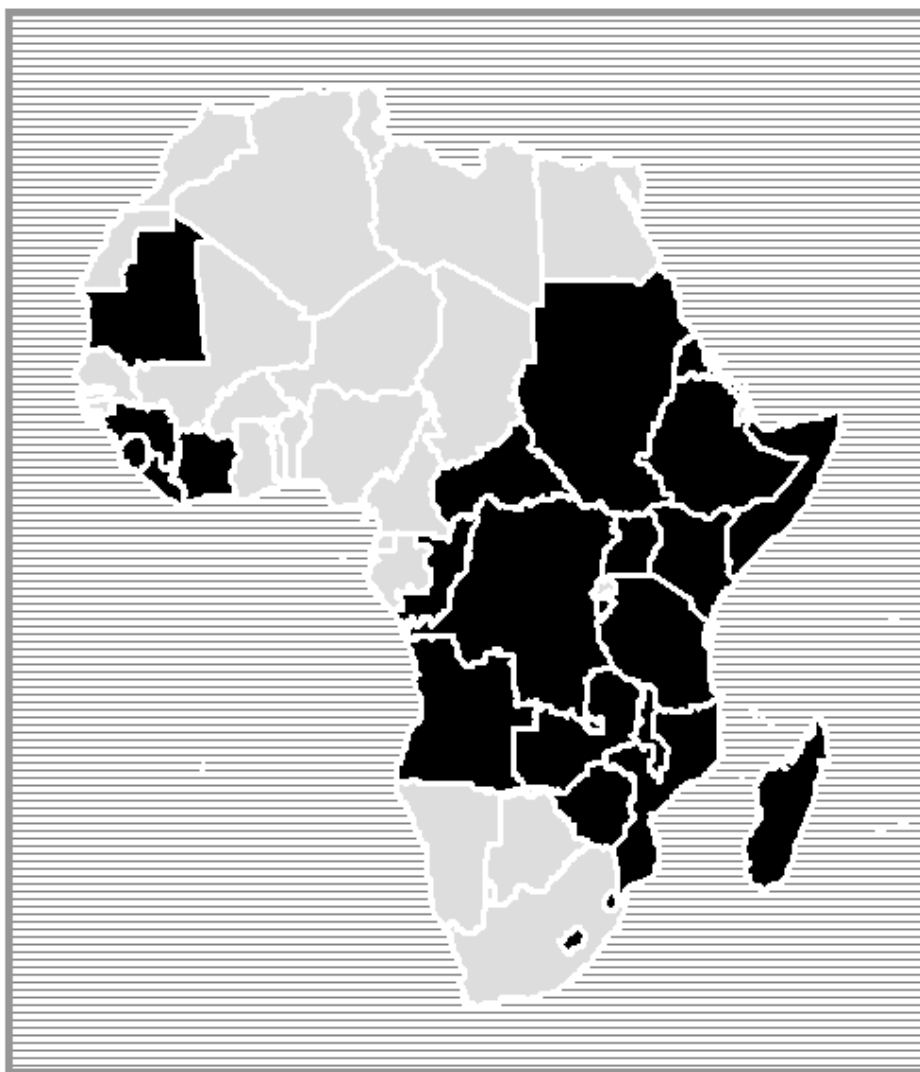


FOOD SUPPLY SITUATION AND CROP PROSPECTS IN SUB-SAHARAN AFRICA

No. 3

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Countries facing food emergencies:

Angola, Burundi, Cape Verde, Central Afr. Rep., Congo Dem. Rep. of, Congo Rep. of, Côte d'Ivoire, Eritrea, Ethiopia, Guinea, Kenya, Lesotho, Liberia, Madagascar, Malawi, Mauritania, Mozambique, Sierra Leone, Somalia, Sudan, Swaziland, Tanzania, Uganda, Zambia, Zimbabwe



FOOD AND AGRICULTURE ORGANIZATION OF THE UNITED NATIONS

INTRODUCTION

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

Part I focuses on the continuing food crisis in southern Africa, particularly in Malawi, Zambia and Zimbabwe, as well as Lesotho, Namibia, Swaziland and parts of Mozambique. It highlights the looming food crisis in the Horn of Africa, especially in Eritrea, Ethiopia and parts of Sudan due to drought-induced poor harvests. The report also draws attention to emerging food shortages in western parts of the Sahel as well as the continuing need for food assistance in the Great Lakes region, Angola, Guinea, Liberia and Sierra Leone due to population displacements, refugees and insecurity.

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

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

COUNTRIES FACING FOOD EMERGENCIES (Total: 25 countries)	
<u>Country</u>	<u>Reasons for emergency</u>
Angola	Internally displaced persons (IDPs)
Burundi	Civil strife, IDPs
Cape Verde	Drought
Central Afr. Rep.	Civil strife
Congo, Dem. Rep. of	Civil strife, IDPs and refugees
Congo, Rep. of	Civil strife, IDPs
Côte d'Ivoire	Civil strife, IDPs
Eritrea	Drought, IDPs, returnees
Ethiopia	Drought, IDPs
Guinea	IDPs and refugees
Kenya	Drought in parts
Lesotho	Adverse weather
Liberia	Civil strife, IDPs
Madagascar	Drought in parts, economic problems
Malawi	Adverse weather
Mauritania	Drought, irrigation water shortages
Mozambique	Drought in parts
Sierra Leone	Civil strife, IDPs
Somalia	Civil strife, drought in parts
Sudan	Civil strife in the south and east, drought in parts
Swaziland	Drought in parts
Tanzania	Poor rains in parts, refugees
Uganda	Civil strife, IDPs, drought in parts
Zambia	Drought in parts
Zimbabwe	Drought, economic problems

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

Please note that this report is available on the Internet as part of the FAO World Wide Web (www.fao.org) at the following address: <http://www.fao.org/giews/>

HIGHLIGHTS

In Southern Africa, the food crisis is worsening as food shortages become more acute, particularly in Zimbabwe. For the region as a whole, food aid requirements amount to 1.6 million tonnes, about half of which are still uncovered. As a result of two consecutive poor cereal harvests, 14.4 million people in Zimbabwe, Zambia, Malawi, Mozambique, Lesotho and Swaziland need emergency food assistance to survive until the next harvest in April 2003. The impact of food shortages is aggravated by the high rates of HIV/AIDS prevalence across the region. Of WFP's emergency appeal in July for 993 050 tonnes of food to assist 10.3 million most affected people in these six countries, pledges by late November amounted to 662 945 tonnes or 67 percent. Commercial maize imports have been slow and prices have started to rise in several countries. With the critical hunger period January-March approaching, there is urgent need to expedite commercial imports and food aid distributions. The outlook for the 2003 cereal crops, now being planted, is uncertain. Dry weather prevailed in the sub-region in the second and third dekad of November delaying planting and shortening the agricultural season. Precipitation has resumed in several areas since the first dekad of December, notably in South Africa, providing much needed relief. However, more rains are needed elsewhere to prevent yet another poor harvest in southern Africa. In Angola, despite improved access to the needy population, food insecurity and malnutrition rates remain high, and IDPs returning home have no basic health services. FAO has appealed for US\$ 12.7 million to assist the most affected farmers in the sub-region with agricultural inputs for the next cropping season.

In eastern Africa, serious food shortages have emerged in several countries of the Horn of Africa. The food situation is particularly serious in Eritrea and Ethiopia where food aid is urgently needed to prevent famine. In Eritrea, more than a third of the population face severe food shortages due to drought. In addition, humanitarian assistance continues to be needed for the population displaced by the war with Ethiopia in 1998-2000 and returning refugees from Sudan. In Ethiopia, poor and erratic rains have led to severe food difficulties, particularly in pastoral areas in the east where water supplies and pastures are dwindling. Large numbers of livestock have died and unusual population migrations are reported in these areas. The Government has recently appealed to the international community for food assistance for more than 11 million people. Elsewhere in eastern Africa, large numbers of people in Sudan, Kenya, Somalia and Uganda need food assistance due to production shortfalls caused by poor rainfall and/or civil conflict.

In the Great Lakes region, the food outlook is poor in Rwanda and Burundi where the 2003 first season harvests from January are forecast to fall due to delayed onset of rains. In the Democratic Republic of Congo, the escalation of fighting in eastern parts has resulted in new population displacements. Acute malnutrition continues to be on the increase among the IDPs as insecurity hinders humanitarian assistance.

In western Africa, this year's cereal harvest in the Sahel is estimated below last year's, reflecting insufficient rainfall in parts. The food situation is extremely serious in Mauritania, following three consecutive poor harvests. Food assistance is urgently needed for sections of the population, particularly in rural areas. In the coastal countries along the Gulf of Guinea, harvest prospects are mixed. Agricultural activities in Liberia have been disrupted by renewed civil strife, pointing to reduced rice production this year. Emergency food assistance is needed in Côte d'Ivoire, following a resurgence of civil strife, while Sierra Leone and Guinea remain heavily dependent on international food assistance due to large numbers of IDPs and refugees.

Sub-Saharan Africa's cereal import requirements in 2003 are expected to increase over 2002, reflecting reduced harvests in eastern, southern and western Africa, mainly due to drought.

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PART I: OVERVIEW

As 2002 draws to a close, the food situation in southern Africa remains grave, particularly in Zimbabwe. The food outlook in eastern Africa is also bleak, particularly in Ethiopia and Eritrea, mainly due to drought. In the Great Lakes region, insecurity and flare-ups in civil conflicts continue to disrupt agricultural production. In western Africa, the food situation in Mauritania is very serious following three consecutive years of poor harvests.

DEEPENING FOOD CRISIS IN SOUTHERN AFRICA, ESPECIALLY IN ZIMBABWE AND ZAMBIA

The food crisis in southern Africa resulting from two consecutive poor harvests is worsening due to dwindling food stocks and slow imports, including food aid. The situation could deteriorate into a large-scale famine if international assistance continues to be slow and inadequate.

In **Zimbabwe**, the food crisis is worsening. Severe shortages of basic foods including maize, milk, bread and sugar are reported in rural and urban areas, with bakeries closing due to lack of wheat. Increasing cases of malnutrition are reported from different locations. About half of the population, or 6.7 million people, are in need of emergency food assistance until next March, mostly in rural areas. Despite considerable effort made by both humanitarian organisations and the Government to import maize, the actual level of imports remains well below requirements.

The overall economic crisis in the country, with inflation rates projected to reach 155 percent by the end of the year, coupled with continuous depreciation of the national currency, is further reducing access to basic food for the majority of the population. Following severe shortages of fuel in October, the Government authorized imports of fuel by the private sector in early November.

There is urgent need to increase and expedite maize imports to avert famine in Zimbabwe.

In **Zambia**, the food situation of 2.9 million people, or 25 percent of the population, is of grave concern following two consecutive poor harvests. The food situation is particularly serious for vulnerable people in remote areas who have exhausted their food stocks at a time when prices of maize have increased sharply from the already high levels of last year. WFP projects a shortage of 100 000 tonnes of maize in the pipeline from November to March, the critical hunger period, and it is using recent cash contributions to purchase maize.

In **Malawi**, food distributions during October were double the level of September, providing relief to some 2.3 million people. Against WFP food aid appeal of 171 000 tonnes of cereals for Malawi in the Southern Africa Regional Emergency Operation, the level of pledges by late October were adequate and 83 000 tonnes had already arrived in the country. Commercial imports of maize have also been adequate and most of the 225 000 tonnes requirement estimated by an FAO/WFP Mission in April-May, has been covered. However, despite the improvement in the overall food supply, there are serious food access problems. Prices of maize remain at high levels, although by early October they were generally below their levels at the same time last year. Large numbers of people in rural areas still lack purchasing power to buy food in the market.

In **Namibia**, 345 000 people of the country's population of 1.8 million are in need of emergency food assistance as a result of a prolonged dry spell that sharply reduced the 2002 cereal production in the main producing northern regions. The worst affected region is Caprivi in the north-east. The Government has allocated US\$ 14 million for the provision of emergency food assistance and has recently awarded tenders to transport companies to move relief food across the country.

In **Madagascar**, despite an overall satisfactory 2002 cereal harvest, the food supply situation is tight for a large number of vulnerable people due to the lingering effects of the political crisis in the first half of the year which seriously disrupted economic activities. Increases in petrol prices and transport costs resulted in sharp increases in basic food prices in urban areas and, at the same time, depressed producer prices in isolated rural areas. Overall, it is estimated that 150 000 people lost their jobs as a result of the crisis.

Serious food difficulties are also being experienced in 13 districts of the south, where the harvest was reduced by dry weather for the second consecutive year and in parts of the eastern province of Toamasina where crops and irrigation infrastructure were destroyed following Cyclone Kesiny in May.

A WFP Emergency Operation has recently been jointly approved with FAO to provide 18 000 tonnes of food assistance until next March for 394 250 vulnerable people affected by the socio-economic crisis and natural disasters.

In **Angola**, the food situation of a large number of displaced people gives cause for serious concern. The number of people in need of emergency food aid has been raised to 1.9 million from the 1.42 million estimated by the FAO/WFP Mission in May 2002. Recent reports indicate that while malnutrition rates have declined with improved access to the needy population, they remain at high levels. Most of the areas to which the populations are returning have no basic health services. Despite the gradually improving accessibility to the provinces, poor road conditions, broken bridges and landmines continue to hamper expansion of relief assistance, as well as internal trade.

Elsewhere in the sub-region, improved food aid distribution has provided relief to large numbers of people affected by a poor harvest in **Lesotho** and **Swaziland**. In **Mozambique**, heavy rains in October have hampered access to vulnerable groups in remote areas, particularly in Inhambane and Tete provinces.

A FOOD CRISIS LOOMS IN THE HORN OF AFRICA

The food situation in the Horn of Africa is cause for serious concern, following drought conditions that have sharply reduced the 2002 cereal harvests. The situation is particularly serious in Ethiopia and Eritrea where large cereal imports, are needed to stave off mass starvation. Generous donor response has averted starvation so far, but the food shortages are expected to continue well into 2003.

In **Eritrea**, more than one-third of the population faces severe food shortages due to a prolonged drought that seriously affected agricultural and livestock production. A recent FAO/WFP Crop and Food Supply Assessment Mission found that the failure of the short "azmera" rains (March to June) and the inadequate long "kiremti" rains (June to September) resulted in the lowest level of cereal production since the country's independence in 1993. Pastoralists have also been seriously affected with livestock numbers in some sub-regions reduced by up to 20 percent from their 2001 levels. Furthermore, humanitarian assistance to more than 60 000 people displaced by the recent war with neighbouring Ethiopia and about 50 000 Eritrean returnees from Sudan has placed a huge strain on the country's resources. The UN, in conjunction with the Government of Eritrea, has recently appealed to the international community for US\$ 163.4 million in food and non-food assistance

In **Ethiopia**, poor secondary season "belg" rains and a late start and early cessation of the main "meher" season rains have created an 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 food assistance for more than 11 million people until the end of 2002. An FAO/WFP Crop and Food Supply Assessment Mission has just returned from the country and a report on the outcome of the 2002 "Meher" production and an estimate of food assistance requirements in 2003 will be issued shortly.

In **Kenya**, the current maize harvest in major producing provinces has improved the overall food supply situation. The decline in food prices is especially beneficial to households in marginal agricultural areas previously affected by drought. However, early estimates of the long rains maize crop indicate an output of about 1.89 million tonnes, down by 19 percent compared to 2.32 million tonnes in 2001. While rainfall was favourable in several previously drought-affected pastoral areas, food insecurity persists in the districts of Mandera, Turkana, Samburu, Marsabit, West Pokot and Baringo.

In **Somalia**, good rains during the second half of October, which were particularly abundant in major growing areas, encouraged land preparation and early sowing of the 2002/03 secondary "deyr" season crops. The good main "gu" season cereal harvest in southern Somalia has improved the overall food supply situation. However, serious food supply difficulties remain in parts due to successive years of drought and insecurity. In north-western Somalia (Somaliland), despite some recent rainfall the food situation is severe in Sool, Sanag and Nugal regions where the poor "gu" rains affected crops and livestock production. Despite new export opportunities in chilled meat to some countries in the Near East, the continuing ban by the same on imports of live animals on account of Rift Valley Fever has reduced foreign exchange earnings and affected the livelihoods of a large number of pastoralists.

In **Sudan**, a recent FAO/WFP Crop and Food Supply Assessment Mission to the southern regions found a deterioration in the food supply situation compared to last year and estimated a larger deficit in cereal production. Late onset of rains and new population displacement following the recent escalation of the long-running conflict, have severely affected agricultural production. In central and northern Sudan, harvesting of the 2002 main season cereal crops has just started. Reports indicate poor crop prospects with food shortages already being experienced in several areas. An FAO/WFP Crop and Food Supply Assessment Mission has just returned from the country and a report is to be issued shortly.

In **Tanzania**, the overall food situation remains satisfactory with increased on-farm stocks and market supplies. However, current wholesale prices for maize in major maize producing regions (including Rukwa, Mbeya, and Iringa in the Southern Highlands, and Dodoma in Central Tanzania) were higher this month than the average of the previous five years. Also, on certain markets such as Kilimanjaro and Tanga (northern Tanzania), wholesale prices of maize have started to rise earlier than usual.

In **Uganda**, a late onset of the secondary season rains coupled with an escalation of the conflict in the north has seriously affected the food supply situation in parts. Crop failure in the north-eastern region of Karamoja due to long dry spells has aggravated the food difficulties. The intensification of conflict and insecurity in the north has displaced a large number of people, adding to the existing large IDP population. Nearly 750 000 people are currently being assisted in several parts of the country.

