LIBERIA* (3 June)

First rains were registered in early March in the south, becoming widespread in late March. However, precipitation remained generally below average until early June.

Following a deterioration of the general security situation, the Government declared a state of emergency on 8 February 2002, which was extended by the parliament in mid-May for six months.

Increasing clashes between Government forces and rebels in the north, north-west and central regions have displaced over 100 000 people. It has also led to the repatriation of more than half of the 36 000 Sierra Leonean refugees in camps in Monrovia and Sinje. The farming season has been disrupted and many people are now dependent on food aid than before.

WFP is currently assisting 85 000 IDPs throughout the country.

MALI (6 June)

The growing season has started in the south. The first significant rains were registered in the extreme south in April. They progressed northwards and were above normal during the first and second dekads of May. They decreased during the last dekad, but remained generally adequate in May. Land preparation is underway and first sowing of millet and sorghum has started in the south. Seed availability is adequate following the 2001 good harvest. The pest situation as of mid June was calm although isolated Desert Locusts and groups of grain-eating birds have been reported in a few places.

Following well above-average cereal harvest in 2001, estimated at 2.87 million tonnes (including paddy), the overall food situation is satisfactory. Cereal import requirement in 2001/02 (November/October) is estimated at 90 000 tonnes, including 5 000 tonnes of wheat as food aid.

MAURITANIA (6 June)

Seasonably dry conditions prevail. Planting will start following the onset of rains in July. During the first half of May, isolated Desert Locusts were reported in a few places.

Seasonal droughts and the poor distribution of rainfall in the 2001/2002 growing season, combined with exceptionally strong rain and cold in mid-January, have created the risk of an unprecedented food crisis. Following release of final production estimates by national statistical services, the aggregate 2001 cereal production is estimated at some 122 177 tonnes, 9 percent lower than the previous year. Prices of cereals have risen considerably on most markets.

In April, WFP approved an Emergency Operation for US\$ 7.5 million (16 230 tons of food) and in mid-May, issued an urgent appeal for funds to help 250 000 people threatened by serious food shortages.

NIGER (3 June)

First rains were registered in the south in mid-May where they permitted land preparation and first early plantings. However, the weather was mostly dry in early June. It is estimated that only 2 percent of the villages had planted as of 29 May, instead of 27 percent last year. Seed availability is generally adequate following the 2001 above average harvest. No significant pest activity has been reported.

The final official aggregate 2001 cereal production is estimated at 3.11 million tonnes, 49 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 rose by 0.75 million tonnes to 2.4 million tonnes.

Following this good harvest, the overall food supply situation is satisfactory. However, an untimely sharp rise in cereal prices on all markets across the country has been reported, which makes access to food difficult. The above-normal cereal prices are mainly due to activities of speculators and outflows to Nigeria.

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

NIGERIA (19 June)

First rains in the south in late February/early March permitted land preparation and planting of the first maize crop. Rains progressed northwards in April and precipitation was generally above average in April and May. Seasonably dry conditions prevail in the extreme north-east. Late rains in much of northern Nigeria have raised fears of likely crop failure and food shortages in the region.

The overall food supply situation is satisfactory. Some population groups, however, remain vulnerable following communal conflicts notably in the states of Benue, Nasarawa and Taraba.

SENEGAL (19 June)

Early limited rains were registered in the extreme southeast in May allowing land preparation and first plantings to start. Elsewhere, seasonably dry conditions prevail. Seed availability is generally adequate and no significant pest activity has been reported.

Overall, the food situation is satisfactory following above average 2001 cereal crop and substantial imports late last year. The markets are well supplied.

Cereal import requirements in 2001/02 (November/October) are forecast at 850 000 tonnes, some 100 000 tonnes less than actual imports in the previous year.

Following renewed fighting between government troops and rebels in the southern Senegalese province of Casamance, at least 9 000 refugees have reportedly crossed into The Gambia in early-May.

SIERRA LEONE* (3 June)

Rains started in late April but remained generally below average. Rice production should further increase this year reflecting better security situation, increased plantings by returning refugees and farmers previously displaced, as well as comparatively improved conditions for the distribution of agricultural inputs. Cereal production in 2001 is estimated at 348 000 tonnes.

In an effort to continue helping the country, a UN Consolidated Inter-Agency Appeal was launched on 26 November 2001, including an agricultural component with five projects proposed by FAO to facilitate recovery of food production and reduce dependence on food aid.

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

TOGO (3 June)

First rains were received in the south and the centre in early March, allowing land preparation and planting of the first maize crop. They progressed to the north in April and permitted planting of millet and sorghum.

Following an average cereal harvest in 2001, estimated at about 0.7 million tonnes, the overall food situation is satisfactory.

CENTRAL AFRICA

CAMEROON (3 June)

Rains started in the south in March. They became particularly abundant in the south and centre in April, permitting land preparation and first plantings.

The overall food supply situation is satisfactory. Cereal imports (including re-exports) in the 2002 marketing year are estimated at 310 000 tonnes.

CENTRAL AFRICAN REPUBLIC (3 June)

Precipitation has been generally widespread and abundant since March, permitting land preparation and first plantings.

Following an above-average harvest in 2001, the food supply situation is satisfactory. With an improvement of the overall security situation, a nationwide curfew was lifted in mid-May nearly one year after its imposition. In late May, WFP began an emergency operation to provide food to some 6 000 IDPs displaced by armed conflict in the northern part of the country.

CONGO, DEMOCRATIC REPUBLIC OF* (5 June)

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 that about 64 percent of the population of eastern DRC are undernourished. This is 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 face critical food needs as a result of prolonged displacement. While access to the vulnerable population has improved in Government-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 provision of humanitarian assistance.

CONGO, REP OF* (3 June)

A resurgence of fighting in the Pool region (surrounding the capital Brazzaville) at the end of March has led to new population displacements. About 50 000 IDPs have been reported in the region. Some areas have been cut off from humanitarian aid since late March. In late May WFP has started assisting 20 000 IDPs, amidst growing concern about tens of thousands more people trapped in the conflict areas inaccessible to aid agencies.

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

EQUATORIAL GUINEA (3 June)

Precipitation has been widespread and abundant since March. The staple crops are sweet potatoes, cassava and plantains. Cereal import requirement for 2002 is estimated at 15 000 tonnes (10 000 tonnes of wheat and 5 000 tonnes of rice).

GABON (3 June)

Precipitation has been widespread and abundant since March. 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.

SAO TOME AND PRINCIPE (25 April)

The staple foodcrops are roots, plantains and tubers. The cereal import requirement in 2002 is estimated at 12 000 tonnes.

EASTERN AFRICA

BURUNDI* (2 June)

Harvesting of the 2002 second season foodcrops is about to start. Prospects are favourable reflecting adequate rains since planting time. The output of the 2002 first season crops, mainly of non-cereal foodcrops, was good. Food prices that declined at harvest time in December/January remain stable.

Food assistance continues to be required for some 432 000 internally displaced people as a result of insecurity in parts. Intensified fighting between Government forces and rebels in the past month has resulted in fresh waves of population displacement, particularly in Bujumbura Rural province.

ERITREA* (3 June)

Planting of the 2002 cereal and pulse crops is about to start. The main rains are expected to start from late June, however, spring (short) rains in March and April in parts helped early land preparation and regeneration of pasture. The Ministry of Agriculture forecasts area to be cultivated in 2002 at about 550 000 hectares and has made an appeal for assistance with inputs, including seeds and fertilizers.

The final estimate of the 2001 cereal crop is now put at about 220 000 tonnes. This is more than twice the harvest of the previous year and about average. The overall food supply situation, however, remains tight reflecting the displacement of large numbers of people by the war with Ethiopia and the lingering effects of earlier drought. As of June 2002, some 300 000 persons in the Sahel Regions, 60 000 IDPs in camps, 180 000 resettled IDPs in the Temporary Security Zone and about 44 000 repatriated refugees continue to rely on food assistance. In addition between 60 000 to 80 000 refugees are expected to be repatriated in the remaining months of 2002 and a further 62 000 in 2003.

The slow response to the 2002 UN Consolidated Appeal (CAP) remains a major concern to both the Government and humanitarian agencies. In May 2002, only 23.5 percent of the appeal has received funding.

ETHIOPIA* (3 June)

Prospects for the 2002 secondary "belg" grain crops have improved considerably following adequate rains, except in South Tigray where rainfall was poor. The belg crop accounts for some 10 percent of total grain production but in some areas it provides most of the annual grain production. The 2001 main "meher" season bumper grain harvest has resulted in sharply falling grain prices in most markets, negatively impacting on farmers' income and is expected to also negatively affect this year's main season production.

Good rains in April and early May were adequate for the regeneration of pasture and replenishment of water supplies in the low land areas of the south and south-east.

The overall good harvest masks the existence of food insecure 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. An Emergency Operation was jointly approved in May 2002 by FAO and WFP for food assistance to 2.1 million small scale farmers and drought-affected pastoralists, worth US\$ 51.1 million for a period of 12 months (1 April 2002 to 31 March 2003).

KENYA* (3 June)

Heavy rains, floods and landslides in April and May 2002, resulted in the death of more than 40 people and left tens of thousands homeless. Large cropped areas were also destroyed. The worst affected areas include the low-lying areas near Lake Victoria in western Kenya, where rivers burst their banks, submerging fields and washing away roads, and Tana River District in the east.

Prospects for the 2002 main "long rains" season crops are mixed. Normal to above-normal rains in parts have greatly improved crop conditions while in some key maize growing areas in the Rift Valley Province poor rains have dampened prospects. In addition, some key producers are expected to shift out of maize due to the sharp decline in prices.

Unusually heavy rains in most pastoralist areas have improved overall food supply prospects. However, food assistance is still required in many areas, particularly in Turkana, Mandera and parts of Marsabit Districts, where the effects of the 1999/00 drought remain. An Emergency Operation was jointly approved in April 2002 by FAO and WFP for food assistance to 1.26 million drought-affected people, worth US\$ 36.26 million for a period of 6-1/2 months (15 April to 31 October).

RWANDA* (20 May)

Harvesting of the 2002 second-season foodcrops is about to start. Abundant rains in January and February provided adequate soil moisture for sowing operations, while normal precipitation in March allowed good establishment of the sorghum and bean crops. The outlook is favourable. The output of the 2002 first season foodcrops was also good at 3.7 million tonnes, 28 percent higher than last year's first season.

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

SOMALIA* (3 June)

Good rains received between mid-April/early-May have boosted prospects for the main "gu" cereal crops which accounts for some 75-80 percent of the annual production in normal years. The highest rainfall was recorded in Middle and Lower Juba, Gedo and Bay regions. However more rains are necessary to achieve good yields.

The output of the recently harvested secondary "Deyr" season cereal crop is forecast at about 140 000 tonnes, which is about 47 percent above the previous year's harvest. The total cereal production in 2001/02 is therefore estimated at about 255 000 tonnes, which is close to the 1993-2000 average.

However, the food supply situation is highly precarious particularly in Gedo, East Sanag, Sool and parts of Bari. Recent escalation of conflict is expected to exacerbate the already precarious food situation and may disrupt agricultural activities. Large numbers of people are estimated to be facing severe food difficulties, mainly due to past poor harvests, long-term effects of insecurity and reduced foreign exchange earnings due to the continuing ban on livestock imports from eastern Africa by countries along the Arabian Peninsula.

SUDAN* (3 June)

Harvesting of the 2002 wheat crop is complete and output is expected to be similar to last year's crop of about 300 000 tonnes. The 2001/02 total cereal production, estimated at 4.75 million tonnes, is about 36 percent above last year's crop and about 13 percent above the average of the last five years.

