

FOODCROPS AND SHORTAGES

No.4

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	<p>AFRICA: In eastern Africa, serious food shortages have emerged in parts, particularly in Eritrea, parts of Ethiopia and Kenya mainly due to poor rainfall. In southern Africa, the number of people in need of food aid due to poor harvests has increased to 14.4 million. Delayed commercial imports and food aid are resulting in rapid deterioration of the food security situation. In the Democratic Republic of Congo the food supply situation remains difficult due to persistent conflict and dry weather in southern parts. In western Africa, harvest prospects are unfavourable in Cape Verde, Mauritania, The Gambia and Senegal due to a long dry spell in July.</p>
	<p>ASIA: In Afghanistan agricultural production has recovered strongly but years of civil strife and recurrent droughts have rendered millions of people dependent on food assistance. In DPR Korea, additional pledges are needed to cover emergency relief until the end of the year. Typhoons and an erratic monsoon have seriously damaged infrastructure, displaced millions of people and caused loss of thousands of lives, notably in Bangladesh, China, India and Nepal, while Mongolia, parts of Pakistan and Sri Lanka have been hit by drought. The food situation in the West Bank and Gaza Strip is grave due to continuing confinement of families under curfews.</p>
	<p>LATIN AMERICA AND THE CARIBBEAN: In Central America, food assistance is being provided in El Salvador, Guatemala and Nicaragua to households affected by last year's drought and by the severe crisis affecting the coffee sector. The western parts of Cuba have been hit by Hurricane "Isidore", the impact of which is not yet assessed. In South America, freezing temperatures and snowstorms in the highlands of Peru and Bolivia have affected thousands of small farmers and their livestock.</p>
	<p>EUROPE: Wheat output in the EU has risen this year by about 13 percent to 104 million tonnes, but aggregate output of other grains is likely to be down overall. Among the eastern European countries wheat production has dropped sharply in Hungary and Romania, but elsewhere, cereal production is expected to be around last year's level. In the European CIS, cereal production is forecast to decline by about 6 percent. In the Russian Federation, international food assistance continues to be provided to IDPs in Chechnya and Ingushitia.</p>
	<p>NORTH AMERICA: In the United States, total wheat production in 2002 is estimated at about 46 million tonnes 14 percent down from the previous year's below-average output. Prospects for the maize harvest have deteriorated since the previous report due to exceptionally dry conditions throughout the summer. Maize output is now forecast at 225 million tonnes, about 6 percent below last year's about-average crop. In Canada, following one of the worst droughts on record in the main grain producing areas, wheat output is set to fall to 15.4 million tonnes, well below last year and the average. A sharp drop in barley output is also forecast.</p>
	<p>OCEANIA: Prospects for the 2002 winter grain harvest have deteriorated sharply in Australia following widespread dry conditions throughout the first five months of the growing season. Total wheat output is forecast at just 13.5 million tonnes, down from almost 24 million tonnes last year.</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> (6 countries)	
Angola*	Internally displaced persons (IDPs)	Afghanistan*	Drought, war
Burundi*	Civil strife, IDPs	Georgia	Drought
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, drought
Ethiopia*	Drought in parts, IDPs	Tajikistan*	Irrigation water shortages
Guinea	IDPs and refugees		
Kenya*	Drought in parts	<u>LATIN AMERICA</u> (3 countries)	
Lesotho	Adverse weather	El Salvador	Drought, earthquakes, international coffee crisis
Liberia*	Civil strife, IDPs	Guatemala	International coffee crisis
Malawi	Adverse weather	Nicaragua	International coffee crisis
Mauritania	Irrigation water shortages		
Mozambique	Drought in parts	<u>EUROPE</u> (2 countries)	
Sierra Leone*	Civil strife, IDPs	Russian Federation (Chechnya)	Civil strife
Somalia*	Drought, civil strife	F.Rep. Yugoslavia (Serbia & Montenegro)	Refugees
Sudan*	Civil strife in the south, drought in parts		
Swaziland	Drought in parts		
Tanzania	Drought in parts, refugees		
Uganda	Civil strife, IDPs		
Zambia	Drought in parts		
Zimbabwe*	Drought, economic problems		

COUNTRIES WITH UNFAVOURABLE PROSPECTS FOR CURRENT CROPS

<u>Country</u>	<u>Harvest date</u>	<u>Main contributory factors</u>
Cape Verde	October/November	Dry weather
Georgia	June/August	Unfavourable weather
Mauritania	October/November	Dry weather
Mongolia*	September	Drought
Papua New Guinea	December/January	Drought
Senegal	October/November	Dry weather
Tajikistan*	June/August	Irrigation water shortages
The Gambia	October/November	Dry weather

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 September 2002, the number of countries facing serious food difficulties throughout the world stands at 32, with 21 in Africa, 6 in Asia, 3 in Latin America and 2 in Europe.

In **southern Africa**, the food crisis following two consecutive years of poor cereal harvests is worsening due to insufficient and slow food imports, both commercial and emergency relief. Prices of cereals are rising throughout the sub-region further curtailing access to food for large sections of the population. A series of FAO/WFP Crop and Food Supply Assessment Missions in April/May 2002 estimated the number of people in need of food aid at 12.8 million. However, follow-up vulnerability assessments recently undertaken by SADC Regional Vulnerability Assessment Committee, in collaboration with international agencies, have estimated the number at 14.4 million, with the largest increases in Zimbabwe and Zambia. A regional WFP emergency operation worth US\$ 507.3 million to provide food assistance to 10.3 million most affected people until the next harvest in April 2003, was jointly approved by FAO and WFP in late June 2002 and an international appeal launched in early July. However, only 36 percent of the appeal had been pledged by mid-September. Coupled with the low level of pledges, some countries of the sub-region have been reluctant to accept food aid supplies produced with genetically modified organisms (GMOs), which has further delayed food deliveries.

In the **Great Lakes region**, the overall food supply situation has improved in Burundi and Rwanda following improved food productions in 2002. However, food production in the Democratic Republic of Congo continues to be hampered by persistent civil conflict, coupled with dry weather in southern parts in recent months.

In **eastern Africa**, the early outlook for the 2002 crops in most countries is unfavourable due to poor rains and extended dry spells. Serious food shortages have started to emerge in several parts of the sub-region, particularly in Eritrea, parts of Ethiopia and Kenya. In Eritrea, prospects for current crops are bleak due to the failure of the short "azmera" rains and the continued drought into the important planting months of June and July. Over one million people are currently estimated to be in need of emergency food assistance. In Ethiopia, poor secondary season "belg" rains and a late start to the current main "meher" season rains have created a rather alarming food situation. Large numbers of livestock have died and unusual migrations in search of water and pasture are reported in several parts of the country. In response the Government has recently appealed to the international community for nearly US \$12 million to stave off the effects of poor rains. In Kenya, the "long rains" have been inadequate in several parts, leading to a poor food outlook for 2002/03. The food supply situation is particularly alarming in the districts of Mandera, Moyale, southern parts of Tana River, West Pokot, Koibatek, Marakwet and Baringo. In Sudan, crop prospects are unfavourable due to delayed onset of rains and population displacement in the south following recent escalation of the long-running conflict. In Somalia, despite a favourable outcome of the recently harvested main season "gu" crops, continuing insecurity and escalation of conflict in parts with the attendant population displacement are cause for serious concern. In Uganda, despite an overall stable food supply situation, erratic rains in parts and recent population displacements in the north pose serious food problems in the affected areas. In Tanzania, the recent good harvests from the main season crops have improved overall food availability.

In **central Africa**, crop growing conditions are favourable so far in Cameroon, while in the Central African Republic, erratic and below average rainfall has affected crop development in some regions.

In **northern Africa**, harvesting of the 2002 winter grain crops is complete. Aggregate production of wheat and barley is estimated to be some four percent down compared to the above-average crop last year. Lower wheat outputs in Algeria and Tunisia are not offset by increased harvests in Egypt and Morocco. By contrast, increased barley production in Morocco and Egypt more than offset declines in Algeria and Tunisia. The output from the paddy crop in Egypt, is anticipated to be average.

In **western Africa**, the first maize crop has been harvested and the second maize crop has recently been planted in southern parts of the countries along the Gulf of Guinea. In Liberia, agricultural activities have been disrupted by renewed civil strife, pointing to reduced rice production this year. In the western part of the Sahel, the dry spell in July which severely affected growing crops and raised serious concerns over the food supply outlook, ended in the first dekad of August in most parts of The Gambia, Guinea Bissau, Mauritania and Senegal. However, an FAO mission which visited Senegal and The Gambia in late August/early September anticipated declines in this year's cereal production due to reduced yield potential and localised crop failures. In Mauritania, most "dieri" (rainfed) crops failed. In Cape Verde recently planted maize also failed in parts, following irregular rains in August. Mauritania and The Gambia have declared national disasters and appealed for emergency food aid. In the eastern and central parts of the Sahel, weather conditions have been much more favourable with widespread and regular

rains over most of Burkina Faso, Chad, Mali and Niger. Crops are generally growing satisfactorily and overall crop prospects are favourable.

In **Asia**, food shortages prevail in DPR Korea, where WFP urgently requires additional pledges to implement its emergency relief operations until the end of the year. An FAO/WFP Crop and Food Supply Assessment Mission is presently in the country to review the 2002 main season harvest and estimate the cereal import requirement, including food aid needs for 2002/03. A large number of countries have been affected by tropical depressions, typhoons and an erratic 2002 monsoon season, causing excessive rainfall and severe floods in some areas and drought in others. Massive relief operations are underway by government agencies and national and international aid organizations. However, in most countries the effect on national cereal production has not been significant. The most widespread damage occurred in Bangladesh, China and India. In Bangladesh, floods affected 7 million people and caused more than 150 deaths from flood-related incidents and diseases. Some 300 000 hectares of paddy fields were submerged and widespread damage to housing and infrastructure was reported. In China, notably in central and southern provinces, torrential rainfall and typhoons resulted in floods and landslides with extensive damage to property and infrastructure, displacement of millions of people and more than 1 500 deaths, while in northern and north-eastern provinces, drought affected crop production and caused devastating forest fires. In India, the monsoon brought unusually heavy rainfall from mid-June to the north-eastern states, mainly Assam and Bihar, affecting some 21 million people and causing 400 deaths. However, the monsoon did not affect the important grain producing states in north-western India, which were instead hit by a serious drought. In Nepal, heavier than normal rains led to widespread floods and landslides in central and eastern parts, affecting 260 000 people with more than 500 deaths reported. A severe drought has hit Mongolia, affecting both livestock and cereal production and increasing food aid needs above the current levels. Droughts have also affected southern parts of Sri Lanka and Sindh and Baluchistan provinces of Pakistan.

In the **Near East**, favourable weather conditions in most countries have boosted domestic food production. In Afghanistan agricultural production has recovered strongly, reducing cereal import requirements by more than a third compared to the previous two years. Funding shortfalls in the face of massive return of refugees gives cause for serious concern. Investment in the agricultural sector, particularly in the rehabilitation, upgrading and maintenance of the irrigation infrastructure will be essential for speedy recovery of the Afghan economy. In the Islamic Republic of Iran, torrential rain in August triggered flash floods and landslides in north-eastern provinces, affecting 100 000 people and causing 37 deaths. The food situation in the West Bank and Gaza Strip is grave due to continuing confinement of families in homes by curfews and military operations.

In the **Asian CIS**, improved precipitation and relatively better growing conditions have improved the food outlook this year. Cereal output in the Kyrgyz Republic, Uzbekistan, Turkmenistan, Azerbaijan and Armenia have significantly improved. However, food supply in Tajikistan and Georgia remains rather tight.

In **Central America and the Caribbean**, harvesting of the 2002/03 first season cereal and bean crops is underway and the outlook is favourable. Average to above-average outputs are expected in Guatemala, El Salvador, Nicaragua and Honduras. However, localized droughts are still reported. Food assistance is being provided by the international community to affected farmers, many of whom have also been affected by the collapse of international coffee prices. Thousands of households and workers have been rendered food insecure by the crisis. In Costa Rica and Panama, heavy rains and flooding are reported, particularly along the Caribbean coastal areas, with damage to foodcrops. In Jamaica, the agricultural sector is slowly recovering from the impact of the heavy rains and flooding in June. In Cuba, the western parts of the country and the Isle of Youth were seriously affected by Hurricane "Isidore" (22-23 September) with damage to crops and infrastructure.

In **South America**, harvesting of the 2002 wheat crop has started in Brazil and near-record production is forecast. In Chile, planting of the 2002/03 wheat crop has been completed and the planted area is provisionally estimated at an above-average level. Sowing of the maize crop has started and plantings are expected to increase slightly over the 2001 good level. In Uruguay sowing of the 2002 wheat crop has also been completed and below-average plantings are estimated. Planting of the 2002/03 maize crop has just started under normal weather conditions. In the Andean countries, heavy snowstorms and freezing temperatures in the highlands of Bolivia and southern Peru have affected livestock production. In Ecuador, harvesting of the 2002 maize crop has been completed and an average output is estimated. In Colombia, harvesting of the 2002 first season cereal crops is nearly completed, while planting of the second season cereal crops is underway in some areas. In Venezuela, heavy and continuing rains since June have resulted in serious flooding in the southwest, leaving 35 000 people homeless and causing serious damage to infrastructure and some loss of livestock and crops.

In **Europe**, wheat output in the EU has risen this year by about 13 percent to 104 million tonnes, but the quality of later harvested crops may be reduced by widespread heavy summer rains. However, aggregate output of other grains is likely to be down overall and just below average. In eastern Europe, wheat production has dropped sharply in Hungary and Romania but elsewhere outputs are similar to last year's levels. Widespread heavy

summer rains have probably had an adverse impact on the quality of the small grain crops in several countries but may be beneficial overall for the maize crops, which are still developing.

In the European **CIS**, cereal harvest in 2002/03 marketing year is estimated to decline by nearly 8.0 million tonnes compared with the good harvest of last year. In Russia total cereal harvest is estimated at 77.7 million tonnes compared to 83 million tonnes last year, a decrease of 7 percent.

In the **Balkans**, cereal harvest is estimated at levels close to the sharply recovered harvest of the preceding year. Floods and hail, which normally occur during late spring and summer in the region have had insignificant effect on crops this year.

In **North America**, wheat production has fallen further this year in the United States to just below 46 million tonnes, 14 percent down from the previous year's below-average output. Prospects for the maize harvest, which is just starting in the Corn Belt, have deteriorated due to exceptionally dry conditions throughout the summer. Maize output is now forecast at 225 million tonnes, about 6 percent below last year's about-average crop. In Canada, prospects for the 2002 cereal crops deteriorated sharply during July and August due to one of the worst droughts on record. Wheat production is forecast at just 15.4 million tonnes, 5 million tonnes down from last year and almost 40 percent below the five-year average, and barley production is also likely to fall sharply.

In **Oceania**, prospects for the 2002 grain crops in Australia have deteriorated sharply in the past two months due to continuing widespread dry conditions. Total wheat production is now estimated at 13.5 million tonnes, 10.5 million tonnes down from last season and the smallest crop since 1994/95, and barley output is also likely to fall sharply. Papua New Guinea is currently experiencing drought which may reduce agricultural production this year.

COUNTRY REPORTS ^{1/}

AFRICA

NORTHERN AFRICA

ALGERIA (10 September)

The harvesting of the winter grain crops, mainly wheat and barley, is virtually over. Aggregate 2002 cereal production is estimated at about 1.8 million tonnes, some 32 percent lower than the bumper 2001 output and slightly below the average for the previous five years. Rains in March and April were too late to adequately improve the growing condition of the crops previously affected by recurring drought. Production of wheat is currently estimated at 1.6 million tonnes, about 400 000 tonnes less than last year while barley output, estimated at some 0.17 million tonnes, was only one-third of last year's above-average outturn.