FOOD INSECURITY IN BURUNDI AND DEMOCRATIC REPUBLIC OF CONGO SET TO DETERIORATE DUE TO UNFAVOURABLE CROP PROSPECTS

In the **Democratic Republic of Congo (DRC)**, the humanitarian situation remains serious due to the persistent civil war. The intensification of military activities in South-Kivu province, particularly around the border town of Uvira in October has resulted in renewed population displacement, as people flee from fighting. At the same time, it has seriously curtailed humanitarian access to the victims, and insufficient WFP food stocks have led to reduced distributions. The nutritional situation of the internally displaced population is extremely serious. Recent assessments indicate that between 10 to 30 percent of the population in eastern areas of the country are suffering from acute malnutrition.

The food and nutritional situation is also severe in urban areas, particularly in the capital Kinshasa and surrounding areas, where a survey undertaken in poor neighbourhoods last August found that the average daily intake of calories was about half of the minimum recommended amount. Food assistance is being provided by humanitarian agencies but it remains below the requirements. Alarming rates of malnutrition are also reported in parts of Katanga region where grain production this year was sharply reduced by drought.

Despite some violent incidents, some 2 000 Rwandan militiamen and their families were repatriated in early November, under the auspices of the UN peacekeeping mission (MONUC).

In **Burundi**, the security situation continues to deteriorate. Cease-fire negotiations in Tanzania between the Government and rebels in late October ended without an agreement. The escalation of violence in central and eastern provinces, including Gitega, Bujumbura Rural, Bubanza and Ruyigi, is causing fresh waves of population displacements internally and to neighbouring countries, mainly Tanzania. A recent assessment carried out by WFP in five communes of Gitega and Rutana provinces indicates that over 14 000 households in Gitega and 16 670 households in Rutana have been seriously affected by insecurity and urgently need food assistance. In addition, food assistance is needed for the growing number of Congolese refugees fleeing from armed conflict in DRC. UN together with other resident international agencies are currently reviewing estimates of the population requiring assistance. There is concern that current food aid stocks may not be sufficient to cover the increasing needs.

The outlook for the 2003 first season foodcrops, to be harvested towards the end of the year, is poor reflecting dry weather in September and first two decades of October, which resulted in reductions in the area planted to beans and maize. Although the final result will depend on the rains in the remaining weeks of the growing season, the number of people in need of food assistance is likely to increase as production is anticipated to be reduced in several areas.

In **Rwanda**, despite a satisfactory overall food supply situation following a good 2002 B season harvest, recent vulnerability assessment undertaken locally by WFP and FEWS NET in chronically food deficit high-altitudes areas of Kibuye, Gisenyi, Gikongoro and Ruhengeri provinces, and in some districts of Butare

province, where last season's harvest was poor, found that vulnerable populations are experiencing serious food difficulties. The assessment estimated that some 274 000 people are in need of food assistance until the next harvest at the end of the year, as their food reserves and coping mechanisms are becoming exhausted.

The early outlook for the 2003 first season crops, to be harvested towards the end of the year, is poor reflecting a late start of the rainy season. The output is likely to decline due to reduced and delayed plantings.

FOOD SHORTAGES EMERGE IN THE SAHEL WITH MAURITANIA FACING A FOOD EMERGENCY

In the **Sahel**, the 2002/03 food outlook is mixed. A long dry spell from early July through August severely affected crops in Cape Verde, The Gambia, Guinea-Bissau, Mauritania and Senegal, causing sharp falls in crop production. By contrast, in the central and eastern parts of the Sahel (the main cereal producing countries), crop growing conditions were more favourable, despite an erratic start of the rainy season which necessitated replantings in most areas.

A series of joint FAO/CILSS Crop Assessment Missions to the 9 CILSS member countries in October estimated aggregate 2002 cereal production at 11.3 million tonnes, 3 percent lower than 2001 but 11 percent above the average of the previous five years. Burkina Faso had a very good year, but poor harvests are estimated in Mauritania, Cape Verde and Guinea-Bissau. Compared to 2001, output declined significantly in Chad, The Gambia and Senegal but was similar in Mali and Niger.

The food supply situation is anticipated to be tight in 2003, following the reduced harvests. It should also be noted that despite the generally good harvests in most Sahelian countries in 2001, access to food has been difficult for some sections of the population following a sharp rise in millet prices in most markets. The rural populations have been the most affected as millet is their most important staple. Although national coarse grain deficits in the 2002/03 are expected to be covered by commercial imports of rice and wheat, prices of local cereals are likely to stay high.

In **Mauritania**, the food supply situation gives cause for serious concern following three consecutive poor cereal harvests. A joint FAO/WFP Crop and Food Supply Assessment Mission which visited the country from 20 to 26 October, estimated the 2002 aggregate cereal production at about 100 000 tonnes, over 40 percent lower than the average for the previous five years and 18 percent below last year's poor harvest. The 'dieri' crop, which accounts for more than 80 percent of planted area and about 60 percent of total cereal production in a normal year, decreased by 80 percent compared to last year.

The mission estimated cereal import requirement for the marketing year 2002/03 (November/October) at 322 534 tonnes, mostly wheat and rice. Taking into account anticipated commercial cereal imports of 228 000 tonnes and 11 000 tonnes of food aid pledges, the uncovered cereal deficit for the year is about 95 000 tonnes which needs to be covered by additional food aid pledges. Approximately 400 000 people throughout Mauritania will require emergency food assistance. Emergency provision of agricultural inputs such as seeds is also recommended to enable disaster-affected farming families to resume agricultural production in the next main planting season starting in June 2003.

Elsewhere in western Africa, the food outlook in **Côte d'Ivoire** is bleak, following an outbreak of civil strife on 19 September 2002. In Abidjan, thousands of people have been displaced and most have insufficient access to basic needs including food. In Bouake, worsening conditions including lack of food supplies have prompted many residents to leave. According to the Red Cross, between 150 000 and 200 000 residents have fled the town, whose population used to be about 600 000. Thousands of immigrants from neighbouring countries have been forced to return to their original homes.

Moreover, well below normal rainfall in September and October affected the second maize crop. A reduction in rice and other cereal production is forecast this year as a result of unfavourable weather coupled with the conflict that forced many farmers to leave their land.

WFP has launched a three-month emergency operation to assist 94 000 people affected by the conflict. The bulk of this operation will be inside Côte d'Ivoire, with assistance also provided to neighbouring Burkina Faso, Mali and Ghana.

In **Guinea**, harvest prospects are good, although rainfall was generally below average at the beginning of the rainy season. The overall food supply situation is satisfactory following favourable harvests in 2000 and 2001. The presence of a large refugee population and the persistent instability in neighbouring countries, have exacted a heavy toll on the country. According to WFP, some 30 000 new Liberian refugees have entered the country since the beginning of this year. Additionally, new refugees have entered Guinea from Côte d'Ivoire since September. The country also has some 82 000 internally displaced persons (IDPs) following armed clashes in and around the country over the period September 2000 – March 2001.

In **Liberia**, as a result of persistent armed clashes in the north, north-west and central regions, there are 184 000 IDPs currently living in camps in other parts of the country. WFP, which has expressed concern about the increasing number of IDPs, continues to provide food assistance to them, in addition to more than 22 000 Sierra Leonean refugees still in the country. While access to those living in areas under Government control, has improved the situation remains difficult for those in contested areas where insecurity and violence hamper provision of humanitarian assistance.

In **Sierra Leone**, 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. In spite of below average rainfall, harvest prospects are generally favourable reflecting an improved security situation, increased plantings by returning refugees and farmers previously displaced, as well as improved distribution of agricultural inputs.

UPDATE ON FOOD AID PLEDGES AND DELIVERIES

Sub-Saharan Africa's cereal import requirement, including food aid, in 2002/03 is expected to increase, reflecting seriously reduced harvests in southern and eastern Africa and parts of the Sahel. For the 24 countries which have already entered the 2002/03 marketing year, GIEWS preliminary estimates of 2002 production and 2002/03 import and food aid requirements are summarized in Table 1. The final amount of the increase in import and food aid requirements will depend on the outcome of the current season in the remaining 24 countries.

AREAS OF PRIORITY ACTION

Over 40 million people in sub-Saharan Africa need food assistance as shown in the following table:

Eastern Africa	19.3 million
Southern Africa	16.7 million
Western Africa	2 million
Central Africa	2.75 million

- In eastern and southern Africa, areas of priority action include:
 - Increased pledges of food aid;
 - Expedited commercial imports;
 - Improved food aid distribution;
 - Balance of payments support.
- Food assistance is urgently required to avert famine in Mauritania.
- International food assistance is or continues to be needed in many countries of sub-Saharan Africa affected by conflict and/or adverse weather, including Angola, Burundi, Democratic Republic of Congo, Liberia, Sierra Leone, parts of Uganda and, lately, Côte d'Ivoire and its neighbours.
- Countries which have suffered serious falls in food production this year also need assistance with agricultural inputs for the next cropping season.

PART II : POSITION BY SUB-REGION

Planting of main season crops has started in southern Africa. Crops in several countries in eastern Africa are maturing or being harvested, while harvesting of main season crops is complete or nearing completion in Eritrea, Ethiopia and Sudan. Harvesting is also complete in the Sahelian countries.

Cereal Crop Calendar

Sub-Region	Cereal Crops	
	Planting	Harvesting
Eastern Africa ^{1/}	March-June	August-December
Southern Africa	October-December	April-June
Western Africa		
- Coastal areas (first season)	March-April	July-September
- Sahel zone	June-July	October-November
Central Africa ^{1/}	April-June	August-December

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

In **southern Africa**, harvesting of the 2002 wheat crop is well advanced. Aggregate output is forecast at 2.6 million tonnes, 9 percent lower than last year but still average. This reflects a decline of 9 percent in the largest producer, South Africa, mainly as a result of lower yields following high temperatures in the northern growing areas in October. In Zimbabwe, official forecasts point to a crop of 213 000 tonnes, one of the lowest in the past decade as a result of lower yields and planted area due to land reform activities.

Planting of the 2003 cereal crops, mainly maize, is underway. Prospects are uncertain. Following a good start of the rainy season in late October and early November, dry weather prevailed in the sub-region in the second and third dekad of November delaying planting and leading to failure of the early planted crops. Precipitation resumed in several areas in the first dekad of December, notably in South Africa, providing relief from dryness. However, more rains are needed in Swaziland, Botswana, southern parts of Malawi and Zimbabwe, southern and central parts of Mozambique and in north-eastern parts of Zambia.

Estimates of the 2002 coarse grains, mainly maize, stand at 14.8 million tonnes, which is slightly higher than last year's reduced level. This mainly reflects sharp declines for the second consecutive year in most countries of the sub-region, compensated by an increase of 22 percent in South Africa, which was not affected by the drought this year. As a result of adverse weather and lower plantings, production was reduced in all other countries of the sub-region, except Botswana. The food supply situation is tight and food assistance is needed for 14.4 million people affected by a poor harvest in Zimbabwe, Malawi, Zambia, Mozambique, Swaziland and Lesotho. In Angola, food assistance is needed for 1.9 millions internally displaced people. Food assistance is also required in Madagascar following a reduced harvest in several southern districts and general economic disruption by the recent political crisis. The sub-region's aggregate cereal import requirement for marketing year 2002/03 is estimated at 7.2 million tonnes. Commercial imports are estimated at 5.6 million tonnes, leaving 1.6 million tonnes to be covered by food aid.

In **eastern Africa**, the main season cereal harvests have either been completed or are underway and the secondary season crops to be harvested in the coming months are developing under mixed conditions. The region's aggregate cereal production in 2002/03 is expected to decline compared to last year, mainly due to drought.

In Eritrea, following drought during the "short rains" season earlier in the year and erratic and poorly distributed rains during the "long rains" season, the 2002 cereal crop is estimated at about 74 000 tonnes, the lowest level since the country's independence in 1993. In Ethiopia, in addition to the near-total failure of the secondary "belg" season due to drought, erratic rains and pests have severely affected yields of the 2002 main season cereal crops. An FAO/WFP Crop and Food Supply Assessment Mission has just returned from the country and a report on the outcome of the 2002 "Meher" production and estimate of food assistance requirements in 2003 will be issued shortly. In Kenya, recent favourable rainfall in several

previously drought-affected pastoral areas improved overall food supply prospects. However, the 2002 long rains maize crop is estimated at a lower level of about 1.89 million tonnes compared to 2.32 million tonnes in 2001. In Sudan, prospects for the 2002 main crops are generally unfavourable. A recent FAO/WFP Crop and Food Supply Assessment Mission to southern Sudan indicated a larger deficit in cereal production compared to last year due to delayed and erratic rainfall and population displacement following recent escalation of the long-running conflict. In central and northern Sudan, harvesting of the 2002 main season cereal crops has just started. An FAO/WFP Crop and Food Supply Assessment Mission has just returned from the country and a report is to be issued shortly. In Uganda, delayed onset of the secondary season rains coupled with a serious escalation of the conflict in the north has severely affected the food supply situation. Crop failure in the north-eastern region of Karamoja due to long dry spells during the recently concluded single cropping season of the region has also aggravated the food difficulties. By contrast in Somalia, the recently harvested main "gu" season cereal crop in the south is estimated at about 260 000 tonnes (100 000 tonnes of sorghum and 160 000 tonnes of maize), more than double the poor gu crop in 2001. In Tanzania, planting of the 2002/03 short season "vuli" crops in the bi-modal northern areas is underway. The 2002 total cereal production (maize, rice, wheat, sorghum and millet) at 4.3 million tonnes is about 10 percent above last year's harvest due to more favourable rains. Similarly, production of non-cereal crops (pulses, potatoes, cassava and plantains) is reported to be good.

As a result of the anticipated decline in the sub-region's aggregate 2002 cereal production, imports in 2002/03 are expected to increase substantially to 3.5 million tonnes, about 13 percent above the previous year. Commercial imports are estimated at 2.9 million tonnes and the food aid requirement at some 0.6 million tonnes. Food aid pledges reported to GIEWS up to early December amount to 115 000 tonnes, with 27 000 tonnes delivered so far.

In **western Africa**, a series of joint FAO/CILSS Crop Assessment Missions in October to the nine CILSS member countries estimated the 2002 aggregate cereal production at 11.3 million tonnes, 3 percent below 2001 but 11 percent above the average of the last five years. Below-average production is estimated for Cape Verde, Guinea Bissau and Mauritania, while it is average in Chad, the Gambia, Mali and Senegal. Above average production is estimated for Burkina Faso and Niger. These estimates should be viewed as preliminary, as the national surveys on which they are based were generally carried out before the end of the harvest and include forecasts for flood recession and off-season crops yet to be planted.

Despite above-average to record crops in most Sahel countries in 2001, access to food has been difficult for some sections of the population, due to a sharp rise in cereal prices, notably millet prices in most markets. The rural populations were the most affected as they depend mostly on millet, sorghum and maize. Although national cereal deficits for the 2002/03 marketing year (November/October) are anticipated to be covered by commercial rice and wheat imports, prices of local cereals are likely to stay high, given the reduced harvests, notably in Cape Verde, The Gambia, Mauritania and Senegal.

In the coastal countries along the Gulf of Guinea, 2002 total cereal production estimates are not yet available. Harvest prospects are generally favourable in Benin, Nigeria and Togo but are less favourable in Ghana, following below normal rains in September and October. Rice production should increase in Sierra Leone while it will decrease in Liberia following renewed civil strife. In Côte d'Ivoire, a reduction in rice and other cereal production is forecast as a result of unfavourable weather and the outbreak of civil strife that forced many farmers to leave their land and disrupted economic activities.

In **central Africa**, crop prospects are generally favourable in Cameroon. In the Central African Republic, harvest prospects are uncertain following erratic and below average rains in some regions, while a resurgence of fighting in Bangui between government and rebel troops in late October led to new population displacements.

Table 1: Cereal Imports and Food Aid Requirements in 2002/03 for sub-Saharan Africa Countries
which have entered their 2002/03 marketing year (in thousand tonnes)

Sub-Region/ Country	Marketing year	2002 Cereal production 1/		Position for 2002/03						
		Total	As %of average of previous 5 years	Cereal import require- ments 2/	Antici- pated com- mer- cial imports	Food aid require- ments	Commer- cial imports already made or contracted	Food aid		
								Pledges	of which received so far	Uncov. food aid require- ments
Eastern Africa		11 355	105	3 520	2 932	588	77	115	27	473
Kenya	Oct./Sept.	2 970	113	1 540	1 240	300	-	46	-	255
Somalia	Aug./July	280	107	320	275	45	-	15	-	30
Sudan	Nov./Oct.	3 815	90	1 390	1 200	190	-	38	10	152
Tanzania	June/May	4 290	115	270	217	53	77	17	17	36
Southern Africa		19 439	92	7 222	5 617	1 605	2 456	845	555	835
Angola	April/March	549	102	725	504	221	221	149	123	72
Botswana	April/March	25	132	266	266	-	148	-	-	-
Lesotho	April/March	54	34	338	191	147	131	38	38	109
Madagascar	April/March	2 007	107	255	205	50	17	49	25	1
Malawi	April/March	1 661	78	510	302	208	250	150	83	58
Mozambique	April/March	1 715	108	642	592	50	233	105	63	-
Namibia	May/April	69	63	156	156	-	71	20	-	-
South Africa	May/April	11 797	103	1 806	1 806	-	578	-	-	-
Swaziland	May/April	68	62	111	96	15	27	10	10	5
Zambia	May/April	744	72	626	401	225	300	106	46	119
Zimbabwe	April/March	750	34	1 787	1 098	689	480	218	167	471
Western Africa		10 841	112	2 658	2 429	229	-	69	15	161
Sahelian countries		10 841	112	2 658	2 429	229	-	69	15	161
Burkina Faso	Nov./Oct.	3 237	129	242	224	18	-	13	-	6
Cape Verde	Nov./Oct.	5	28	108	33	75	-	31	11	44
Chad	Nov./Oct.	1 095	98	98	91	7	-	7	2	-
Gambia	Nov./Oct.	142	101	143	138	5	-	-	-	5
Guinea-Bissau	Nov./Oct.	121	98	69	65	4	-	5	-	-
Mali	Nov./Oct.	2 266	100	258	251	7	-	3	-	4
Mauritania	Nov./Oct.	77	55	308	202	106	-	11	3	95
Niger	Nov./Oct.	3 062	121	375	375	-	-	-	-	-
Senegal	Nov./Oct.	836	100	1 057	1 050	7	-	-	-	7
TOTAL		41 635	100	13 400	10 978	2 422	2 533	1 029	598	1 469

1/ Including rice in milled equivalent.