Despite the overall good harvest, the recent escalation of conflict in southern Sudan, particularly in Bahr-el-Ghazal, Eastern Equatoria and Western Upper Nile, is set to exacerbate an already poor food security situation due to continuing civil strife and adverse weather. Large numbers of people have been displaced and hundreds of thousands cut off from humanitarian access. Already an estimated 3 million IDPs, drought-affected and vulnerable people in different parts of the country depend on food assistance. In addition, the current situation coincides with the planting season for cereal crops and is expected to adversely impact on food production.

An Emergency Operation was jointly approved in April 2002 by FAO and WFP for food assistance for 2.9 million people, worth US\$132.8 million for a period of 12 months (1 April 2002 to 31 March 2003).

TANZANIA (3 June)

Heavy rainfall and extensive flooding in April and May in Rufiji Basin and parts of southern highlands caused loss of life and localized damage to crops and property. However, generally normal to above-normal rains in April and May benefited crops of the main "long rains" season in unimodal central and southern areas. Harvesting has just started boosting food availability. By contrast, in the bi-modal rainfall areas of the north and northeast, poor rains since April have negatively affected the "Masika" season crops. The outlook for the harvest from August is generally unfavourable.

The overall food supply situation remains satisfactory with ongoing harvests in the central and southern regions. Prices of maize have remained stable or slightly declined in most markets since April.

UGANDA (3 June)

Prospects for the 2002 main season cereal crops are generally favourable. Normal to above-normal rains were experienced from March in many parts of the country, notwithstanding reports of some pockets of dry conditions. However, heavy rainfall in western Uganda has caused land slides and displacement of many households.

Livestock in much of the country have adequate access to drinking water and pasture. However, pasture conditions in the north-eastern Karamoja region (Kotido, Moroto and Nakapiripirit Districts) have deteriorated due to severe moisture stress.

The overall food supply situation is seasonably satisfactory. However, some 700 000 refugees and displaced persons remain dependent on food assistance.

SOUTHERN AFRICA

ANGOLA* (4 June)

Harvesting of the 2002 cereal crops is underway. The output is forecast to increase for the second consecutive year, reflecting generally favourable rains in the main growing areas. However, production is still constrained by low levels of plantings due to insecurity at sowing time.

After 27 years of civil war, a cease-fire agreement has been signed between the Government and rebel groups in early April. The opening of roads previously closed due to the conflict has allowed improved access to populations which were cut off from relief aid before. Reports indicate that the food and nutritional situation of tens of thousands of people in

“demobilization camps” is critical, with deaths by starvation. Humanitarian assistance is urgently required for at least 500 000 people in areas previously inaccessible.

An FAO/WFP Crop and Food Supply Assessment Mission has just completed its visit to the country and its report is expected in the next few weeks.

BOTSWANA (2 June)

Harvesting of the 2002 cereal crops, mainly sorghum, is completed. The harvest is estimated to be reduced for the second consecutive year. Despite a good start of the rainy season, a prolonged dry spell in January adversely affected yields, particularly for the maize crop.

The overall food supply situation remains satisfactory. The country imports most of the food it requires.

LESOTHO (2 June)

An FAO/WFP Crop and Food Supply Assessment Mission¹ visited the country from 25 April to 4 May 2002. The mission estimated domestic cereal supply in 2002/03 at 74 000 tonnes, against total national consumption requirement of 412 000 tonnes, resulting in an import requirement of 338 000 tonnes. Commercial imports were estimated at 191 000 tonnes and food aid at 147 000 tonnes which needs to be met by the Government and external assistance.

The mission also estimated that a total of 444 800 people throughout Lesotho will require emergency food assistance. The districts hardest hit by this year’s poor harvest are Qacha’s Nek, Quthing and Mohale’s Hoek. Overall, the Mission recommended targeted emergency assistance of approximately 68 955 tonnes of food, including maize, pulses, vegetable oil and iodized salt. Emergency provision of agricultural inputs such as seeds was also recommended to enable disaster-affected farming families to restart agricultural production during the next main planting season starting in October 2002.

MADAGASCAR (4 June)

Harvesting of the 2002 cereal crops, mainly rice, is well advanced. Some minor damages to crop have been reported due to the passage of cyclone “Keseny” in April. Assessment results have not yet been completed. However, damages are not expected to make a major dent in global crop production figures. Overall prospects are satisfactory reflecting generally adequate rains. The aggregate paddy crop is forecast slightly above last year’s good level of 2.6 million tonnes. Maize is also expected to be around the 2001 crop.

The food supply situation continues to be affected by the current political crisis and it is likely to deteriorate in the coming months if a solution is not found soon. Shortages of rice, sugar, salt and essential non-food items, including fuel, are being experienced in Antananarivo, and to a lesser extent, in provincial capitals that depend on supply of vegetables and other agricultural produce from the highlands, due to disruption of transport (road blocks, damaged bridges, etc.). In urban areas, prices of food staples have increased, undermining access to food for increasing numbers of vulnerable people. In the rural areas, the current difficulties in marketing agricultural products have resulted in a decline in producer prices, adversely affecting the food security of farming households, particularly in remote areas.

Overall, the disruption of economic activities since the beginning of the crisis in February has resulted in increasing unemployment and poverty.

¹ Assessment reports for Lesotho, Malawi, Mozambique, Swaziland, Zambia and Zimbabwe can be found on the Internet at the following address: <http://www.fao.org/WAICENT/faoinfo/economic/qIEWS/english/alertes/sptoc.htm>.

MALAWI (4 June)

An FAO/WFP Crop and Food Supply Assessment Mission visited the country from 21 April to 11 May 2002 and estimated maize production in 2002 at 1 539 000 tonnes, 10 percent below last year's poor harvest. The major cause was erratic rainfall with long dry spells, but also reduced input supplies. Cereal supply in 2002/03 marketing year (April/March) was estimated at 1.7 million tonnes, while the national cereal requirement was estimated at 2.2 million tonnes, resulting in an import requirement of 485 000 tonnes. Commercial imports of cereals were forecast at 277 000 tonnes and food aid requirements at 208 000 tonnes, which will need to be covered by the Government and external assistance.

Approximately 3.2 million people seriously affected by the combined effects of reduced food availability and purchasing power need emergency food assistance estimated at approximately 207 689 tonnes of cereals, mainly maize. National production of roots and tubers has increased, and this will moderate the impact of the maize shortage in many areas. Emergency provision of agricultural inputs such as maize seed, bean seed, fertilizer and hand hoes was also recommended to assist affected farming households to carry out winter cultivation in wetlands and irrigated areas in May/June and for the main planting season in October/November.

MOZAMBIQUE (4 June)

An FAO/WFP Crop and Food Supply Assessment Mission visited the country from 21 April to 10 May 2002 and found that severe dry weather during the 2001/02 cropping season sharply reduced crop yields in southern and parts of central Mozambique. In the main cereal growing areas of the northern region and remaining parts of the central region, abundant and well distributed rains led to increased production of cereals. Overall, the 2002 cereal output was estimated by the mission at 1.71 million tonnes, 5 percent above last year, and maize output at 1.24 million tonnes, an increase of 8 percent. An exportable maize surplus in northern and central areas was projected at 100 000 tonnes.

Approximately 515 000 people in poor households in 43 districts of the Southern and Central regions are facing severe food insecurity due to drought-devastated agricultural production and exhaustion of their coping abilities over the last four years. These severely food insecure people require food aid totaling 70 050 tonnes between now and April 2003. Emergency provision of agricultural inputs such as seeds is also urgently required to enable drought affected farming families to restart agricultural production during the main planting season starting in October 2002.

NAMIBIA (3 June)

The output of the recently harvested 2002 coarse grains is estimated at 82 000 tonnes, 20 percent below the cereal crop of 2001. Insufficient rains at planting time sharply reduce the area sown to millet/sorghum and maize, while a dry spell in January adversely affected yields. Subsequent precipitation arrived too late to prevent yield reductions. The food supply situation is anticipated to remain tight in marketing year 2002/03 (May/April), particularly for farmers who gathered a poor harvest last year and for vulnerable groups in urban areas.

SOUTH AFRICA (4 June)

Harvesting of the 2002 coarse grains is underway. Latest official forecasts of the main maize crop have been revised upwards to about 9 million tonnes, an increase of 20 percent on last year's reduced level. This is the result of an increase of 4 percent in the area planted and generally favourable weather conditions in the main growing areas. Sorghum is forecast at 192 000 tonnes, 9 percent higher than in 2001 despite a decline of 15 percent in the area planted.

Reflecting low levels of carry-over stocks following large exports of maize in marketing year 2001/02 (May/April), and increased import demand from neighbouring countries, domestic prices of maize remain high. The country is importing white maize from USA and Argentina to replenish stocks.

SWAZILAND (4 June)

An FAO/WFP Crop and Food Supply Assessment Mission visited the country from 15 to 24 April 2002 and estimated domestic cereal supply in 2002/03 at 77 000 tonnes, against total national consumption requirement of 188 000 tonnes. This resulted in an import requirement of 111 000 tonnes. Commercial imports were estimated at 96 000 tonnes and food aid at 15 200 tonnes which will need to be covered by the Government and external assistance.

The mission also estimated that a total of 144 000 people in Lowveld, Middleveld and Lubombo Plateau will need food assistance. Overall, the Mission recommended targeted assistance of approximately 17 720 tonnes of food, including such commodities as maize, pulses, vegetable oil and iodised salt. Emergency provision of agricultural inputs such as seeds was also recommended to enable drought-affected farming families to restart agricultural production during the next main planting season starting in October 2002.

ZAMBIA (4 June)

An FAO/WFP Crop and Food Supply Assessment Mission visited the country from 15 to 24 April 2002 and estimated the 2002 output of the main staple maize at 606 000 tonnes, 24 percent below last year's poor harvest and 42 percent lower than the normal crop of 2000. Prolonged dry spells during the 2001/02 growing season in five of the nine provinces of Zambia sharply reduced yields and production of cereals. Cereal import requirements for marketing year 2002/03 (May/April) were estimated at 626 000 tonnes. Commercial imports were projected at 351 000 tonnes and emergency food aid requirements for 2.329 million most affected people at 174 000 tonnes. This leaves an uncovered deficit of 101 000 tonnes. Additional Government and external assistance is needed to cover the gap.

The most affected area is the Southern Province, where 60 percent of the population was estimated to be in need of relief food. Emergency supply of seeds (maize, sorghum, groundnuts) to drought affected farming families is urgently required for the main planting season starting in October 2002.

ZIMBABWE* (4 June)

An FAO/WFP Crop and Food Supply Assessment Mission visited the country from 21 April to 10 May 2002 and estimated cereal production at about 0.67 million tonnes, 57 percent down from last year's poor harvest and 69 percent down from production in 1999/00. The production of maize, the main staple, was estimated at 0.48 million tonnes, down by 67 percent on last year and by 77 percent on 1999/00. The major cause was a severe prolonged drought between January and March, which wiped out crops in most parts of the country, coupled with land reform activities which disrupted agricultural production on large-scale commercial farms. Cereal import requirements for the marketing year 2002/03 are estimated at a staggering 1.869 million tonnes, of which maize accounts for 1.705 million tonnes or 91 percent. Taking into account an anticipated commercial cereal import of 312 000 tonnes and 60 000 tonnes of food aid pledges, the total uncovered cereal deficit for the year is 1.497 million tonnes with the maize deficit amounting to 1.345 million tonnes.