Imports of cereals, excluding semolina, in 2001/2002 (July/June) are estimated to have declined by some 165 000 tonnes to 6.6 million tonnes. As a result of the below-average crop recently harvested, cereal imports (mainly wheat and maize) in the year ending June 2003, are forecast at some 7 million tonnes.

EGYPT (10 September)

Mainly reflecting a larger area sown, the output of wheat in 2002 is officially estimated at 6.6 million tonnes, some 6 percent higher than both last year and the average of 1997-2001. As a result of a marked increase in the area sown, barley production this year is put at 132 000 tonnes, 40 percent more than the below-average crop harvested in 2001.

The state of the 2002 paddy crop, due for harvest from now until November, is reported to be normal. Area planted to rice is estimated at 594 000 hectares, some 6 percent above last year's below-average level and close to the average of the previous five years. Production is anticipated to be average.

Imports of wheat in 2002/03 (July/June) are forecast to decrease by some 3 percent to 6.3 million tonnes. From 1 July to mid-August 2002 purchases of wheat totalled 0.9 million tonnes. Imports of coarse grains, mainly maize, are anticipated to decrease slightly from the previous year's level.

MOROCCO (10 September)

Aggregate cereal production in 2002 is estimated at 5.3 million tonnes, some 10 percent higher than last year and above average. This total includes an estimated 190 000 tonnes of maize recently harvested, 3.4 million tonnes of wheat, 1.6 million tonnes of barley and 81 000 tonnes, in aggregate, of rice, rye, oats, millet and sorghum. Above-normal and well-distributed rains since April helped substantially the wheat and barley crops, particularly in the northern parts of the country, as well as improving pasture conditions.

Imports of both wheat and coarse grains in 2002/03 (July/June) are forecast to decline from last year by 7.6 percent, to 2.8 million tonnes and 1.5 million tonnes, respectively.

Production of sugar beet in 2002 is expected to reach 3.3 million tonnes, 10 percent higher than last year, mostly reflecting an increase of some 6 percent in the area planted. By contrast, the sugar cane

^{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 (*).

harvest is anticipated to fall by 21 percent, compared to the previous season, to some 1 million tonnes, mainly as a result of a 16 percent reduction in the area planted.

TUNISIA (10 September)

The output from the 2002 cereal harvest is estimated to be below normal for the third consecutive year. Aggregate production of cereals, estimated at 0.51 million tonnes, is the lowest since 1995. Wheat output, estimated at 0.42 million tonnes, declined by more than 60 percent compared to last year. Barley production was down 61 percent, to 0.1 million tonnes, from the already below-average crop harvested in 2001. Rains in May benefited pastures but were too late to improve the state of the cereal crops previously stressed by prolonged dry weather.

Reflecting the sharp drop in production, wheat imports in 2002/03 (July/June) are forecast to increase substantially from the 1.4 million tonnes imported last year. Similarly, coarse grain imports (barley and maize) are expected to increase compared to 1.2 million tonnes imported in 2001/02.

WESTERN AFRICA

BENIN (12 September)

Following regular and well-distributed rains in general during the growing season, overall crop prospects are favourable. The first maize crop has been harvested in the south. Millet and sorghum crops are developing satisfactorily in the north.

As a result of an average cereal harvest in 2001, estimated at about 900 000 tonnes, the overall food supply situation remains satisfactory. Cereal imports for domestic use and re-exports during the 2002 marketing year (November/October) are estimated at 144 000 tonnes, including 14 000 tonnes of food aid.

BURKINA FASO (12 September)

Following erratic and below-average rains until late June, which necessitated replantings in most regions and shortened the growing season, precipitation has improved significantly since July with regular and better distribution. Reflecting these favourable growing conditions, coarse grains are developing satisfactorily. However, due to the erratic start of the rainy season, stages of development vary greatly in the regions and are generally late compared to normal years. In the east, cereals are generally emerging, while in the west and centre they are in the elongation/flowering and heading stages. In the north they are in the tillering/elongation stages. Due to the delayed rains and initial dry conditions, crops will need rains until October to reach full maturity.

The final 2001 production estimates released by the statistical services indicate that aggregate production of cereals reached a record of 3.1 million tonnes, 36 percent higher than the previous year and 22 percent above average.

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

CAPE VERDE (12 September)

Following first rains in early August on Santiago, Fogo, Santo Antao and S. Nicolau islands, the weather became dry on all islands except Fogo during the second dekad of August. Precipitation resumed on Santiago island during the third dekad, while the weather remained dry on Santo Antao and Nicolau islands until early September. The dry weather conditions affected recently planted maize which failed in parts. In early September the Government

created an inter-ministerial committee monitor the anticipated adverse impact which could result in a second consecutive poor harvest.

As a result of the 2001 reduced harvest, 46 tonnes of bean seeds and 67 tonnes of maize seeds were distributed under an FAO emergency project, supplementing Government distributions.

The 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 early June, WFP launched an emergency operation to assist some 30 000 people throughout the country. 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.

CHAD (12 September)

After irregular and below-average rains in May and June, precipitation improved in early July and remained widespread and regular through August, although decreasing somewhat in late August. Reflecting improved growing conditions, coarse grains are developing satisfactorily. Millet and sorghum are heading in the Sudanian zone and tillering in the Sahelian zone. Pastures are generally adequate in both the Sudanian and Sahelian zones. Grasshopper attacks are reported on millet in Abéché, Abougoudam, Mabrone, Massakory and Mongo regions while army worm infestations are reported in Abéché and Guéra regions. No desert locust activity is reported.

Following the release of final production estimates by national statistical services, the aggregate 2001 cereal production is estimated at a record 1.31 million tonnes, 44 percent higher than the previous year and 23 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.

Cereal import requirement of in 2001/02 marketing year (November/October) is estimated at 71 000 tonnes, including 14 000 tonnes of food aid.

COTE D'IVOIRE (12 September)

Rains started in late February and became widespread in April and May. However, precipitation remained below average in general and the weather was mostly dry during the last two dekads of August, which may have affected planting of the second maize crops in the south. The first maize crop has been harvested.

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 140 000 Liberian refugees in the country, mainly in the west.

THE GAMBIA (12 September)

After above-normal precipitation in mid-June, which allowed planting operations, rains decreased during the last dekad and mostly dry weather prevailed until early August. Some germination failures were experienced and some fields were replanted. Most of the crops suffered temporary wilting but others were permanently affected. On 23 August, the Government declared 2002/03 a year of crop failure and food shortages. However, rainfall has resumed since the end of the first dekad of August and the situation has improved substantially. An FAO Mission which visited the country on 6-7 September, verified that crops affected by the lack of rains in July have been recovering, particularly the important millet crop. However, the impact of the dry spell on crops varies greatly according to areas.

Overall, the Mission anticipated a general reduction in yield potential and a decline in this year's cereal output. The final outcome of the season will depend on the rainfall pattern through October.

GHANA (12 September)

Following above-average rains until early June, precipitation decreased and remained generally below average through early September. In the south and the centre, the weather remained mostly dry during the last two dekads of August. The first maize crop has been harvested in the south.

The overall food supply situation is close to normal, with drought-reduced cereal production in northern regions to be covered by adequate availability of other foodcrops, anticipated commercial imports and food aid already pledged.

Total cereal import requirements in 2002 (January/December) are estimated at 461 200 tonnes including 89 000 tonnes of food aid.

GUINEA (12 September)

The first rains were registered in the south in March, and by early June rains covered the entire country. However, precipitation was below average until early September. The overall food supply situation is satisfactory following satisfactory harvests in 2000 and 2001. Markets are well supplied, except in the south-east where past 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. According to WFP, some 30 000 new Liberian refugees entered the country since the beginning of the year, of whom 80 percent were women and children. Following armed clashes in and around the country over the period September 2000 – March 2001, there are still some 82 000 IDPs, mainly concentrated in Kissigougou, Macenta and Gueckedou Prefectures. Approximately 45 000 Liberian refugees in camps are currently receiving WFP assistance. Some 5 000 Liberians are also being assisted by WFP outside the camps in areas close to the Guinean-Liberian border waiting for transfer to the camps by UNHCR

Cereal import requirement for the 2002 marketing year is estimated at 331 000 tonnes.

GUINEA-BISSAU (12 September)

After substantial rains in mid-June, precipitation decreased in July, delaying transplanting of rice from seedbeds to swamp areas. Precipitation resumed in early August and became particularly abundant in late August and early September, allowing transplanting of rice to continue. Crops are developing satisfactorily.

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

LIBERIA* (25 September)

First significant rains started in early April and continued through September, and have been above the average. However, agriculture activities have been severely hampered, by an upsurge of civil strife. The country continues to depend on food assistance as domestic production remains far below requirement.

As a result of the persistent armed clashes, more than 130 000 internally displaced persons from the north, northwest, and central regions are currently living in camps in other parts of the country. WFP continues to provide food assistance to these people, in addition to more

than 22 000 Sierra Leonean refugees still in the country. WFP is providing monthly food rations to over 166 000 people faced with critical food needs. While access has improved for those living in areas under Government control, the situation remains uncertain for those in contested areas where insecurity and violence continue to prevent provision of humanitarian assistance.

Recent reports indicate that 40 000 Liberians have fled to Sierra Leone, 117 000 to Guinea and some 75 000 to Côte d'Ivoire.

MALI (12 September)

Following irregular and below-average rains in May and June, precipitation improved in early July and remained widespread and regular until early September, although decreasing in mid-August in the south and west. Reflecting this improvement, crops are growing satisfactorily and no crop stress is reported. Millet, sorghum and rainfed rice are generally in the tillering/elongation stages while maize is in the elongation/flowering stages. Pastures are generally adequate. Grain-eating birds are reported in several regions, notably in Diaro. Grasshopper infestations are also reported, notably on the pastures of the Sahelian zone. Army worms and rodents are also reported in a few places. The desert locust situation is reported to be calm but scattered adults are likely to be present in the north with small-scale breeding expected, but the situation remains below threatening levels.

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 (12 September)

Following the first significant early rains in June, which permitted early planting of coarse grains, dry weather prevailed in July. Limited, unevenly dispersed rainfall resumed in early August in the southern and south-eastern regions, allowing replantings but overall weather conditions remained abnormally dry. The south-western regions (North Gorgol, Brakna and Traza) and center region of Tagant have not had significant rainfall. As a result, by mid-August most "dieri" (rainfed) crop plantings had failed in most of the country. Dieri production represents about one-third of total cereal production in a normal year. On 1 September the Government declared a national disaster and appealed for 51 000 tonnes in emergency food aid in support of over 820 000 affected people.

Dry spells and the poor distribution of rainfall in 2001 growing season resulted in a serious decline in the cereal production. Final production estimates by national statistical services is estimated at some 122 177 tonnes, 32 percent lower than the previous year and 27 percent lower than average. Prices of cereals have risen considerably on most markets. In March 2002, WFP launched an Emergency Operation valued at US\$ 7.5 million (16 230 tonnes of food) to assist 250 000 people most threatened by serious food shortages. By end September, due to a limited donor response, only 46 percent of WFP's emergency food requirements have been covered. Other than WFP's emergency assistance, bilateral contributions have been received from France (600 tonnes of wheat through the French Red Cross), and Italy (approximately 920 tonnes rice). An EU-financed food security stock consisting of 6 000 tonnes of wheat is scheduled to arrive in October. In addition, the Government of Mauritania distributed 10 000 tonnes of wheat from its own resources.

NIGER (14 September)

After above-normal rains in late July, precipitation decreased somewhat in early August, notably in the extreme south. It improved significantly during the second dekad and remained widespread in late August. Crops are developing satisfactorily in most agricultural zones. Pastures are abundant, reflecting good rains in the pastoral zones. Grasshopper and other insect infestations are reported in several departments. The desert locust situation is reported to be calm but scattered adults are

present and are expected to breed on a small-scale in Tamesna and perhaps in western Air. However, no significant developments are likely.

The final official aggregate 2001 cereal production is estimated at 3.11 million tonnes, about 46 percent higher than the poor crop in the previous year and about one-third more than average. 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 for poorer sections of the population. 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 (13 September)

Reflecting widespread and regular rains, crop development is generally satisfactory. The first maize crop has been harvested in the south. The overall food supply situation is satisfactory, although some population groups remain food-insecure following communal conflicts notably in the states of Benue, Nasarawa and Taraba. From April to June, more than 85 000 IDPs have been resettled in their home villages in central region.

SENEGAL (12 September)

Following substantial rains in May and June, the weather became almost completely dry from the second dekad of July through the first dekad of August. This dry spell severely stressed crops which failed in many areas. Precipitation resumed on 10 August and remains widespread and well distributed. Some of the crops that suffered temporary wilting have been recovering. However, the dry spell has extended the lean period and this, combined with the reduced millet and sorghum production in the 2001 growing season, has led to a sharp rise in cereal prices in most markets, making access to food difficult for many households especially in rural areas. To assist the affected rural population, the Government has released CFA 15 billion (US\$ 23 million) for food assistance and has begun food distributions. An FAO mission which visited the country in late August/early September anticipated a decline in cereal production, notably in the centre and north. However, the extent of the decline will depend on the rainfall pattern through October.

Following renewed fighting between government troops and rebels in the southern Senegalese province of Casamance, at least 9 000 refugees reportedly crossed into The Gambia in early-May. In early July, WFP distributed emergency food rations to 2 047 people, mostly women and children, who had settled along the border.

SIERRA LEONE* (12 September)

Rains started in late April but were generally below average, though quite regular. Rice production should further increase this year reflecting an improved 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.

The renewed conflict in Liberia has caused at least 40 000 Liberians to cross into the country since the beginning of the year, while some 39 000 Sierra Leoneans who had been living in

camps in Liberia and 15 000 who had lived outside camps returned home as fighting intensified.

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

TOGO (13 September)

Reflecting generally widespread rains, crops are developing satisfactorily. In the south, the first maize crop has been harvested while the second maize crop is emerging/tillering. In the north, coarse grains benefited from regular rains since July.

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

CENTRAL AFRICA

CAMEROON (13 September)

Crop prospects are favourable in general, following widespread and regular rains. 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 (13 September)

Erratic and below-average rains have affected crop development in some regions. 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* (15 September)

Food production continues to be disrupted by the civil war, particularly in eastern parts. In the Kivu region, despite favourable growing conditions during the past months, production of the 2002 second season was reduced by the intensification of military activities that resulted in new population movements. In the provinces of Katanga, Eastern and Western Kasai, where better security conditions prevail, the 2002 food production was sharply reduced by dry weather. These provinces normally cover a large part of their food requirements through imports from neighbouring countries. However, following reduced harvests in most southern Africa countries, supplies have greatly diminished. The food situation is serious. A local UN Inter-Agency Mission is assessing relief requirements. Distributions of food and agricultural inputs by humanitarian agencies have already started.

CONGO, REP OF* (12 September)

A resurgence of fighting in the Pool region (surrounding the capital Brazzaville) at the end of March 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. The displacement of people and disruption of marketing activities have seriously affected the food supply situation. In late May WFP started assisting 20 000 IDPs, amidst growing concern about tens of thousands more people trapped in the conflict areas inaccessible to aid agencies. The Emergency Operation for the assistance of the Democratic Republic of Congo's refugees in the north of Congo Brazzaville that was due to end on 31 May 2002 has been extended until December.

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

EQUATORIAL GUINEA (13 September)

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 (13 September)

Seasonably dry conditions prevailed in July and August. 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 (13 September)

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

**EASTERN
AFRICA**

BURUNDI* (16 September)

Harvest of the 2002 third season crops, mainly vegetables and sweet potatoes in swamp areas, is well advanced. The output is generally satisfactory. Production during the 2002 second season was also good and estimated 4 percent higher than the previous year's level.