2/ Excluding re-exports.

Table 2: Cereal Imports and Food Aid Requirements in sub-Saharan Africa, 2001/02 or 2002 (in thousand tonnes)

Sub-Region/ Country	Marketing year	2001 Cereal production 1/		2000/01 or 2001 imports			Position for 2001/02 or 2002						
		Total	As % of average of previous 5 years	Total imports	As % of average of previous 5 years	Food aid	Cereal import require- ment 2/	Antici- pated commer- cial imports	Food aid require- ment	Commer- cial imports already made or contracted	Food aid		
											Pledges 3/	of which received so far	Uncov. food aid require- ments
Countries still in 2001/02 or 2002 marketing year													
Eastern Africa		11 360	103	1 819	130	1 267	1 118	539	579	135	461	352	126
Burundi	Jan./Dec.	280	107	110	222	44	65	30	35	-	7	7	28
Comoros	Jan./Dec.	6	100	46	103	-	46	46	-	22	-	-	-
Djibouti	Jan./Dec.	-	-	68	77	9	78	55	23	42	18	18	5
Eritrea	Jan./Dec.	230	107	377	161	285	170	75	95	55	103	43	-
Ethiopia 4/	Jan./Dec.	8 827	105	883	142	845	370	75	295	11	227	209	69
Rwanda	Jan./Dec.	252	125	175	71	31	190	150	40	6	28	25	12
Seychelles	Jan./Dec.	-	-	13	102	-	13	13	-	-	-	-	-
Uganda	Jan./Dec.	1 765	94	147	151	53	186	95	91	-	79	50	12
Southern Africa		2	100	290	108	-	248	248	-	122	-	-	-
Mauritius	Jan./Dec.	2	100	290	108	-	248	248	-	122	-	-	-
Western Africa		27 310	104	6 818	159	176	5 242	4 999	243	3 568	234	182	44
Coastal countries		27 310	104	6 818	159	176	5 242	4 999	243	3 568	234	182	44
Benin	Jan./Dec.	884	101	122	94	14	114	100	14	42	17	12	-
Côte d'Ivoire	Jan./Dec.	1 363	111	1 435	190	6	1 025	1 010	15	816	15	5	-
Ghana	Jan./Dec.	1 525	92	505	112	54	461	372	89	276	53	53	36
Guinea	Jan./Dec.	763	106	427	114	33	337	296	41	13	41	41	-
Liberia	Jan./Dec.	94	82	204	98	16	210	180	30	9	28	25	2
Nigeria	Jan./Dec.	21 764	104	3 757	189	-	2 770	2 770	-	2 355	13	-	-
Sierra Leone	Jan./Dec.	224	97	277	112	47	225	176	49	11	68	47	-
Togo	Jan./Dec.	693	104	91	70	6	100	95	5	47	-	-	5
Central Africa		2 849	99	1 062	51	78	826	737	89	302	88	74	6
Cameroon	Jan./Dec.	1 242	101	397	150	6	300	298	2	129	2	2	-
Cent.Afr.Rep.	Jan./Dec.	141	103	51	147	1	36	31	5	6	5	3	-
Congo, Dem. Rep of	Jan./Dec.	1 429	96	250	99	29	250	190	60	28	65	60	-
Congo, Rep. of	Jan./Dec.	4	100	199	150	36	125	110	15	89	11	5	4
Equat. Guinea	Jan./Dec.	-	-	18	154	2	15	14	1	-	-	-	1
Gabon	Jan./Dec.	32	103	137	172	-	88	88	-	50	-	-	-
Sao Tome	Jan./Dec.	1	-	11	106	5	12	6	6	-	5	5	1
Sub-total		41 521	103	9 988	148	1 521	7 434	6 523	911	4 127	783	608	175
Countries which have entered their 2002/03 marketing year													
Eastern Africa		12 810	115	4 056	158	574	3 121	2 563	558	2 825	371	371	187
Kenya	Oct./Sept.	3 297	126	1 860	145	348	1 080	810	270	1 045	135	135	135
Somalia	Aug./July	267	100	241	93	34	320	250	70	252	18	18	52
Sudan	Nov./Oct.	5 339	122	1 446	224	158	1 262	1 160	102	1 160	102	102	-
Tanzania	June/May	3 907	102	509	138	33	459	343	116	368	116	116	-
Southern Africa		19 783	89	4 127	97	424	4 703	4 336	367	4 336	367	367	-
Angola	April/March	586	112	548	111	203	572	402	170	402	170	170	-
Botswana	April/March	12	32	255	120	-	267	267	-	267	-	-	-
Lesotho	April/March	81	42	228	118	3	181	178	3	178	3	3	-
Madagascar	April/March	1 939	104	395	240	26	393	364	29	364	29	29	-
Malawi	April/March	1 834	86	39	23	27	151	144	7	144	7	7	-
Mozambique	April/March	1 632	107	482	149	156	684	550	134	550	134	134	-
Namibia	May/April	107	100	82	78	1	135	135	-	135	1	1	-
South Africa	May/April	10 652	88	1 790	96	-	1 632	1 632	-	1 632	-	-	-
Swaziland	May/April	85	69	87	120	-	78	77	1	77	1	1	-
Zambia	May/April	983	85	76	23	3	270	252	18	252	18	18	-
Zimbabwe	April/March	1 872	77	144	46	4	340	335	5	335	5	5	-
Western Africa		10 953	118	2 705	130	191	2 132	1 943	189	2 432	174	160	26
Sahelian countries		10 953	118	2 705	130	191	2 132	1 943	189	2 432	174	160	26
Burkina Faso	Nov./Oct.	3 064	128	236	139	19	171	148	23	227	24	22	-
Cape Verde	Nov./Oct.	20	143	91	102	50	93	45	48	37	37	37	11
Chad	Nov./Oct.	1 273	123	103	135	34	71	57	14	84	4	3	11
Gambia	Nov./Oct.	186	151	164	144	1	124	119	5	143	7	5	-
Guinea-Bissau	Nov./Oct.	134	106	56	73	5	70	60	10	44	7	6	3
Mali	Nov./Oct.	2 214	100	114	102	6	90	85	5	237	7	7	-
Mauritania	Nov./Oct.	102	72	328	109	33	318	281	37	259	40	34	-
Niger	Nov./Oct.	3 084	131	644	179	22	345	313	32	357	31	28	1
Senegal	Nov./Oct.	876	103	969	123	22	850	835	15	1 043	17	17	-
Sub-total		43 546	102	10 889	123	1 189	9 956	8 842	1 114	9 592	912	899	212
TOTAL		85 067	103	20 877	134	2 709	17 390	15 365	2 025	13 720	1 696	1 507	387

1/ Including rice in milled equivalent.

2/ Excludes re-exports.

3/ Includes all pledges reported to the GIEWS, whether for free distribution or market sale. However, there may be some cases where governments count some food aid received for market sale against commercial import requirements.

4/ Includes refugee needs.

Table 3: Utilization of 2001/02 or 2002 Cereal Surpluses in sub-Saharan Africa (in thousand tonnes)

Sub-Region/ Country	Cereal import requirement		Total availabilities for export and/or local purchases	of which local purchase require- ment	Surpluses utilized or committed so far			Remain- ing surpluses
	Wheat and rice	Coarse grains			Donor financed local purchases	Exports		
						Commer- cial	Trian- gular trans- actions 1/	
Eastern Africa	3 185	1 054	1 322	642	118	100	3	1 102
Burundi	30	35	-	-	-	-	-	-
Comoros	46	-	-	-	-	-	-	-
Djibouti	75	3	-	-	-	-	-	-
Eritrea	135	35	2	2	2	-	-	-
Ethiopia 2/	335	35	250	200	14	50	-	186
Kenya	680	400	110	100	46	-	1	63
Rwanda	25	165	0.4	0.4	0.4	-	-	-
Seychelles	7	6	-	-	-	-	-	-
Somalia	200	120	-	-	-	-	-	-
Sudan	1 163	99	500	300	19	50	-	431
Tanzania	368	91	150	30	27	-	2	121
Uganda	121	65	310	10	10	-	-	300
Southern Africa	3 220	1 731	1 659	57	59	1 372	55	174
Angola	426	146	5	5	5	-	-	-
Botswana	70	197	-	-	-	-	-	-
Lesotho	53	128	3	3	3	-	-	-
Madagascar	380	13	2	2	2	-	-	-
Malawi	38	113	16	16	16	-	-	-
Mauritius	228	20	-	-	-	-	-	-
Mozambique	552	132	162	12	12	-	-	150
Namibia	60	75	1	1	1	-	-	-
South Africa	1 050	582	1 427	-	-	1 372	55	-
Swaziland	40	38	-	-	-	-	-	-
Zambia	68	202	43	18	18	-	-	25
Zimbabwe	255	85	0.3	0.3	0.3	-	-	-
Western Africa	6 909	465	530	65	17	-	0.5	513
Coastal countries	5 046	196	270	-	-	-	0.5	270
Benin	112	2	55	-	-	-	-	55
Côte d'Ivoire	1 020	5	10	0.3	0.3	-	0.5	9
Ghana	379	82	25	-	-	-	-	25
Guinea	325	12	-	-	-	-	-	-
Liberia	200	10	-	-	-	-	-	-
Nigeria	2 700	70	180	-	-	-	-	180
Sierra Leone	210	15	0.3	0.3	0.3	-	-	-
Togo	100	-	-	-	-	-	-	-
Sahelian countries	1 863	269	260	65	17	-	-	243
Burkina Faso	170	1	100	20	-	-	-	100
Cape Verde	53	40	-	-	-	-	-	-
Chad	68	3	40	20	1	-	-	39
Gambia	122	2	-	-	-	-	-	-
Guinea-Bissau	70	-	-	-	-	-	-	-
Mali	90	-	85	10	6	-	-	79
Mauritania	290	28	-	-	-	-	-	-
Niger	175	170	30	10	7	-	-	23
Senegal	825	25	5	5	3	-	-	2
Central Africa	743	83	6	0.6	1	-	2	3
Cameroon	290	10	5	0.3	0.3	-	2	3
Cent.Afr.Rep.	33	3	-	-	-	-	-	-
Congo, Dem.Rep.of	190	60	0.3	0.3	0.3	-	-	-
Congo, Rep. of	120	5	-	-	-	-	-	-
Equat.Guinea	15	-	-	-	-	-	-	-
Gabon	85	3	-	-	-	-	-	-
Sao Tome	10	2	-	-	-	-	-	-
TOTAL	14 057	3 333	3 518	765	194	1 472	60	1 791

Note: Totals computed from unrounded data.

1/ Referring to supplying countries

2/ Includes refugee needs.

Table 4: Triangular Transactions within sub-Saharan Africa in 2001/02 or 2002
(in thousand tonnes) 1/

Donor	Source of supply	Recipient Country	Total by donor
EC	South Africa	Angola (8.2)	8.2
NGOs	South Africa	Kenya (0.3)	0.3
WFP	Kenya	Somalia (0.9)	16.9
	South Africa	Angola (3.1), Cameroon (1.6), Cape Verde (0.5), Congo, Dem. Rep.(1.1) , Madagascar (0.7), Namibia (1.0), Somalia (3.4), Tanzania (4.4)	
	Uganda	Burundi (0.2)	
TOTAL			25.4

1/ Based on information reported by donors to GIEWS as of early December 2002.

Table 5: Local Purchases within sub-Saharan Africa in 2001/02 or 2002
(in thousand tonnes) 1/

Donor	Recipient Country	Total by donor
Germany	Kenya (1.0), Malawi (1.5), Sudan (0.1)	2.6
NGOs	Ethiopia (1.2), Niger (1.2), Sierra Leone (0.3), Tanzania (0.4)	3.1
WFP	Angola (5.4), Cameroon (0.3), Chad (1.0), Congo Dem.Rep.of (0.3) Côte d'Ivoire (0.3), Eritrea (1.7), Ethiopia (12.7), Kenya (44.7), Lesotho (3.0), Madagascar (2.3), Malawi (14.6) Mali (5.6), Mozambique (11.8), Namibia (1.3), Niger (6.1), Rwanda (0.4), Senegal (3.3), Sudan (19.2), Tanzania (26.2), Uganda (9.7), Zambia (18.4), Zimbabwe (0.3)	188.6
TOTAL		194.3

1/ Based on information reported by donors to GIEWS as of early December 2002.

Table 6: Availabilities for Export and Local Purchase Requirements in Cereals in sub-Saharan Africa

Current situation (in thousand tonnes)

Sub-Region / Country	Availabilities for export		Local Purchase Requirements	
	Total	Contracted so far	Total	Utilized so far
Countries still in 2001/02 or 2002 marketing year				
Eastern Africa	350	50	212	26
Eritrea	-	-	2	2
Ethiopia	50	50	200	14
Uganda	300	-	10	10
Western Africa	285	-	-	-
Coastal countries	285	-	-	-
Benin	55	-	-	-
Côte d'Ivoire	10	-	-	-
Ghana	25	-	-	-
Nigeria	180	-	-	-
Togo	15	-	-	-
Central Africa	5	2	-	-
Cameroon	5	2	-	-
Sub-total	640	52	212	26
Countries which have entered their 2002/03 marketing year				
Eastern Africa	140	-	162	51
Kenya	-	-	100	30
Sudan	90	-	2	2
Tanzania	50	-	60	19
Western Africa	347	-	20	2
Sahelian countries	347	-	20	2
Burkina Faso	295	-	15	-
Chad	16	-	-	-
Mali	20	-	-	-
Mauritania	1	-	-	-
Niger	15	-	5	2
Southern Africa	1 690	856	37	22
Angola	-	-	3	3
Lesotho	-	-	7	7
Mozambique	200	200	20	5
South Africa	1 480	656	-	-
Zambia	10	-	7	7
Sub-total	2 177	856	219	75
TOTAL	2 817	908 1/	431	101

Note: Totals computed from unrounded data.

1/ Includes 906 000 tonnes of commercial exports and 2 000 tonnes of triangular transactions.

Table 7: Cereal Food Aid Pledges to Sub-Saharan Africa for 2001/02 or 2002 and Triangular

Transactions/Local Purchases known to FAO as of early December 2002 (in thousand tonnes)

Donor	Wheat	Rice	Coarse grains	Total cereals	Of which: triangular	Local purchases
China	-	3.0	-	3.0	-	-
EC	29.5	13.8	12.5	55.8	8.2	2.6
of which:						
Community action	14.3	3.2	0.1	17.6	8.2	-
National action	15.2	10.6	12.4	38.2	-	2.6
France	3.3	-	-	3.3	-	-
Germany	-	2.4	12.3	14.7	-	2.6
Italy	3.9	8.2	0.1	12.2	-	-
Luxembourg	8.0	-	-	8.0	-	-
Japan	-	198.7	3.0	201.7	-	-
NGOs	5.6	5.5	3.4	14.5	0.3	3.1
Pakistan	-	1.0	-	1.0	-	-
United States	324.9	46.1	79.0	450.0	-	-
World Food Programme	316.3	53.6	599.7	969.6	16.9	188.6
TOTAL	676.3	321.7	697.6	1 695.6	25.4	194.3

Note: Totals computed from unrounded data.