Zimbabwe is facing a serious food crisis, and unless international food assistance is provided urgently and adequately, there will be a serious famine and loss of life in the coming months. Approximately 6.074 million people were estimated to have insufficient production, income and other entitlements to be able to meet their minimum food

requirements throughout the coming year. Emergency food assistance in the amount of 705 000 tonnes of cereals, in addition to other supplementary food items, is needed to support their minimum cereal consumption requirements. Millions of people who have the resources to purchase their cereal staple food are increasingly unable to do so because grain is not widely available in the markets, or is selling at very high prices. Emergency provision of agricultural inputs was also recommended to enable drought-affected farming families to restart agricultural production during the next main planting season starting in October 2002.

ASIA

AFGHANISTAN* (3 June)

Recent locust invasion, described as the worst in 30 years, and floods in parts of the country have worsened the already unfavourable prospects for the 2002 cereal harvest. Hardest hit areas by the locust plague include the agriculturally important province of Baghlan. Heavy rains and floods in the northwestern parts and later in the central Province of Bamiyan have also destroyed large cropped areas

The overall food situation in Afghanistan remains precarious, notwithstanding the relative peace and improved delivery of food assistance. Emergency food aid programmes are facing funding shortfalls and the massive return of refugees from neighbouring countries is overwhelming humanitarian agencies. Years of civil strife and three successive years of severe drought have exposed millions of people to extreme hardship, with coping means virtually exhausted. An Emergency Operation worth US\$284.98 million was jointly approved in January 2002 by FAO and WFP for food assistance to some 9.88 million most vulnerable people for a period of 9 months.

An FAO/WFP Crop and Food Supply Assessment Mission is scheduled to visit the country in late June to assess the overall food supply situation and estimate cereal import requirements in 2002/03, including food aid.

ARMENIA* (30 May)

The cereal harvest this year is estimated at 414 000 tonnes, which is similar to the good harvest of 2001. The forecast cereal harvest, if achieved, would be some 33 percent higher than the average of the past six years. Domestic cereal consumption requirement is estimated at 752 000 tonnes, 267 000 tonnes of which will be commercially imported while food aid requirement is estimated at 71 000 tonnes. Targeted food aid in 2001 was estimated at 37 000 tonnes, mainly wheat.

AZERBAIJAN (29 May)

The cereal harvest this year is seen at more than 2.4 million tonnes, nearly 400 000 tonnes higher than the improved harvest in 2001. The good harvest this year is mainly in response to an increase in the area planted to cereals by more than 114 000 hectares compared with the preceding year. However, much will depend on spring and early summer precipitation, lack of which have compromised grain harvests in the past.

The cereal import requirement for 2002/03 marketing year is estimated at 525 000 tonnes, including 505 000 tonnes of wheat and 20 000 tonnes of rice, which would be commercially procured. However, the most vulnerable and internally displaced population will continue to depend on targeted food assistance

BANGLADESH (4 June)

Floods from heavy rains in neighbouring India have inundated some 150 000 hectares of land around Sumanganj, one of the country's main rice growing areas. Although losses have not been assessed, some paddy was about to be harvested when the floods hit the area.

Harvesting of the 2002 wheat crop has been completed. Provisionally, the output is estimated at 1.8 million tonnes, about 9 percent above last year. Harvesting of the Boro (spring) rice crop will be completed at the end of the month. Reflecting favourable weather and adequate availability of agricultural inputs the output is expected to exceed the record of 12.6 million tonnes harvested last year. Assuming average yields for the other two crops currently in the ground, the Aus and the Aman, total rice output in 2001/02 is estimated at 26 million tonnes (milled), higher than both last year and average.

Reflecting a constant rise in domestic production, imports of cereals, mainly wheat, have declined from 4.2 million tonnes in 1998/99 to 1.7 million tonnes last year. For the 2001/02 marketing year (July/June) the cereal import requirement is estimated at 1.8 million tonnes. Government cereal stocks at the end of April 2002 amounted to 0.87 million tonnes, down compared to stocks held last year. Wheat and rice stocks as of April 2002 amounted to 0.63 and 0.24 million tonnes, respectively.

CAMBODIA (4 June)

The main current agricultural activities include the completion of the harvesting of dry season paddy crops, estimated at 0.8 million tonnes, and planting/transplanting of main wet season rice due for harvest from November. The total 2001 paddy production, including 3.3 million tonnes of the main crop harvested earlier in the year, is estimated at 4.1 million tonnes, some 2 percent more than the previous season and above average for the third consecutive year. A preliminary forecast for 2002 indicates paddy production at 4.7 million tonnes from a planted area of 2.2 million hectares.

Maize production in 2001 is estimated to have increased by about 18 percent to 185 600 tonnes. The current season's maize harvest is forecast at 185 000 tonnes from an area of 80 000 hectares. Availability of inputs is reported to be normal with the exception of vaccines and veterinary equipment, which are reported to be inadequate.

Despite the overall satisfactory food supply situation resulting from these successive bumper harvests, the communities affected by serious floods in previous years are still in need of food assistance.

CHINA* (4 June)

The output from the 2002 winter wheat crop, now being harvested, is estimated at 81.7 million tonnes, some 7 percent lower than in 2001, reflecting a reduction in the area planted as a result of unfavourable weather at planting time and more attractive alternative crops such as rapeseed, vegetables, fruits and cotton. The outturn from the spring wheat crop recently planted and due for harvest from August is forecast at 6.1 million tonnes slightly below production in 2001. Wheat production in 2002 would then total 87.8 million tons, about 6 million tonnes less than last year and the lowest level since 1989.

The sowing of most of the 2002 coarse grain crops, mainly maize, is virtually completed. Given normal weather for the remainder of the season, production of coarse grains is forecast to increase to 131 million tonnes, some 4 percent more than last year. Maize output is forecast at 120 million tonnes, an increase of about 6 million tonnes compared to 2001.

Harvesting of the early rice crop has started. This is the smallest of the country's three rice crops, accounting for some 19 percent of total output. Production is estimated at some 33 million tonnes, 4 percent less than last year due to a slight reduction in the area planted. Output of the main rice crop, now being planted, is forecast at 104 million tonnes, an increase of 2 percent compared with 2001. Total 2002 paddy production is put at 179.5 million tonnes (123 million tonnes milled), similar to 2001 and more than 8 percent below the

average of the previous five years. This total includes a tentative forecast of some 39 million tons from the late rice crop to be harvested from November.

The estimated cereal output of 342 million tonnes (including rice in milled terms) in 2002 is virtually the same as last year's reduced crop and almost 8 percent below the 1997-2001 average. The shortfall in production is expected to be met by drawdown of stocks and increased imports.

CYPRUS (3 June)

The 2002 aggregate output of wheat and barley, now being harvested, is forecast at 82 000 tonnes, 36 percent lower than last year but about average. Cereal production normally covers less than one-third of total domestic requirements.

Imports of cereals in 2002/03 (May/April), mainly wheat and barley, are forecast at about 644 000 tonnes, similar to the previous year.

EAST TIMOR (4 June)

On 20 May 2002 the country became an independent nation. The large number of people that are returning from refugee camps in West Timor since December 2001 are in need of assistance. In addition, a survey carried out by the World Bank, the UNDP and other international organizations indicates that almost half of the total population of some 0.8 million live in poverty and under-nourishment.

Harvesting of the maize crop, one of the main staples of the country, has been completed while that of rice has just started. Output of cereals is estimated to be unchanged from last year and below average. Inadequate agricultural infrastructures and a poor marketing system continue to hinder development of the agricultural sector.

GEORGIA (29 May)

Winter crops suffered significant damage due exceptionally cold and dry winter and strong windstorms, while insufficient precipitation and water availability may compromise summer crop harvest. Therefore, cereal harvest this year is estimated at 577 000 tonnes, which is about 140 000 tonnes less than the somewhat improved harvest of the preceding year. Drought and structural problems have affected food production in the past few years when food aid has been necessary to fill the critical shortfall in food availability. This year's forecast harvest is based on the assumption that drought does not affect summer crops as much as it did in 2000 when the country produced less than half the average harvest. Heavy precipitations in spring 2002 have partly damaged the crop in East Georgia (wheat) whereas they delayed plantings (maize) in West Georgia (only some 70 percent of the land had been sown by the end of May).

Activities under the WFP Emergency Operation originally in favour of the 2000 drought affected people are just completed in all the six targeted regions. Three rounds of free food distribution have been carried out in the five regions of East Georgia plus Imereti in West Georgia and two additional rounds were conducted in the latter, following the drought that affected it in July 2001 for the second consecutive year. A total of 184 community work projects, mostly rehabilitation of irrigation channels and feeder roads have been implemented since October 2001. Between February 2001 and May 2002, a total of 41 300 tons of food was distributed to 527 720 vulnerable persons including participants in community work projects.

Within the framework of the current WFP PRRO, FFW projects are on-going in three out of the five targeted regions. A total of 10 500 tonnes of mixed food is planned to be distributed

to an average of 15 800 workers and their family (4 person ration) as a payment for their regions. The PRRO is scheduled to be finished at the end of March 2003. Up-to-date 90 percent of total commitment has been resourced.

INDIA (4 June)

Harvesting of the wheat crop is almost complete and sowing of the coarse grain and Kharif rice, oilseeds and groundnuts crops, for harvest from September, has begun. Reflecting favourable growing conditions, the output from the 2002 wheat crop is officially estimated at 73.5 million tonnes, higher than both the 2001 harvest of some 68.8 million tonnes and the 1997-2001 average of 70.3 million tonnes. Coarse grains production in 2002 is tentatively forecast at 33 million tonnes, some 2 million tonnes more than last year.

Production of Rabi and Kharif paddy crops in 2001 is estimated at record 136 million tonnes, 8.9 million tonnes higher than the previous year and above average. The early outlook is for a similar size crop in 2002.

Reflecting consecutive above average cereal harvests in recent years, the overall food supply situation is satisfactory and cereal stocks have increased to record levels. As of 1 March 2002 government stocks of wheat and rice stood at 28.46 million tonnes and 25.97 million tonnes respectively, sharply higher than the total buffer requirement of 16.8 million tonnes. In an effort to promote exports and reduce stocks, the Government in early March lifted the quantitative restrictions on exports of wheat and wheat products and increased the minimum support price of wheat.

INDONESIA (4 June)

Most of the area normally under the secondary rice crop has been planted. Aggregate paddy production in 2002 is estimated to decline by some 2 percent to 48.7 million tonnes reflecting a similar reduction in the area planted. The floods in late January and February, which affected 700 000 people across the country, is estimated to have destroyed 10 000 hectares, or 0.1 percent of total rice area. The output from the 2002 maize crop is provisionally estimated at 9.3 million tonnes, a slight increase compared to last year.

Lower paddy production should result in increased imports in the marketing year ending in March 2003. Currently planned imports in 2002/03 are set at 3 million tonnes. One million will be handled by BULOG (National Logistic Planning Agency) and the remainder by private traders. Imports of wheat and maize will also be needed.

IRAN, ISLAMIC REPUBLIC OF (23 June)

In late April 2002, a series of minor earthquakes in western areas resulted in casualties and damage to property. Some 20 000 people, mostly farmers in the grain and fruit producing area of Songhor, were affected. Furthermore, on 22 June 2002, an earthquake measuring 6.3 on the Richter Scale and followed by several aftershocks struck Qazvin, Hamadan and Zanjan provinces, destroying or damaging more than 80 villages, causing over 200 deaths and injuring more than 1 000 people. So far, assistance is being provided by national relief organizations.

Main current agricultural activities include harvesting of wheat and planting of the paddy crop due for harvest from August. The 2002 wheat crop, which benefited from improved weather conditions since January, is expected to recover substantially from last year's drought-affected crop and is provisionally estimated at 9.5 million tonnes. This is some 2 million tonnes more than in 2001. Prospects for the paddy crop will crucially depend on more rains to replenish the water reservoirs which have been seriously depleted by recurrent droughts.