Rains in the third dekad of August and first dekad of September facilitated land preparation for the 2003 first season, which has started. FAO, in collaboration with other humanitarian agencies, has started distribution of agricultural inputs, mainly seeds and hoes, to assist some 192 000 vulnerable people. However, planting operations could be disrupted by persistent insecurity in the eastern provinces of Gitega and Ruyigi Provinces and in parts of Karuzi Province where insecurity during August resulted in fresh waves of population displacement.

The overall food supply situation has improved with the good harvest of 2002. Prices of sweet potatoes, bananas and cassava remain stable or declined during August. By contrast, prices of beans continue to increase reflecting low production last season.

ERITREA* (25 September)

Poor rains have seriously affected crop and livestock production. Total failure of the secondary *azmera* season rainfall in major agricultural areas has seriously affected land preparation and the replenishment of pasture, while the main *kremti* season rains arrived late over most of the country, delaying planting by several weeks. An early cessation of the rains could also compromise the important chickpea crop which is normally planted in early September.

An FAO/WFP Crop and Food Supply Assessment Mission visited the country from 19 August to 1 September and its report is expected to be issued shortly.

ETHIOPIA* (10 September)

Despite a favourable onset of the 2002 secondary “belg” season and consequent optimistic crop prospects, poor rainfall distribution and early cessation have resulted in a rather alarming food outlook in several parts of the country. 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 main “meher” rainy season is also off to a poor start with the important July and August rainfall well below normal. Heavy rains were mainly confined to small areas in the western highlands, although moderate to heavy showers hit parts of north-central in August.

In response to this alarming situation the Government renewed its appeal on 3 September to the international community to respond to an uncovered deficit of about 104 000 tonnes. Of immediate concern are Afar and Kereyu pastoralists in the east and north-eastern parts of the country. Loss of large numbers of livestock and unusual migrations in search of water and pasture are reported. Other areas of concern include low lands of Bale and Hararghe in Oromia Region, and Shinile, Fik, Dagahbour and Jijiga Zones in Somali Region. The sharp fall in grain prices following the bumper 2001 main “meher” harvest is now reversed with sharp rises reported in parts.

An Emergency Operation valued at US\$51.1 million was jointly approved in May 2002 by FAO and WFP for food assistance to 2.1 million small scale farmers and drought-affected pastoralists for a period of 12 months (1 April 2002 to 31 March 2003).

KENYA* (10 September)

Harvest prospects for the 2002 main “long rains” cereal crop are unfavourable due to an early end to the season. Earlier optimistic crop prospects based on normal rainfall forecasts were dampened by erratic rains, with some key maize growing areas in the Rift Valley Province receiving poor rains. However, the maize harvest in Western and Nyanza provinces, with the exception of some flooded areas, is expected to be normal to above normal. Early estimates of the long rains maize crop indicate an output of about 1.89 million tonnes compared to 2.32 million tonnes in 2001.

Favourable rainfall in July in several previously drought-affected pastoral areas improved overall food supply prospects. However, continued food security concerns are reported in the districts of Mandera, Moyale, southern parts of Tana River, West Pokot, Koibatek, Marakwet and Baringo. An Emergency Operation worth US\$ 36.26 million was jointly approved in April 2002 by FAO and WFP for food assistance to 1.26 million drought-affected people for a period of 6-1/2 months (15 April to 31 October).

RWANDA (10 September)

Planting of the 2003 A season, crops to be harvested from January, is underway. Rains in the third dekad of August and early September provided soil moisture for planting operations, particularly in southern parts.

Final estimates of the 2002 B season food crops indicate an output of 3.353 million tonnes, an increase of 12 percent on the previous year's same season, reflecting higher plantings and yields. Rains were abundant during the growing season but stopped earlier than normal. This adversely affected yields of beans and production declined from the previous year. By contrast, increased productions of sweet potatoes and cassava were obtained.

Production during the 2002 A season was also good and the overall food supply situation remains satisfactory.

SOMALIA* (10 September)

The current main "gu" season cereal crop being harvested in southern Somalia is forecast at about 260 000 tonnes (100 000 tonnes of sorghum and 160 000 tonnes of maize), more than double the relatively poor gu crop in 2001.

Despite the good gu crop that is expected to improve overall food supply situation in parts of southern Somalia, serious food supply difficulties remain in northern Gedo, as well as in Garbaharay and Burdhubo due to successive years of drought and insecurity. Recent escalation of conflict, particularly around Baidoa, north-eastern Somalia (Puntland) and in Mogadishu has displaced a large numbers of people and has prevented the delivery of food assistance to vulnerable groups, raising serious humanitarian concerns.

Elsewhere, in north-western Somalia (Somaliland) poor rains have adversely affected the establishment of the gu crop. The food situation is worsening in Sool, Sanag and Nugal regions where below-average rains have affected crop and livestock production. The continued ban on livestock imports from eastern Africa by countries along the Arabian Peninsula has reduced foreign exchange earnings and affected the livelihoods of a large number of pastoralists.

SUDAN* (10 September)

Prospects for 2002 crops, to be harvested from October, are uncertain. In southern Sudan, prospects were dampened due to continuous population displacements following a recent upsurge in conflict coupled with late and below average rains in parts. The exception is West Equatoria Region where the first of two season crops was harvested in August and the second is just being planted, as is typical of the region. Heavy rains and floods in July displaced a large number of people in West Kordofan and White Nile States.

Escalation of conflict in parts of southern Sudan 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.

A joint FAO/WFP Crop and Food Supply Assessment Mission will visit southern Sudan in October and northern Sudan later in November/December to assess this year's crop harvest and food supply prospects for the 2002/03 marketing year.

TANZANIA (10 September)

Harvesting of the 2002 main season cereal crops is almost complete. Official reports indicate improved overall crop production with preliminary estimates of total cereal production (maize, rice, wheat, sorghum and millet) at 4.3 million tonnes, about 10 percent above last year's harvest due to favourable rains. Similarly, prospects for non-cereal crops (pulses, potatoes, cassava and plantains) are reported to be good.

The overall food situation remains satisfactory with increased on-farm stocks and market supplies. Nationally, maize prices have declined since April with the harvest. Adequate availability of water and forage has also improved the food security of most pastoralists. However, localized food shortages are anticipated in some northern parts of the country during the 2002/03 marketing year due to poor performance of the short (vuli) rains and the long (masika) rains. Insufficient pasture and water is also predicted in these areas.

UGANDA (10 September)

Harvesting of the 2002 main season cereal crop is almost complete and the outlook is poor. Maize yield losses of about 30 to 40 percent, compared to average, are reported in major maize growing districts in eastern and central Uganda due to moisture stress during critical

grain-filling stages. Recent reports also indicate massive crop failure in the north-eastern region of Karamoja due to long dry spells.

Pasture conditions in several districts of the country including Mbarara, Ntungamo and Rakai in south-western Uganda and Kotido, Moroto and Nakapiripirit in north-eastern Uganda have deteriorated due to severe moisture stress. Livestock, however, are still reported to be in good physical conditions.

Despite the expected poor cereal harvest, stable crop prices continue to favour household access to food. However, intensified conflict and insecurity in northern parts have displaced a large number of people, adding to the large IDP population. Nearly 1.5 million people are currently being assisted by WFP in several parts of the country.

SOUTHERN AFRICA

ANGOLA* (12 September)

As a result of more than two decades of devastating civil war, thousands of people have been displaced and lack access to food, water and health services. Following the cease-fire in April this year, large areas of the country have become accessible for the first time, revealing a serious food and nutritional situation. An FAO/WFP Crop and Food Supply Assessment Mission in May 2002 estimated at 1.42 million the number of people in need of food assistance in 2002/03 (May/April), including internally displaced persons, families of demobilized UNITA soldiers and large numbers of vulnerable people. However, the situation is changing with massive numbers of IDPs and refugees returning to their areas of origin, and the number of the needy has increased to 1.9 million. Additional food aid pledges are urgently required. Emergency assistance in the form of agricultural tools and seeds is also required to allow the returning populations to grow crops during the 2002/03 cropping season about to start. Distributions of relief assistance continue to be hampered by the poor state of roads, broken bridges and land mines that have forced suspension of the operations in several areas, particularly in the provinces of Malange, Huila and Cunene.

BOTSWANA (12 September)

The 2002 cereal production increased substantially on the previous year's level to 25 000 tonnes. However, the country normally covers most of its cereal requirements through commercial imports. The cereal deficit in marketing year 2002/03 (April/March) is estimated by FAO at 266 000 tonnes. The food supply situation is stable reflecting adequate amounts of imports so far.

LESOTHO (16 September)

The food supply situation remains tight as a result of two consecutive reduced harvests. An FAO/WFP Mission in May 2002 estimated cereal import requirements in 2002/03 (April/March) at 338 000 tonnes. Against this requirement, imports until early September have been slow. Commercial imports received amount to 56 500 tonnes and food aid at only 5 300 tonnes. Prices of cereals are on the increase at the same time that about half of the rural households have run out of cereal stocks.

A recent follow-up vulnerability assessment undertaken by SADC in collaboration with international agencies has raised the number of people in need of relief assistance from 445 000 to 650 000. Food aid requirements of this population for the period September 2002-March 2003 are estimated at 36 000 tonnes of cereals. The districts most affected are Mokhotlong, Qacha's Nek, Quthing and Thaba Tseka. There is urgent need of additional food aid pledges and expeditious commercial imports. Emergency provision of agricultural inputs,

mainly seeds, is also required to enable affected farming families to plant crops in the next season starting in October.

MADAGASCAR (13 September)

The 2002 paddy output is provisionally estimated at 2.4 million tonnes, down by 200 000 tonnes from 2001.

The tight food supply situation during the first half of the year, with shortages of basic food and increasing food prices in the capital city, have eased with the resolution of the political crisis in late July. Assistance has been pledged by the international community to support economic recovery of the country over four years. By mid-September US\$ 600 million have been granted by the EU.

MALAWI (15 September)

Final official production estimates, which include the winter production, indicate a 2002 cereal harvest of 1.76 million tonnes, 3 percent above the FAO/WFP Mission's estimate of 1.7 million tonnes. Production of cassava and sweet potatoes has been estimated at 1.5 million tonnes and 1.1 million tonnes respectively, less than half of earlier estimates, mainly reflecting a change in the methodology used.

Maize import requirements in 2002/03 (April/March) were calculated by the FAO/WFP Mission in April-May 2002 at 433 000 tonnes, including 225 000 tonnes of commercial imports and 208 000 tonnes of food aid. Against this requirement, the National Food Reserve Agency has imported 136 000 tonnes commercially and the Government is planning to contract additional 250 000 tonnes. Following an EU donation, the Government is also buying 38 000 tonnes of maize for the replenishment of the Strategic Grain Reserve. Pledges of food aid amounted to 86 000 tonnes of cereals and an additional 52 000 tonnes are to be confirmed. However, only 24 000 tonnes have been received in the country by late August. Donors are urged to expedite deliveries. Prices of maize, which reached record levels before the harvest in April, have continued to decline in most markets, although they remain above their levels of a year earlier.

A recent follow-up vulnerability assessment conducted by SADC in collaboration with international agencies has revised slightly upwards the number of people in need of food assistance from the FAO/WFP Mission estimate of 3.2 million to 3.25 million people. The food situation of this population remains difficult.

MOZAMBIQUE (15 September)

The overall food supply situation remains stable following the good cereal harvest of 2002 that resulted in exportable surpluses in northern parts. However, the food situation remains very tight in southern provinces and parts of the central provinces, where cereal production declined by 34 percent from the reduced level of the previous year. A recent vulnerability assessment undertaken by SADC together with international agencies has revised upwards the number of people requiring relief assistance from 550 000 persons (estimate of the FAO/WFP Mission in April/May) to 590 000, in order to account for pockets of food insecurity in the northern province of Nampula and in the central province of Zambezia. This number represents some 3.5 percent of the country's total population. Emergency food aid requirement for the period September 2002-March 2003 estimated at 49 000 tonnes is almost covered. However, donor assistance is also required with seeds for planting in the next main season from November in the affected areas.

Prices of maize increased sharply in most markets in August and are above their levels of a year ago. This reflects steady domestic demand and substantial informal exports, mainly to Malawi. However, in some markets in the southern districts prices remain stable or have declined reflecting food aid distributions.

NAMIBIA (16 September)

The 2002 cereal harvest was reduced for the second consecutive year. The cereal deficit in marketing year 2002/03 (May/April) is estimated at 155 000 to be covered mostly by commercial imports. By the end of July, planned imports by commercial mills amounted to 103 000 tonnes of which 37 000 tonnes have entered the country. While the overall food supply situation is expected to remain satisfactory with additional imports, food supply difficulties are being experienced by large population groups which gathered a drought-reduced harvest. A vulnerability assessment conducted by the Government estimating that 500 000 people were in need of food aid has been updated and the figure revised to 345 000. The Caprivi region in the north-east has been the worst affected by the drought. The Government has allocated US\$ 14 million to provide relief assistance to the affected population.

SOUTH AFRICA (20 September)

The outlook for the 2002 wheat crop, to be harvested from next month, has improved following an upward revision of the area planted. The output is now expected to be close to 2.4 million tonnes, which is still 4 percent lower than the good crop of last year due to lower plantings and yields, but above average. Production of the main maize crop in 2002 was estimated at 9.1 million tonnes, 22 percent higher than in the previous year. Planting intentions for the new 2002/03 coarse grains season, to start from November, indicate an increase of 9 percent in the areas planted to both maize and sorghum. This reflects higher price expectations, crop rotation practices and increased demand for white maize in other Southern African countries.

SWAZILAND (13 September)

The food supply situation is difficult as a result of three consecutive years of below-average harvests. The number of people in need of food assistance, estimated by an FAO/WFP Mission in April at 231 000, has been revised upwards by a recent follow-up vulnerability assessment by SADC in collaboration with international agencies, to 265 000 persons. The cereal food aid requirement has also increased from 15 200 tonnes to 19 500 tonnes. Against this requirement, pledges until the end of July amounted to only 4 300 tonnes. Additionally, the Government has distributed 500 tonnes. Commercial imports, estimated by the FAO/WFP Mission at 96 000 tonnes have also been slow amounting to only 28 000 tonnes. As a result, prices of cereals have increased by about 25 percent from April to July and are well above their levels of a year earlier. At the same time, prices of livestock have declined sharply leading to a deterioration in the food security situation. Donors are urged to make additional food aid contributions.

ZAMBIA (15 September)

The food supply situation is tight for large numbers of people in rural areas following two consecutive reduced cereal harvests and delayed imports. Import requirements in 2002/03 (May/April) were estimated by an FAO/WFP Mission in May 2002 at 626 000 tonnes. The Government made arrangements with the private sector for duty-free importation of 350 000 tonnes of maize, but in mid-August private millers revised down their import plans to 150 000 tonnes. By early September only 43 000 tonnes had entered the country. So far maize stocks in the main mills are adequate to cover requirements until December and prices in urban areas have remained relatively stable, although well above their levels of a year ago. However, there is need to contract additional commercial imports to avoid a sharp increase in prices in the coming months.

A recent follow-up vulnerability assessment undertaken by SADC in collaboration with international agencies has raised the number of people in need of relief assistance from 2.33 millions to 2.9 million and the food aid needs to 224 000 tonnes. Against this requirement, only 21 700 tonnes had been received by early September. The country has rejected large US

food aid supplies produced with genetically modified organisms (GMOs), pending the results of the Government's assessment of the safety of such foods. The food situation of the farming population which gathered a poor harvest as well as the urban poor is critical. Prices of maize are increasing rapidly, undermining access to food. WFP is considering giving Zambia food aid in the form of wheat which is not genetically modified, instead of maize.

ZIMBABWE* (16 September)

The 2002 wheat crop, about to be harvested, is forecast at 213 000 tonnes. At this level, production is higher than anticipated but still 23 percent below the normal level of last year. The decline in this year's output reflects late plantings and lower yields.