Table 8: Food Aid Pledges in Cereals for 2001/02 or 2002 by Donor and by Recipient (in thousand tonnes)

Donor/Recipient	Total	delivered	China	EC	Japan	NGOs	Pakistan	U.S.A.	WFP
Eastern Africa	832.8	723.4	-	2.7	37.2	0.3	-	189.5	603.1
Burundi	6.8	6.6	-	2.7	-	-	-	-	4.1
Comoros	-	-	-	-	-	-	-	-	-
Djibouti	18.1	18.1	-	-	-	-	-	-	18.1
Eritrea	102.9	43.3	-	-	-	-	-	71.3	31.6
Ethiopia 1/	226.5	209.1	-	-	-	-	-	25.4	201.1
Kenya	135.1	135.1	-	-	-	0.3	-	35.0	99.8
Rwanda	28.0	24.5	-	-	-	-	-	11.6	16.4
Seychelles	-	-	-	-	-	-	-	-	-
Somalia	18.3	18.3	-	-	-	-	-	5.5	12.8
Sudan	101.7	101.7	-	-	-	-	-	7.7	94.0
Tanzania	116.3	116.3	-	-	37.2	-	-	-	79.1
Uganda	79.1	50.4	-	-	-	-	-	33.0	46.1
Southern Africa	367.4	367.4	-	24.5	86.0	3.2	-	110.7	143.0
Angola	169.7	169.7	-	17.8	38.4	0.4	-	13.1	100.0
Botswana	-	-	-	-	-	-	-	-	-
Lesotho	2.8	2.8	-	-	-	2.8	-	-	-
Madagascar	28.6	28.6	-	5.4	9.9	-	-	7.3	6.0
Malawi	6.6	6.6	-	1.3	-	-	-	5.3	-
Mauritius	-	-	-	-	-	-	-	-	-
Mozambique	133.7	133.7	-	-	34.7	-	-	85.0	14.0
Namibia	1.4	1.4	-	-	-	-	-	-	1.4
South Africa	-	-	-	-	-	-	-	-	-
Swaziland	1.2	1.2	-	-	-	-	-	-	1.2
Zambia	18.4	18.4	-	-	3.0	-	-	-	15.4
Zimbabwe	5.0	5.0	-	-	-	-	-	-	5.0
Western Africa	407.3	341.8	3.0	27.4	73.7	11.0	1.0	138.3	152.9
Coastal countries	233.7	182.0	-	-	32.2	0.4	-	96.2	104.9
Benin	17.0	12.2	-	-	7.8	-	-	7.1	2.1
Côte d'Ivoire	14.8	4.6	-	-	-	-	-	9.6	5.2
Ghana	52.6	52.6	-	-	10.6	-	-	39.4	2.6
Guinea	41.2	41.2	-	-	13.8	-	-	0.3	27.1
Liberia	27.9	24.9	-	-	-	0.4	-	4.6	22.9
Nigeria	12.5	-	-	-	-	-	-	12.5	-
Sierra Leone	67.7	46.5	-	-	-	-	-	22.7	45.0
Togo	-	-	-	-	-	-	-	-	-
Sahelian countries	173.6	159.8	3.0	27.4	41.5	10.6	1.0	42.1	48.0
Burkina Faso	23.8	21.9	-	-	8.0	0.1	-	14.1	1.6
Cape Verde	36.6	36.6	-	10.6	5.7	-	-	16.2	4.1
Chad	3.5	3.3	-	-	-	-	-	-	3.5
Gambia	7.3	5.1	-	-	-	-	-	-	7.3
Guinea-Bissau	7.2	6.3	3.0	0.7	-	-	-	0.6	2.9
Mali	7.3	7.3	-	-	-	-	-	0.6	6.7
Mauritania	40.1	34.3	-	9.9	8.8	-	-	8.3	13.1
Niger	31.1	28.3	-	4.6	9.2	10.5	1.0	2.3	3.5
Senegal	16.7	16.7	-	1.6	9.8	-	-	-	5.3
Central Africa	88.1	74.3	-	1.2	4.8	-	-	11.5	70.6
Cameroon	2.2	1.8	-	-	-	-	-	-	2.2
Cent.Afr.Rep.	5.0	2.6	-	-	-	-	-	2.4	2.6
Congo, Dem.Rep.of	64.6	60.2	-	1.2	-	-	-	-	63.4
Congo, Rep.of	11.1	4.5	-	-	-	-	-	9.1	2.0
Equat. Guinea	-	-	-	-	-	-	-	-	-
Gabon	-	-	-	-	-	-	-	-	-
Sao Tome	5.2	5.2	-	-	4.8	-	-	-	0.4
TOTAL	1 695.6	1 506.9	3.0	55.8	201.7	14.5	1.0	450.0	969.6

1/ Includes refugee needs.

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

(situation as of early December 2002)

ANGOLA

Area:	1 247 000 sq km
Climate:	Coastal desert, south-west semi-arid, rest tropical wet-dry. Rainy season: Sept.-May
Population:	14.90 million (2002 estimate), G.N.P. per caput US\$500 (2001)
Specific characteristics of the country:	Low-income food-deficit country; infrastructure devastated by prolonged civil strife
Logistics:	Inadequate port, rail and road facilities
Major foodcrops:	Roots, tubers, maize, plantains
Marketing year:	April/March; Lean season: January-April
Share of cereals in total calorie intake:	35 percent

CURRENT SITUATION

Normal to above-normal rains in October and November maintained adequate soil moisture for planting of the 2003 coarse grain crops and benefited early sown crops, mainly maize in central areas.

The food situation of large numbers of displaced people gives serious cause for concern. Following the cease-fire agreement between the Government and UNITA forces in April this year, massive movements of people returning to their place of origin continue. The number of people in need of emergency food aid has been raised to 1.9 million from the 1.42 million estimated by the FAO/WFP Crop and Food Supply Assessment Mission in May 2002. Recent reports indicate that while malnutrition rates have declined with improved access to the needy population, they remain at high levels. Most of the areas to which the populations are returning have no basic health services. Despite the gradually improved accessibility to the provinces, poor road conditions, broken bridges and landmines continue to be a constraint to the expansion of relief assistance, as well as internal trade.

Against food aid requirements of 221 000 tonnes of cereals for 2002/03 (April/March) pledges by early December amounted to 149 000 tonnes of which 123 000 tonnes have already been received in the country.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	5	7	527	539
Previous five years average imports	277	104	166	547
<u>2002/03 Domestic Availability</u>	<u>3</u>	<u>3</u>	<u>546</u>	<u>549</u>
2002 Production (rice in paddy terms)	-	4	546	550
2002 Production (rice in milled terms)	-	3	546	549
Possible stock drawdown	-	-	-	-
<u>2002/03 Utilization</u>	<u>280</u>	<u>160</u>	<u>834</u>	<u>1 274</u>
Food use	280	160	720	1 160
of which: local purchase requirement	-	-	3	3
Non-food use	-	-	109	109
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	5	5
<u>2002/03 Import Requirement</u>	<u>280</u>	<u>157</u>	<u>288</u>	<u>725</u>
Anticipated commercial imports	280	157	67	504
Food aid needs	-	-	221	221
<u>Current Aid Position</u>				
Food aid pledges	21	-	128	149
of which: delivered	-	-	123	123
Donor-financed purchases	-	-	3	3
of which: for local use	-	-	3	3
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>19</u>	<u>11</u>	<u>48</u>	<u>78</u>
<u>Indexes</u>				
2002 Production as % of average:				102
2002/03 Import requirement as % of average:				133

BENIN

Area:	112 620 sq km
Climate:	Tropical wet-dry; two rainy seasons in south (Mar.-Jul. and Oct.) and one in north (May-Oct.)
Population:	6.43 million (2002 estimate); G.N.P. per caput US\$360 (2001)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports, roads, rail adequate; gateway to Niger
Major foodcrops:	Roots and tubers, maize
Marketing year:	January/December; Lean season: April-June
Share of cereals in total calorie intake:	37 percent

CURRENT SITUATION

The prospects for the 2002 cereal crop are favourable reflecting overall good weather during the growing season. In the south the first maize crop has been harvested while the second maize crop, is flowering/cobbing. In the North, harvesting of millet and sorghum is underway, while rice harvesting is due to start soon.

Following last year's good cereal output and the arrival of the first season crops on the markets, the food supply situation remains satisfactory. The cereal import requirement for 2002 (including re-exports of 30 000 tonnes of rice and wheat) is estimated at 144 000 tonnes, including 14 000 tonnes of food aid.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	34	855	889
Previous five years average imports	53	97	4	154
<u>2002 Domestic Availability</u>	<u>-</u>	<u>29</u>	<u>910</u>	<u>939</u>
2001 Production (rice in paddy terms)	-	49	855	904
2001 Production (rice in milled terms)	-	29	855	884
Possible stock drawdown	-	-	55	55
<u>2002 Utilization</u>	<u>58</u>	<u>113</u>	<u>912</u>	<u>1 083</u>
Food use	52	81	647	780
of which: local purchase requirement	-	-	-	-
Non-food use	1	7	210	218
Exports or re-exports	5	25	55	85
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>58</u>	<u>84</u>	<u>2</u>	<u>144</u> ^{1/}
Anticipated commercial imports	55	75	-	130
Food aid needs	3	9	2	14
<u>Current Aid Position</u>				
Food aid pledges	3	11	3	17
of which: delivered	0	10	2	12
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>8</u>	<u>13</u>	<u>101</u>	<u>121</u>
<u>Indexes</u>				
2001 Production as % of average:				102
2002 Import requirement as % of average:				94

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

BOTSWANA

Area:	567 000 sq km
Climate:	South-western part arid (Kalahari desert); rest semi-arid with some rains in Dec.-Feb.
Population:	1.68 million (2002 estimate); G.N.P. per caput: US\$3 630 (2001)
Specific characteristics of the country:	East; swamps in the northern parts; desert in the west
Logistics:	Imports through South Africa
Major foodcrops:	Sorghum, pulses, vegetables
Marketing year:	April/March; Lean season: January-March
Share of cereals in total calorie intake:	55 percent

CURRENT SITUATION

Planting of the 2003 cereal crops, mainly sorghum, is underway. Early prospects are uncertain reflecting mostly dry weather during November in eastern growing areas. More rains are urgently needed to avoid planting reductions.

The 2002 cereal production was estimated at about 25 000 tonnes, which is a significant improvement from last season's output of only 12 000 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.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	-	19	19
Previous five years average imports	69	-	185	254
<u>2002/03 Domestic Availability</u>	=	=	29	29
2002 Production (rice in paddy terms)	-	-	25	25
2002 Production (rice in milled terms)	-	-	25	25
Possible stock drawdown	-	-	4	4
<u>2002/03 Utilization</u>	78	=	217	295
Food use	71	-	215	286
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	2	2
Exports or re-exports	7	-	-	7
Possible stock build up	-	-	-	-
<u>2002/03 Import Requirement</u>	78	=	188	266
Anticipated commercial imports	78	-	188	266
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	42	=	128	170
<u>Indexes</u>				
2002 Production as % of average:				132
2002/03 Import requirement as % of average:				105

BURKINA FASO

Area:	274 000 sq km
Climate:	Tropical wet-dry in south, semi-arid in north; rainy season: May-October
Population:	12.01 million (2003 estimate); G.N.P. per caput: US\$210 (2001)
Specific characteristics of the country:	Low-income food-deficit country; Sahelian land-locked country
Logistics:	Roads inadequate during rainy season; adequate rail link to Abidjan (Côte d'Ivoire)
Major foodcrops:	Millet, sorghum, pulses, maize
Marketing year:	November/October; Lean season: July-September
Share of cereals in total calorie intake:	73 percent

CURRENT SITUATION

The prospects for the 2002 cereal harvest are favourable despite the erratic starts of the growing season in most regions that delayed plantings. Regular and widespread rains from August through October improved crop conditions countrywide with the exception of the northern regions and Sahel. Pastures are adequate in southern and western areas but insufficient in the north and Sahel. The locust situation remained mostly calm despite some attacks of cantharid and other insects which were adequately controlled.

A joint FAO/CILSS Crop Assessment Mission that visited the country recently, estimated 2002 aggregate cereal production at 3.28 million tonnes (rice in paddy equivalent). This is five percent above last year's level and markedly higher than the average for the last five years. Compared to 2001, maize production increased by 14 percent, rice by 5 percent and sorghum and millet by 4 percent and 3 percent, respectively.

The overall food supply situation remained satisfactory during the lean season July-September. Reflecting this year's good harvest, the food supply position will improve also in those areas where it had tightened before the harvest as a result of low production, depleted stocks and sharp increase in cereal market prices which limited access to food.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	97	2 456	2 553
Previous five years average imports	66	131	19	216
<u>2002/03 Domestic Availability</u>	<u>=</u>	<u>76</u>	<u>3 161</u>	<u>3 237</u>
2002 Production (rice in paddy terms)	-	116	3 161	3 277
2002 Production (rice in milled terms)	-	76	3 161	3 237
Possible stock drawdown	-	-	-	-
<u>2002/03 Utilization</u>	<u>68</u>	<u>235</u>	<u>3 176</u>	<u>3 479</u>
Food use	67	222	2 286	2 574
of which: local purchase requirement	-	-	15	15
Non-food use	1	14	480	495
Exports or re-exports	-	-	295	295
Possible stock build up	-	-	115	115
<u>2002/03 Import Requirement</u>	<u>68</u>	<u>159</u>	<u>15</u>	<u>242</u>
Anticipated commercial imports	62	154	9	224
Food aid needs	6	5	7	18
<u>Current Aid Position</u>				
Food aid pledges	4	8	1	13
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>6</u>	<u>18</u>	<u>190</u>	<u>214</u>
<u>Indexes</u>				
2002 Production as % of average:				128
2002/03 Import requirement as % of average:				112

BURUNDI

Area:	25 700 sq km
Climate:	Highland rainy climate with moderate temperature (20°C); two rainy seasons: Feb.-May and Sept.-Nov.
Population:	6.8 million (2002 estimate); G.N.P. per caput: US\$100 (2001)
Specific characteristics of the country:	Low-income food-deficit country; land-locked country
Logistics:	Ports: Mombasa (Kenya) and Dar es Salaam (Tanzania); rail and road connections inadequate
Major foodcrops:	Pulses, plantains, roots, tubers, maize and sorghum
Marketing year:	January/December; Lean season: November-December
Share of cereals in total calorie intake:	34 percent

CURRENT SITUATION

Prospects for the 2003 first season crops, to be harvested from late December, are poor. Following good rains at the beginning of September, below-average precipitation was experienced in most areas until mid-October affecting planting operations, normally undertaken from mid-September. Rains were received in the second half of October but the dry weather resumed in November particularly in western parts. The dry weather has resulted in reductions in the area planted to beans and maize and negatively affected yields of cereals and non-cereal crops. Most affected areas are the northern provinces of Ngozi and Kayanza. The harvest is already anticipated to be reduced in Ngozi, Kayanza, Gitega, Ruyigi and Bujumbura Rural provinces. At the overall level, production will decline from the good level of 2002 first season.

Prices of beans have increased by 25-50 percent according to locations over the past two months, reflecting a reduced 2002 second season output. However, prices of other basic food, sweet potato, cassava and banana remain stable, or have decreased, as a result of good production. Overall, the depreciation of the national currency by 20 percent at the end of August has lowered purchasing power in urban areas.

The deterioration of the security situation in the past months has resulted in new displacements of population escaping from violence, particularly in central and eastern provinces. The food and nutrition situation of the displaced population gives cause for serious concern. Additional emergency food aid is required.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	9	56	215	280
Previous five years average imports	23	3	38	64
<u>2002 Domestic Availability</u>	<u>9</u>	<u>49</u>	<u>235</u>	<u>293</u>
2002 Production (rice in paddy terms)	9	61	235	305
2002 Production (rice in milled terms)	9	41	235	285
Possible stock drawdown	-	8	-	8
<u>2002 Utilization</u>	<u>34</u>	<u>54</u>	<u>270</u>	<u>358</u>
Food use	32	52	238	322
of which: local purchase requirement	-	-	-	-
Non-food use	2	2	32	36
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>25</u>	<u>5</u>	<u>35</u>	<u>65</u>
Anticipated commercial imports	10	5	15	30
Food aid needs	15	-	20	35
<u>Current Aid Position</u>				
Food aid pledges	1	-	5	7
of which: delivered	1	-	5	7
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>5</u>	<u>7</u>	<u>34</u>	<u>46</u>
<u>Indexes</u>				
2002 Production as % of average:				109
2002 Import requirement as % of average:				102

CAMEROON

Area:	475 440 sq km
Climate:	North: tropical wet-dry, south: tropical wet; length of rainy season declines from 11 months in south to 4 months in extreme north
Population:	15.9 million (2002 estimate); G.N.P. per caput: US\$570 (2001)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports and roads adequate; gateway to Chad
Major foodcrops:	Roots and tubers, coarse grains, fruit
Marketing year:	January/December; Lean season: June-August
Share of cereals in total calorie intake:	39 percent

CURRENT SITUATION

Following generally abundant and widespread rains, precipitation ceased in the north from late October but remained by contrast well abundant in the south. Coarse grains have been harvested in the north. The maize crop is developing satisfactorily in the south.

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

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	86	1 183	1 269
Previous five years average imports	205	106	10	321
<u>2002 Domestic Availability</u>	<u>=</u>	<u>59</u>	<u>1 183</u>	<u>1 242</u>
2001 Production (rice in paddy terms)	-	86	1 183	1 270
2001 Production (rice in milled terms)	-	59	1 183	1 242
Possible stock drawdown	-	-	-	-
<u>2002 Utilization</u>	<u>220</u>	<u>139</u>	<u>1 193</u>	<u>1 552</u>
Food use	206	128	938	1 273
of which: local purchase requirement	-	-	-	-
Non-food use	4	10	250	264
Exports or re-exports	10	-	5	15
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>220</u>	<u>80</u>	<u>10</u>	<u>310^{1/}</u>
Anticipated commercial imports	220	78	10	308
Food aid needs	-	2	-	2
<u>Current Aid Position</u>				
Food aid pledges	-	2	-	2
of which: delivered	-	2	-	2
Donor-financed purchases	-	-	2	2
of which: for local use	-	-	-	-
for export	-	-	2	2
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>13</u>	<u>8</u>	<u>59</u>	<u>80</u>
<u>Indexes</u>				
2001 Production as % of average:				100
2002 Import requirement as % of average:				97

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

CAPE VERDE

Area:	4 033 sq km
Climate:	Semi-arid; rainfall increases with altitude; rainy season: July-December
Population:	466 219 (2003 estimate); G.N.P. per caput: US\$1 310 (2001)
Specific characteristics of the country:	Low-income food-deficit country; archipelago
Logistics:	Port capacity and roads adequate
Major foodcrops:	Maize, rice, pulses
Marketing year:	November/October; Lean season: n.a. since 90 percent of requirements covered by imports
Share of cereals in total calorie intake:	57 percent

CURRENT SITUATION

Due to a late start of the rainy season which delayed plantings, and subsequent erratic precipitation, the conditions of the maize crop, the only cereal grown, have been poor in most islands.