The improved production will result in a marked drop in cereal import requirement for 2002/03 from an average of 9.9 million tonnes over the three previous years.

IRAQ* (3 June)

Despite shortages of some agricultural inputs, cereal output (mainly wheat and barley) in 2002 is forecast at 1.4 million tonnes, about 15 percent above last year due to improved precipitation compared to the previous three years.

Grain imported under the SCR 986 oil-for-food deal has led to significant improvements in the overall food supply situation, but malnutrition remains a serious problem. The United Nations Security Council passed on 14 May 2002 a new resolution that introduced comprehensive changes aimed at speeding up the processing and approval of civilian goods submitted for contracts signed under the oil-for-food programme.

ISRAEL (3 June)

Harvesting of the 2002 wheat crop is almost complete and the output is forecast at about 180 000 tonnes, about 68 percent above the average for the previous five years, as a result of favourable weather conditions.

Imports of cereals in 2002/03 (July/June) are forecast at some 2.8 million tonnes, almost similar to the previous year.

JAPAN (4 June)

Planting of the main rice crop for harvest in October-November is underway. Paddy production in 2001 is estimated to have declined by 4 percent to 11.3 million tonnes reflecting a 2.6 percent reduction in the area planted and a slight decrease in yields. The output from the 2002 wheat crop, due for harvest soon, is provisionally estimated at 0.7 million tonnes, virtually unchanged from last year.

Imports of cereals (mainly maize and wheat) in the marketing year ending September 2002 are estimated at 26 million tonnes, slightly down compared to the previous year. In the current fiscal year ending 31 March 2003, the country has to import a minimum of 682 000 tonnes (milled equivalent) of rice under the Uruguay Round agricultural trade agreement.

JORDAN (3 June)

Aggregate output of wheat and barley in 2002 is forecast at 55 000 tonnes, more than double last year's reduced crop due mainly to favourable rainfall. Domestic cereal production normally meets only a small proportion of consumption requirements, the rest being covered by imports. Imports of wheat in 2002/03 (July/June) are forecast at 900 000 tonnes, slightly higher than last year. Coarse grain imports are forecast at 1.2 million tonnes, about the same as in 2001/02.

KAZAKHSTAN (30 May)

Despite an increase of 148 000 hectares in area under cereals, production this year is estimated at 12.5 million tonnes, which is some 3.4 million tonnes less than the harvest in 2001. Official estimates put wheat production at 9.7 million tonnes, barley at 1.9 million tonnes and maize at 300 000 tonnes in 2002. By contrast, last year's bumper harvest produced some 12.7 million tonnes of wheat and 2.9 million tonnes of coarse grains.

Kazakhstan is set to export nearly 4.9 million tonnes of cereals in the coming marketing year compared with about 4.4 million tonnes in the 2001/02 marketing year. Wheat is the main export cereal and markets are mainly the neighbouring CIS countries and the Middle East.

KOREA, DEMOCRATIC PEOPLE'S REPUBLIC OF* (4 June)

Harvesting of spring wheat, barley and potato crops is underway and will be completed in the coming weeks. Wheat and barley production in the 2001/02 agricultural season is provisionally estimated at 178 000 tonnes, sharply above the previous year's harvest. Including the main cereal crops harvested in late 2001, estimated at 2.9 million tonnes, total cereal production available for consumption in the marketing year ending in October 2002 totals 3.1 million tonnes, 0.8 million tonnes more than the previous year. Potato production in 2001/02 is estimated, in grain equivalent, at 475 000 tonnes against 290 000 tonnes in the previous year.

Notwithstanding the increased food production, domestic supplies fall short of requirements by some 1.5 million tonnes. With commercial imports estimated at about 100 000 tonnes, the remaining 1.4 million tonnes will have to be covered by food aid or concessional imports. Of this, WFP has estimated that 525 000 tonnes of cereals and 85 000 tonnes of other food are required to feed 6.4 million beneficiaries, mainly children, pregnant and nursing mothers as well as elderly people. Against this requirement, so far a total of about 400 000 tonnes is available, including carryovers from the end of 2001 and recent new pledges from the U.S. and Australia which have yet to arrive in the country. Owing to the delay in receiving new contributions, in May WFP had to scale back its operations, giving priority to the continued feeding of orphans, young children and pregnant and nursing women. An additional 130 000 tonnes of cereals are urgently required to meet the needs of the most vulnerable populations through to the end of 2002.

An FAO/WFP Crop and Food Supply Assessment Mission is scheduled to visit the country in late June 2002 to assess the early crop prospects and review the food supply situation.

KOREA, REPUBLIC OF (4 June)

Planting of the 2002 paddy crop, the most important cereal crop grown in the country, is underway. In 2001, for the third successive year, the country produced a bumper paddy crop estimated at 7.45 million tonnes, almost four percent more than the above-average crop harvested the previous year. This increase follows a slight expansion in area planted and better yields due to favourable weather at planting time. In September 2001 the Government implemented a new rice production policy in an attempt to encourage farmers to cultivate alternative crops. If the farmers accept this diversification, paddy output in 2002 could decrease for the first time in four years. The output from the barley crop, recently harvested, is estimated at 293 000 tonnes.

Cereal imports in 2001/02 marketing year (October/September), mostly maize and wheat, are estimated at 13 million tonnes, 0.6 million tonnes higher than the previous year.

KYRGYZ REPUBLIC (30 May)

The cereal harvest this year is forecast at more than 1.8 million tonnes, which compares with 1.9 million tonnes in 2001 and includes 1.3 million tonnes of wheat and 0.5 million tonnes of coarse grains (barley and maize). Domestic cereal consumption requirement is estimated at about 1.9 million tonnes. Cereal import requirement in 2002/03 marketing year is estimated at 165 000 tonnes, which will be commercially procured.

LAOS (4 June)

Planting of the main rainfed paddy crop is underway and will continue until late July. Aggregate paddy production in 2001 is estimated at 2.4 million tonnes, unchanged from the previous year and slightly above average. While this level of production virtually covers national consumption requirements, poor sections of the population in upland areas and people in the flood-prone areas who suffered crop losses have inadequate access to rice, are chronically food insecure and thus in need of food and other assistance. WFP is providing relief through both work for food projects and emergency operations.

LEBANON (3 June)

The output of the 2002 wheat and barley, now being harvested, is expected to be about 81 000 tonnes, about the same as last year. The country depends heavily on imports (around 90 percent) to meet demand for rice, sugar and milk powder.

Imports of cereals - mainly wheat - in 2002/03 (July/June) are forecast at some 760 000 tonnes, similar to the previous year.

MALAYSIA (4 June)

Planting of the irrigated secondary paddy crop, which normally accounts for more than 40 percent of total production, has been completed. Harvesting of the main paddy crop planted in August to November last year, finished in April. Aggregate paddy production in 2001 is estimated at 2.3 million tonnes, a 7 percent increase from the previous year. The 2002 paddy output, assuming a slight increase in area planted, could reach the same above average level of last year which represents some 70 percent of the country's rice requirement. Imports in 2002 are forecast at some 600 000 tonnes. The requirement in wheat is covered by imports forecast at 1.4 million tonnes for 2002/03. The rapid recovery in the pig sector should result in increased imports of maize forecast at 2.9 million tonnes for 2002/03 compared to 2.7 million tonnes estimated for the previous year.

MONGOLIA* (4 June)

Planting of wheat, virtually the only cereal grown in the country, has recently been completed. The impact of the third consecutive harsh winter, coupled with serious problems in the agricultural sector, could result in a further reduction in wheat production in 2002 and thus an increased dependency on international food assistance. Production of wheat has declined steadily over the past years from 700 000 tonnes in the early 1990s to an estimated 191 000 tonnes in 2001. This production covers only about 50 percent of domestic wheat requirements, leaving an estimated import need for 2001/02 of 165 000 tonnes. Imports of some 33 000 tonnes of rice are also foreseen. The emergency food aid need is 40 000 tonnes of which 31 000 tonnes have been pledged and delivered.

Harsh winter conditions continue to stress livestock which play a fundamental role in the nutritional well-being of the majority of the population. A severe storm in March with snow, dust and winds caused further destruction and killed an additional 53 000 livestock bringing the total loss throughout the country, for the 2001/02 winter, to an estimated 2.5 million. As a result, the livelihood and food security of large numbers of nomadic herders, who depend

entirely on animal rearing, was seriously affected. Some 5 200 families have lost all their animals and many more are in a precarious situation with insufficient animals remaining.

MYANMAR (3 June)

Planting of the main season rice crop will start with the arrival of the southwest monsoon rains. This crop, which is harvested from October, normally accounts for some 85 percent of aggregate production and its outcome will crucially depend on the performance of the monsoon. The remaining 15 percent of the paddy crop is produced under the second, or dry season crop harvested from April. Last year's main season crop was above average. In aggregate, paddy production in 2001/02 is estimated at 21 million tonnes, similar to the previous year's output. The wheat and coarse grains harvested in November 2001 yielded 85 000 tonnes and 537 000 tonnes, respectively. Reflecting better crops, exports of rice have increased in recent years; for the marketing year ending in June 2002 the Government forecasts rice exports to increase sharply to 1 million tonnes.

NEPAL (4 June)

Planting of the main paddy crop, which is now underway, will continue until August. The output from the paddy crop harvested in November/December 2001 is estimated at 4.2 million tonnes (2.8 million tonnes in milled equivalent), 5 percent above the previous year. The output of wheat harvested in April 2002 is estimated at 1.3 million tonnes, an increase of 9 percent over 2001. The coarse grain production – mostly maize – in 2002 is forecast at 1.8 million tonnes, fractionally higher than in 2001.

Nepal is one of the most disaster-prone countries in the world. Floods, landslides, earthquakes and other calamities in recent years have resulted in casualties and loss of property and livestock. Thus, while the current level of domestic production altogether covers the country's cereal requirement, more than 9 million people, representing some 42 percent of the country's population, are food insecure living below the poverty line. A number of relief agencies, including WFP, support the most vulnerable groups through feeding and health care projects. Assistance is also needed for some 100 000 Bhutanese refugees.

PAKISTAN (4 June)

The main current agricultural activities include the completion of the harvesting of the 2002 wheat crop and the planting of the paddy and coarse grain crops. Latest official estimates indicate production of wheat at some 19 million tonnes. Although this is below the target of 20 million tonnes, as a result of less area sown and lower yields following shortage of irrigation water, it is still almost 3 percent above average.

Paddy production is tentatively forecast at about 5 million tonnes, lower than both previous year (5.6 million tonnes) and average. The area planted is expected to decline for the second consecutive year as severe shortage of irrigation water forced growers to switch to other somewhat less water demanding crops. The output of coarse grains in 2001, mostly maize, is estimated at 2.1 million tonnes, and a similar production is provisionally forecast for 2002.

On 22 March 2002, a WFP Emergency Operation was approved for food assistance to drought-affected persons in Balochistan and Sindh provinces. The Operation will provide 20 500 tonnes of cereals and other food to 343 000 targeted individuals in the two provinces.

PHILIPPINES (4 June)

A strong earthquake measuring 7.2 on the Richter scale struck Guam on 27 April without causing casualties or major damage.

Harvesting of the secondary rice and maize crops is complete. Total paddy production in 2002 is officially forecast at 12.9 million tonnes, unchanged from last year's good crop. The improved

production over the past 5 years is mainly due to an increase in the area sown under high-yielding varieties. The output from the maize crop is expected to remain at last year's level of 4.5 million tonnes.