The food supply situation gives serious cause for concern. As a result of a 2002 maize harvest estimated at only one-quarter the normal level of 2000, due to unfavourable weather and disruption in the commercial sector, the country faces an unprecedented maize deficit of 1.7 million tonnes in 2002/03 (May/April). Against this, less than one-quarter had been imported by early September. Commercial imports amounted to 335 000 tonnes and food aid at only 71 000 tonnes. The Government is planning to import additional 650 000 tonnes of maize, while committed food aid amounts to 218 000 tonnes.

A recent vulnerability assessment conducted by SADC in collaboration with international agencies has revised the number of people in need of food assistance from 6 million estimated by the FAO/WFP Mission in May 2002, to 6.7 million. This represents almost half of the country's population. Additional food aid pledges are urgently required as coping mechanisms of the vulnerable population are becoming exhausted and malnutrition is reported on the increase. Drought-affected farmers are also in urgent need of seeds for planting during the next main cropping season starting in November.

ASIA

AFGHANISTAN* (10 September)

An FAO/WFP Crop and Food Supply Assessment Mission¹ visited Afghanistan from 15 June to 13 July 2002 and forecast the 2002 total cereal production at about 3.59 million tonnes, comprising 2.69 million tonnes of wheat, 345 000 tonnes of barley, 298 000 tonnes of maize and 260 000 tonnes of milled rice (the latter two to be harvested from September). At this level, cereal production is about 82 percent above last year's drought affected crop but about 4 percent below the good crop of 1998. As a result, the cereal import requirement in the 2002/03 (July/June) marketing year is estimated at 1.38 million tonnes, about 38 percent below the previous two years' volume. Commercial imports are estimated at 911 000 tonnes, similar to the average level of the previous three years. Emergency food aid in pipeline and pledges amount to 219 000 tonnes, leaving an uncovered gap of about 249 000 tonnes.

However, despite the recovery in this year's agricultural production millions of Afghans, particularly pastoral Kuchis, have little access to food due to serious erosion of their purchasing power and/or loss of productive assets. Effects of successive years of drought, deteriorating irrigation and other infrastructure, inability of farmers to access necessary agricultural inputs, lack of employment within and outside agriculture, and serious rural indebtedness render timely and effective intervention all the more essential. Sustained investment in the agricultural sector, particularly the rehabilitation, upgrading and maintenance of the irrigation infrastructure is essential for speedy recovery of the Afghan economy.

¹ An assessment report for Afghanistan can be found on the Internet at the following address:
<http://www.fao.org/WAICENT/faoinfo/economic/gIEWS/english/alertes/2002/SRAFG702.htm>

ARMENIA (3 September)

Cereal harvest in 2002/03 marketing year is estimated at 414 000 tonnes, which is similar to the sharply recovered harvest of the preceding year. The estimated harvest includes 340 000 tonnes of wheat, 62 000 tonnes of barley and 6 000 tonnes of maize. Cereal import requirement for 2002/03 estimated at 344 000 tonnes is similar to last year and includes 280 000 tonnes of wheat, 27 000 tonnes of maize and 12 000 tonnes of rice.

AZERBAIJAN (3 September)

Cereal harvest in 2002/03 marketing year is estimated at more than 2.4 million tonnes, nearly 400 000 tonnes higher than the improved harvest the previous year. This year's harvest includes 1.9 million tonnes of wheat, 292 000 tonnes of barley and 150 000 tonnes of maize. Area planted to cereals increased from 690 000 hectares in 2001/02 marketing year to 804 000 hectares this year. Cereal import requirement for 2002/03 marketing year is estimated at 629 000 tonnes, including 607 000 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 (27 August)

Heavy monsoon rains in June and July compounded by floodwaters from neighbouring India caused the rivers Ganges and Brahmaputra and their tributaries to flow above their danger levels, to erode flood protection embankments and to flood vast areas of the country. Widespread and serious damage to housing and infrastructure was reported, while some 300 000 hectares of rice fields were submerged. Close to 7 million people were affected, of which more than 150 died from flood-related incidents and diseases, thousands were made homeless and hundreds of thousands were marooned. The Government and local NGOs carried out emergency relief operations, supported by international relief organizations which provided food, relief goods and medicines to the most seriously affected populations. In early August, the floodwaters started to recede in the worst hit areas.

The outcome of the 2002 Boro paddy crop harvested in May/June is estimated at 20.0 million tonnes. Together with the 2001 Aus and Aman crops of 2.8 million tonnes and 16.1 million tonnes, respectively, the total 2001/02 paddy production is estimated at a record 38.9 million tonnes. The rising trend in rice production mainly reflects an increased use of hybrid seeds and support to the irrigation sector. Harvesting of the 2002 minor Aus paddy crop was completed in August and, tentatively, the output is estimated at 2.8 million tonnes, similar to the previous year. Currently, the Aman crop is in the ground, planted in June-July and due for harvest in November-December 2002. Assuming normal rainfall for the remainder of the season, but notwithstanding damage to the crop by floods, the output from this crop is provisionally forecast at 16.5 million tonnes of paddy. Together with a targeted output of 19.7 million tonnes from the irrigated Boro crop to be planted in November-December, the total 2002/03 rice production is tentatively forecast at 39 million tonnes (26 million tonnes of milled rice), which is a record.

The food supply situation remains satisfactory. At the beginning of the 2002/03 (July/June) marketing year, government-held food grain stocks were close to 1 million tonnes. Provided the targeted cereal production is achieved, the 2002/03 import requirement is forecast to continue the falling trend of the past years to 1.5 million tonnes (wheat 1.3 million tonnes and rice 0.2 million tonnes).

CAMBODIA (10 September)

In the second half of August, water flows of the Mekong River were pushed above emergency levels. Some 120 000 people were evacuated to higher ground, while 22 deaths were reported. In early September, the floodwaters started to recede.

Planting of the rainfed main season paddy crop, normally accounting for 80 percent of annual production, started in May. In June, rainfall was below normal and in southern parts drought conditions were developing. Dry weather continued in July causing drought in most parts, with southern and central regions being worst affected. The lack of rain seriously delayed transplanting, while seedlings and already transplanted paddy were withering. Though rain fell from mid-August, the area planted was much below that of last year and the paddy crop to be harvested from November is expected to be sharply reduced from the previous year. For the dry season irrigated crop due for planting from November, Government is promoting an increase in the irrigated area by 200 000 hectares. This would help farmers to benefit from higher yields and less dependence on weather. An expected higher output from this crop may partly offset the decline in the main crop. Thus, the aggregate paddy production for the 2002/03 season is provisionally forecast at some 4.1 million tonnes (2.5 million tonnes milled).

This production, together with a possible drawdown in stocks, will be sufficient to maintain an adequate rice supply situation from a national perspective. However, with an estimated 36 percent of the population living below the poverty line a large number of people continue to be food insecure and in need of food relief.

CHINA (19 September)

Torrential rainfall in central, western and southern provinces in June caused floods and landslides. Though not as serious as in 1998, the disaster affected millions of people in 18 provinces, 800 deaths were reported, an estimated 290 000 head of large stock were lost and extensive damage caused to infrastructure, while large crop areas were flooded. By contrast, in early August drought severely affected crops in northern areas while devastating forest fires were reported in the northeastern provinces. In mid-August, excessive rainfall and landslides in Hunan and Yunnan provinces caused damage to property and infrastructure and killed 108 and 57 people in the two provinces, respectively.

The outcome of the spring wheat harvested in July-August is estimated at 6.3 million tonnes, marginally higher than in 2001, reflecting improved late season weather conditions in the main spring wheat growing regions of the northeast and northwest. The winter wheat harvested in May-June is estimated at 81.7 million tonnes, some 7 percent below that of 2001. The total national production of 88.0 million tonnes marks the third consecutive decline in annual wheat production and the lowest since 1989. The estimated shortfall in production for the 2002/03 marketing year (July/June) is expected to be covered mainly by drawdown of stocks, while imports could increase.

Harvesting of maize in southern areas was completed in August, while it is still ongoing in northern provinces. The latest estimate points to an output of 125.7 million tonnes of maize, 10 percent up on 114.3 million tonnes harvested in 2001. As a result, maize exports during the 2002/03 marketing year (October/September) are estimated at 9.3 million tonnes, 1.7 million tonnes higher than in the previous marketing year.

The outcome of the 2002 early rice crop harvested in July is estimated at 31.2 million tonnes of paddy. This is 8 percent below last year, mainly reflecting a decline in the area planted, but also dry weather in the growing areas of the south. The main rice crop is presently being harvested, while harvesting of the late crop is due in October-November. The aggregate paddy production from the three crops is provisionally forecast at 178.8 million tonnes (122.6 million tonnes of milled rice), marginally below last year. Imports of rice in 2002/03 (July/June) are forecast at 0.3 million tonnes, slightly above those of last year, mainly due to larger imports of higher quality rice, while exports are expected to decline.

CYPRUS (10 September)

The 2002 aggregate output of wheat and barley is estimated at 82 000 tonnes, slightly below the previous five year's average. Imports of wheat in 2002/03 (May/April) are forecast at 100 000

tonnes, while aggregate imports of barley and maize are forecast at some 540 000 tonnes, unchanged from last year.

EAST TIMOR (19 September)

East Timorese refugees continue to return from their exile in West Timor. During the first 6 months of 2002 some 25 000 refugees returned and it is now estimated that the number of East Timorese who remain in camps on the western, Indonesian-held side of Timor has been reduced to about 30 000.

The 2002 main crop of maize and rice harvested in April to June was affected by erratic and poor rainfall, while displacement of people also continued to depress agricultural activities. Thus, the cereal output is estimated to be below normal, but no firm figures for production are available. In the south, where there is a minor rainy season and in areas with supplementary irrigation, a secondary crop of maize and rice is presently in the ground and due for harvest in the course of the month. This crop, however, is small and only of local importance.

GEORGIA (23 September)

The cereal harvest in the 2002/03 marketing year is estimated at 577 000 tonnes, which is about 140 000 tonnes less than the somewhat improved harvest of the preceding year. The cereal harvest this year includes 216 000 tonnes of wheat and 300 000 tonnes of maize, which compares with 305 000 tonnes of wheat and 350 000 tonnes of maize in 2001/02. An exceptionally cold and dry winter and strong windstorms compromised significant winter crop areas. Improved precipitation during the critical months of summer favoured the maize crop. Food aid will once again be necessary to fill the gap between requirements and supply.

Within the framework of the current WFP PRRO, a total of 153 FFW projects mainly on rehabilitation of irrigation systems and reclamation of land are on-going in all five targeted regions. A total of 17 700 tonnes of mixed food is planned to be distributed to project participants and their families (4 person ration) as a payment for their work. The PRRO is scheduled to be finished at the end of March 2003. Up-to-date 92 percent of the total commitment has been resourced.

A PRRO Review and Formulation mission visited Georgia in April 2002 and recommended continuation of PRRO activities. A new operation plans to distribute 50 493 tons of food to 209 500 vulnerable persons during a three-year period from April 2003 to March 2006. The project proposal envisages several key changes including targeting of vulnerable persons in rural areas who cannot participate in FFW activities and assessment of needs of vulnerable IDPs with a view to setting up soup kitchens if complementary resources are provided by local authorities and discontinuation of assistance to institutions.

INDIA (17 September)

The 2002 southwest monsoon has been erratic. While the first spell in June evolved normally in most areas, it did not progress towards northwestern states where a drought developed. Yet it brought excessive rainfall to the northeast, causing devastating floods affecting some 21 million people and causing close to 400 deaths. The worst hit states were Assam and Bihar. In early August the floodwaters slowly started to recede. Flooding also occurred in the western states of Maharashtra and Gujarat, where a death toll of 180 was reported, as well as in Uttaranchal in the northwest and Kerala in the south. Following a revival of the monsoon from mid-August, heavy rainfall in eastern and northeastern states brought further suffering due to floods.

While causing extensive local damage, the impact of the floods on national cereal production is expected to be less severe. By contrast, the drought in the northwest adversely affected Kharif crops, mainly coarse grains, but also oilseeds and pulses. The paddy crop was less affected because of irrigation support, but still a decline in paddy yields is expected. Steady rainfall in a number of the drought-stricken states from mid-August brought some relief, but reportedly was insufficient to save the crops fully. Tentatively the 2002 paddy production, including the Rabi rice

crop harvested in April–May 2002, is forecast at 127.5 million tonnes (85.0 million tonnes milled), some 9.9 million tonnes below the previous year. The estimate of the winter wheat harvested in March–May 2002 has been revised to 71.5 million tonnes, down from 73.5 million tonnes reported earlier.

Despite the forecast of a lower cereal production, the national 2002/03 food supply situation remains satisfactory, reflecting large carry-overs. As of 1 July 2002, wheat stocks were estimated at 32.0 million tonnes and those of rice at 26.0 million tonnes, much above the level required for strategic reserve stocks. These stocks have been accumulated over the past years of good harvests, which have also allowed the country to take a position on the world market amongst the seven leading exporters of wheat with forecast exports in 2002/03 of 5.5 million tonnes, while it has become the second largest in rice with a forecast of 4.5 million tonnes of exports.

INDONESIA (13 September)

Foodcrops presently in the ground are secondary/dry season paddy and maize, which are due for harvest from late October. Unusually dry conditions this season has restricted the availability of irrigation water, most notably on the northern coast of Java. Though there are conflicting reports of losses from this secondary season crop, the decline in output is not expected to seriously affect the overall 2002 cereal production. Thus, the aggregate output of paddy in 2002 is estimated at 50.4 million tonnes (32 million tonnes milled rice), slightly above 50.8 million tonnes produced in 2001, while maize production is estimated at 9.3 million tonnes. The 2003 main season paddy and maize crops will be planted from November 2002, at the onset of the northeast monsoon.

For the 2002/03 marketing year (April/March), rice imports are forecast at 3.2 million tonnes of which 1 million tonnes to be imported by BULOG (National Logistics Planning Agency) and some 2.2 million tonnes by private importers. Imports of wheat, which is not grown in the country, is estimated at 4.0 million tonnes, while maize imports of 1.4 million tonnes will be needed to cover the increasing demand for feed for the poultry industry.

While the national cereal supply position is satisfactory, a large number of the poorest Indonesians, internally displaced people and refugees face hunger and malnutrition. On 1 July 2002, the WFP launched a programme to bring relief to 2.1 million people until the end of 2003.

IRAN, ISLAMIC REPUBLIC OF (16 September)

The country is at the end of the hot and dry summer season. Harvesting of irrigated paddy and maize is underway. Provisionally, the output of paddy is estimated at 2 million tonnes, up 15 percent from 1.7 million tonnes produced in 2001. In recent years, production of irrigated maize, largely used for animal feed, has been encouraged and for 2002 is estimated to reach a record 1.25 million tonnes, five times the output a decade ago. The outcome of the winter wheat crop harvested in June–July is estimated at some 10.5 million tonnes, 2.0 million tonnes more than the drought-affected 2001 production, while production of barley, like maize mostly used for feed, was also higher than last year. Reflecting the partial recovery in the harvest this year, cereal imports in the 2002/03 marketing year (April/March) are expected to decline to about 7 million tonnes from their high levels of some 10 million tonnes over the past three years.

Following the devastating earthquake in June 2002, local relief organizations have been providing food and other support to the affected populations. About 25 000 people require food assistance for another three months. The WFP will cover their needs for one month, while the Iranian Red Crescent Society will meet their requirements for the remaining two months. On 13 August, flash floods triggered by torrential rains were reported in the northeastern provinces of Golestan, Khorasan and Semnan. An estimated 100 000 people were affected and 37 deaths reported.

IRAQ* (10 September)

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 in parts. 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 under the oil-for-food programme.

ISRAEL (10 September)

Output of the recently harvested 2002 wheat crop is estimated at about 180 000 tonnes, about 73 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 2.7 million tonnes, almost similar to the previous year.

JAPAN (3 September)

In July and August, tropical storms battered the country, causing floods and landslides and damage to infrastructure. Thousands of people had to be evacuated from their homes and five deaths were reported. No serious damage to crops was reported.