A joint FAO/WFP Crop and Food Supply Assessment Mission recently estimated the output from the maize crop, to be harvested until December, at some 5 000 tonnes mostly produced in Santiago Island (54 percent) and Fogo island (35 percent). This level of production is only one fourth of last year's output and similar to the poor crops harvested in 1997 and 1998. Production of beans and potatoes will also be below normal.

The Mission estimated cereal import requirements for the marketing year 2002/03 at 108 518 tonnes. Taking into account an anticipated commercial cereal import of 33 250 tonnes and 31 300 tonnes of food aid pledges, the total uncovered deficit for the year is about 37 900 tonnes. Although the country imports the bulk of its consumption requirement also in a year of normal production, the rural population, particularly in the semi-arid zones, could be severely affected.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	-	18	18
Previous five years average imports	21	30	33	84
<u>2002/03 Domestic Availability</u>	<u>-</u>	<u>-</u>	<u>5</u>	<u>5</u>
2002 Production (rice in paddy terms)	-	-	5	5
2002 Production (rice in milled terms)	-	-	5	5
Possible stock drawdown	-	-	-	-
<u>2002/03 Utilization</u>	<u>24</u>	<u>31</u>	<u>58</u>	<u>114</u>
Food use	24	31	57	113
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	1	1
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002/03 Import Requirement</u>	<u>24</u>	<u>31</u>	<u>53</u>	<u>108</u>
Anticipated commercial imports	5	17	11	33
Food aid needs	20	14	42	75
<u>Current Aid Position</u>				
Food aid pledges	10	7	15	31
of which: delivered	-	-	11	11
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>52</u>	<u>67</u>	<u>123</u>	<u>242</u>
<u>Indexes</u>				
2002 Production as % of average:				28
2002/03 Import requirement as % of average:				129

CENTRAL AFRICAN REPUBLIC

Area:	622 980 sq km
Climate:	North: tropical wet-dry, south: tropical wet; rainy season: March-November
Population:	3.75 million (2002 estimate); G.N.P. per caput: US\$270 (2001)
Specific characteristics of the country:	Low-income food-deficit country; land-locked country
Logistics:	Roads inadequate during rainy season; river transport important
Major foodcrops:	Roots and tubers, tree nuts, coarse grain, fruit
Marketing year:	January/December; Lean season: May-July
Share of cereals in total calorie intake:	21 percent

CURRENT SITUATION

Following erratic and below-average rains that affected crops development in some regions, harvest prospects are mixed. However, due to an above-average harvest in 2001, the overall food supply situation remains satisfactory.

In late October, a resurgence of fighting in Bangui between government and rebel troops led to new population displacements. WFP has distributed 45 tonnes of food to 10 000 most affected people in northern parts of Bangui.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	19	125	144
Previous five years average imports	31	3	3	37
<u>2002 Domestic Availability</u>	<u>5</u>	<u>16</u>	<u>125</u>	<u>146</u>
2001 Production (rice in paddy terms)	-	25	125	150
2001 Production (rice in milled terms)	-	16	125	141
Possible stock drawdown	5	-	-	5
<u>2002 Utilization</u>	<u>35</u>	<u>19</u>	<u>128</u>	<u>182</u>
Food use	34	16	109	159
of which: local purchase requirement	-	-	-	-
Non-food use	1	3	18	22
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>30</u>	<u>3</u>	<u>3</u>	<u>36</u>
Anticipated commercial imports	30	1	-	31
Food aid needs	-	2	3	5
<u>Current Aid Position</u>				
Food aid pledges	-	2	3	5
of which: delivered	-	-	3	3
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>9</u>	<u>4</u>	<u>29</u>	<u>43</u>
<u>Indexes</u>				
2001 Production as % of average:				104
2002 Import requirement as % of average:				97

CHAD

Area:	1 284 000 sq km
Climate:	From north to south: arid, semi-arid and tropical wet-dry; rainy season: May-Oct.
Population:	7.94 million (2003 estimate); G.N.P. per caput: US\$200 (2001)
Specific characteristics of the country:	Low-income food-deficit country; land-locked Sahelian country.
Logistics:	Roads inadequate during rainy season
Major foodcrops:	Millet and sorghum, roots and tubers, tree nuts
Marketing year:	November/October; Lean season: August-September
Share of cereals in total calorie intake:	52 percent

CURRENT SITUATION

After erratic and below-normal rains at the beginning of the season, that delayed sowings of cereals by 2 – 6 weeks, better precipitation occurred from July onwards, notably in the Sudanian zone. Pasture is adequate in both the Sudanian and Sahelian zones. However, in July, shortage of pasture in the departments of Dadaba, Baguirmi and Hadjer Lamis, resulted in some losses of livestock. Grasshopper attacks and army worm infestations were reported in several regions early in the season. In September, grasshoppers caused damage to crops in several areas of the Sahelian zone.

A joint FAO/CILSS Crop Assessment Mission which visited the country in mid-October provisionally estimated the aggregate output of cereals at 1.12 million tonnes, 15 percent below last year's above average level of 1.31 million tonnes and only fractionally lower than the average for the previous five years.

Despite this year's reduced crop, the overall food supply position is satisfactory. However, people in the areas previously affected by floods and those living in the structural deficit areas of Karem and Bahr El Ghazel will continue to be in need of food assistance. Prices of cereals this year remained mostly stable compared to 2001 and started to decline with the arrival of the new crop on the markets.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	4	118	1 042	1 164
Previous five years average imports	57	13	13	83
<u>2002/03 Domestic Availability</u>	<u>4</u>	<u>62</u>	<u>1 099</u>	<u>1 165</u>
2002 Production (rice in paddy terms)	4	90	1 029	1 123
2002 Production (rice in milled terms)	4	62	1 029	1 095
Possible stock drawdown	-	-	70	70
<u>2002/03 Utilization</u>	<u>69</u>	<u>86</u>	<u>1 108</u>	<u>1 263</u>
Food use	64	72	893	1 028
of which: local purchase requirement	-	-	-	-
Non-food use	1	14	199	214
Exports or re-exports	-	-	16	16
Possible stock build up	5	-	-	5
<u>2002/03 Import Requirement</u>	<u>65</u>	<u>24</u>	<u>9</u>	<u>98</u>
Anticipated commercial imports	65	24	2	91
Food aid needs	-	-	7	7
<u>Current Aid Position</u>				
Food aid pledges	-	-	7	7
of which: delivered	-	-	2	2
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>8</u>	<u>9</u>	<u>112</u>	<u>130</u>
<u>Indexes</u>				
2002 Production as % of average:				97
2002/03 Import requirement as % of average:				118

COMOROS

Area:	2 200 sq km
Climate:	Tropical wet-dry; one hot rainy season with cyclone probability; June-October dry and cool
Population:	0.815 million (2002 estimate); G.N.P. per caput: US\$380 (2001)
Specific characteristics of the country:	Low-income food-deficit country; archipelago of four small islands
Logistics:	-
Major foodcrops:	Rice, roots, tubers, bananas and coconuts
Marketing year:	January/December
Share of cereals in total calorie intake:	44 percent

CURRENT SITUATION

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

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	3	4	7
Previous five years average imports	6	40	1	47
<u>2002 Domestic Availability</u>	<u>6</u>	<u>43</u>	<u>5</u>	<u>54</u>
2001 Production (rice in paddy terms)	-	3	4	7
2001 Production (rice in milled terms)	-	2	4	6
Possible stock drawdown	-	-	1	1
<u>2002 Utilization</u>	<u>6</u>	<u>42</u>	<u>5</u>	<u>53</u>
Food use	6	42	3	51
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	2	2
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>6</u>	<u>40</u>	<u>2</u>	<u>46</u>
Anticipated commercial imports	6	40	-	46
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>7</u>	<u>50</u>	<u>4</u>	<u>60</u>
<u>Indexes</u>				
2001 Production as % of average:				100
2002 Import requirement as % of average:				98

CONGO, DEMOCRATIC REPUBLIC OF

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

CURRENT SITUATION

The food situation remains critical as a result of the persistent civil war. An escalation of military activities in the eastern Kivu region in October, particularly around the town of Uvira, has resulted in renewed displacements of the population fleeing from the fighting, at the same time further hampering access by humanitarian agencies to the affected population. The food situation of the internally displaced population is extremely serious. Recent assessments indicate that between 10 to 30 percent of the population in eastern areas of the country are suffering from acute malnutrition. The food and nutritional situation is also severe in urban areas, particularly in the capital Kinshasa and surrounding areas, where high poverty levels prevail, and in the Katanga Province where this year cereal and bean harvest was sharply reduced by the drought that affected the Southern Africa region. Prices of basic food have increased significantly since July in this province, constraining access to food for large sections of the population.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	18	353	1 234	1 605
Previous five years average imports	145	50	52	247
<u>2002 Domestic Availability</u>	<u>18</u>	<u>220</u>	<u>1 194</u>	<u>1 432</u>
2001 Production (rice in paddy terms)	18	326	1 194	1 538
2001 Production (rice in milled terms)	18	217	1 194	1 429
Possible stock drawdown	-	3	-	3
<u>2002 Utilization</u>	<u>158</u>	<u>270</u>	<u>1 254</u>	<u>1 682</u>
Food use	150	228	990	1 367
of which: local purchase requirement	-	-	-	-
Non-food use	8	43	264	315
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>140</u>	<u>50</u>	<u>60</u>	<u>250</u>
Anticipated commercial imports	140	50	-	190
Food aid needs	-	-	60	60
<u>Current Aid Position</u>				
Food aid pledges	-	1	63	65
of which: delivered	-	-	60	60
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>3</u>	<u>5</u>	<u>21</u>	<u>29</u>
<u>Indexes</u>				
2001 Production as % of average:				96
2002 Import requirement as % of average:				101

CONGO, REPUBLIC OF

Area:	342 000 sq km
Climate:	Tropical wet climate in north, tropical wet-dry in south with main rainy season in October-April
Population:	3.11 million (2002 estimate); G.N.P. per caput: US\$700 (2001)
Specific characteristics of the country:	Low-income food-deficit country; tropical coastal country
Logistics:	Ports adequate; roads inadequate during rainy season
Major foodcrops:	Roots and tubers, fruit
Marketing year:	January/December; Lean season: September-November
Share of cereals in total calorie intake:	19 percent

CURRENT SITUATION

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.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	1	3	4
Previous five years average imports	119	38	5	162
<u>2002 Domestic Availability</u>	<u>45</u>	<u>7</u>	<u>4</u>	<u>56</u>
2001 Production (rice in paddy terms)	-	1	4	5
2001 Production (rice in milled terms)	-	-	4	4
Possible stock drawdown	45	7	-	52
<u>2002 Utilization</u>	<u>130</u>	<u>42</u>	<u>9</u>	<u>181</u>
Food use	128	40	7	175
of which: local purchase requirement	-	-	-	-
Non-food use	2	2	2	6
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>85</u>	<u>35</u>	<u>5</u>	<u>125</u>
Anticipated commercial imports	80	25	5	110
Food aid needs	5	10	-	15
<u>Current Aid Position</u>				
Food aid pledges	-	10	1	11
of which: delivered	-	5	-	5
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>41</u>	<u>13</u>	<u>2</u>	<u>56</u>
<u>Indexes</u>				
2001 Production as % of average:				125
2002 Import requirement as % of average:				77

CÔTE D'IVOIRE

Area:	322 460 sq km
Climate:	Tropical wet-dry; two rainy seasons (March-July and September-December) in south and one in north (May-Oct.)
Population:	15.32 million (2002 estimate); G.N.P. per caput: US\$630 (2001)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports and roads adequate; gateway to Burkina Faso and Mali
Major foodcrops:	Roots and tubers, fruit, rice, maize
Marketing year:	January/December; Lean season: April-July
Share of cereals in total calorie intake:	40 percent

CURRENT SITUATION

The harvesting of the first maize crop and the sowing of the second crop have been completed. The harvesting of the other cereals, mostly rice, is underway and will continue until December. However, well below normal rainfall in September and October may have affected the second maize crop. A reduction in rice and other cereal production is forecast this year as a result of unfavourable weather and the conflicts that forced many farmers to leave their land and disrupted marketing activities.

Production of cereals in 2001 is estimated at 1.8 million tonnes (rice in paddy equivalent), fractionally higher than previous year's above average harvest.

On 19 September, fighting broke out in the cities of Abidjan, Bouake and Korogho between a military rebel group and government forces. In Abidjan, thousands of people living in the shanty town areas were displaced when government forces burnt houses in a search of rebels. Most of them have insufficient access to basic needs including food. In Bouake, worsening conditions including lack of food supplies have prompted many residents to flee. According to the Red Cross between 150 000 and 200 000 residents have fled the town, whose population used to be about 600 000.

A serious food supply situation is reported for the vulnerable people in the areas controlled by the rebels and for the displaced persons in transit centres. WFP has launched a three-month Regional Emergency Operation to assist 94 000 people affected by the conflict, with 4 145 tonnes of food. The bulk of this operation will take place in Côte d'Ivoire but will also cover neighbouring countries of Burkina Faso, Mali and Ghana.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	998	730	1 728
Previous five years average imports	285	640	9	934
<u>2002 Domestic Availability</u>	<u>10</u>	<u>683</u>	<u>730</u>	<u>1 423</u>
2001 Production (rice in paddy terms)	-	1 055	730	1 785
2001 Production (rice in milled terms)	-	633	730	1 363
Possible stock drawdown	10	50	-	60
<u>2002 Utilization</u>	<u>280</u>	<u>1 433</u>	<u>735</u>	<u>2 448</u>
Food use	275	1 275	561	2 111
of which: local purchase requirement	-	-	-	-
Non-food use	5	158	164	327
Exports or re-exports	-	-	10	10
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>270</u>	<u>750</u>	<u>5</u>	<u>1 025</u>
Anticipated commercial imports	270	735	5	1 010
Food aid needs	-	15	-	15
<u>Current Aid Position</u>				
Food aid pledges	-	15	-	15
of which: delivered	-	5	-	5
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>18</u>	<u>83</u>	<u>37</u>	<u>138</u>
<u>Indexes</u>				
2001 Production as % of average:				103
2002 Import requirement as % of average:				110

DJIBOUTI

Area:	23 000 sq km
Climate:	Arid climate
Population:	0.641 million (2002 estimate); G.N.P. per caput: US\$890 (2001)
Specific characteristics of the country:	Low-income food-deficit country
Logistics:	Djibouti is one of the three gateways of Ethiopia
Major foodcrops:	Vegetables
Marketing year:	January/December
Share of cereals in total calorie intake:	52 percent

CURRENT SITUATION

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

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	-	-	-
Previous five years average imports	39	24	3	66
<u>2002 Domestic Availability</u>	=	=	=	=
2001 Production (rice in paddy terms)	-	-	-	-
2001 Production (rice in milled terms)	-	-	-	-
Possible stock drawdown	-	-	-	-
<u>2002 Utilization</u>	55	20	3	78
Food use	55	20	2	77
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	1	1
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	55	20	3	78
Anticipated commercial imports	40	15	-	55
Food aid needs	15	5	3	23
<u>Current Aid Position</u>				
Food aid pledges	13	5	1	18
of which: delivered	13	5	1	18
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	86	31	3	120
<u>Indexes</u>				
2001 Production as % of average:				-
2002 Import requirement as % of average:				118

EQUATORIAL GUINEA

Area:	28 051 sq km
Climate:	Tropical wet climate
Population:	475 800 (2002 estimate); G.N.P. per caput: US\$700 (2001)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports and roads inadequate
Major foodcrops:	Cassava, sweet potatoes, bananas
Marketing year:	January/December; Lean season: September-November
Share of cereals in total calorie intake:	12 percent

CURRENT SITUATION

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

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

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

ERITREA

Area:	124 320 sq km
Climate:	Highland areas: tropical wet/dry with unreliable rains. Lowlands: semi-arid to arid
Population:	3.3 million (2002 estimate); G.N.P. per caput: US\$190 (2001)
Specific characteristics of the country:	Low-income food-deficit country
Logistics:	Roads inadequate, gateway to northern Ethiopia
Major foodcrops:	Sorghum, teff, millet, maize, pulses
Marketing year:	January/December; Lean season: August-November
Share of cereals in total calorie intake:	73 percent

CURRENT SITUATION

An FAO/WFP Crop and Food Supply Assessment Mission which visited the country from 19 August to 1 September has found that the secondary *azmera* season rains have totally failed and the main *kremti* season rains arrived late over most of the country. The current poor agricultural season could not have come at a worse time. The country has just started the recovery from a devastating border war with neighbouring Ethiopia. A large number of people, including farmers, are still displaced and thousands of soldiers are yet to be demobilised. Furthermore, the resettlement of Eritrean refugees that are returning from Sudan is a further strain on the country's resources.