Since wheat is not produced in the country, the estimated requirements of some 3.0 million tonnes are all imported. An import of about 600 000 tonnes of maize will also be needed.

SAUDI ARABIA (3 June)

Aggregate output of wheat and barley in 2002 is forecast at 1.8 million tonnes, similar to last year. Imports of coarse grains (mainly barley and maize) in 2002/03 (July/June) are forecast to remain unchanged at 6.5 million tonnes.

No locusts were reported during May and no significant developments are likely.

SRI LANKA (4 June)

Land preparation and sowings of the mostly irrigated Yala dry season paddy crop are complete. The dry season crop for harvest in August/September accounts for around one third of aggregate paddy production, the rest coming from the Maha crop planted in October/November to coincide with the main rainy season. The output from the 2002 Maha crop, harvested in March, is estimated at some 1 million tonnes, lower than the previous year's harvest due to unfavourable weather during sowing time. Assuming normal growing conditions for the Yala crop to be harvested later in the year, aggregate paddy output in 2002 is forecast slightly above last year's crop of 2.7 million tonnes. Some 0.9 million tonnes of wheat are imported annually to meet the demand for bread and other wheat products.

Of the about 1.6 million people in the south affected by reduced paddy output in 2001, 300 000 are presently being assisted by a WFP Emergency Operation consisting of 22 680 tonnes of cereals and other food.

SYRIA (3 June)

The output of wheat in 2002, now being harvested, is forecast at 4.5 million tonnes, about 5 percent below last year's bumper crop but 27 percent above the average for the previous five years. The barley harvest is also estimated to be above average at 1.3 million tonnes.

Imports of wheat and rice in 2002/03 (July/June) are forecast at a total of 65 000 tonnes, whilst barley imports are forecast at 100 000 tonnes, nearly double of the previous year's level.

TAJIKISTAN* (30 May)

Locust invasion, recent floods and reported irrigation water shortages have dampened earlier expectations of a recovery in cereal production. The cereal harvest is now estimated at about 293 000 tonnes, which is similar to the drought affected harvest of the preceding year. Domestic cereal utilisation is estimated at about 1 million tonnes, while Tajikistan has an estimated capacity to import some 400 000 tonnes of cereals. The shortfall, more than 300 000 tonnes, need to be covered through food aid. In the past, food aid had not exceeded 160 000 tonnes. An FAO/WFP Crop and Food Supply Assessment Mission is currently in the country to determine the extent of food shortages, import requirements and the number of affected people.

THAILAND (4 June)

Planting of the 2002 main season crops and harvesting of the second season paddy crop are underway. Reflecting below normal rains in the first quarter of 2002 production of the second season paddy crop is estimated to decline from last year by some 6 percent to 5.7 million tonnes. Total paddy output in 2001 is estimated at an above-average level of 25.3 million tonnes (16.75 million tonnes in milled rice), including 19.6 million tonnes from the main crop harvested until January 2002. As a result of a slight reduction in the area planted, the 2002 maize crop, now being sown, is forecast to decrease by about 10 percent to 4 million tonnes.

Exports of rice in 2002 are currently forecast at about 8 million tonnes, some 7 percent higher than the record 7.5 million tonnes exported last year.

The intervention price for 5 percent and 25 percent broken grade rice has been set at 4 880 baht (US\$ 112.30) per tonne and 4 500 baht (US\$ 103.57) per tonne, respectively.

TURKEY (3 June)

Output of the 2002 wheat crop is provisionally estimated at 18 million tonnes compared to 16 million tonnes in 2001. Good winter rains and snow cover have helped boost yields. Turkish Marketing Board (TMO) did not announce as yet its wheat purchase plan for this year, but it is expected to buy at least as much as last year's grain purchase of about 2.5 million tonnes.

Wheat imports in 2001/02 (July/June) are forecast at 1.3 million tonnes compared with 0.4 million tonnes estimated for the previous year. Maize imports are also forecast to increase by nearly 142 000 tonnes to 900 000 tonnes. Exports of wheat in the year ending June 2002 are expected to decline sharply.

TURKMENISTAN (30 May)

Cereal harvesting has begun in some parts of the country and official estimates point to a cereal harvest of about 2 million tonnes in 2002. The average harvest in the past 6 years was estimated at less than 1.2 million tonnes and last year cereal harvest amounted to about 1.8 million tonnes. The estimated cereal harvest for the past two years has been significantly high despite the fact that precipitation has been reported below average. In addition, water levels in the two main rivers, Amu and Murghab, which are the main sources of irrigation for the desert country, flow below average. In 2001 some food shortages were reported in Mary province (bordering the Islamic Republic of Iran and Afghanistan) and Dashagouz (bordering Karakalpakstan region of Uzbekistan).

UZBEKISTAN* (31 May)

The cereal harvest this year is estimated at some 3.9 million tonnes, 251 000 tonnes higher than the drought reduced harvest in 2001. Locust invasion that has recently affected neighbouring northern Afghanistan and parts of Tajikistan may affect crops in Uzbekistan. In addition, the forecast harvest may also be threatened by below average precipitation and lower levels of water in the two main rivers, Amu and Syr Darya, which provide more than 90% of irrigation water for Uzbekistan. The worst affected areas for the past two years have been Karakalpakstan and Khorzam autonomous regions, where a large number of people required emergency food assistance.

VIET NAM (4 June)

The area sown to rice is progressively declining as farmers shift land to other crops such as maize and soybeans to increase animal feed supplies. In the southern provinces the area reduction occurred mainly in the Mekong River Delta where some rice land was converted into aquaculture or used for more profitable economic activities.

Harvesting of the winter/spring paddy crop in the Mekong River Delta is due for completion at the end of June. Favourable weather, the use of high-yielding varieties and adequate availability of inputs are expected to result in increased paddy output. This improvement in output in the Mekong River Delta should offset the lower production in the other southern regions where yields were adversely affected by dry weather in April. The winter/spring paddy crop in the northern provinces is reportedly in good condition. The aggregate paddy production in 2002 is forecast at 32.3 million tonnes, slightly above last year's harvest.

The rice export target for this year is 3.8 million tonnes compared to 3.5 million tonnes exported in 2001. However, in the first quarter of 2002 exports of rice were only about 60 percent of the amount delivered in the same period last year, mainly due to low market supplies. Thus, total rice exports in 2002 are likely to be sharply below the target.

YEMEN (3 June)

Good Rainfall has generally favoured the main 2002 sorghum and millet crops, for harvest from October. However, heavy rains were reported to have caused some damage in some districts of Hajja, Ta'iz and Ibb. Cereal production in 2001 is estimated at about 700 000 tonnes, about 1 percent above the level of the previous year.

No locusts were reported and no surveys were carried out during May, however, low numbers of locust adults may be present in the interior near Wadi Hadhramaut and Shabwah. Surveys to clarify the situation are highly recommended in these areas.

Imports of cereals in 2002 - mainly wheat - are estimated at about 2.4 million tonnes, an increase of some 8 percent compared with 2001.

CENTRAL AMERICA **(including the Caribbean)**

COSTA RICA (5 June)

Heavy rains and flooding along the Caribbean coast in the early half of May severely affected minor food crops. A large number of people was forced out of their homes. Serious damage to rural infrastructure is also reported. Valle de la Estrella, Matina, Batan, Siquirres and Talamanca, in particular, are reported among the worst hit communities. A state of emergency has been declared by the Government and measures taken to avoid the outbreak of diseases following the floodings. Planting of the 2002/03 first season cereal and bean crops has started with the arrival of the seasonal rains. Overall, the area planted should increase from last year's drought affected plantings, particularly for paddy, the main cereal. Imports of rice in marketing year 2002 (January/December) should increase from 55 000 tonnes imported in 2001 to about 65 000 tonnes.

CUBA (16 June)

Delayed but well distributed rains throughout May benefited the development of minor food crops and planting of the spring (main) paddy and maize crops currently underway. No disruption was caused to 2001/02 winter (irrigated) paddy crop presently being harvested. Production of paddy in 2002 is early forecast at 340 000 tonnes, a slight increase from 2001 volume of 330 000 tonnes. Rice imports between 470 000 and 480 000 tonnes would nevertheless be required in marketing year 2003 (January/December) to meet domestic demand for this important staple. Harvesting of the important sugar cane crop has extended into May due to fuel shortages and other inputs. Production is provisionally estimated at 3.6 million tonnes, below the 4 million tonnes officially forecast at the start of the harvest in November last year, but still above the 3.5 million tonnes collected in 2001.

DOMINICAN REPUBLIC (5 June)

Harvesting of this year's main paddy crop and planting of the 2002/03 first season coarse grain crops have started under normal weather conditions. Early forecasts point to an above-average paddy output, the main cereal, but lower than the record production level reached in 2001. The outlook is also favourable for other important food crops such as beans, plantains and roots.

Wheat imports in marketing year 2002/03 (July/June) are forecast at about 325 000 tonnes, slightly above the previous year's volume, while maize imports, mostly for the animal feed industry, should remain at about the same 2001/02 (July/June) level of 700 000 tonnes.

EL SALVADOR (7 June)

Planting of the 2002/03 first (main) season maize, paddy and bean crops has started with the arrival of the first season rains from mid-April. Production of maize, the main cereal, is forecast to recover from last year when the crop was affected by severe drought. The food security situation is difficult at the moment and is expected to continue until the first season crop harvest in August. Food assistance to about 10 000 drought-affected families in 44 municipalities should continue until August. In addition, some 16 500 families, victims of last year's February earthquakes in the same drought-affected areas, will be receiving food assistance from the international community until July. The important coffee sector continues to be affected by low international prices, thus reducing the possibility of the affected population for alternative or supplementary employment in rural areas.

GUATEMALA (7 June)

Planting of the 2002/03 first (main) season maize and bean crops has started in some parts, particularly along the Pacific coastal and tropical areas, with the arrival of the seasonal rains from mid-May, while in others sowing is delayed due to the late arrival of the rains. A recovery in production is, nevertheless, expected from last year's drought affected crop. The food supply situation is still tight in some of the most affected areas, where international food aid continues to be provided. About 31 000 families are being assisted, including a large number of children suffering from acute malnutrition. The food supply situation is also difficult for the increasing number of unemployed and low paid workers from the coffee sector due to the prolonged international crisis which is affecting the industry.

HAITI* (30 May)

Heavy rains and flooding in the southern departments of Grande-Anse and Sud in the last days of May have left a number of victims and caused damage to rural housing and infrastructure. Some 560 families in about 20 towns are reported to be affected by the disaster, and many of the towns have remained in isolation. Damage to the agricultural sector is also reported. A detailed assessment of damage has not been made available yet. Harvesting of the 2002/03 first season maize and bean crops was interrupted following the heavy rains. Weeks of dry weather had previously affected the developing crops, and despite the heavy rains, moisture deficits in various degrees are still reported all over the country. Some areas in the north west were particularly hit by the dry spell. Harvesting of the important irrigated paddy crop has started while planting of the rainfed paddy crop has been completed. Prospects are uncertain and slightly below-average outputs are tentatively forecast. Food assistance from the international community continues to be distributed through development projects to some sectors of the population, mainly in the north and northwest.

HONDURAS (28 May)

Planting of the 2002/03 first season cereal and bean crops has started with the arrival of the rainy season. The rains have been particularly heavy in the central parts of the country and damage to

rural housing and infrastructure is reported. So far, no serious damage to the agricultural sector has been reported. Production of maize, the main cereal, is expected to recover from last year, when the first season crops were affected by severe drought. The food supply situation should remain tight until harvest of the first season crops which is due from August. This is particularly true in the drought affected departments of Choluteca, Francisco de Morazán, Intibuca, Valle, Comayagua and El Paraiso in the south, where food assistance was distributed to the hardest stricken groups.