The 2002 paddy crop will be harvested from later this month and into November. Reflecting the government efforts to reduce the area planted to rice, paddy production is forecast at about 11 million tonnes, a decline of 3 percent from 2001. The country also produces some wheat and coarse grain, this year estimated at 0.7 million tonnes and 0.2 million tonnes, respectively, marginally below the previous year.

To meet cereal consumption needs, the import requirement for the 2001/02 marketing year (October/September) is estimated at 26.5 million tonnes, of which 20.0 million tonnes of coarse grains, 5.7 million tonnes of wheat and about 0.7 million tonnes of rice.

JORDAN (10 September)

Aggregate output of wheat and barley in 2002 is forecast at 60 000 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 (3 September)

Cereal harvest in 2002/03 marketing year is estimated at 12.5 million tonnes compared with 15.9 million tonnes the previous year. This year's cereal harvest consists of 9.7 million tonnes of wheat, 1.9 million tonnes of barley and 300 000 tonnes of maize. Cereal exports for 2002/03 marketing year is estimated at 5.29 million tonnes compared with 4.2 million tonnes last year. Cereal exports this year include 4.86 million tonnes of wheat, 387 000 tonnes of barley and 16 000 tonnes of maize. The main export destinations are the neighbouring CIS countries and increasingly the Middle East.

KOREA, DEMOCRATIC PEOPLE'S REPUBLIC OF* (11 September)

On 5 August, torrential rains exacerbated by strong winds and high tides, triggered floods and landslides across the western provinces of South Pyongan and South Hwanghae. An estimated 60 000 people were affected but there was reportedly no loss of life. Extensive damage was caused to infrastructure and to houses in areas susceptible to flooding. The affected regions are important cereal producers, but the damage to crops is expected to be

only moderate to light. In early September, typhoon Rusa, which devastated parts of the Korean peninsula, destroyed infrastructure and flooded paddy fields in the coastal areas of the eastern Kangwon Province.

An FAO/WFP Crop and Food Supply Assessment Mission which visited the country in June 2002 found that despite an increase in the 2001/02 food production, local supplies remain well below domestic consumption requirement, leaving a cereal import gap of 1.3 million tonnes including 0.6 million tonnes of emergency food aid. Only part of this requirement has been met by donor pledges, and WFP requires an additional 98 000 tonnes of emergency food relief to implement its operations until the end of the year.

Harvesting of the 2002 main season crops of rice, maize and potatoes is underway. The early outlook for the harvest is favourable. Planting was timely and the area planted was larger than the previous year, while precipitation has been about normal in most growing areas. An FAO/WFP Crop and Food Supply Assessment Mission is presently in the country to make an on-the-spot assessment of the harvest outcome and make a forecast of the food supply situation for the 2002/03 marketing year (November/October).

KOREA, REPUBLIC OF (3 September)

Typhoon Rammasun in early July 2002 killed 4 people and caused damage to property and infrastructure. This was followed in early August by heavy downpours and thunderstorms flooding roads and submerging houses in central parts of the country, while causing 14 deaths and rendering 2 400 people homeless. Furthermore, on 1 September typhoon Rusa, the most powerful typhoon to hit the Korean peninsula since Sarah in 1959, left a trail of devastation in southern and eastern parts of the country. Extensive damage was caused to roads, bridges and housing, while 124 people were reported dead. The typhoons affected large areas of farmland, but damage was mainly to vegetables and fruit trees, while no major impact on cereal production is expected.

Harvesting of the 2002 paddy crop will start at the end of this month and continue into November. The Government production target is 7.2 million tonnes, 0.3 million tonnes lower than the harvest of 2001. However, despite Government's efforts to restrict rice production, output has been steadily increasing over the past three years, while consumption has been declining as a result of changing dietary habits. This has led to swelling rice stocks, which are forecast to reach 1.8 million tonnes at the end of October 2002 from 1.44 million tonnes the previous year.

The country produces only about one third of its annual cereal consumption requirement. Cereal imports in the 2001/02 marketing year (October/September) are estimated at 4.0 million tonnes of wheat, 8.5 million tonnes of maize and 0.2 million tonnes of other grains. The early outlook for 2002/03 is for increases in both wheat and coarse grain imports.

KYRGYZ REPUBLIC (5 September)

Cereal harvest in 2002 is estimated at about 1.7 million tonnes, which compares with 1.8 million tonnes in 2001. Cereal harvest this year includes 1.2 million tonnes of wheat and 0.5 million tonnes of coarse grains (barley and maize). Cereal import requirement in 2002/03 marketing year is estimated at 179 000 tonnes, which will be commercially procured, while exports are estimated at 35 000 tonnes.

LAOS (31 August)

This country has so far been the least affected by floods in the south-eastern sub-region. In late August, rising water levels in the lower Mekong River flooded rice fields and affected some 15 000 homes, while 2 deaths were reported. The impact on rice production is expected to be minimal.

The wet season paddy crop, which is predominantly grown in the Mekong River basin, is due for harvest from end September through December. This crop accounts for about 85 percent of annual

cereal production. In recent years the proportion of high yielding varieties has increased, resulting in a rising trend in yields. Thus, the 2002/03 paddy output for consumption in calendar year 2003 is forecast at 2.4 million tonnes, slightly higher than the good production of the previous year. A small amount of maize is also being produced. However, despite the higher cereal output, large sections of the population continue to suffer from chronic food insecurity and are in need of additional food supplies. Part of their requirements is being met by targeted food assistance through WFP.

LEBANON (10 September)

The output of the 2002 wheat and barley, estimated at about 86 000 tonnes and about average. 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 (15 August)

Harvesting of the secondary irrigated paddy crop is ongoing. Due to somewhat below normal rainfall, the aggregate paddy harvest in 2002 is estimated to be around 2.1 million tonnes, similar to that in 2001, and about average. Imports of rice in 2002 are estimated at 0.6 million tonnes unchanged from the previous year. The country's consumption requirements of wheat and maize are virtually all covered by imports, which for 2002/03 are estimated at 1.4 million tonnes and 2.4 million tonnes, for the two grains respectively, about the same as the previous year.

MONGOLIA* (10 September)

Three years of harsh winters and dry summers continue to affect disaster-hit herders and farmers. Millions of animals are dead and production of wheat, virtually the only cereal grown, has declined from 700 000 tonnes in the early 1990s to less than 200 000 tonnes over the past five seasons. The problems are exacerbated by a painful transition from socialist to market economy and a high level of bureaucracy and corruption. The traditional lifestyle is under serious threat, with the rural population moving to urban centres in large numbers in search of jobs.

In 2002, the summer rains from May to August (inclusive) were less than 50 percent of average and the lowest for 5 years, affecting livestock rearing and cereal production alike. In the northern wheat growing areas, rainfall was only between 42 percent and 51 percent of normal. Thus, the wheat crop due for harvest this month is expected to be even lower than the poor outturn of 190 000 tons produced in 2001. To cover domestic consumption requirements for the 2002/03 marketing year (October/September) the country will need to import an estimated 200 000 tonnes of wheat, while imports of some 15 000 tonnes of rice will also be required. Given that the country has a serious balance of payment problem, commercial imports will only cover part of this requirement and allocation of food aid will be necessary to meet the deficit.

MYANMAR (10 September)

Strong winds followed by torrential rain in August caused floods, which inundated villages, destroyed housing and reportedly killed some 20 people. No official records of damage to crops are available.

The 2002 main season rice crop to be harvested in October-November benefited from about average rainfall. This crop normally accounts for 85 percent of annual production, while the remaining 15 percent is produced during the dry season and harvested in April. Tentatively, the 2002 paddy production is forecast at 22.5 million tonnes, based on an estimated expansion in the area planted and higher yields. The production of wheat and coarse grain is forecast at some 93 000 and about 540 000 tonnes, respectively. As a result of a marked increase in production in

recent years, the country, once named the “Rice Bowl of the World”, has re-established itself as a major rice exporter, with a target of 1.1 million tonnes of rice being exported in 2002.

NEPAL (10 September)

Due to its rugged mountainous terrain, Nepal is one of the most disaster-prone countries of the world. The most destructive types of disaster are flash floods and landslides, which every year are caused by the monsoon, leading to loss of life and damage to infrastructure. During the 2002 monsoon, heavier than normal torrential rainfall was followed by widespread floods and landslides, notably in eastern and central parts of the country. An estimated 260 000 people were affected in 47 out of the country's 75 districts with more than 500 deaths reported and many more people injured. About 10 000 houses have been destroyed and the national highway has been washed away in 20 locations, while 6 major bridges were damaged. The disaster also hit electricity works, water supply systems and schools. Large areas of fertile farmland was washed away, but overall the effect on cereal production is expected to be minimal, as standing paddy has benefited from the rain. By contrast, in western parts of the country dry weather has persisted.

The 2002 rice crop, which was planted in July-August, is due for harvest in November-December. The outcome of the harvest is provisionally forecast at 4.0 million tonnes of paddy, some 5 percent below the bumper crop of 4.2 million tonnes in 2001, but still above average. Harvesting of maize is underway and millet will be harvested from the end of this month. The aggregate output of coarse grains is expected to remain at about last year's level of 1.8 million tonnes.

PAKISTAN (19 September)

Above average rainfall over northeastern parts in June 2002 at the start of the monsoon season favoured planting and early growth of paddy and coarse grain crops. However, in July and August rainfall was much below normal as the progress of the monsoon was interrupted. Drought conditions emerged, notably in southern Sindh and southwest Baluchistan provinces, while underground water levels had also fallen sharply. By contrast, the level of irrigation water in the country's two main dams remained adequate because of snowmelt.

The outlook for the 2002 paddy crop to be harvested from October is for an output similar to or slightly above 5.6 million tonnes harvested the previous year. A decline in the area planted following a switch of production to less water demanding crops, was offset by higher yields due to adequate availability of irrigation water. Rice exports for 2002 are estimated at 1.4 million tonnes, substantially below 2.3 million tonnes of exports the previous year. The wheat crop harvested in April-May is estimated at 19.2 million tonnes, which together with high opening stocks provide for an exportable surplus in 2002/03 (May/April) estimated at 0.5 million tonnes. The 2002 coarse grain crop presently being harvested is estimated to yield 2.1 million tonnes, similar to the output of the previous year.

PHILIPPINES (5 September)

In July 2002, the typhoons Chata'an, Nakri and Halong and a tropical depression Juan brought torrential rainfall over the main island Luzon causing heavy floods and landslides affecting 1.6 million people in 26 provinces. More than 140 lives were lost and extensive damage to infrastructure was reported. Some 40 000 hectares of agricultural land were flooded, but the heavy rains had a favourable effect on agriculture in general. Furthermore, in mid-August tropical depression Milenyo swept through Luzon and the Visayas, with heavy rainfall causing 39 deaths from landslides and other flood related accidents.

The 2002 main season paddy and maize crops were affected by dry conditions in May, which reduced the area planted to paddy in the key producing regions of Luzon, and early growth of both crops. As a result, the aggregate 2002 paddy crop is provisionally forecast at 12.6 million tonnes, some 4 percent below that of 2001, while maize production could also be less than last year. Reflecting the slightly lower harvests and plans to increase the country's buffer stocks, rice imports in 2002 are estimated at 1.1 million tonnes and those of maize at 0.4 million tonnes. With no wheat being produced in the country, the total requirement in this grain is covered by imports, estimated at 3.4 million tonnes in 2002.

SAUDI ARABIA (10 September)

Aggregate output of wheat and barley in 2002 is forecast at 1.9 million tonnes, similar to last year. Imports of coarse grains (mainly barley and maize) in 2002/03 (July/June) are forecast at 6.6 million tonnes.

Breeding conditions for locusts are expected to be favourable in areas of recent rainfall along the Red Sea coast but less favourable in the interior where it was mainly dry.

SRI LANKA (26 August)

Harvesting of the 2002 irrigated Yala rice crop is underway. This crop normally accounts for one third of annual rice production, the remainder being produced during the Maha season. Subject to the final outcome of the Yala harvest, the aggregate 2002 paddy production is provisionally estimated at 2.7 million tonnes, similar to the previous year. This output falls short of domestic demand and has to be supplemented by imports, which for 2002 are estimated at 140 000 tonnes. Imports of some 850 000 tonnes of wheat and 130 000 tonnes of maize are also foreseen.

Drought persists in southern parts of the country for the third year in succession. Hambantota region is worst hit with an estimated 400 000 affected people. The Sri Lankan Red Cross provide drought relief to 18 000 most vulnerable persons among the poverty stricken population, while 300 000 in Hambantota and two other districts of the south are being assisted through a WFP Emergency Operation.

SYRIA (10 September)

The output of wheat in 2002, now being harvested, is forecast at 4.5 million tonnes about 27 percent above the average for the previous five years. The barley harvest is also estimated to be above average.

Import of wheat in 2002/03 (July/June) is forecast at about 65 000 tonnes, whilst rice imports are forecast at 230 000 tonnes.

TAJIKISTAN* (4 September)

A joint FAO/WFP Crop and Food Supply Assessment Mission was fielded to Tajikistan in late June to assess the 2001/02 cereal output and possible food aid requirement for 2002/03 marketing year. The Mission found that though there were no major disasters this year, cereal harvest is still considered far below planned output. Cereal production this year is estimated at 444 000 tonnes, an increase of 30 percent over the drought reduced harvest of 2001, which can only cover some 40 percent of the total consumption requirements. Good rainfall was the main contributor to this year's improved production, though heavy rains did have some adverse effects in some areas. Area under cereals was even lower than the significantly reduced area of last year due to lack of inputs and the perceived continuation of drought.

Aggregate import requirement for 2002/03 marketing year is estimated at 656 000 tonnes of wheat equivalent, while national capacity to import is estimated at 450 000 tonnes. Existing food aid programmes and pledges amount to 93 414 tonnes, which leaves a deficit of 112 000 tonnes. Some 71 657 tonnes of emergency and 40 343 tonnes of programme food aid will be necessary to meet the consumption needs of the country. WFP estimates that some 1.5 million people will require food assistance during the ensuing year.

THAILAND (17 September)

In early August, flooding in the northeastern province of Nong Khai by the Mekong River inundated at least 6 villages, affecting 2 640 people and causing 13 deaths, while in mid-August, as the Moei River overflowed, thousands of people had to be evacuated in the western province of Tak. Heavy rains in early September caused flash floods and the overflowing of riverbanks in 30 northern and northeastern provinces, damaging roads and housing and bringing the total number of deaths from flooding this year to 78.

Planting of the main rice crop, which started in June, has been completed in northern and central areas, while in the south planting ends this month. Favourable growing conditions from June through August benefited early development of the crop, harvesting of which will begin in November. This crop accounts for about 75 percent of annual rice production. The remainder is produced mainly under irrigation, being planted in January-March and harvested in May-July. Reflecting the good rainfall for the main crop so far, the 2002 output of paddy is provisionally forecast at 27 million tonnes, which is above average. Harvesting of maize is underway and an output of 3.9 million tonnes is expected. This is some 13 percent below the 4.5 million tonnes produced in 2001, reflecting dry conditions in some of the maize growing areas in the north.

Following two successive bumper rice crops and a third one in prospect, exports have been at record levels. In 2002, shipments during the early months of the year were record high, but recently, closures of new sales contracts have slowed down. Nevertheless, aggregate rice exports in 2002 are forecast to remain at the record level of 7.5 million tonnes.

TURKEY (10 September)

Output of the 2002 wheat crop is provisionally estimated at 17.5 million tonnes compared to 16 million tonnes in 2001. Good winter rains and snow cover have helped boost yields. Wheat imports in 2001/02 (July/June) are forecast at 1 million tonnes compared with 0.4 million tonnes estimated for the previous year. Maize imports are also forecast to increase by nearly 442 000 tonnes to 1.2 million tonnes. Exports of wheat in the year ending June 2002 are expected to decline sharply.