Against this adverse backdrop, the Mission forecast a cereal harvest of a mere 74 000 tonnes, nearly 60 percent below the average of the last 10 years. This figure has been revised down recently to 54 000 tonnes. The poor rains have also had a serious impact on the country's livestock and drought-related livestock deaths were reported in several parts of the country. The cereal import requirement for the marketing year 2003 (January/December) is now estimated at 440 000 tonnes. Reflecting the serious economic difficulties facing the country, only 20 percent of the requirement is anticipated to be covered commercially. With 60 000 tonnes of food aid expected by the end of 2002, the uncovered deficit, for which international assistance is required, is estimated at 273 000 tonnes. The UN, in conjunction with the Government of Eritrea, launched its consolidated appeal for assistance on 19 November 2002 for US\$ 163.4 million in food and non-food assistance. The bulk of the request, about US\$ 105 million, came from WFP to help feed the nation's 1.4 million drought-affected people. This year's appeal was up more than 60 percent from 2001, when the UN requested US\$ 92 million for 800 000 war and drought-affected people.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	17	-	227	244
Previous five years average imports	184	8	59	251
<u>2003 Domestic Availability</u>	<u>10</u>	<u>-</u>	<u>54</u>	<u>64</u>
2002 Production (rice in paddy terms)	10	-	44	54
2002 Production (rice in milled terms)	10	-	44	54
Possible stock drawdown	-	-	10	10
<u>2003 Utilization</u>	<u>205</u>	<u>15</u>	<u>284</u>	<u>504</u>
Food use	195	15	272	482
of which: local purchase requirement	-	-	-	-
Non-food use	10	-	12	22
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2003 Import Requirement</u>	<u>195</u>	<u>15</u>	<u>230</u>	<u>440</u>
Anticipated commercial imports	35	15	30	80
Food aid needs	160	-	200	360
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>57</u>	<u>4</u>	<u>79</u>	<u>140</u>
<u>Indexes</u>				
2002 Production as % of average:				22
2003 Import requirement as % of average:				175

ETHIOPIA

Area:	976 680 sq km
Climate:	Northern coastal area and lowlands in south and east are semi-arid to arid; rest of country has a highland rainy climate with mild winter.
Population:	66.5 million (2002 estimate); G.N.P. per caput: US\$100 (2001)
Specific characteristics of the country:	Low-income food-deficit country
Logistics:	Land-locked country, roads inadequate
Major foodcrops:	Maize, teff, barley, sorghum, wheat, pulses, enset (false banana)
Marketing year:	January/December; Lean season: August-November
Share of cereals in total calorie intake:	69 percent

CURRENT SITUATION

Poor secondary "belg" season rains and erratic main "meher" rainy season have severely affected agricultural production in several parts of the country. Millions of people are now estimated to be in need of urgent food assistance. In response to this alarming situation the Government recently renewed its appeal to the international community for food assistance to about 11 million people for October-December 2002. Preliminary results from the recently concluded FAOWFP Crop and Food Supply Assessment Mission to Ethiopia indicate that the 2002 cereal crop will be significantly down on last year reflecting late and erratic rains; this indicates that the number of people in need of assistance is expected to be considerably higher. Report of the Mission's findings is expected to be issued soon.

An Emergency Operation jointly approved by FAO and WFP for food assistance to small-scale farmers and drought-affected pastoralists for a period of 12 months (1 April 2002 to 31 March 2003) is being increased in scale to cover the additional requirements. The revised EMOP targets 4.47 million people with a total cost of about US\$ 163 million.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	1 273	-	7 040	8 313
Previous five years average imports	694	14	70	778
<u>2003 Domestic Availability</u>	<u>1 520</u>	<u>=</u>	<u>6 200</u>	<u>7 720</u>
2002 Production (rice in paddy terms)	1 100	-	5 610	6 710
2002 Production (rice in milled terms)	1 100	-	5 610	6 710
Possible stock drawdown	420	-	590	1 010
<u>2003 Utilization</u>	<u>2 720</u>	<u>15</u>	<u>6 630</u>	<u>9 365</u>
Food use	2 610	15	5 905	8 530
<i>of which: local purchase requirement</i>	-	-	-	-
Non-food use	110	-	725	835
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2003 Import Requirement</u>	<u>1 200</u>	<u>15</u>	<u>430</u>	<u>1 645</u>
Anticipated commercial imports	110	15	180	305
Food aid needs	1 090	-	250	1 340
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>38</u>	<u>=</u>	<u>87</u>	<u>125</u>
<u>Indexes</u>				
2002 Production as % of average:				81
2003 Import requirement as % of average:				211

GABON

Area: 267 670 sq km
Climate: Tropical wet climate; most rainfall: October-May
Population: 1.30 million (2002 estimate); G.N.P. per caput: US\$3 160 (2001)
Specific characteristics of the country: Coastal country
Logistics: Ports and roads adequate
Major foodcrops: Roots and tubers
Marketing year: January/December; Lean season: September-November
Share of cereals in total calorie intake: 19 percent

CURRENT SITUATION

Following mostly seasonably dry weather in July and August, rains resumed in early September and became abundant and widespread in October. The main foodcrops are cassava and plantains but some maize is also produced (around 31 000 tonnes). The country imports commercially the bulk of its cereal requirement, estimated at around 88 000 tonnes for 2002

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

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

GAMBIA

Area:	11 300 sq km
Climate:	Tropical wet-dry climate; rainy season: May-October
Population:	1.46 million (2003 estimate); G.N.P. per caput: US\$330 (2001)
Specific characteristics of the country:	Low-income food-deficit country; coastal Sahelian country
Logistics:	Port capacity and roads adequate
Major foodcrops:	Rice, millet and sorghum
Marketing year:	November/October; Lean season: July-September
Share of cereals in total calorie intake:	63 percent

CURRENT SITUATION

A joint FAO/WFP Crop and Food Supply Assessment Mission which visited the country recently from 20 to 26 October, estimated 2002 aggregate cereal production at some 150 000 tonnes, about one quarter less than last year's above average harvest and slightly below the average for the previous five years. The important early millet crop decreased by 10 percent to some 89 000 tonnes while the paddy crop, estimated at about 20 000 tonnes, was lower than both last year and the average by 45 percent and 35 percent, respectively. Production of groundnut, the main cash crop, was down by more than half to 73 500 tonnes mostly reflecting a reduction in the area planted. This decline is due to a dry spell which lasted for three to five weeks from late June to early August.

Millet prices have increased steeply over the last six months, rising by 245% from May to October 2002 and passing beyond rice prices for the first time in the last five years. Although the cereal production shortfall is anticipated to be covered by commercial rice and wheat imports, millet prices are likely to stay high, given the poor harvest forecast for 2002/03 in the Gambia as well as in the whole western Sahel region. The impact on vulnerable households food security should be monitored closely.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	30	120	150
Previous five years average imports	45	89	2	136
<u>2002/03 Domestic Availability</u>	<u>-</u>	<u>13</u>	<u>147</u>	<u>159</u>
2002 Production (rice in paddy terms)	-	20	130	149
2002 Production (rice in milled terms)	-	13	130	142
Possible stock drawdown	-	-	17	17
<u>2002/03 Utilization</u>	<u>40</u>	<u>113</u>	<u>150</u>	<u>303</u>
Food use	24	100	128	252
of which: local purchase requirement	-	-	-	-
Non-food use	1	3	22	26
Exports or re-exports	15	10	-	25
Possible stock build up	-	-	-	-
<u>2002/03 Import Requirement</u>	<u>40</u>	<u>100</u>	<u>4</u>	<u>143</u>
Anticipated commercial imports	40	96	2	138
Food aid needs	-	4	1	5
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>16</u>	<u>69</u>	<u>88</u>	<u>173</u>
<u>Indexes</u>				
2002 Production as % of average:				100
2002/03 Import requirement as % of average:				105

GHANA

Area:	238 540 sq km
Climate:	Tropical wet-dry; two rainy seasons in south and one in north
Population:	19.4 million (2002 estimate); G.N.P. per caput: US\$290 (2001)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports and roads inadequate
Major foodcrops:	Roots and tubers, coarse grain, rice
Marketing year:	January/December; Lean season: April-June
Share of cereals in total calorie intake:	27 percent

CURRENT SITUATION

In the south, rains were generally below average in September and October, which may have affected development of the second maize crop. Harvest prospects are therefore mixed.

In early February, a joint FAO/WFP Crop and Food Supply Assessment Mission visited northern Ghana where unusually dry weather conditions had affected crop production. The mission estimated the 2001 cereal production at 1.525 million tonnes, (milled equivalent) which was below average. However the overall food supply situation is close to normal as reduced cereal production in northern regions will be covered by adequate availability of other foodcrops, anticipated commercial imports and food aid already pledged.

The mission estimated total cereal import requirements in 2002 (January/December) at 461 200 tonnes including 89 000 tonnes of food aid. Worst affected areas and vulnerable groups will require food assistance estimated at about 5 000 tonnes to compensate for their reduced harvests.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	212	1 523	1 735
Previous five years average imports	234	210	41	485
<u>2002 Domestic Availability</u>	<u>10</u>	<u>173</u>	<u>1 352</u>	<u>1 535</u>
2001 Production (rice in paddy terms)	-	284	1 352	1 636
2001 Production (rice in milled terms)	-	173	1 352	1 525
Possible stock drawdown	10	-	-	10
<u>2002 Utilization</u>	<u>214</u>	<u>348</u>	<u>1 434</u>	<u>1 996</u>
Food use	211	315	1 209	1 734
of which: local purchase requirement	-	-	-	-
Non-food use	3	34	196	232
Exports or re-exports	-	-	25	25
Possible stock build up	-	-	5	5
<u>2002 Import Requirement</u>	<u>204</u>	<u>175</u>	<u>82</u>	<u>461</u>
Anticipated commercial imports	138	167	67	372
Food aid needs	66	9	15	89
<u>Current Aid Position</u>				
Food aid pledges	32	13	7	53
of which: delivered	32	13	7	53
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>11</u>	<u>16</u>	<u>62</u>	<u>89</u>
<u>Indexes</u>				
2001 Production as % of average:				94
2002 Import requirement as % of average:				95

GUINEA

Area:	245 860 sq km
Climate:	Tropical wet-dry; rainy season: March/June to October/November
Population:	7.57 million (2002 estimate); G.N.P. per caput: US\$400 (2001)
Specific characteristics of the country:	Low-income food-deficit country; mountainous coastal country
Logistics:	Ports and roads inadequate
Major foodcrops:	Rice, roots and tubers, coarse grains
Marketing year:	January/December; Lean season: July-September
Share of cereals in total calorie intake:	52 percent

CURRENT SITUATION

Following generally below-average rainfall until late October, harvest prospects are uncertain. However, the overall food supply situation is satisfactory reflecting satisfactory harvests in 2000 and 2001. Markets are well supplied.

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. New refugees have entered Guinea from Côte d'Ivoire into the Kankan and N'Zérékoré regions.

Cereal import requirement for the 2002 marketing year is estimated at 337 000 tonnes.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	769	215	984
Previous five years average imports	117	244	3	364
<u>2002 Domestic Availability</u>	<u>5</u>	<u>546</u>	<u>237</u>	<u>788</u>
2001 Production (rice in paddy terms)	-	789	237	1 026
2001 Production (rice in milled terms)	-	526	237	763
Possible stock drawdown	5	20	-	25
<u>2002 Utilization</u>	<u>115</u>	<u>761</u>	<u>249</u>	<u>1 125</u>
Food use	112	636	196	943
of which: local purchase requirement	-	-	-	-
Non-food use	3	115	45	164
Exports or re-exports	-	10	-	10
Possible stock build up	-	-	8	8
<u>2002 Import Requirement</u>	<u>110</u>	<u>215</u>	<u>12</u>	<u>337</u>
Anticipated commercial imports	96	200	-	296
Food aid needs	14	15	12	41
<u>Current Aid Position</u>				
Food aid pledges	14	15	12	41
of which: delivered	14	15	12	41
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>15</u>	<u>84</u>	<u>26</u>	<u>125</u>
<u>Indexes</u>				
2001 Production as % of average:				104
2002 Import requirement as % of average:				93

GUINEA-BISSAU

Area:	36 125 sq km
Climate:	Tropical wet-dry; rainy season: May-October
Population:	1.23 million (2003 estimate); G.N.P. per caput: US\$160 (2001)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Roads inadequate, particularly during the rainy season; river transport important
Major foodcrops:	Rice, coarse grains, oils and fats, roots and tubers
Marketing year:	November/October; Lean season: May-August
Share of cereals in total calorie intake:	64 percent

CURRENT SITUATION

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 remained abundant until October, allowing transplanting of rice to continue.

A joint FAO/WFP Crop Assessment Mission which visited the country from 21 to 26 October estimated 2002 aggregate cereal production at some 147 000 tonnes (rice in paddy equivalent), which is 11 percent below last year's output and 5 percent below the average for the previous five years.

Following the arrival of the first season crops on the markets, the overall food supply situation remains satisfactory. However, the food situation of people living in the structural deficit areas along the northern border with Senegal should be closely monitored.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	92	63	155
Previous five years average imports	10	53	2	65
<u>2002/03 Domestic Availability</u>	=	53	72	126
2002 Production (rice in paddy terms)	-	80	67	147
2002 Production (rice in milled terms)	-	53	67	121
Possible stock drawdown	-	-	5	5
<u>2002/03 Utilization</u>	7	116	72	195
Food use	7	96	62	165
of which: local purchase requirement	-	-	-	-
Non-food use	-	10	11	20
Exports or re-exports	-	5	-	5
Possible stock build up	-	5	-	5
<u>2002/03 Import Requirement</u>	7	63	=	69
Anticipated commercial imports	5	60	-	65
Food aid needs	2	3	-	4
<u>Current Aid Position</u>				
Food aid pledges	2	3	-	5
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	6	78	50	134
<u>Indexes</u>				
2002 Production as % of average:				95
2002/03 Import requirement as % of average:				106

KENYA

Area:	570 000 sq km
Climate:	North-east is semi-arid to arid; mountainous central and south-western areas have two rainy seasons: March-May and November-December.
Population:	32.52 million (2003 estimate), GNP per caput US\$340 (2001)
Specific characteristics of the country:	Low-income food-deficit country; regular importer and occasional exporter of grain.
Logistics:	Good port (Mombasa) and extensive rail and road network. Gateway to Burundi, Rwanda and Uganda
Major foodcrops:	Maize, wheat, pulses, roots and tubers
Marketing year:	October/September; Lean season: June-July
Share of cereals in total calorie intake:	56 percent

CURRENT SITUATION

The current maize harvest in major producing provinces has improved the overall food supply situation. The current decline in food prices in key harvesting areas and nearby markets is especially beneficial to the previously drought affected marginal agricultural households. However, 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 several previously drought-affected pastoral areas improved overall food supply prospects. However, continued food security concerns are reported in the districts of Mandera, Turkana, Samburu, Marsabit, West Pokot and Baringo.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	212	52	2 484	2 748
Previous five years average imports	581	100	760	1 441
<u>2002/03 Domestic Availability</u>	<u>250</u>	<u>36</u>	<u>2 734</u>	<u>3 020</u>
2002 Production (rice in paddy terms)	200	55	2 734	2 989
2002 Production (rice in milled terms)	200	36	2 734	2 970
Possible stock drawdown	50	-	-	50
<u>2002/03 Utilization</u>	<u>850</u>	<u>176</u>	<u>3 534</u>	<u>4 560</u>
Food use	820	156	3 163	4 139
of which: local purchase requirement	-	-	100	100
Non-food use	30	20	371	421
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002/03 Import Requirement</u>	<u>600</u>	<u>140</u>	<u>800</u>	<u>1 540</u>
Anticipated commercial imports	500	140	600	1 240
Food aid needs	100	-	200	300
<u>Current Aid Position</u>				
Food aid pledges	44	-	2	46
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	30	30
of which: for local use	-	-	30	30
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>25</u>	<u>5</u>	<u>97</u>	<u>127</u>
<u>Indexes</u>				
2002 Production as % of average:				109
2002/03 Import requirement as % of average:				107

LESOTHO

Area:	30 000 sq km
Climate:	Highland rainy climate with mild winter. Rainy season: Oct.-April. Cool temperatures in May-September with frost hazard
Population:	2.21 million (2002 estimate); G.N.P. per caput: US\$550 (2001)
Specific characteristics of the country:	Low-income food-deficit country; land-locked
Logistics:	All imports through South Africa
Major foodcrops:	Maize, sorghum, vegetables
Marketing year:	April/March; Lean season: February-April
Share of cereals in total calorie intake:	75 percent

CURRENT SITUATION

Planting of the 2003 cereal crops is underway. Abundant rains in the third dekad of October and normal precipitation in the first two dekads of November benefited planting operations and development of early sown crops. However prospects have deteriorated with dry weather in the main western growing areas in the third dekad of November. Shortage of agricultural inputs has also constrained planting operations.

The food supply situation remains tight as a result of two consecutive reduced harvests. Some 650 000 people are in need of 36 000 tonnes of cereals as food aid in the period September 2002-March 2003. The districts most affected are Mokhotlong, Qacha's Nek, Quthing and Thaba Tseka. Prices of cereals are on the increase at the same time as half of the rural households are running out of cereal stocks.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	24	-	133	157
Previous five years average imports	57	4	157	218
<u>2002/03 Domestic Availability</u>	<u>27</u>	<u>-</u>	<u>47</u>	<u>74</u>
2002 Production (rice in paddy terms)	14	-	40	54
2002 Production (rice in milled terms)	14	-	40	54
Possible stock drawdown	13	-	7	20
<u>2002/03 Utilization</u>	<u>94</u>	<u>3</u>	<u>318</u>	<u>415</u>
Food use	93	3	316	412
of which: local purchase requirement	-	-	7	7
Non-food use	1	-	2	3
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002/03 Import Requirement</u>	<u>66</u>	<u>-</u>	<u>272</u>	<u>338</u>
Anticipated commercial imports	66	-	125	191
Food aid needs	-	-	147	147
<u>Current Aid Position</u>				
Food aid pledges	15	-	23	38
of which: delivered	15	-	23	38
Donor-financed purchases	-	-	7	7
of which: for local use	-	-	7	7
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>42</u>	<u>1</u>	<u>143</u>	<u>186</u>
<u>Indexes</u>				
2002 Production as % of average:				34
2002/03 Import requirement as % of average:				155

LIBERIA

Area:	97 750 sq km
Climate:	Southern half tropical wet, northern half tropical wet-dry; rainy season: March-November
Population:	3.0 million (2002 estimate); G.N.P. per caput: n.a.
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports and roads adequate
Major foodcrops:	Rice, roots and tubers, oils
Marketing year:	January/December; Lean season: July-August
Share of cereals in total calorie intake:	48 percent

CURRENT SITUATION

Following generally below-average rainfall through late October, harvest prospects are uncertain.