JAMAICA (3 June)

Heavy rains during the last week of May, resulting in flooding and landslides, have caused damage to rural housing and infrastructure. A number of victims is reported while some of the affected population has been forced to leave their homes. Some losses are also reported to crops, particularly bananas, and to livestock. The most affected areas are the parishes of Clarendon, Manchester and St. Catherine, followed by Kingston, St. Thomas, St. Ann, Portland and St. Elizabeth, in the south and southeast of the country.

MEXICO (29 May)

Harvesting of the 2002 irrigated wheat crop, particularly in the northwest main growing areas, has been completed. Production is provisionally estimated at some 3.2 million tonnes, which compares to the average 3.3 million tonnes collected in 2001. The decline is largely due to lack of water availability in the main producing state of Sonora, which resulted in decreased plantings and lower than normal yields. Planting of the important 2002 spring/summer maize crop, for harvesting in the fall/winter, is well advanced. Adequate growing conditions are reported in the large producing states of Jalisco, México, Michoacán, Chiapas and Puebla, in the central plateau and the south. Harvesting of the 2002 winter (planted January/February) sorghum crop is underway in the main producing states of Tamaulipas and Nuevo León, in the north east, where about 80 per cent of the winter sorghum crop is grown. The outlook is uncertain due to lack of normal rainfall during growth, particularly in the former state. Scattered showers since mid-May, however, have helped improve the situation.

NICARAGUA (7 June)

Heavy rains and flooding along the Pacific coastal areas by end-May caused severe damage to housing and rural infrastructure. Some 1 625 families are reported to be affected, more than one thousand houses damaged and a number of small towns cut off of all means of communication in Nueva Segovia (Región I), León and Chinandega (Región II) and in Matagalpa (Región VI). Some of the surrounding areas around the capital of Managua are also particularly affected. No significant damage to the agricultural sector is so far reported. Planting of the 2002/03 first season cereal and bean crops started end-May with the arrival of the rainy season. Production is expected to recover from last year, when the first and second season crops were affected by drought and hurricane "Michelle" respectively. The food supply situation is particularly difficult for some of the drought affected families and should continue to be so until harvest of the first season crops which is due from August. This situation is aggravated by the high number of unemployed and low paid workers from coffee plantations, critically affected by the fall in international coffee prices.

PANAMA (27 May)

Planting of the 2002 cereal crops, mainly paddy, has started with the arrival of the seasonal rains in May. The area planted to paddy and maize, particularly the irrigated area, is expected to increase from last year, when the crops were affected by drought.

**SOUTH
AMERICA**

ARGENTINA (7 June)

Heavy rains in the large maize growing areas of eastern Buenos Aires disrupted harvesting operations of the 2002 maize crop and caused localized flooding. Heavy rains were also reported in the central and northern parts of the country. The rains, nevertheless, brought some relief to the crops which had been affected by seasonably dry weather. By mid-May, about 68 per cent of the crop had been harvested, compared to 63 per cent by the same time the year before. Latest official forecast indicates a 2002 maize output of some 13.5 million tonnes, an improvement over an earlier estimate, but well below the average of the past 5 years. The decline is mainly the consequence of intensive rains at sowing, resulting in reduced plantings, and weeks of dry weather during the developing period which affected yields.

Planting of the 2002 wheat crop has started. The intended area planted is officially forecast to be slightly less than that of 2001, largely reflecting the credit constraints to the sector in the face of the economic and financial situation still affecting the country.

BOLIVIA (30 May)

Harvesting of the 2002 first (main) cereal and potato crops has been completed and land is being prepared for planting of the second season wheat and coarse grain crops, principally in the eastern Department of Santa Cruz. Yields from the first crops were good in those areas in the highlands and valleys not affected by the adverse weather at planting (February).

BRAZIL (7 June)

Increasing soil moisture due to normal to abundant rains are benefiting planting of the 2002 wheat crop. Considerably enlarged plantings compared to 2001 are reported in the main producing states of Paraná, Rio Grande do Sud and Santa Catarina. An early official production forecast points to a well above-average output of 3.8 million tonnes. This is mainly the result of the government's recent incentive programme for farmers, motivated in part by the likelihood of higher wheat import prices (about 7.2 million tonnes of wheat imports are anticipated in 2002). Recent rains extending from Rio Grande do Sud to southern Parana have helped improve growing conditions of the second season maize crop ("zafrinha"), previously affected by weeks of dry weather. The dry weather, by contrast, favoured harvesting operations in the more northerly maize growing areas, where harvesting of the second season crop had already started. A bumper second season maize crop is anticipated. Aggregate maize output in 2002 is provisionally estimated at an above-average 36 million tonnes. This is principally due to increased plantings of almost 29 per cent with respect to last year. Harvesting of the 2002 paddy crop has been completed and a high above-average crop of 11.0 million tonnes is provisionally estimated.

CHILE (16 June)

Heavy rains and flooding in early June have caused a number of victims and affected more than 170 000 people across the country. Some 6 000 have lost their homes. It is officially reported as one of the worst floodings in memory.

Harvesting of the 2002 maize crop has been virtually completed and a below-average output is provisionally estimated. Maize imports in marketing year 2002/03 (February/January) are forecast to increase from the previous year's 1.1 million tonnes to about 1.2 million tonnes.

Land is being prepared for planting of the 2002/03 wheat crop to be harvested from December.

COLOMBIA (7 June)

Normal to above-normal precipitation in April has benefited planting of the 2002/03 first season cereal crops starting from May. The area planted to wheat is expected to remain similar to that of the previous year's average, while that of maize, the main cereal, is forecast to increase from 2001 in response to the government's technical and extension support programme for farmers. Planting of the 2002 rainfed and irrigated paddy crops is well advanced, particularly the rainfed crop, and intended plantings are forecast to be similar to the 2001 slightly above-average crop. Production of rice will not be enough to meet domestic demand for this important staple and some 120 000 tonnes will be required as imports in 2002.

Food assistance from the international community is being provided in various parts of the country to the internally displaced population, victims of the civil strife affecting the nation.

ECUADOR (30 May)

Heavy rains and flooding along the coastal areas have stopped since mid-May, following weeks of incessant precipitation which resulted in severe damage to housing and infrastructure. It is officially reported that more than 27 000 people have been affected by the rains and over 2 000 have been left homeless. A state of emergency in the coastal provinces was declared by the government. Some damage to the agricultural sector is also reported, mainly to paddy, coffee and cocoa crops. Harvesting of the 2002 maize crop is underway and early production forecasts point to an increase from last year's 400 000 tonnes to an average 510 000 tonnes. The paddy crop is currently being harvested and output in 2002 is also anticipated to decline from 1.4 million tonnes to some 1.3 million tonnes which is still about average.

PERU (30 May)

The bulk of the 2002 wheat harvesting operations in the highlands is underway, where most of the domestic output is grown by small farmers for their own direct consumption. Early forecasts indicate an above-average output of some 190 000 tonnes. Harvesting of the 2002 white maize crop has been virtually completed while harvesting of the yellow maize crop is at its peak. Output from both crops, mainly grown along the coast and on the eastern slopes of the mountain range, is forecast at a near record 1.5 million tonnes which compares with the past 5-year average of 1.1 million tonnes. The increase is largely due to the government's support programme to farmers, in an effort to substitute imports with local crops and enhanced by favourable weather conditions. Harvesting of the important paddy crop is underway. Most of the crop is irrigated, largely grown by small producers, with main producing areas located in the departments of Lambayeque and Piura, in the north, and Arequipa in the south. Production in 2002 is anticipated to be a well above-average 2.1 million tonnes.

Wheat imports in 2002/03 are expected to increase from the previous year's 1.3 million tonnes to about 1.4 million tonnes, in response to population growth and mainly for pasta consumption. Despite the increase in production, maize imports should stay at the same high level of the previous year, when about 1 million tonnes were imported. Rice imports in 2003 (January/December) are forecast at 50 000 tonnes.

URUGUAY (30 May)

Planting of the 2002 wheat and barley crops, for harvesting at the end of the year, is about to start and the area planted for each is expected to remain close to last year's. Harvesting of the 2002 maize crop has been completed and an above-average output of some 260 000 tonnes, similar to 2001, is provisionally estimated. By contrast, output from the recently harvested paddy crop is provisionally estimated at a low 800 000 tonnes, largely as a consequence of reduced plantings with respect to the previous year.

VENEZUELA (30 May)

Following weeks of dry weather, recent precipitation has improved conditions for planting of the 2002 coarse grain and paddy crops currently underway. Reduced plantings are, nevertheless, anticipated for maize (white) and paddy, the main crops, compared to 2001 average levels.

Imports of wheat in marketing year 2002/03 (July/June) are expected to remain at last year's level, while maize imports are likely to increase from the previous year's 1.1 million tonnes. However, import restrictions in view of the economic difficulties being faced by the country could be a strong constraint and eventually limit intended volumes.

EUROPE

EC (4 June)

Output of wheat in 2002 is forecast to increase sharply after a significant expansion in the winter wheat area, mostly at the expense of coarse grains. Some land is also reported to have been shifted to wheat from non-cereal crops and set-aside. Furthermore, generally mild winter conditions have favoured crop development during the winter and spring throughout most of the Community and yield prospects are good. Harvesting has already begun in the most southern parts such as the south of Spain and Italy. Production is expected to increase the most in France and the United Kingdom, but significant increases are also reported for Italy and Spain. Output in Germany is forecast to remain close to last year's level. The Community's aggregate wheat crop is forecast at just under 106 million tonnes compared to 91.7 million tonnes last year. The outlook for the coarse grain crops is less certain. Although the overall area sown is expected to decline, largely reflecting the shift of winter barley land to wheat, this year's favourable conditions could lead to better yields. FAO currently forecasts the Community's aggregate coarse grains output at 106.7 million tonnes, which is 2 million tonnes below last year's level but this forecast could be revised significantly in the coming months as crops get closer to maturity. Regarding rice, plantings are tentatively estimated to be up in Spain, supported by good supplies of water for irrigation this year. Production could also rise in Greece, which was afflicted last year by drought, and in Italy, in response to improved producer returns in 2001. Aggregate output for the community is currently forecast at 2.6 million tonnes, up 2.9 percent from 2001.

ALBANIA (17 June)

Generally satisfactory weather conditions are reported for the season. Output of wheat, the main cereal crop, is expected to remain around the average of the past few years at about 350 000 tonnes.

BELARUS (29 May)

Latest information point to 5.2 million tonnes of grain harvest in 2002, including 0.8 million tonnes of wheat, 1.7 million tonnes of barley and 1.6 million tonnes of rye. The estimated grain output in 2002 is similar to 2001 harvest. Cereal import requirements in 2002/03 marketing year is estimated at 857 000 tonnes, which is about 120 000 tonnes higher than the import estimates of the marketing year coming to a close.

BOSNIA-HERZEGOVINA (28 May)

Latest reports point to a cereal harvest of more than 1.1 million tonnes in 2002, nearly 100 000 tonnes higher than the flood and hail affected harvest in 2001. The forecast cereal harvest is subject to weather conditions, in particular seasonal floods and hail, which normally occur during late spring and early summer. Domestic cereal utilisation is estimated at 1.3 million tonnes. Import requirement in the ensuing marketing year is estimated at 230 000 tonnes, including 80 000 tonnes of food aid.

BULGARIA (17 June)

Latest indications point to a significant increase in cereal output this year as a result of increased plantings, an increase in the use of fertilizer and generally favourable weather conditions for the season. Official reports indicate that winter wheat plantings increased by about 100 000 hectares last autumn to 1.15 million hectares. Output is now forecast to exceed 4 million tonnes and could reach as much as 4.5 million tonnes according to some opinions. The area sown to maize this spring is reported to have declined for the second year in succession as farmers have been put off the crop by drought losses in the past two years. Thus, even if yields return to normal levels maize output could remain close to the reduced level of the past two years.