TURKMENISTAN (4 September)

Official reports indicate an unprecedented 2.3 million tonnes of cereal harvest in 2002, which is some 1.1 million tonnes higher than the average harvest of the past six years. Cereal harvest this year includes about 2.19 million tonnes of wheat, 60 000 tonnes of barley and 25 000 tonnes of maize. Cereal utilisation totals about 1.9 million tonnes.

UZBEKISTAN (4 September)

Cereal harvest in 2002 is estimated at an unprecedented 5.3 million tonnes, which is some 1.4 million tonnes higher than the preceding year and the average harvest of the past six years. This year's harvest includes some 4.9 million tonnes of wheat, 160 000 tonnes of barley and 120 000 tonnes of maize. Improved precipitation, water availability and relatively improved access to inputs are the main factors contributing to this year's bumper crop.

National consumption needs are estimated at about 5.1 million tonnes, which will be entirely met by domestic production including accumulation of stocks. Cereal imports for 2002/03 marketing year is estimated at 362 000 tonnes, mainly high quality wheat (280 000 tonnes), rice (60 000 tonnes) and maize (20 000 tonnes).

VIET NAM (23 September)

Torrential rains in early August caused flash floods in 9 provinces of the mountainous north. Some 6 400 houses were submerged and 10 lives lost, while additional floods in mid-August also brought loss of life. These provinces are not key rice producing areas and the effect of the floods on this year's paddy production is minimal. By contrast, unusually dry conditions in a number of central provinces seriously affected planting and early growth of paddy crops in these areas. Tropical storm

Vongfong in late August brought much needed rain for crops in these provinces. Flooding in the southern Mekong Delta in mid-September caused 71 deaths, mainly children, while floods and landslides in central provinces claimed 49 victims, but damage to the rice crop was insignificant. These latest floods have brought the number of casualties nationwide to 205 this year.

Harvesting of the winter/spring paddy crop was completed in July. Following excellent growing conditions, the outcome of the harvest is estimated at 16.5 million tonnes of paddy, a record for this season. The outlook for the summer/autumn crop is mixed. Thus, some losses due to flooding are reported from the Mekong Delta during harvest in August, while dry conditions in central parts of the country affected several thousand hectares of paddy fields. These dry conditions also disrupted sowing and early development of the 10th month crop. While there is still uncertainty about the performance of the summer/autumn and 10th month crops, the aggregate 2002 paddy production is tentatively forecast at 32.3 million tonnes.

The outcome of the 2002 maize crop is estimated at 1.85 million tonnes, slightly below the previous year but above average. In a bid to attain self-sufficiency in maize, the Government plans to expand the area under maize to 1.2 million hectares by 2005 and increase the use of hybrid seeds to reach an annual production in excess of 4 million tonnes.

During the first months of 2002, rice exports were sharply down compared to the previous year. As a result, the forecast tonnage for export in 2002 has been adjusted downwards and now stands at 3 million tonnes, the lowest for the past six years.

YEMEN (10 September)

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 Haja, 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.

Breeding conditions for locusts are expected to be favourable in areas of recent rainfall along the Red Sea coast but less favourable in the interior where it was mainly dry.

Imports of cereals in 2002 - mainly wheat - are estimated at about 2.4 million tonnes, same level as last year.

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

COSTA RICA (11 September)

Abundant rains in August and first half of September, in the Huetar Norte and central parts of the country, and particularly in the Caribbean regions, have resulted in heavy flooding with consequent damage to village housing and rural infrastructure, and minor food crops. The heavy rains are expected to continue for the next few days. No detailed assessment of damage has been made available yet. Relief assistance from national institutions is being provided to the affected population. Harvesting of the 2002/03 first season crop, mostly maize, is underway and a low output is anticipated. Planting of the main bean crop has started and this area is expected to be close to the 2001/02 below-average level. Harvesting of the 2002 paddy crop is also underway and output for the year is provisionally estimated at an about-average 300 000 tonnes. Some increases are forecast in the main producing regions of Chorotega and Brunca, in the northwest and southwest of the country respectively. Production of rice is insufficient to meet domestic demand, and about 75 000 tonnes of imports are tentatively forecast in 2003 marketing year (January/December).

CUBA (20 September)

The western parts of the country were hit by Hurricane "Isidore" on 21-22 September. The heavy rains and flooding affected food and important cash crops as well as inflicting damage to housing and infrastructures. Nearly 300 000 people have been evacuated into temporary shelters. An assessment of damage has not yet been made available.

Normal to abundant rains have been registered since August, although low moisture levels are being reported in some isolated locations. In general, the state of the crops is satisfactory. Harvesting of the 2002/03 first season cereal crops, mainly maize and paddy, is underway and average outputs of 146 000 tonnes and 281 000 tonnes respectively are tentatively forecast. Cereal production is insufficient to meet domestic demand and rice imports between 470 000 and 480 000 tonnes would be required in marketing year 2003 (January/December), while imports of maize in marketing year 2002/03 (July/June) should be close to the previous year's volume of about 267 000 tonnes. Harvesting of the important sugar cane crop has been completed and production is officially estimated at 3.6 million tonnes, slightly above the relatively low output in 2001.

DOMINICAN REPUBLIC (11 September)

Normal weather conditions are benefiting harvesting of the 2002/03 first season maize and sorghum crops as well as planting of the second season paddy crop. Other minor food crops are also being favoured by the rains. An average coarse grain crop is anticipated while an above-average paddy output of about 600 000 tonnes is tentatively forecast. The good results expected are largely the result of new government measures to assist the farming sector. No rice imports are presently forecast for marketing year 2003 (January/December) as production in 2002 and carryover stocks at the end of this year are considered sufficient to meet domestic demand for this important staple. However, in marketing year 2002/03 (July/June), imports of wheat and yellow maize for the animal feed industry, are expected to be 320 000 tonnes and 700 000 tonnes respectively, similar to those of the previous year.

EL SALVADOR (17 September)

Heavy rains and flooding in early September all over the country and particularly in the central parts, including the district of Santo Tomas, near the capital, caused a number of victims and damage to infrastructure. By contrast, normal rains in the latter part of July and in August benefited the development of the 2002 first (main) maize crop currently being harvested. Some damage to the maize crops due to drought, however, is reported in isolated areas such as San Vicente and La Paz, in the northeast of the country. The damage has been induced by the short dry spell ("canicula") which occurs every year around mid-July. The situation has been aggravated for those small farmers who worked in coffee plantations to supplement their income and who have now lost their jobs as a result of the continuing crisis affecting the sector. Nevertheless, a maize output of some 610 000 tonnes is currently forecast for the year, a significant increase over the slightly above-average output collected in 2001. The rains also benefited fieldwork for planting of the important bean crop currently underway, and an early forecast points to a slight increase in production over last year's average level. Sowing of the 2002/03 sorghum crop started in August and intended plantings should be slightly above last year's below-average level. International food assistance to the 2001/02 drought-affected population, which was expected to finish in August, will continue for an additional few weeks.

GUATEMALA (17 September)

Torrential rains in mid-September resulted in flooding and landslides, leaving behind more than 30 victims and a large number of homeless in the district of San Lucas Tolimán. By contrast, light to moderate rainfall in the last weeks of August benefited development of the 2002/03 first season maize crop currently being harvested; however, rains were rather irregular and ill distributed in the departments of El Progreso, Zacapa and Chiquimula, in the

east, and damage to crops is reported. Tentatively the output of maize is forecast at 1.1 million tonnes, a slight improvement over last year's average level. About 590 000 tonnes of maize imports, mostly yellow, in marketing year 2002/03 (July/June) will still be required to meet domestic demand. Planting of the important bean crop is underway and early production forecasts indicate that a satisfactory output should be collected if adequate weather conditions persist in the main growing areas. Food assistance from the international community continues to be distributed to farmers affected by last year's drought or unemployed from coffee plantations. It is reported that hundreds of coffee plantations have been closed due to the continuing crisis affecting the coffee sector. Cases of severe malnutrition in certain areas, such as in the administrative districts of Pasaco, Quesada, Jalapa, Malacatán, Sibinal and San Carlos Alzatate have been registered and international assistance provided in nutritional and recovery centres.

HAITI (1 September)

Normal to abundant rains since May have helped improve some of the developing cereal and bean crops that had been affected by dry weather at planting. The rains were particularly beneficial in some high areas of the Grand' Anse and the Artibonite, the south, the south-east, the west and some of the central plains. Harvesting of the 2002 first season maize crop has been completed and the output is tentatively estimated at about 180 000 tonnes which compares to last year's average crop of 215 000 tonnes. Harvesting of the important irrigated paddy crop has been completed while that of the rainfed crop is underway. Total production of paddy in 2002 is tentatively forecast at about an average 103 000 tonnes. Planting of the sorghum crop in the plain has been completed while that in the mountains is underway. An early forecast points to an output of some 100 000 tonnes, similar to last year's average harvest.

Planting of this year's second season bean crop has been completed and output for the year is expected to be about 30 000 tonnes, close to last year's production. 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 (17 September)

Stormy weather in mid-September has caused some damage to housing and infrastructure in various parts of the country. By contrast, normal rains in the last few weeks of August favoured the development of the 2002/03 first season maize, currently being harvested. Some isolated areas in the departments of Choluteca, Valle, El Paraiso and Francisco Morazán, mostly in the south and central parts of the country, have been affected by the annual recurrent dry spell "canicula" and damage to crops is reported. Food assistance from the international community is being distributed to the affected small farmers. Despite incurred losses, production of maize should be about average. Planting of the sorghum crop is underway and the area planted is provisionally estimated at an average level. Maize imports, largely for the animal feed industry, in marketing year 2002/03 (July/June) are tentatively forecast at some 240 000 tonnes, slightly more than the previous year.

JAMAICA (20 September)

The country was hit by tropical storm "Isidore" on 12 September, leaving behind considerable damage to houses and infrastructure in various parishes. An assessment of damage has not been made available yet. By contrast, the agricultural sector has been slowly recovering from the damage incurred by the heavy rains and flooding in late May and early June. Financial assistance has been provided by national and international lending institutions. Apart from the damage to minor food crops, poultry, livestock and other animal farms, heavy losses were also inflicted to the important banana and sugar cane crops. Sugar cane plantations in the large producing parishes of Clarendon and St. Catherine were particularly affected. Total sugar production for the year dropped to 175 000 tonnes from an earlier target of 212 000 tonnes. The foreign exchange earner coffee had been harvested by the time of the storm and damage incurred was basically to coffee plants.

MEXICO (24 September)

The north-eastern coastal areas of the Yucatan Peninsula were battered on 22-23 September by Hurricane "Isidore's" heavy rains and high speed winds. Thousands have been evacuated into temporary shelters as a consequence of high level coastal flooding. No assessment of damage has yet been made available. In the last days of August and first half of September light to moderate rains in the southern maize producing areas benefited the developing spring/summer crop, previously affected by dry weather at planting. Normal to abundant rains were also reported in the southeastern parts, and in Veracruz and Yucatan, greatly improving prospects for maize and other crops. As a consequence of the earlier dry weather and delayed planting, the area planted to maize is provisionally estimated to be somewhat below that of 2001. Harvesting is due to start from late September and early production forecasts point to about 18.8 million tonnes which compares to the 5-year average of 18.3 million tonnes. Harvesting of the 2002 winter sorghum crop (mostly planted in January/February) has been completed. Heavy rains in early September across north-eastern areas have benefited development of the spring/summer crop. Total output for the year is tentatively forecast at 6.9 million tonnes, close to the above-average output of 2001.

Land is being prepared for planting of the 2002/03 wheat winter crop in the irrigated areas of the northwest. Recent storm rains have helped replenish water reservoir levels, which were reported at below-normal levels.

NICARAGUA (14 September)

Normal and well distributed rains were recently reported in the central parts of the country, while precipitation has been erratic and ill distributed in some of the Pacific coastal areas and western parts of the country. The rains were particularly scarce in the departments of León and Chinandega, with serious adverse consequences on developing crops. Harvesting of the 2002/03 first season (main) maize crop is underway while planting of sorghum has recently started. Despite probable losses incurred in the drought affected areas, maize output is early forecast at an above-average level. Harvesting of the first season bean crop was also completed in August and a satisfactory outturn was collected. Food assistance from the international community is being distributed to coffee plantation workers affected by the crisis which for long has affected the important coffee sector. Thousands have remained unemployed, and many homeless and landless, in the northern departments of Matagalpa and Jinotega where food security levels are jeopardized and levels of malnutrition reported, especially among children.

PANAMA (11 September)

Heavy rains in the early half of August followed by storm rains and winds on 10 September, resulting in flooding and landslides, have caused considerable damage to housing and infrastructure in the Caribbean coastal province of Colon. Some fishing villages are reported to have been seriously affected by the adverse weather. By contrast, an irregular rainfall pattern has affected the important paddy producing province of Chiriqui, particularly in the Alanje and Banjú areas, thus inflicting serious losses to crops. Rice is one of the main food staples and even if the country is virtually self sufficient, some imports would be required to compensate for the losses incurred, which in localized areas have reached 70 per cent of the expected outturn.

SOUTH
AMERICA

ARGENTINA (11 September)

Normal rains in the last days of August in the key wheat producing areas of the Buenos Aires province benefited planting of the 2002 crop, which has just been completed, and improved crop prospects in general. Some 6.3 million hectares have been sown, according to preliminary estimates by the Government, which compares to 6.8 million hectares the previous year. The reduction in

plantings is mainly due to the severe credit and financial constraints faced by farmers following the serious economic crisis which has been affecting the country since November 2001. Purchase of high yield seeds and fertilizers by producers has been at minimum levels. Harvesting of the 2002 maize crop was completed in August and the output is provisionally estimated by the Government at some 14.7 million tonnes, an improvement over earlier forecasts but still considerably below average. The decline is mainly due to reduced plantings compared to previous years, caused by intensive rains at sowing, and lower than normal yields due to dry weather during the growing period.

BOLIVIA (3 September)

Intense cold weather and snowstorms in July, principally in the highlands in the department of Potosi, have caused a number of victims and affected more than 2 400 families. About 50 per cent of the cattle is reported to be lost. The provinces of Sud Lipez, Nor Lipez, E. Valdivieso and A. Quijarro have been particularly hard hit. No relevant damage is reported to crops as most of the cereals grown in the area had been harvested. Subsequently, in the month of August, some 30 000 hectares of forest were destroyed by fire. It is reported that forestry is an important source of livelihood for the communities in the affected area. Normal weather conditions, by contrast, are reported in the main cereal producing Department of Santa Cruz where harvesting of the winter wheat crop (planted in April/May) is about to start. Total wheat production in 2002 is provisionally forecast at 143 000 tonnes, slightly above average. Aggregate maize output collected in 2002 was also above average at 724 000 tonnes. Planting of the important winter potato crop has started in the highland valleys.

BRAZIL (20 September)

Normal to abundant rains resumed at the end of August in the key wheat producing states of Paraná and Rio Grande do Sul, which account for nearly 90 per cent of domestic wheat output. Some main producing areas in these states have suffered from a dry spell with a consequent adverse effect on crop development. Harvesting has started in some parts and early forecasts tentatively point to a near record wheat output in 2002 of 3.9 million tonnes but production is likely to be smaller in view of serious frosts around 10 September. The increase in production is largely a result of the government's recent incentive programme for farmers, motivated in part by the likelihood of higher wheat import prices (over 7 million tonnes of wheat are annually imported). Harvesting of the second season maize crop ("zafrihna") in the southern states has been completed and a bumper crop of some 6 million tonnes has been collected. This is lower than earlier forecast as a result of adverse weather in the largest producing state of Paraná. Adverse weather also affected the second season crops in Matto Grosso do Sul, Sao Paulo, Matto Grosso and Goias. Total maize output for the year is provisionally estimated at 35.7 million tonnes which compares to the past 5-year average of 34.5 million tonnes.