As a result of the persistent armed clashes, some 184 000 internally displaced persons from the north, northwest, and central regions are currently living in camps in other parts of the country. WFP, which has expressed concern about the continuing increase in the number of IDPs, continues to provide food assistance to them, in addition to more than 22 000 Sierra Leonean refugees still in the country. 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.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	115	-	115
Previous five years average imports	61	101	17	179
<u>2002 Domestic Availability</u>	<u>-</u>	<u>94</u>	<u>-</u>	<u>94</u>
2001 Production (rice in paddy terms)	-	145	-	145
2001 Production (rice in milled terms)	-	94	-	94
Possible stock drawdown	-	-	-	-
<u>2002 Utilization</u>	<u>55</u>	<u>239</u>	<u>10</u>	<u>304</u>
Food use	53	218	10	281
of which: local purchase requirement	-	-	-	-
Non-food use	2	21	-	23
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>55</u>	<u>145</u>	<u>10</u>	<u>210</u>
Anticipated commercial imports	40	140	-	180
Food aid needs	15	5	10	30
<u>Current Aid Position</u>				
Food aid pledges	22	-	6	28
of which: delivered	20	-	5	25
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>18</u>	<u>72</u>	<u>3</u>	<u>93</u>
<u>Indexes</u>				
2001 Production as % of average:				126
2002 Import requirement as % of average:				117

MADAGASCAR

Area:	582 000 sq km
Climate:	Eastern coast is tropical wet, the rest tropical wet-dry. Rainy season: October-March; tropical cyclones
Population:	16.81 million (2003 estimate); G.N.P. per caput: US\$260 (2001)
Specific characteristics of the country:	Low-income food-deficit country
Logistics:	Dilapidated roads and lack of spare parts and tyres
Major foodcrops:	Rice, roots, tubers, maize, fruit
Marketing year:	April/March; Lean season: February/March
Share of cereals in total calorie intake:	60 percent

CURRENT SITUATION

Planting of the 2003 cereal crops, mainly paddy, has started. Early prospects are favourable following good rains in late October and early November which improved soil moisture for field operations. However, more rains are needed in northern parts where unseasonable dry weather prevailed in the first week of November.

The 2002 paddy crop was estimated at the average level of 2.4 million tonnes. Despite the overall stable food supply situation, crops were sharply reduced in parts of the drought-prone southern area by dry weather. It is estimated that some 183 000 people in 13 districts, out of 89, in the Southern region are in need of food assistance as a result of a second consecutive poor harvest. The food situation is also tight for a large number of vulnerable people due the lingering effects of the political crisis in the first half of the year which severely disrupted economic activities, caused unemployment and resulted in sharp increases in food prices in urban areas. Following a Government appeal for international assistance, WFP will distribute 18 000 tonnes of food aid until next March to 394 250 most vulnerable people, including those worst affected by the political crisis and those who gathered a poor harvest in southern districts and in eastern parts affected by Cyclone Kesiny earlier in the year.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	9	2 507	172	2 688
Previous five years average imports	88	156	11	255
<u>2002/03 Domestic Availability</u>	<u>10</u>	<u>1 856</u>	<u>186</u>	<u>2 052</u>
2002 Production (rice in paddy terms)	10	2 670	181	2 861
2002 Production (rice in milled terms)	10	1 816	181	2 007
Possible stock drawdown	-	40	5	45
<u>2002/03 Utilization</u>	<u>111</u>	<u>1 997</u>	<u>199</u>	<u>2 307</u>
Food use	111	1 862	178	2 151
of which: local purchase requirement	-	-	-	-
Non-food use	-	135	21	156
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002/03 Import Requirement</u>	<u>101</u>	<u>141</u>	<u>13</u>	<u>255</u>
Anticipated commercial imports	80	120	5	205
Food aid needs	21	21	8	50
<u>Current Aid Position</u>				
Food aid pledges	21	20	8	49
of which: delivered	10	14	1	25
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>7</u>	<u>111</u>	<u>11</u>	<u>128</u>
<u>Indexes</u>				
2002 Production as % of average:				106
2002/03 Import requirement as % of average:				100

MALAWI

Area:	94 000 sq km
Climate:	Tropical wet-dry climate; rainy season: November-May
Population	11.44 million (2002 estimate); G.N.P. per caput: US\$170 (2001)
Specific characteristics of the country:	Low-income food-deficit country; land-locked country; importer and exporter of grain
Logistics:	Imports/exports through Beira (Mozambique) or Dar es Salaam (Tanzania)
Major foodcrops:	Maize, pulses, roots, tubers, rice
Marketing year:	April/March; Lean season: February-March
Share of cereals in total calorie intake:	70 percent

CURRENT SITUATION

Dry weather in the last two dekads of November in most areas, except the northern highlands, is delaying planting of the 2003 cereal crops, normally scheduled from the second half of October and resulted in poor germination of seeds. The Government has targeted 3 million households for the free distribution of agricultural inputs, mainly fertilizers, which is progressing well.

The food supply situation remains tight following two consecutive poor cereal harvests. An FAO/WFP Crop and Food Supply Assessment Mission in April-May 2002 estimated the cereal deficit at 433 000 tonnes.

Against WFP's food aid appeal of 171 000 tonnes of cereals for Malawi in the Southern Africa Regional Emergency Operation, the level of pledges by late October were adequate and 83 000 tonnes have already been received in the country. WFP stepped up its distribution in October, reaching approximately 2.3 million beneficiaries. This figure represents more than a 100 percent increase from September. Against commercial imports of maize, estimated by an FAO/WFP Mission in April-May at 225 000 tonnes, the Government has made arrangements to import 250 000 tonnes of maize, including replenishment of the Food Security Reserve. By late November, 194 000 tonnes had arrived in the country. Cross-border imports from Mozambique and Tanzania, estimated at 50 000-60 000 tonnes of maize, have also contributed to improve supplies. Prices of maize, which have declined from their peak in March, had started to increase from August but by early October they remained generally below their levels of last year.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	2	82	2 065	2 149
Previous five years average imports	40	1	86	127
<u>2002/03 Domestic Availability</u>	<u>2</u>	<u>63</u>	<u>1 597</u>	<u>1 662</u>
2002 Production (rice in paddy terms)	2	95	1 597	1 694
2002 Production (rice in milled terms)	2	62	1 597	1 661
Possible stock drawdown	-	1	-	1
<u>2002/03 Utilization</u>	<u>50</u>	<u>67</u>	<u>2 055</u>	<u>2 172</u>
Food use	50	55	1 776	1 881
of which: local purchase requirement	-	-	-	-
Non-food use	-	12	274	286
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	5	5
<u>2002/03 Import Requirement</u>	<u>48</u>	<u>4</u>	<u>458</u>	<u>510</u>
Anticipated commercial imports	48	4	250	302
Food aid needs	-	-	208	208
<u>Current Aid Position</u>				
Food aid pledges	-	-	150	150
of which: delivered	-	-	83	83
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>4</u>	<u>5</u>	<u>155</u>	<u>164</u>
<u>Indexes</u>				
2002 Production as % of average:				79
2002/03 Import requirement as % of average:				402

MALI

Area:	1 240 190 sq km
Climate:	From north to south: arid, semi-arid and tropical wet-dry; rainy season: May-October
Population:	10.94 million (2003 estimate); G.N.P. per caput: US\$210 (2001)
Specific characteristics of the country:	Low-income food-deficit country; land-locked Sahelian country
Logistics:	Roads inadequate during rainy season; river transport important; rail link to Dakar (Senegal)
Major foodcrops:	Millet, sorghum, rice, maize
Marketing year:	November/October; Lean season: July-September
Share of cereals in total calorie intake:	75 percent

CURRENT SITUATION

Following irregular and below-average rains in May and June, precipitation improved in early July and remained widespread and regular until early September. However, it decreased significantly during the last dekad of September.

A joint FAO/CILSS Crop Assessment Mission which visited the country from 7 to 11 October estimated 2002 aggregate cereal production at some 2 500 000 tonnes (rice in paddy equivalent), which is similar to both last year's good harvest and the average of the last five years. Compared to last year, rice production is forecast to decrease by 13 percent to some 816 000 tonnes, while coarse grains production, estimated at about 1 700 000, increased by 4 percent.

The overall food situation is satisfactory. Overall cereal prices started to decrease. The reconstitution of the National Security Stock to its optimum level of 35 000 tonnes will require the purchase of 15 000 tonnes in 2002/03.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	6	741	1 761	2 508
Previous five years average imports	53	80	5	138
<u>2002/03 Domestic Availability</u>	<u>11</u>	<u>555</u>	<u>1 700</u>	<u>2 266</u>
2002 Production (rice in paddy terms)	11	816	1 700	2 527
2002 Production (rice in milled terms)	11	555	1 700	2 266
Possible stock drawdown	-	-	-	-
<u>2002/03 Utilization</u>	<u>74</u>	<u>733</u>	<u>1 717</u>	<u>2 524</u>
Food use	73	527	1 438	2 038
of which: local purchase requirement	-	-	-	-
Non-food use	1	106	259	366
Exports or re-exports	-	100	20	120
Possible stock build up	-	-	-	-
<u>2002/03 Import Requirement</u>	<u>63</u>	<u>178</u>	<u>17</u>	<u>258</u>
Anticipated commercial imports	63	178	10	251
Food aid needs	-	-	7	7
<u>Current Aid Position</u>				
Food aid pledges	-	-	3	3
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>7</u>	<u>48</u>	<u>132</u>	<u>186</u>
<u>Indexes</u>				
2002 Production as % of average:				101
2002/03 Import requirement as % of average:				187

MAURITANIA

Area:	1 025 520 sq km
Climate:	Mostly a Saharian country; semi-arid fringe in extreme south with rains in June-September
Population:	2.71 million (2003 estimate); G.N.P. per caput: US\$350 (2001)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Port capacity adequate, though storms during January-March sometimes cause difficulties
Major foodcrops:	Wheat, rice, millet and sorghum
Marketing year:	November/October; Lean season: July-September
Share of cereals in total calorie intake:	54 percent

CURRENT SITUATION

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 the average of the last five years. In addition, freak rain storms from 9-11 January caused the death of 120 000 cattle, sheep and goats; destruction of 25 percent of already harvested crops; and loss of lives and property. Prices of cereals have risen considerably on most markets while animal prices decreased steeply. The food crisis has been amplified by poor rainfall during the 2002 growing season, which led to the failure of most 'dieri' (rainfed) crop, creating the risk of a severe food crisis. On 1 September the Government declared a national disaster and appealed for emergency food aid.

A joint FAO/CILSS/WFP Crop and Food Supply Assessment Mission which visited the country from 20 to 26 October, estimated 2002 aggregate cereal production at some 100 000 tonnes, about 40 percent less than the average for the previous five years and 18 percent below last year's poor harvest. The 'dieri' crop, which represents more than 80 percent of planted areas or about 60 percent of total cereal production in a normal year, decreased by 80 percent to some 8 000 tonnes.

The mission estimated cereal import requirements for the marketing year 2002/03 (November/October) at 322 534 tonnes, of which wheat accounts for almost 200 000 tonnes. Taking into account an anticipated commercial cereal import of 228 000 tonnes and 11 000 tonnes of food aid pledges, the total uncovered cereal deficit for the year is about 95 000 tonnes. Approximately 400 000 people throughout Mauritania will require food assistance. Emergency provision of agricultural inputs such as seeds is recommended to enable disaster-affected farming families to restart agricultural production during the next main planting season starting in June 2003.

Evidence of malnutrition abounds in the form of exhaustion and loss of weight, night blindness, scurvy, dehydration and diarrhoea and hunger-related deaths. 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.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	1	81	87	169
Previous five years average imports	249	42	4	295
<u>2002/03 Domestic Availability</u>	<u>20</u>	<u>45</u>	<u>32</u>	<u>97</u>
2002 Production (rice in paddy terms)	-	68	32	100
2002 Production (rice in milled terms)	-	45	32	77
Possible stock drawdown	20	-	-	20
<u>2002/03 Utilization</u>	<u>218</u>	<u>109</u>	<u>93</u>	<u>420</u>
Food use	178	99	82	359
of which: local purchase requirement	-	-	-	-
Non-food use	25	8	6	39
Exports or re-exports	15	2	1	18
Possible stock build up	-	-	4	4
<u>2002/03 Import Requirement</u>	<u>198</u>	<u>64</u>	<u>61</u>	<u>323^{1/}</u>
Anticipated commercial imports	192	18	8	217
Food aid needs	6	46	54	106
<u>Current Aid Position</u>				
Food aid pledges	6	5	-	11
of which: delivered	3	-	-	3
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>66</u>	<u>36</u>	<u>30</u>	<u>132</u>
<u>Indexes</u>				
2002 Production as % of average:				59
2002/03 Import requirement as % of average:				109

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

MAURITIUS

Area:	1 850 sq km
Climate:	No dry months, most rainfall in November-July; tropical cyclones
Population:	1.15 million (2002 estimate); G.N.P. per caput: US\$3 830 (2001)
Specific characteristics of the country:	Cereal consumption covered almost entirely by imports
Logistics:	Inadequate port handling capacity; road system good
Major foodcrops:	Vegetables
Marketing year:	January/December
Share of cereals in total calorie intake:	48 percent

CURRENT SITUATION

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

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	-	2	2
Previous five years average imports	151	78	35	264
<u>2002 Domestic Availability</u>	<u>=</u>	<u>=</u>	<u>2</u>	<u>2</u>
2001 Production (rice in paddy terms)	-	-	2	2
2001 Production (rice in milled terms)	-	-	2	2
Possible stock drawdown	-	-	-	-
<u>2002 Utilization</u>	<u>150</u>	<u>78</u>	<u>22</u>	<u>250</u>
Food use	104	78	3	185
of which: local purchase requirement	-	-	-	-
Non-food use	6	-	19	25
Exports or re-exports	40	-	-	40
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>150</u>	<u>78</u>	<u>20</u>	<u>248</u>
Anticipated commercial imports	150	78	20	248
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>90</u>	<u>68</u>	<u>3</u>	<u>161</u>
<u>Indexes</u>				
2001 Production as % of average:				100
2002 Import requirement as % of average:				94

MOZAMBIQUE

Area:	784 000 sq km
Climate:	Tropical wet-dry; coast is semi-arid
Population:	18.19 million (2002 estimate); G.N.P. per caput: US\$210 (2001)
Specific characteristics of the country:	Low-income food-deficit country; exposed to tropical storms and cyclones
Logistics:	Dilapidated rail and road transport fleet; lack of fuel and spares; poor roads; substantial Deliveries by coastal vessels
Major foodcrops:	Roots, tubers, maize
Marketing year:	April/March; Lean season: February-April
Share of cereals in total calorie intake:	53 percent

CURRENT SITUATION

Excessive rains in the first week of November in southern parts, which resulted in localized floods have been followed by well below-average precipitation until the end of the month which has delayed planting of the 2003 cereal crops. Expectations of an increase in the area planted in response to high level of prices and adequate input availability could not materialize if more rains are not received soon.

The overall food supply situation remains stable following the good cereal harvest of 2002 that resulted in exportable surpluses in northern parts. Prices of maize which have increased sharply since August, stabilized in October. However, in the capital Maputo they are above their level of a year ago. The increase in prices reflects steady internal demand and substantial exports to deficit neighbouring countries.

The food situation remains difficult in southern provinces and parts of the central and northern provinces, where cereal production declined by 34 percent from the reduced level of the previous year, and 590 000 people are estimated to be in need of relief assistance. Emergency food aid requirement for the period September 2002-March 2003 are estimated at 49 000 tonnes. Food aid in WFP pipeline is adequate to cover requirements until February. However, distributions have been delayed because low capacity of implementing partners.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	2	175	1 463	1 640
Previous five years average imports	201	123	113	437
<u>2002/03 Domestic Availability</u>	<u>-</u>	<u>109</u>	<u>1 626</u>	<u>1 735</u>
2002 Production (rice in paddy terms)	-	164	1 606	1 770
2002 Production (rice in milled terms)	-	109	1 606	1 715
Possible stock drawdown	-	-	20	20
<u>2002/03 Utilization</u>	<u>260</u>	<u>371</u>	<u>1 746</u>	<u>2 377</u>
Food use	255	341	1 273	1 869
of which: local purchase requirement	-	-	20	20
Non-food use	5	30	273	308
Exports or re-exports	-	-	200	200
Possible stock build up	-	-	-	-
<u>2002/03 Import Requirement</u>	<u>260</u>	<u>262</u>	<u>120</u>	<u>642</u>
Anticipated commercial imports	260	262	70	592
Food aid needs	-	-	50	50
<u>Current Aid Position</u>				
Food aid pledges	35	7	63	105
of which: delivered	-	-	63	63
Donor-financed purchases	-	-	5	5
of which: for local use	-	-	5	5
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>14</u>	<u>19</u>	<u>70</u>	<u>103</u>
<u>Indexes</u>				
2002 Production as % of average:				108
2002/03 Import requirement as % of average:				147

NAMIBIA

Area:	823 000 sq km
Climate:	Mostly arid (south-west and coast) or semi-arid. Only north and north-east gets regular rainfall in November-April
Population:	1.98 million (2002 estimate); G.N.P. per caput: US\$1 960 (2001)
Specific characteristics of the country:	Arid to semi-arid country; cereal production mainly in the north
Logistics:	Good road and railway network
Major foodcrops:	Millet, maize, sorghum, wheat
Marketing year:	May/April;
Share of cereals in total calorie intake:	48 percent

CURRENT SITUATION

Abundant rains in the third dekad of November and first week of December in northern growing areas, benefited planting of the 2003 cereal crops. Early prospects are favourable.