CROATIA (31 May)

Early reports indicate that the cereal harvest in 2002 estimated at 3.1 million tonnes will be similar to the harvest in 2001. Cereal harvest estimates this year include 912 000 tonnes of wheat, 1.97 million tonnes of maize and 165 000 tonnes of barley. Cereal exports during the ensuing marketing year is estimated at about 250 000 tonnes, including 150 000 tonnes of maize and 100 000 tonnes of wheat.

CZECH REPUBLIC (June)

Generally favourable weather conditions and average plantings point to an average wheat crop in 2002 of about 4 million tonnes, about 500 000 tonnes less than last year's output. This assumes a return to average yields after above-average levels in the previous year. Also for barley, the main coarse grain, a return to average yields could lead to a marginal decline in output to about 1.9 million tonnes.

ESTONIA (28 May)

Latest reports point to a cereal harvest of 566 000 tonnes in 2002, which is the same as the harvest of the preceding year. Ample soil moisture and favourable weather conditions have contributed to maintaining the improved harvest of the past two years. Domestic cereal consumption requirement in the country is estimated at about 0.8 million tonnes per year. Import requirement for the current marketing year is estimated at 292 000 tonnes, including 133 000 tonnes of wheat, 68 000 tonnes of maize and 35 000 tonnes of barley.

FORMER YUGOSLAV REPUBLIC OF MACEDONIA (17 June)

Latest indications suggest that cereal yields will be somewhat constrained again this year due to adversely dry conditions. Wheat is the major cereal grown and output is likely to improve from last year when serious drought hit the country, but will likely remain below potential for the area sown at between 250 000 to 300 000 tonnes. The maize crop has averaged about 150 000 tonnes over the past five years and is likely to remain close to this level again this year.

HUNGARY (17 June)

Widespread heavy rains in the first half of June were very beneficial for the spring wheat and maize crops, although too late to benefit the winter wheat, which is due to be harvested from the end of June. Previously, a prolonged period of dry weather had given rise to concern for the yields of the spring crops, which had been growing under predominantly dry conditions since planting. Wheat output is forecast at between 4 million to 4.5 million tonnes. This is less than last year's good crop but about the average of the past five years. In view of the recent good rains, the prospect of average maize yields is more likely now and output is forecast at about 6.5 million tonnes.

LATVIA (30 May)

Early reports indicate a cereal harvest of 890 000 tonnes from an area of 417 000 hectares in 2002, which is respectively similar to 2001. The forecast cereal output this year is seen to include 390 000 tonnes of wheat, 260 000 tonnes of barley and 120 000 tonnes of rye.

LITHUANIA (30 May)

Lithuania is set to harvest nearly 2.6 million tonnes of cereals this year, which is some 110 000 tonnes higher than the 2001 harvest. This year's harvest include 0.9 million tonnes of wheat, 1 million tonnes of barley and 450 000 tonnes of rye. Domestic cereal utilisation is estimated at about 2.4 million tonnes.

MOLDOVA (29 May)

Moldova is set to harvest 2.7 million tonnes of cereals in 2002, which is similar to 2001 but nearly 750 000 tonnes higher than the average harvest of the previous six years. Cereal harvest includes about 1.4 million tonnes of wheat and about 1.3 million tonnes of coarse grains. Lack of sufficient farm inputs including machinery, fertilizers and access to credit are thought to be the main factors inhibiting increases in cereal output.

POLAND (14 June)

Prospects for the 2002 cereal crops are satisfactory. Although winter crop planting was hampered somewhat by adverse weather last autumn, a mild winter and good spring weather have been beneficial for crop development. According to official reports, about 1.9 million hectares of wheat were sown last autumn, 3 percent less than the year before. Although the outcome of the spring planting is still unknown, the overall wheat area is currently expected to remain similar to the previous year's level, at about 2.6 million hectares. Some reduction is also expected in yields this year, largely because use of fertilizer, herbicides and pesticides is expected to be curtailed in response to lower returns for wheat last season. Based on the above, the total output of wheat in 2002 is expected to fall to between 8.5 to 9 million tonnes, from almost 9.3 million tonnes in the previous year.

ROMANIA (7 June)

The outlook for this year's cereal harvest has deteriorated following excessively dry conditions over the past two months. Drought conditions are affecting important producing areas in the west, south and east of the country. The winter wheat crop was already expected to be lower this year after reduced plantings last autumn, but latest forecasts have been revised downward further reflecting a deterioration of yield prospects from earlier expectations and the likelihood that crops in some parts have been completely destroyed. The official forecast for the 2002 wheat crop now stands at 4.9 million tonnes, compared to 7.8 tonnes last year. Prospects for coarse grain crops are uncertain. The maize area is expected to remain similar to last year, but yields could be affected by dry conditions.

RUSSIAN FEDERATION (3 June)

Despite an increase of 1.6 million hectares in area planted to cereals, official estimates indicate a reduction in the cereal harvest by nearly 12 million tonnes in 2002 compared with the bumper harvest in 2001. The wheat harvest this year is seen to total 40.5 million tonnes compared with about 47 million tonnes in 2001, while the barley harvest is expected to decline by 3.5 million tonnes in 2002 compared with last year. In view of high stocks from last year's bumper crop, cereal exports in 2002/03 marketing year are likely to remain high.

Civil strife and military operation in Chechnya continue to disrupt life and agricultural activities. WFP and some international NGOs continue to provide supplementary food and non-food assistance to internally displaced populations. WFP intends to provide supplementary food assistance to some 310 000 people in Ingushetia and Chechnya. The current emergency programme, which began last January, is expected to continue until the end of October this year, by then some 70 000 tonnes of food would have been distributed to 310 000 internally displaced and vulnerable persons.

SLOVAK REPUBLIC (17 June)

Weather conditions have been generally favourable for the cereal crops this year. The season is reported to be somewhat ahead of normal because of mild winter conditions. Aggregate cereal output is forecast to remain similar to the previous year's level and the average at about 3.1 million tonnes. Of the total, wheat is expected to account for about 1.6 million tonnes.

SLOVENIA (17 June)

Normal cereal production is expected at around 500 000 tonnes reflecting generally satisfactory weather conditions. Of the total, wheat is expected to account for about 130 000 tonnes and maize 300 000 tonnes.

THE UKRAINE (3 June)

Official estimates point to a reduced cereal harvest of 34.4 million tonnes in 2002, which is some 3 million tonnes lower than the harvest in 2001. The estimated reduced harvest, despite an increase of about 1.3 million hectares in area, is due to extensive frost in winter and insufficient topsoil moisture to support spring crop germination. The cereal harvest this year includes some 19 million tonnes of wheat, 8.8 million tonnes of barley and 3.2 million tonnes of maize, compared with 21.3 million tonnes of wheat, 10.4 million tonnes of barley and 2.5 million tonnes of maize in 2001.

Cereal exports in 2002/03 marketing year is estimated at over 6 million tonnes compared with more than 8 million tonnes in marketing year coming to a close. This year's exports have been boosted by lower tariffs on Ukrainian cereals in the EU.

YUGOSLAVIA, FED. REP. OF (SERBIA AND MONTENEGRO)* (29 May)

Yugoslavia is set to produce some 8.3 million tonnes of cereals in 2002, which is some 500 000 tonnes lower than the excellent harvest of the preceding year. Cereal harvest estimates this year include 2.4 million tonnes of wheat, 5.5 million tonnes of maize and 303 000 tonnes of barley. Cereal exports in 2002/03 marketing year are estimated at 500 000 tonnes, including 200 000 tonnes of wheat and 300 000 tonnes of maize.

WFP has approved a Protected Relief and Recovery operation which will extend its food assistance programme from 1 July. This assistance will be gradually phased out by December 2003. Under a regional emergency operation WFP currently assists some 320 000 beneficiaries, of which 160 000 are refugees/IDPs and 160 000 social cases. Assistance to IDPs and social cases will be phased out by mid-2002 when the emergency operation ends. From 1 July, WFP assistance will focus exclusively on 174 000 refugees of which 170 000 in

Serbia and 4 000 in Montenegro. ICRC will ensure continued food assistance to IDPs through December 2003.

NORTH AMERICA

CANADA (3 June)

Latest information confirms earlier expectations of a decline in the overall wheat area for the 2002 harvest. The latest official forecast puts the wheat area to be harvested later this year at 10.4 million hectares, about 6 percent down from the previous year. The average yield expected is currently put at nearly 2.2 tonnes per hectare, somewhat less than earlier forecast following some extremely dry conditions in Saskatchewan in Western Canada, but still well above the previous year's reduced level. The country's aggregate wheat output is now forecast at just over 23 million tonnes, about 1.7 million tonnes up from 2001. For coarse grains, latest indications continue to point to an increase in area. The barley area is expected to increase by 15 percent to about 5 million hectares, that of oats, by almost 21 percent, to some 1.6 million hectares, and that of maize, by 5 percent to 1.3 million hectares. Yield prospects for coarse grains are also more favourable than in the previous year, and the aggregate coarse grain output is forecast at 28.4 million tonnes, 24 percent up from last year.

UNITED STATES (14 June)

Winter wheat production is set to fall to the lowest level since 1978 in anticipation of one of the smallest harvested areas ever recorded and expectations for yields well below the average of the past five years. Based on conditions in early June, the latest official forecast for the winter wheat output is 33.7 million tonnes, 9 percent below last year's crop. Regarding spring wheat, planting was virtually complete by the end of May and, if early indications in the USDA's Prospective Plantings Report have materialized, the area will be down by about 3 percent from 2001 to 7.3 million hectares. Based on these latest indications, the country's aggregate wheat output is set to fall further this year, and could drop below 50 million tonnes for the first time since 1993. With regard to coarse grains, planting of the main crops was well advanced by the end of May, although, for maize and sorghum, slightly behind the average pace of the past five years. According to the USDA's Prospective Plantings Report, a 4 percent increase in maize area is expected after reductions last year due to adverse wet weather, while, by contrast, a sharp 12 percent decrease is forecast for sorghum. Based on the indicated areas planted, and assuming normal weather conditions prevail for the remainder of the season, aggregate 2002 coarse grains output in the United States is forecast at about 267 million tonnes, which would be about 2 percent up on the previous year. Of the total, maize would account for 245 million tonnes. The area sown to rice in 2002 is likely to remain close to that of last year. However, assuming a return to normal conditions after the excellent season in 2001, production will probably decline somewhat this year.

OCEANIA

AUSTRALIA (14 June)

Prospects for the 2002 winter grain crops have deteriorated in the past two months due to lack of rainfall for planting. It is reported that by early June, planting pace was well behind normal and less than half of the expected 2002 winter crop had been sown. For the main winter grains – wheat and barley – there is still time to plant crops if adequate rainfall occurs in June. However, the wheat area is now forecast to fall by 6 percent from last year to about 11.8 million hectares. Based on current indications yields are also likely to be down from the previous year and below average but, as for the planted area, the final outcome will depend crucially on the amount of rainfall in the coming weeks. The latest official forecast for the 2002 wheat crop, which was released in early June, and assumes the arrival of sufficient rainfall in June, put the wheat output at 20.5 million tonnes, 15 percent down from last year and the lowest level since 1997. Output of barley is also forecast to fall, to about 6.1 million tonnes from almost 7.5 million tonnes in the previous year, also reflecting lower area sown

and lower yields. The summer grain harvest is virtually completed and production is estimated to have declined in 2002. Output of sorghum is estimated at about 1.8 million tonnes compared to 2.1 million tonnes in the previous year. Likewise, rice production has fallen to about 1.3 million tonnes, from nearly 1.8 million tonnes last year.