CHILE (3 September)

Planting of the 2002/03 wheat crop, for harvesting from December, was recently completed. The area planted is provisionally estimated at some 413 000 hectares which compares to the satisfactory level of 426 000 hectares planted in 2001/02. Sowing of the 2002/03 maize crop has just started and the area planted is tentatively forecast to increase slightly from the good level of the year before. Plantings of oats in 2002/03 are also expected to increase from the good level in 2001/02, when a near record crop was harvested.

COLOMBIA (5 September)

Moderate to heavy rains are reported for the Caribbean coastal regions with the possibility of increased precipitation with the advance of the hurricane season. Planting of the 2002 second season cereal crops is being accelerated in anticipation of the heavier rains. In the Andean mountains range, light to moderate rains are benefiting sowing of the cereal and other food crops. In the Pacific coastal areas, where planting is also underway, heavy rains are reported in the north but

diminishing in intensity towards the south. In the eastern Orinoquia and Amazonia regions, heavy rains are reported in the former, while in the latter region adequate levels of moisture are reported for the crops. Harvesting of the 2002 first season cereal crops is about to be completed in some of the regions, while planting of the second season crops should, in general, continue until the end of the year. Early production prospects are good and average outputs are anticipated.

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

ECUADOR (5 September)

Volcano ash emissions in August have affected pastures and livestock, and fields of foodcrops in the central province of Bolivar. Some impact on the population's health is also reported. Furthermore, the country has been affected by heavy rainfall and landslides on the eastern side of the Andes mountains range in July, with consequent local damage to crops, livestock, and rural housing and infrastructure. Harvesting of the 2002 winter maize crop (planted December/April), which accounts for some 75 per cent of total domestic maize output, has been completed and about 451 000 tonnes of yellow maize have been collected. Also sowing of the summer crop (planted June/August) for harvesting from October has been completed. Prospects are good and total maize output in 2002 should be above average. Harvesting of the 2002 second season paddy crop is due to start from October and an above-average output of 1.3 million tonnes for the year is tentatively forecast.

PERU (5 September)

Extremely low temperatures and snowstorms in July in the southern Andean areas caused over 60 victims and affected more than 86 000 persons. The freezing temperatures killed a high number of livestock and caused serious damage to pastures and crops, and rural housing. A state of emergency was declared by the Government and relief assistance to the affected population has been provided by national and international institutions. The bulk of the 2002 wheat harvest has been completed and output exceeds that of the previous year for the same period. Harvesting should continue through October and an above-average production of about 190 000 tonnes for the year is forecast. Harvesting of the 2002 white maize crop is virtually complete, while that of the yellow maize crop is still underway. Aggregate outputs, so far, are slightly above the previous year's near record volumes. Thus, a well above-average maize crop is expected. Paddy is harvested all year round and indications are that another bumper crop, like last year's, should be expected.

URUGUAY (5 September)

Planting of the 2002 wheat and barley crops, for harvesting from November, has been completed and the area planted for each is provisionally estimated at about 125 000 hectares and 129 000 hectares respectively, close to 2001 levels. Planting of the 2002/03 maize and sorghum crops, as well as that of paddy, the important foreign exchange earner, has recently started under normal weather conditions.

VENEZUELA (5 September)

Heavy and continuing rains since June culminated in extensive flooding at the end of July in the state of Apure, in the southwest, leaving more than 35 000 people homeless and covering huge expanses of farmland. A number of victims is also reported. Serious damage to infrastructure, as well as to livestock and crops, is reported. An assessment of damage has not been made available yet. The flooding and the lack of drinking water in some areas have also raised the risk of diseases. A state of regional emergency has been declared and relief assistance is being provided by national and international institutions. Harvesting of the coarse grain crops is underway and an above-average maize output is tentatively forecast, while that of sorghum is expected to be slightly below average. Harvesting of the important paddy crop is underway and a below-average output is also forecast.

EUROPE

EC (9 September)

As of early September the small grains harvest is well advanced throughout the member countries. In the United Kingdom and parts of northern Germany, mostly dry, warm weather in late August favoured harvesting after earlier wet conditions had significantly hampered progress. However, in northern France, Belgium, and central Germany, rain continued to disrupt harvesting. In late August, heavy rain also covered parts of southern France, Italy and parts of Spain, favouring filling maize crops.

FAO estimates aggregate wheat output in the EU at just under 104 million tonnes, slightly less than the forecast in the previous report but still about 13 percent up from last year's small crop and above the five-year average. Heavy rains in late July and August interrupted the harvest in the north of France, Germany and the United Kingdom, where the quality of the crops is expected to be reduced as a result. Regarding coarse grains, barley output is also estimated to be up this year, but only slightly, by about 1 percent, to just over 49 million tonnes, while output of the other small coarse grains (mostly rye and oats) is estimated to be down. The latest forecast for the maize crop, which still has to be gathered in many parts, now stands at just over 39 million tonnes, about 4 percent down on 2001.

ALBANIA (6 September)

Albania suffered from a particularly dry winter grain season in 2001/02 and although firm information on the outcome of the wheat harvest is still not available, yields are expected to have been lower than normal. Total wheat output is unlikely to be above 300 000 tonnes while the average of the past five years stands at about 350 000 tonnes. As a result, the import requirement for wheat in the current season is forecast to increase from the estimated 300 000 tonnes in 2001/2002 (July/June)

As of 1 July, a new WFP protracted recovery and relief operation (PRRO), with a duration of 18 months, is underway in the country. This PRRO targets 63 000 beneficiaries from the most vulnerable communities in the country, particularly in the northeastern parts, where the focus of the operation will be community asset building through food for work programmes

BELARUS (3 September)

Official reports estimate cereal harvest at 5.28 million tonnes in 2002/03 marketing year compared with 4.9 million tonnes the previous year. This year's harvest includes 1.85 million tonnes of barley, 1.68 million tonnes of rye and 910 000 tonnes of wheat. Cereal imports in 2002/03 marketing year is estimated at 651 000 tonnes, including 405 000 tonnes of wheat, 135 000 tonnes of maize and 71 000 tonnes of rye.

BOSNIA-HERZEGOVINA (9 September)

Cereal harvest in 2002/03 marketing year is estimated at more than 1.1 million tonnes, which is some 71 000 tonnes higher than the significantly improved harvest of the preceding year. The cereal harvest this year includes some 640 000 tonnes of maize, 340 000 tonnes of wheat and 55 000 tonnes of barley. Cereal import requirement for 2002/03 marketing year is estimated at 230 000 tonnes, which is some 60 000 tonnes lower than the preceding year.

BULGARIA (3 September)

Adverse weather this summer has caused the forecast for cereal production to be reduced somewhat, since the previous report, but overall output is still likely to be just above last year's level. Heavy rains in early August are reported to have affected mostly the later wheat crops, with implications for yield and quality. The 2002 wheat output is now estimated at about 3.5 million

tonnes, which would be unchanged from the 2001 crop. Wheat quality was already affected by higher than normal incidence of pests earlier in the season when conditions were predominantly warm and dry, and the subsequent wet weather caused ulterior damage. It is estimated that less than 50 percent of this year's output may be off milling standard, significantly less than last year and the norm. This year's barley crop fared somewhat better, increasing to about 1 million tonnes (2001: 850 000), following increased plantings and better yields than in the past few years. The barley crop was harvested before the arrival of the wet weather in August. Regarding the summer maize crop, there is still uncertainty over the affect of the heavy summer rains on crops but the outcome could be favourable for yields. Maize output is currently forecast at about 950 000 tonnes, slightly above last year's level despite a smaller area.

CROATIA (9 September)

Latest estimates show that cereal harvest in 2002/03 marketing year will amount to just over 3 million tonnes, which is some 120 000 tonnes lower than the harvest the previous year. Wheat harvest this year is estimated at 850 000 tonnes compared with 965 000 tonnes in 2001, while coarse grain at about 2.2 million tonnes in 2002/03 marketing year is similar to the preceding year. Cereal exports during the ensuing marketing year is estimated at about 400 000 tonnes, including 150 000 tonnes of maize and 250 000 tonnes of wheat.

CZECH REPUBLIC (3 September)

Heavy rains in late July and early August, coinciding with the peak harvest period, caused serious damage to many cereal crops before they could be gathered. The official forecast released at the beginning of August already showed an expected reduction in cereal output compared to the forecast a month earlier because of the rain in July but, with rain continuing into August, it is likely that the final estimate for the year will be lower. Pending further information, the total 2002 cereal crop is forecast at 7 million tonnes, about 4 percent down from the previous year. Of the total, wheat would account for just over 4 million tonnes, compared to almost 4.5 million tonnes last year. As well as the affect on the current harvest, there is concern that the devastating summer floods will have a significant impact also on the coming 2002/03 cropping season, as many farmers may find themselves short of finances or due to technical problems as a result of the floods, such as damage to machinery.

ESTONIA (5 September)

Latest reports indicate that cereal harvest at 566 000 tonnes in 2002 is similar to the harvest last year. Cereal harvest this year includes some 131 000 tonnes of wheat, 284 000 tonnes of barley and 85 000 tonnes of oats. Cereal import requirement is estimated at 243 000 tonnes including 104 000 tonnes of wheat, 60 000 tonnes of maize and 45 000 tonnes of barley.

FORMER YUGOSLAV REPUBLIC OF MACEDONIA (4 September)

Latest information points to an increase in wheat output this year after last year's severely drought reduced yields. Precipitation is reported to have been much closer to normal for the winter grain season and somewhat above normal for the spring/summer crops. Tentative estimates put wheat production at about 250 000 tonnes compared to the recent average of about 300 000 tonnes.

HUNGARY (4 September)

The 2002 small grain harvest was complete ahead of normal by the end of July, reflecting the long summer drought, which brought plants to maturity early. Preliminary estimates put the wheat output at 3.9 million tonnes, down from over 5 million tonnes last year. However, although the drought had a significant impact on crop yields, the percentage of good quality grain is reported to be much higher than normal. The summer maize crop is now forecast at 6 million tonnes, down from 7.8 million tonnes last year, also reflecting the expected effect on yields of persisting dry conditions, as the area planted is estimated to have changed little from last year.

LATVIA (5 September)

Early reports indicate a cereal harvest of 917 000 tonnes in 2002/03 marketing year, which is some 7 000 tonnes lower than the preceding year. Area under cereals this year declined by 48 000 hectares compared with 2001/02 marketing year when area planted to cereals was 417 000 hectares. Cereal import requirement is estimated at 151 000 tonnes, while cereal exports may amount to 57 000 tonnes.

LITHUANIA (5 September)

Cereal harvest in 2002/03 marketing year is estimated at 2.4 million tonnes, which is similar to last year's harvest. Cereal harvest this year includes some 800 000 tonnes of wheat, 1 million tonnes of barley and 450 000 tonnes of rye. Lithuania is a net exporter of cereals with exports estimated at some 168 000 tonnes and imports at 105 000 tonnes.

MOLDOVA (3 September)

Grain harvest is estimated at about 2.7 million tonnes in 2002/03 marketing year, which is about 100 000 tonnes below the harvest last year but nearly 700 000 tonnes higher than the average harvest of the previous six years. This year's harvest includes about 1.2 million tonnes of wheat, 1.2 million tonnes of maize and 230 000 tonnes of barley. Cereal exports in 2002/03 marketing year is estimated at 303 000 tonnes compared with 345 000 tonnes last year. Cereal exports in 2002/03 marketing year consists of 130 000 tonnes of wheat, 90 000 tonnes of barley and 83 000 tonnes of maize.

POLAND (4 September)

Latest information confirms earlier expectations for a good cereal harvest but marginally down from last year, mostly because of a reduction in the area sown to wheat. The wheat crop is estimated at some 9 million tonnes, about 2 percent down from 2001. Although the total area sown to wheat (winter and spring) fell by about 9 percent, a mild winter and good spring weather were beneficial for crop development and resulted in above average yields. The forecast of total cereal production in 2002 now stands at 25.7 million tonnes, compared to 25.9 million tonnes last year.

ROMANIA (4 September)

With most of the small grain crops already gathered, a sharp drop in the country's cereal production is reported this year. The official estimate of wheat production now stands at 4.3 million tonnes, about 45 percent down from the bumper crop in 2001 and well below the average of the past few years. A reduction in the area sown to wheat last autumn was partly behind the decrease but, above all, yields were severely reduced by drought throughout most of the growing season. The barley crop has similarly been affected by dry conditions. Regarding the summer maize, the outcome is still somewhat uncertain, especially in the wake of exceptionally heavy rainfall in August which caused severe flooding and crop damage in many parts. However, the significant improvement in water availability may have an overall favourable result by improving crop yields in general.

RUSSIAN FEDERATION (3 September)

Total grain harvest in 2002/03 marketing year is estimated at about 79.6 million tonnes compared with more than 85 million tonnes last year. Total grain harvest this year includes 46 million tonnes of wheat, 16.5 million tonnes of barley and about 1.3 million tonnes of maize. Cereal exports in 2002/03 marketing year are estimated at about 6.8 million tonnes compared with 6.9 million tonnes the previous year. Cereal imports in 2002/03 marketing year are estimated at 1.6 million tonnes, which is similar to last year. Maize imports estimated at 679 000 tonnes for the ensuing marketing year, is the largest import commodity and imports are seen to rise with increased poultry sector.

WFP and other international organisations continue to assist the internally displaced Chechen population in Chechnya and Ingushetia. The current WFP food assistance programme, which began in January 2001, shall continue until the end of December 2002, by then some 76 000 tonnes of food would have been distributed to 310 000 internally displaced and vulnerable persons.

SLOVAK REPUBLIC (6 September)

The bulk of the 2002 small grain harvest was complete by the end of August. Based on results up until that time, the total wheat production for the year should amount to just over 1.6 million tonnes, about 12 percent down from the previous year as a result of reduced plantings and lower yields. The barley crop, however, has turned out larger at over 747 000 tonnes, compared to about 670 000 tonnes last year.

SLOVENIA (26 September)

The 2002 wheat production is about average at 160 000 tonnes, slightly less than last year's output, but the quality is reported to be better.

UKRAINE (3 September)

Latest reports indicate that Ukraine will harvest some 35 million tonnes of cereals in 2002/03 marketing year, which is about 2.6 million tonnes less than the harvest last year. Cereal harvest in 2002/03 includes 20.2 million tonnes of wheat, 8.79 million tonnes of barley and 2.5 million tonnes of maize. Cereal exports in 2002/03 marketing year is estimated at about 8.0 million tonnes compared with more than 9 million tonnes in the preceding year. Cereal exports in 2002/03 marketing year include 5.0 million tonnes of wheat and about 2.3 million tonnes of barley.

YUGOSLAVIA, FED. REP. OF (SERBIA AND MONTENEGRO) (9 September)

Latest reports indicate that cereal harvest in 2002/03 marketing year at 8.14 million tonnes will be lower than the sharply recovered harvest of the preceding year by some 301 000 tonnes. This year's harvest consists of 2.1 million tonnes of wheat 6 million tonnes of coarse grains, which compares with 2.5 million tonnes of wheat and 5.9 million tonnes of coarse grains in 2001/02 marketing year. Cereal exports are estimated at 480 000 tonnes, including 300 000 tonnes of maize and 180 000 tonnes of wheat.

WFP Protracted Relief and Recovery Operation is being implemented from July 2002 until the end of 2003. WFP food aid assistance exclusively focuses on refugees, 133 000 of whom are currently assisted in Serbia and 4 000 in Montenegro. ICRC assistance shall continue to target IDPs until end March 2003.

**NORTH
AMERICA**

CANADA (6 September)

Prospects for the 2002 cereal crops deteriorated sharply during July and August due to one of the worst droughts on record in Western Canada where the bulk of the small grain crops are grown. In eastern Canada where most of the maize is produced crop conditions are better than last year and yields are expected to improve from last year's low levels. As of late August, the official forecast for total wheat production had been reduced to 15.4 million tonnes, 5 million tonnes down from last year and almost 40 percent below the five-year average. Barley production is forecast to fall sharply also, to 7.9 million tonnes, the lowest level since 1968. By contrast, the maize crop is forecast to increase marginally this year to almost 8.5 million tonnes.