ESTIMATED CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/
a) 2001/02 or 2002 estimates (in thousand tonnes)

COUNTRY	Marketing year	2000/01 or 2001			2001/02 or 2002			
		Actual imports			Total import requirements (excluding re-exports)	Import position		
		Commercial purchases	Food aid	Total commercial and aid		Total commercial and aid	Food aid allocated committed or shipped	Commercial purchases
AFRICA		30 910.2	2 943.2	33 853.4	29 159.2	18 272.1	1 058.8	17 213.3
Northern Africa		15 240.1	298.3	15 538.4	15 162.0	13 080.2	42.8	13 037.4
Egypt	July/June	10 640.9	20.7	10 661.6	10 550.0	9 955.0	34.3	9 920.7
Morocco	July/June	4 599.2	277.6	4 876.8	4 612.0	3 125.2	8.5	3 116.7
Eastern Africa		4 283.9	1 774.1	6 058.0	3 813.0	1 424.7	374.9	1 049.8
Burundi	Jan./Dec.	64.2	45.8	110.0	61.0	2.9	2.9	0.0
Comoros	Jan./Dec.	46.0	0.0	46.0	46.0	12.0	0.0	12.0
Djibouti	Jan./Dec.	58.8	9.2	68.0	63.0	32.3	10.0	22.3
Eritrea	Jan./Dec.	92.4	269.9	362.3	140.0	20.5	20.5	0.0
Ethiopia	Jan./Dec.	37.7	844.8	882.5	300.0	41.6	41.6	0.0
Kenya	Oct./Sept.	1 712.2	348.2	2 060.4	1 045.0	428.3	111.4	316.9
Rwanda	Jan./Dec.	144.2	30.8	175.0	170.0	15.7	15.6	0.1
Somalia	Aug./July	206.7	34.3	241.0	300.0	25.0	17.1	7.9
Sudan	Nov./Oct.	1 411.4	158.1	1 569.5	1 270.0	431.2	39.5	391.7
Tanzania	June/May	510.3	33.0	543.3	418.0	415.2	116.3	298.9
Southern Africa		1 389.2	418.0	1 807.2	2 126.0	2 091.4	361.8	1 729.6
Angola	April/March	351.9	200.9	552.8	581.0	521.8	169.7	352.1
Lesotho	April/March	224.9	3.1	228.0	181.0	180.8	2.8	178.0
Madagascar	April/March	368.9	26.3	395.2	205.0	205.0	28.6	176.4
Malawi	April/March	12.2	27.2	39.4	125.0	149.6	6.6	143.0
Mozambique	April/March	271.3	155.5	426.8	684.0	684.0	131.9	552.1
Swaziland	May/April	87.0	0.0	87.0	78.0	78.2	1.2	77.0
Zambia	May/April	73.0	5.0	78.0	272.0	272.0	21.0	251.0
Western Africa		9 157.1	377.5	9 534.6	7 318.2	1 571.3	236.2	1 335.1
Coastal Countries		6 657.2	175.7	6 832.9	5 235.2	969.4	108.0	861.4
Benin	Jan./Dec.	107.7	14.3	122.0	114.0	14.1	14.1	0.0
Cote d'Ivoire	Jan./Dec.	1 414.8	5.7	1 420.5	1 025.0	123.1	2.6	120.5
Ghana	Jan./Dec.	481.3	53.7	535.0	461.2	120.6	35.1	85.5
Guinea	Jan./Dec.	393.8	33.2	427.0	330.0	27.1	26.7	0.4
Liberia	Jan./Dec.	187.8	16.3	204.1	210.0	9.9	7.9	2.0
Nigeria	Jan./Dec.	3 756.9	0.0	3 756.9	2 770.0	644.2	0.0	644.2
Sierra Leone	Jan./Dec.	230.0	46.5	276.5	225.0	27.9	21.6	6.3
Togo	Jan./Dec.	84.9	6.0	90.9	100.0	2.5	0.0	2.5
Sahelian Countries		2 499.9	201.8	2 701.7	2 083.0	601.9	128.2	473.7
Burkina faso	Nov./Oct.	216.8	18.9	235.7	171.0	19.5	12.7	6.8
Cape Verde	Nov./Oct.	41.5	49.7	91.2	93.0	40.0	40.0	0.0
Chad	Nov./Oct.	69.2	33.7	102.9	71.0	8.9	1.3	7.6
Gambia	Nov./Oct.	163.1	1.2	164.3	124.0	13.3	4.3	9.0
Guinea Bissau	Nov./Oct.	51.4	7.3	58.7	70.0	7.5	5.7	1.8
Mali	Nov./Oct.	108.2	6.5	114.7	90.0	17.1	0.9	16.2
Mauritania	Nov./Oct.	280.0	32.7	312.7	269.0	180.1	18.1	162.0
Niger	Nov./Oct.	622.9	29.5	652.4	345.0	39.9	32.1	7.8
Senegal	Nov./Oct.	946.8	22.3	969.1	850.0	275.6	13.1	262.5
Central Africa		839.9	75.3	915.2	740.0	104.5	43.1	61.4
Cameroon	Jan./Dec.	381.1	6.1	387.2	300.0	10.9	1.8	9.1
Cent.Afr.Rep.	Jan./Dec.	51.9	0.6	52.5	38.0	0.0	0.0	0.0
Congo, Dem.Rep.	Jan./Dec.	221.4	28.6	250.0	250.0	42.0	33.8	8.2
Congo, Rep.	Jan./Dec.	162.6	33.9	196.5	125.0	45.8	2.0	43.8
Eq. Guinea	Jan./Dec.	16.5	1.5	18.0	15.0	0.3	0.0	0.3
Sao Tome	Jan./Dec.	6.4	4.6	11.0	12.0	5.5	5.5	0.0

ESTIMATED CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/
a) 2001/02 or 2002 estimates (in thousand tonnes)

COUNTRY	Marketing year	2000/01 or 2001			2001/02 or 2002			
		Actual imports			Total import requirements (excluding re-exports)	Import position		
		Commercial purchases	Food aid	Total commercial and aid		Total commercial and aid	Food aid allocated committed or shipped	Commercial purchases
ASIA		31 253.0	3 951.0	35 204.0	37 434.0	23 264.8	2 834.5	20 430.3
Afghanistan	July/June	957.6	246.3	1 203.9	2 178.0	1 133.9	320.3	813.6
Armenia	July/June	368.0	99.0	467.0	340.0	80.4	37.4	43.0
Azerbaijan	July/June	783.0	22.0	805.0	672.0	492.8	13.8	479.0
Bangladesh	July/June	1 169.8	511.1	1 680.9	1 800.0	1 812.6	520.6	1 292.0
Bhutan	July/June	59.0	0.0	59.0	54.0	5.9	5.9	0.0
Cambodia	Jan./Dec.	74.1	31.7	105.8	60.0	28.8	26.6	2.2
China 2/	July/June	8 729.4	70.6	8 800.0	11 700.0	6 932.2	50.5	6 881.7
Georgia	July/June	537.0	120.0	657.0	466.0	331.9	109.6	222.3
India	April/March	116.4	191.8	308.2	282.0	238.5	187.0	51.5
Indonesia	April/March	6 920.5	446.1	7 366.6	6 988.0	5 298.4	225.0	5 073.4
Korea, D.P.R.	Nov./Oct.	705.8	1 428.7	2 134.5	1 536.0	657.7	632.5	25.2
Kyrgyz Republic	July/June	78.0	61.0	139.0	165.0	129.7	9.3	120.4
Laos	Jan./Dec.	25.0	12.0	37.0	37.0	19.0	19.0	0.0
Maldives	Jan./Dec.	29.0	8.0	37.0	37.0	0.1	0.0	0.1
Mongolia	Oct./Sept.	139.9	63.4	203.3	203.0	155.1	31.3	123.8
Nepal	July/June	69.7	9.3	79.0	95.0	14.1	8.1	6.0
Pakistan	May/April	148.1	2.2	150.3	500.0	98.2	94.4	3.8
Philippines	July/June	4 505.4	104.3	4 609.7	4 201.0	2 699.3	249.5	2 449.8
Sri Lanka	Jan./Dec.	1 009.0	119.7	1 128.7	1 120.0	520.4	15.1	505.3
Syria	July/June	1 814.4	31.1	1 845.5	1 260.0	1 050.3	11.8	1 038.5
Tajikistan	July/June	386.0	156.0	542.0	579.0	515.8	184.8	331.0
Turkmenistan	July/June	20.0	6.0	26.0	55.0	41.3	7.5	33.8
Uzbekistan	July/June	569.0	38.0	607.0	721.0	508.3	73.3	435.0
Yemen	Jan./Dec.	2 038.9	172.7	2 211.6	2 385.0	500.1	1.2	498.9
CENTRAL AMERICA		3 869.4	260.4	4 129.8	4 049.0	3 070.0	249.5	2 820.5
Cuba	July/June	1 687.4	1.9	1 689.3	1 697.0	1 182.2	6.0	1 176.2
Guatemala	July/June	989.1	64.5	1 053.6	1 022.0	957.1	96.3	860.8
Haiti	July/June	511.0	104.9	615.9	550.0	326.3	79.3	247.0
Honduras	July/June	513.7	54.3	568.0	525.0	397.9	18.8	379.1
Nicaragua	July/June	168.2	34.8	203.0	255.0	206.5	49.1	157.4
SOUTH AMERICA		833.4	143.9	977.3	948.0	662.5	123.3	539.2
Bolivia	July/June	200.6	65.4	266.0	268.0	92.5	53.9	38.6
Ecuador	July/June	632.8	78.5	711.3	680.0	570.0	69.4	500.6
OCEANIA		388.5	0.0	388.5	383.0	46.0	0.0	46.0
Kiribati	Jan./Dec.	8.0	0.0	8.0	8.0	0.0	0.0	0.0
Papua New Guinea	Jan./Dec.	325.5	0.0	325.5	320.0	45.9	0.0	45.9
Samoa	Jan./Dec.	17.0	0.0	17.0	17.0	0.1	0.0	0.1
Solomon Isl.	Jan./Dec.	26.0	0.0	26.0	26.0	0.0	0.0	0.0
Tuvalu	Jan./Dec.	1.0	0.0	1.0	1.0	0.0	0.0	0.0
Vanuatu	Jan./Dec.	11.0	0.0	11.0	11.0	0.0	0.0	0.0
EUROPE		643.4	92.6	736.0	856.0	195.4	140.4	55.0
Albania	July/June	326.1	2.9	329.0	309.0	89.1	34.9	54.2
Bosnia&Herzegovina	July/June	215.0	75.0	290.0	290.0	104.7	104.6	0.1
Macedonia, FYR	July/June	102.3	14.7	117.0	257.0	1.6	0.9	0.7
TOTAL		67 897.9	7 391.1	75 289.0	72 829.2	45 510.8	4 406.5	41 104.3

SOURCE: FAO

1/ Includes food deficit countries with per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. U.S.\$ 1 445 in 1999), which is in accordance with the guidelines and criteria agreed to by the CFA should be given priority in the allocation of food aid. 2/ Includes import requirements of Taiwan Province.

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DEFINITIONS:

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

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

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

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

Enquiries may be directed to Office of the Chief, Global Information and Early Warning Service, Commodities and Trade Division, (ESC), FAO, Rome (Direct Facsimile: 0039-06-5705-4495, E-mail INTERNET: GIEWS1@FAO.ORG).

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