UNITED STATES (6 September)

The latest USDA Crop Production report in September, put total wheat production in the United States in 2002 at just below 46 million tonnes, 14 percent down from the previous year's below-average output and the smallest harvest since 1972. Although the total area sown declined further for this year's crop, the bulk of the decrease reflects a sharp drop in yield as a result of

drought conditions in the main growing areas. As of mid-September the maize harvest was just starting in the Corn Belt. Prospects for this year's output have deteriorated since the previous report due to exceptionally dry conditions throughout the summer. Maize output is now forecast at 225 million tonnes, about 6 percent below last year's about-average crop. Aggregate coarse grains output for the year is put at 243 million tonnes, about 19 million tonnes down from 2001.

OCEANIA

AUSTRALIA (10 September)

Prospects for the 2002 grain crops have deteriorated sharply in the past two months due to continuing widespread dry conditions. It is reported by the official Meteorology office that in the first five months of the 2002/03 winter cropping season (April-August) serious to severe rainfall deficiencies were recorded over most Australian grain belt. Total wheat production is now officially forecast to decline to 13.5 million tonnes, 10.5 million tonnes down from last season and the smallest crop since 1994/95. Barley production is forecast to decrease by 39 percent from last year's record crop to 4.6 million tonnes.

COOK ISLANDS (22 September)

Control measures are still being implemented in an effort to eliminate the spread of the fruit fly in the main island of Rarotonga. Measures are also taken in the island of Arorangi which is currently being affected by moths, but signs of recovery are observed.

PAPUA NEW GUINEA (10 September)

The country is being affected by a severe drought with serious consequences on food crops. The lack of water has forced the closing of schools and emergency measures are being taken by the Government to cope with the problem.

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		30 786.4	2 943.2	33 729.6	30 503.2	23 795.1	1 463.8	22 331.3
Northern Africa		15 240.1	298.3	15 538.4	16 586.0	16 586.0	43.0	16 543.0
Egypt	July/June	10 640.9	20.7	10 661.6	11 973.0	11 973.0	34.5	11 938.5
Morocco	July/June	4 599.2	277.6	4 876.8	4 613.0	4 613.0	8.5	4 604.5
Eastern Africa		4 160.1	1 774.1	5 934.2	3 687.0	2 195.8	636.3	1 559.5
Burundi	Jan./Dec.	64.2	45.8	110.0	65.0	5.9	5.9	0.0
Comoros	Jan./Dec.	46.0	0.0	46.0	46.0	12.6	0.0	12.6
Djibouti	Jan./Dec.	58.8	9.2	68.0	63.0	25.4	12.3	13.1
Eritrea	Jan./Dec.	92.4	269.9	362.3	140.0	74.5	74.5	0.0
Ethiopia	Jan./Dec.	37.7	844.8	882.5	309.0	198.3	187.6	10.7
Kenya	Oct./Sept.	1 712.2	348.2	2 060.4	855.0	459.0	111.0	348.0
Rwanda	Jan./Dec.	144.2	30.8	175.0	170.0	28.1	28.0	0.1
Somalia	Aug./July	206.7	34.3	241.0	310.0	310.0	18.1	291.9
Sudan	Nov./Oct.	1 287.6	158.1	1 445.7	1 270.0	601.8	82.6	519.2
Tanzania	June/May	510.3	33.0	543.3	459.0	480.2	116.3	363.9
Uganda	Jan./Dec.	93.7	52.3	146.0	130.0	63.9	63.6	0.3
Southern Africa		1 389.2	418.0	1 807.2	2 124.0	2 056.4	361.0	1 695.4
Angola	April/March	351.9	200.9	552.8	581.0	521.5	169.7	351.8
Lesotho	April/March	224.9	3.1	228.0	181.0	181.0	2.8	178.2
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	116.5	6.6	109.9
Mozambique	April/March	271.3	155.5	426.8	684.0	684.0	133.7	550.3
Swaziland	May/April	87.0	0.0	87.0	78.0	78.0	1.2	76.8
Zambia	May/April	73.0	5.0	78.0	270.0	270.4	18.4	252.0
Western Africa		9 157.1	377.5	9 534.6	7 368.2	2 706.4	357.9	2 348.5
Coastal Countries		6 657.2	175.7	6 832.9	5 236.2	1 903.8	192.1	1 711.7
Benin	Jan./Dec.	107.7	14.3	122.0	114.0	20.1	16.6	3.5
Cote d'Ivoire	Jan./Dec.	1 414.8	5.7	1 420.5	1 025.0	191.1	14.2	176.9
Ghana	Jan./Dec.	481.3	53.7	535.0	461.2	210.2	35.9	174.3
Guinea	Jan./Dec.	393.8	33.2	427.0	331.0	53.7	41.2	12.5
Liberia	Jan./Dec.	187.8	16.3	204.1	210.0	28.1	21.5	6.6
Nigeria	Jan./Dec.	3 756.9	0.0	3 756.9	2 770.0	1 295.3	0.0	1 295.3
Sierra Leone	Jan./Dec.	230.0	46.5	276.5	225.0	72.3	62.7	9.6
Togo	Jan./Dec.	84.9	6.0	90.9	100.0	33.0	0.0	33.0
Sahelian Countries		2 499.9	201.8	2 701.7	2 132.0	802.6	165.8	636.8
Burkina faso	Nov./Oct.	216.8	18.9	235.7	171.0	37.7	26.9	10.8
Cape Verde	Nov./Oct.	41.5	49.7	91.2	93.0	40.8	40.8	0.0
Chad	Nov./Oct.	69.2	33.7	102.9	71.0	16.9	4.8	12.1
Gambia	Nov./Oct.	163.1	1.2	164.3	124.0	20.2	5.7	14.5
Guinea Bissau	Nov./Oct.	51.4	7.3	58.7	70.0	8.4	6.3	2.1
Mali	Nov./Oct.	108.2	6.5	114.7	90.0	29.2	0.9	28.3
Mauritania	Nov./Oct.	280.0	32.7	312.7	318.0	235.8	33.4	202.4
Niger	Nov./Oct.	622.9	29.5	652.4	345.0	43.0	32.3	10.7
Senegal	Nov./Oct.	946.8	22.3	969.1	850.0	370.6	14.7	355.9
Central Africa		839.9	75.3	915.2	738.0	250.5	65.6	184.9
Cameroon	Jan./Dec.	381.1	6.1	387.2	300.0	90.6	1.8	88.8
Cent.Afr.Rep.	Jan./Dec.	51.9	0.6	52.5	36.0	9.4	3.1	6.3
Congo, Dem.Rep.	Jan./Dec.	221.4	28.6	250.0	250.0	77.4	53.5	23.9
Congo, Rep.	Jan./Dec.	162.6	33.9	196.5	125.0	67.6	2.0	65.6
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	5.2	5.2	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		31 917.2	3 951.0	35 868.2	36 195.0	33 312.8	3 206.6	30 106.2
Afghanistan	July/June	957.6	246.3	1 203.9	2 178.0	1 372.1	323.8	1 048.3
Armenia	July/June	368.0	99.0	467.0	345.0	345.0	37.0	308.0
Azerbaijan	July/June	783.0	22.0	805.0	738.0	738.0	17.0	721.0
Bangladesh	July/June	1 227.3	511.1	1 738.4	2 000.0	2 000.0	520.6	1 479.4
Bhutan	July/June	59.0	0.0	59.0	54.0	54.0	6.2	47.8
Cambodia	Jan./Dec.	74.1	31.7	105.8	63.0	44.1	29.6	14.5
China 2/	July/June	8 729.4	70.6	8 800.0	10 000.0	10 000.0	64.2	9 935.8
Georgia	July/June	544.0	120.0	664.0	518.0	518.0	93.0	425.0
India	April/March	116.4	191.8	308.2	282.0	199.4	187.4	12.0
Indonesia	April/March	7 363.2	446.1	7 809.3	6 840.0	6 840.0	225.0	6 615.0
Korea, D.P.R.	Nov./Oct.	767.3	1 428.7	2 196.0	1 301.0	1 097.5	880.7	216.8
Kyrgyz Republic	July/June	78.0	61.0	139.0	206.0	206.0	9.0	197.0
Laos	Jan./Dec.	25.0	12.0	37.0	37.0	28.2	19.7	8.5
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	208.0	203.1	56.3	146.8
Nepal	July/June	69.7	9.3	79.0	75.0	75.0	8.1	66.9
Pakistan	May/April	148.1	2.2	150.3	500.0	483.0	94.4	388.6
Philippines	July/June	4 505.4	104.3	4 609.7	4 810.0	4 810.0	249.5	4 560.5
Sri Lanka	Jan./Dec.	930.5	119.7	1 050.2	1 084.0	711.2	79.2	632.0
Syria	July/June	1 814.4	31.1	1 845.5	1 260.0	1 455.9	13.3	1 442.6
Tajikistan	July/June	386.0	156.0	542.0	642.0	642.0	203.0	439.0
Turkmenistan	July/June	20.0	6.0	26.0	52.0	52.0	7.0	45.0
Uzbekistan	July/June	571.0	38.0	609.0	580.0	580.0	68.0	512.0
Yemen	Jan./Dec.	2 210.9	172.7	2 383.6	2 385.0	858.2	14.6	843.6
CENTRAL AMERICA		3 921.6	260.4	4 182.0	4 049.0	4 184.3	261.9	3 922.4
Cuba	July/June	1 689.6	1.9	1 691.5	1 697.0	1 673.9	6.0	1 667.9
Guatemala	July/June	989.1	64.5	1 053.6	1 022.0	1 152.1	96.4	1 055.7
Haiti	July/June	511.0	104.9	615.9	550.0	585.0	81.6	503.4
Honduras	July/June	544.7	54.3	599.0	525.0	536.6	27.3	509.3
Nicaragua	July/June	187.2	34.8	222.0	255.0	236.7	50.6	186.1
SOUTH AMERICA		833.4	143.9	977.3	948.0	1 007.2	112.6	894.6
Bolivia	July/June	200.6	65.4	266.0	268.0	266.2	43.2	223.0
Ecuador	July/June	632.8	78.5	711.3	680.0	741.0	69.4	671.6
OCEANIA		388.5	0.0	388.5	383.0	58.0	0.0	58.0
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	57.9	0.0	57.9
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		657.4	92.6	750.0	870.0	870.0	148.2	721.8
Albania	July/June	340.1	2.9	343.0	323.0	323.0	42.7	280.3
Bosnia&Herzegovina	July/June	215.0	75.0	290.0	290.0	290.0	104.6	185.4
Macedonia, FYR	July/June	102.3	14.7	117.0	257.0	257.0	0.9	256.1
TOTAL		68 504.5	7 391.1	75 895.6	72 948.2	63 227.4	5 193.1	58 034.3

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 2000), 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.

ESTIMATED CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/
b) 2002/03 estimates (in thousand tonnes)

COUNTRY	Marketing year	2001/02			2002/03			
		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		18 894.2	538.4	19 432.6	19 510.0	6 220.5	1 791.6	4 428.9
Northern Africa		16 543.0	43.0	16 586.0	15 663.0	952.4	7.4	945.0
Egypt	July/June	11 938.5	34.5	11 973.0	11 400.0	892.4	7.4	885.0
Morocco	July/June	4 604.5	8.5	4 613.0	4 263.0	60.0	0.0	60.0
Eastern Africa		655.8	134.4	790.2	580.0	4 495.3	1 473.9	3 021.4
Somalia	Aug./July	291.9	18.1	310.0	310.0	14.6	14.6	0.0
Tanzania	June/May	363.9	116.3	480.2	270.0	19.8	13.0	6.8
Southern Africa		1 695.4	361.0	2 056.4	3 267.0	772.8	310.3	462.5
Angola	April/March	351.8	169.7	521.5	725.0	97.9	97.9	0.0
Lesotho	April/March	178.2	2.8	181.0	338.0	76.8	20.3	56.5
Madagascar	April/March	176.4	28.6	205.0	315.0	42.0	37.0	5.0
Malawi	April/March	109.9	6.6	116.5	510.0	264.0	86.0	178.0
Mozambique	April/March	550.3	133.7	684.0	642.0	88.1	43.1	45.0
Swaziland	May/April	76.8	1.2	78.0	111.0	32.3	4.3	28.0
Zambia	May/April	252.0	18.4	270.4	626.0	171.7	21.7	150.0
ASIA		28 243.9	2 126.5	30 370.4	31 974.0	2 761.8	722.2	2 039.6
Afghanistan	July/June	1 048.3	323.8	1 372.1	1 379.0	153.5	103.5	50.0
Armenia	July/June	308.0	37.0	345.0	344.0	47.3	1.4	45.9
Azerbaijan	July/June	721.0	17.0	738.0	629.0	16.0	16.0	0.0
Bangladesh	July/June	1 479.4	520.6	2 000.0	1 477.0	49.5	49.5	0.0
Bhutan	July/June	47.8	6.2	54.0	53.0	0.0	0.0	0.0
China 2/	July/June	9 935.8	64.2	10 000.0	10 800.0	415.7	44.0	371.7
Georgia	July/June	425.0	93.0	518.0	575.0	26.1	26.1	0.0
India	April/March	12.0	187.4	199.4	350.0	83.0	66.0	17.0
Indonesia	April/March	6 615.0	225.0	6 840.0	8 640.0	1 364.5	158.0	1 206.5
Kyrgyz Republic	July/June	197.0	9.0	206.0	179.0	8.6	8.6	0.0
Nepal	July/June	66.9	8.1	75.0	70.0	50.0	0.0	50.0
Pakistan	May/April	388.6	94.4	483.0	630.0	37.0	36.0	1.0
Philippines	July/June	4 560.5	249.5	4 810.0	5 000.0	352.6	55.1	297.5
Syria	July/June	1 442.6	13.3	1 455.9	805.0	0.7	0.7	0.0
Tajikistan	July/June	439.0	203.0	642.0	656.0	17.5	17.5	0.0
Turkmenistan	July/June	45.0	7.0	52.0	25.0	0.0	0.0	0.0
Uzbekistan	July/June	512.0	68.0	580.0	362.0	139.8	139.8	0.0
CENTRAL AMERICA		3 922.4	261.9	4 184.3	1 932.0	202.6	202.6	0.0
Cuba	July/June	1 667.9	6.0	1 673.9	1 712.0	0.0	0.0	0.0
Guatemala	July/June	1 055.7	96.4	1 152.1	1 160.0	67.5	67.5	0.0
Haiti	July/June	503.4	81.6	585.0	595.0	96.9	96.9	0.0
Honduras	July/June	509.3	27.3	536.6	527.0	11.0	11.0	0.0
Nicaragua	July/June	186.1	50.6	236.7	220.0	27.2	27.2	0.0
SOUTH AMERICA		894.6	112.6	1 007.2	958.0	100.7	100.7	0.0
Bolivia	July/June	223.0	43.2	266.2	268.0	57.7	57.7	0.0
Ecuador	July/June	671.6	69.4	741.0	690.0	43.0	43.0	0.0
EUROPE		721.8	148.2	870.0	622.0	74.7	74.7	0.0
Albania	July/June	280.3	42.7	323.0	365.0	20.3	20.3	0.0
Bosnia&Herzegovina	July/June	185.4	104.6	290.0	230.0	54.4	54.4	0.0
Macedonia, FYR	July/June	256.1	0.9	257.0	257.0	0.0	0.0	0.0
TOTAL		52 676.9	3 187.6	55 864.5	54 996.0	9 360.3	2 891.8	6 468.5

SOURCE: FAO

for footnotes, please see page 42.

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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.

"Purchase and Distribution of Localized 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.

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