The food supply situation is tight for large numbers of people in rural areas following two consecutive reduced cereal harvests. While most of the deficit in marketing year 2002/03 (May/April) estimated at 156 000 tonnes, is expected to be covered on commercial basis, only 71 000 tonnes have been received in the country by late November. Prices of cereals are reported one-quarter higher than a year earlier. Some 345 000 most vulnerable people face food shortages and are in need of food assistance until the next harvest. The Government plans to distribute 30 000 tonnes of cereals to the affected population and has allocated up to US\$ 14 million for the emergency operation.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	5	-	105	110
Previous five years average imports	56	-	92	148
<u>2002/03 Domestic Availability</u>	<u>6</u>	<u>-</u>	<u>75</u>	<u>81</u>
2002 Production (rice in paddy terms)	6	-	63	69
2002 Production (rice in milled terms)	6	-	63	69
Possible stock drawdown	-	-	12	12
<u>2002/03 Utilization</u>	<u>54</u>	<u>-</u>	<u>183</u>	<u>237</u>
Food use	53	-	176	229
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	7	7
Exports or re-exports	-	-	-	-
Possible stock build up	1	-	-	1
<u>2002/03 Import Requirement</u>	<u>48</u>	<u>-</u>	<u>108</u>	<u>156</u>
Anticipated commercial imports	48	-	108	156
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	20	-	-	20
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>28</u>	<u>-</u>	<u>95</u>	<u>124</u>
<u>Indexes</u>				
2002 Production as % of average:				63
2002/03 Import requirement as % of average:				105

NIGER

Area:	1 267 000 sq km
Climate:	Northern part arid, southern part semi-arid with rains in June-October
Population:	10.67 million (2002 estimate); G.N.P. per caput: US\$170 (2001)
Specific characteristics of the country:	Low-income food-deficit country; land-locked Sahelian country
Logistics:	Roads inadequate during rainy season
Major foodcrops:	Millet and sorghum, pulses, roots and tubers
Marketing year:	November/October; Lean season: July-September
Share of cereals in total calorie intake:	70 percent

CURRENT SITUATION

Good rains from late July through August remained widespread over the main producing areas in September. A joint FAO/CILSS Crop Assessment Mission in early October gave a provisional estimate of the aggregate output of cereals at around 3 million tonnes. This is similar to the previous year level and above average.

Harvesting has started in most regions, improving cereal supply and reducing prices on markets. Farmers should be able to reconstitute their stocks as well as the government the national security stock at its optimum level of 35 000 tonnes.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	9	60	2 486	2 555
Previous five years average imports	58	133	274	465
<u>2002/03 Domestic Availability</u>	<u>12</u>	<u>103</u>	<u>3 056</u>	<u>3 172</u>
2002 Production (rice in paddy terms)	2	82	3 006	3 090
2002 Production (rice in milled terms)	2	53	3 006	3 062
Possible stock drawdown	10	50	50	110
<u>2002/03 Utilization</u>	<u>57</u>	<u>253</u>	<u>3 236</u>	<u>3 547</u>
Food use	51	243	2 760	3 055
of which: local purchase requirement	-	-	5	5
Non-food use	1	10	461	472
Exports or re-exports	5	-	15	20
Possible stock build up	-	-	-	-
<u>2002/03 Import Requirement</u>	<u>45</u>	<u>150</u>	<u>180</u>	<u>375</u>
Anticipated commercial imports	45	150	180	375
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	2	2
of which: for local use	-	-	2	2
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>4</u>	<u>20</u>	<u>232</u>	<u>257</u>
<u>Indexes</u>				
2002 Production as % of average:				121
2002/03 Import requirement as % of average:				81

NIGERIA

Area:	923 770 sq km
Climate:	Mostly tropical wet-dry, south-west tropical wet, extreme north semi-arid
Population:	116.8 million (2002 estimate); G.N.P. per caput: US\$290 (2001)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports adequate, roads inadequate during rainy season
Major foodcrops:	Roots and tubers, coarse grains, rice
Marketing year:	January/December; Lean season: April-May
Share of cereals in total calorie intake:	43 percent

CURRENT SITUATION

Following widespread and regular rains since July, precipitation decreased in the north in September and ceased in mid-October. Strong rains were registered in the south in October benefiting the second maize crop. Coarse grains are being harvested in the north. Reflecting generally favourable growing conditions during the rainy season, an average to above-average harvest is anticipated. The overall food supply situation is satisfactory. Some population groups, however, remain vulnerable following communal conflicts notably in the states of Benue, Nasarawa and Taraba. From April to June, more than 85 000 IDPs have been resettled in their home villages in central region.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	49	3 301	18 797	22 147
Previous five years average imports	1 604	793	87	2 484
<u>2002 Domestic Availability</u>	<u>150</u>	<u>2 200</u>	<u>19 614</u>	<u>21 964</u>
2001 Production (rice in paddy terms)	50	3 500	19 614	23 164
2001 Production (rice in milled terms)	50	2 100	19 614	21 764
Possible stock drawdown	100	100	-	200
<u>2002 Utilization</u>	<u>1 850</u>	<u>3 200</u>	<u>19 684</u>	<u>24 734</u>
Food use	1 798	2 780	15 083	19 661
of which: local purchase requirement	-	-	-	-
Non-food use	52	420	3 921	4 393
Exports or re-exports	-	-	180	180
Possible stock build up	-	-	500	500
<u>2002 Import Requirement</u>	<u>1 700</u>	<u>1 000</u>	<u>70</u>	<u>2 770</u>
Anticipated commercial imports	1 700	1 000	70	2 770
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	13	-	13
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>15</u>	<u>24</u>	<u>129</u>	<u>168</u>
<u>Indexes</u>				
2001 Production as % of average:				105
2002 Import requirement as % of average:				112

RWANDA

Area:	25 000 sq km
Climate:	Highland rainy climate with moderate temperature (20°C); two rainy seasons: February-May and September-November
Population:	8.36 million (2002 estimate); G.N.P. per caput: US\$220 (2001)
Specific characteristics of the country:	Low-income food-deficit country; land-locked country
Logistics:	Ports: Mombasa (Kenya) and Dar es Salaam (Tanzania); roads and railway inadequate
Major foodcrops:	Roots, tubers, pulses, plantains, sorghum, maize
Marketing year:	January/December; Lean season: November-December
Share of cereals in total calorie intake:	25 percent

CURRENT SITUATION

Mostly dry weather from September to mid-October, particularly in areas of low and middle-altitude, delayed plantings of beans and maize of the 2003 A season and resulted in reductions in the area planted. Below-average precipitation in November, particularly in eastern parts have further affected crop development of both cereal and non-cereal crops. The harvest, normally towards the end of the year, is likely to decline from the good level of last year due to lower planting and yields.

Following a good harvest of the 2002 B season, markets are well supplied with basic staples sorghum, cassava and bananas, and prices remain stable. By contrast, prices of beans, production of which was reduced last season, have increased sharply in the past months. Despite the overall satisfactory food supply situation, a recent vulnerability assessment undertaken by WFP and other international agencies have found that 274 000 most vulnerable persons in chronically food deficit areas are in need of food assistance during the lean period from November to December.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	5	11	203	219
Previous five years average imports	15	14	170	199
<u>2002 Domestic Availability</u>	<u>6</u>	<u>12</u>	<u>264</u>	<u>282</u>
2002 Production (rice in paddy terms)	6	18	249	273
2002 Production (rice in milled terms)	6	12	249	267
Possible stock drawdown	-	-	15	15
<u>2002 Utilization</u>	<u>21</u>	<u>22</u>	<u>429</u>	<u>472</u>
Food use	21	21	347	389
of which: local purchase requirement	-	-	-	-
Non-food use	-	1	82	83
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>15</u>	<u>10</u>	<u>165</u>	<u>190</u>
Anticipated commercial imports	-	-	150	150
Food aid needs	15	10	15	40
<u>Current Aid Position</u>				
Food aid pledges	-	-	28	28
of which: delivered	-	-	25	25
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>2</u>	<u>2</u>	<u>40</u>	<u>45</u>
<u>Indexes</u>				
2002 Production as % of average:				125
2002 Import requirement as % of average:				95

SAO TOME AND PRINCIPE

Area:	964 sq km
Climate:	Tropical wet; rainfall increases with altitude and towards southern parts of the islands
Population:	153 300 (2002 estimate); G.N.P. per caput: US\$280 (2001)
Specific characteristics of the country:	Low-income food-deficit country; archipelago
Logistics:	Ports and roads adequate
Major foodcrops:	Bananas, breadfruit, cocoyam
Marketing year:	January/December
Share of cereals in total calorie intake:	36 percent

CURRENT SITUATION

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

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	-	1	1
Previous five years average imports	3	5	2	10
<u>2002 Domestic Availability</u>	<u>=</u>	<u>=</u>	<u>1</u>	<u>1</u>
2001 Production (rice in paddy terms)	-	-	1	1
2001 Production (rice in milled terms)	-	-	1	1
Possible stock drawdown	-	-	-	-
<u>2002 Utilization</u>	<u>3</u>	<u>7</u>	<u>3</u>	<u>13</u>
Food use	3	6	3	12
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	-	-
Exports or re-exports	-	-	-	-
Possible stock build up	-	1	-	1
<u>2002 Import Requirement</u>	<u>3</u>	<u>7</u>	<u>2</u>	<u>12</u>
Anticipated commercial imports	3	2	1	6
Food aid needs	-	5	1	6
<u>Current Aid Position</u>				
Food aid pledges	-	5	-	5
of which: delivered	-	5	-	5
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>20</u>	<u>39</u>	<u>20</u>	<u>78</u>
<u>Indexes</u>				
2001 Production as % of average:				100
2002 Import requirement as % of average:				120

SENEGAL

Area:	196 720 sq km
Climate:	Semi-arid in north, tropical wet-dry in south, with rains in June-October
Population:	10.27 million (2003 estimate); G.N.P. per caput: US\$480 (2001)
Specific characteristics of the country:	Low-income food-deficit country; coastal Sahelian country
Logistics:	Port capacity adequate; gateway to Mali.
Major foodcrops:	Millet and sorghum, rice, maize, wheat
Marketing year:	November/October; Lean season: August-September
Share of cereals in total calorie intake:	61 percent

CURRENT SITUATION

Following the dry spell of July which severely stressed crops and caused crop failure in many areas, precipitation resumed in early August and remained widespread and well distributed until mid-September. Some of the crops that suffered temporary wilting recovered. However, rainfall decreased significantly during the last decade of September before resuming in October.

A joint FAO/CILSS/WFP Crop and Food Supply Assessment Mission which visited the country from 14 to 20 October estimated 2002 aggregate cereal production at some 900 000 tonnes, 7 percent less than last year's average harvest and about 2 percent below the average for the previous five years. The important millet crop is expected to decrease (for the second consecutive year) by 10 percent to some 425 000 tonnes while the paddy crop is estimated at about 219 000 tonnes, similar to the average of the past five years but 10 percent lower than last year. Production of groundnut, the main cash crop, will be down by more than 35 percent to some 533 000 tonnes.

Millet prices have increased steeply over last marketing year, rising by 70 percent from October 2001 to September 2002. Although the total cereal import requirement, estimated at 1 056 440 tonnes, is anticipated to be covered by commercial rice and wheat imports, millet prices are likely to stay high, given that its production has decreased for the second consecutive year and that its supply will be limited in the whole western Sahel region during marketing year 2002/03. The impact on rural vulnerable households' food security should be monitored closely.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	217	708	925
Previous five years average imports	244	566	52	862
<u>2002/03 Domestic Availability</u>	<u>-</u>	<u>154</u>	<u>682</u>	<u>836</u>
2002 Production (rice in paddy terms)	-	219	682	901
2002 Production (rice in milled terms)	-	154	682	836
Possible stock drawdown	-	-	-	-
<u>2002/03 Utilization</u>	<u>257</u>	<u>838</u>	<u>797</u>	<u>1 892</u>
Food use	252	812	686	1 750
of which: local purchase requirement	-	-	-	-
Non-food use	5	26	106	137
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	5	5
<u>2002/03 Import Requirement</u>	<u>257</u>	<u>685</u>	<u>115</u>	<u>1 057</u>
Anticipated commercial imports	257	678	115	1 050
Food aid needs	-	7	-	7
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>25</u>	<u>79</u>	<u>67</u>	<u>170</u>
<u>Indexes</u>				
2002 Production as % of average:				97
2002/03 Import requirement as % of average:				123

SEYCHELLES

Area:	455 sq km
Climate:	Tropical wet; rains throughout the year, peaking in October-May
Population:	78 000 (2002 estimate); G.N.P. per caput: US\$7 050 (2000)
Specific characteristics of the country:	Consists of about 100 islands scattered over more than 1 million sq km. Tourism provides 50 percent of G.D.P.
Logistics:	-
Major foodcrops:	Coconuts, fruit, vegetables
Marketing year:	January/December
Share of cereals in total calorie intake:	49 percent

CURRENT SITUATION

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

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

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

SIERRA LEONE

Area:	71 740 sq km
Climate:	Mostly tropical wet-dry; extreme south tropical wet; rainy season: March-October
Population:	5.15 million (2002 estimate); G.N.P. per caput: US\$140 (2001)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Roads inadequate
Major foodcrops:	Rice, roots and tubers
Marketing year:	January/December; Lean season: July-August
Share of cereals in total calorie intake:	57 percent

CURRENT SITUATION

Rainfall was generally below average this season. However, harvest prospects are generally favourable 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 49 000 tonnes of food aid.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	316	40	356
Previous five years average imports	70	127	23	220
<u>2002 Domestic Availability</u>	-	186	37	224
2001 Production (rice in paddy terms)	-	311	37	348
2001 Production (rice in milled terms)	-	186	37	224
Possible stock drawdown	-	-	-	-
<u>2002 Utilization</u>	60	336	52	449
Food use	60	280	39	378
of which: local purchase requirement	-	-	-	-
Non-food use	-	47	9	55
Exports or re-exports	-	-	-	-
Possible stock build up	-	10	5	15
<u>2002 Import Requirement</u>	60	150	15	225
Anticipated commercial imports	27	149	-	176
Food aid needs	33	2	15	49
<u>Current Aid Position</u>				
Food aid pledges	54	2	13	68
of which: delivered	33	2	12	47
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	12	54	8	73
<u>Indexes</u>				
2001 Production as % of average:				98
2002 Import requirement as % of average:				102

SOMALIA

Area:	627 000 sq km
Climate:	Semi-arid in the south; rest arid
Population:	6.54 million (2003 estimate); G.N.P. per caput; n.a.
Specific characteristics of the country:	Low-income food-deficit country
Logistics:	Inadequate port facilities; serious shortage of fuel and spare parts
Major foodcrops:	Maize, sorghum, sesame
Marketing year:	August/July; Lean season: June-August
Share of cereals in total calorie intake:	45 percent

CURRENT SITUATION

Good rains during the latter half of October, which were particularly abundant in major growing areas, encouraged land preparation and early sowing of the 2002/03 secondary "deyr" season crops. Flash floods were recently reported in parts but resulted in limited crop damage.

The recently harvested main "gu" season cereal crop in southern Somalia is estimated at about 209 000 tonnes (80 000 tonnes of sorghum and 129 000 tonnes of maize). 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 parts due to successive years of drought and insecurity.

Elsewhere, in north-western Somalia (Somaliland) despite some recent rainfall the food situation is severe in Sool, Sanag and Nugal regions where the last poor "gu" season rains have affected crops 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. However, emerging export opportunities in chilled meat to some countries in the Middle East has helped to partly offset the negative impact on pastoralists and created job opportunities to the urban poor.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	2	260	262
Previous five years average imports	111	106	68	285
<u>2002/03 Domestic Availability</u>	<u>20</u>	<u>1</u>	<u>279</u>	<u>300</u>
2002 Production (rice in paddy terms)	-	2	279	281
2002 Production (rice in milled terms)	-	1	279	280
Possible stock drawdown	20	-	-	20
<u>2002/03 Utilization</u>	<u>120</u>	<u>101</u>	<u>399</u>	<u>620</u>
Food use	120	91	328	539
of which: local purchase requirement	-	-	-	-
Non-food use	-	10	41	51
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	30	30
<u>2002/03 Import Requirement</u>	<u>100</u>	<u>100</u>	<u>120</u>	<u>320</u>
Anticipated commercial imports	100	100	75	275
Food aid needs	-	-	45	45
<u>Current Aid Position</u>				
Food aid pledges	-	-	15	15
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>18</u>	<u>14</u>	<u>50</u>	<u>82</u>
<u>Indexes</u>				
2002 Production as % of average:				107
2002/03 Import requirement as % of average:				112

SOUTH AFRICA

Area:	1.22 million sq km
Climate:	Sub-tropical with rains concentrated in the summer months (November-April); occasional snow in winter over higher parts of plateau and Cape ranges; an average of 120 days frost in the interior plateau
Population:	41.35 million (2002 estimate); GNP per caput US\$2 900 (2001)
Specific characteristics of the country:	Normally net food exporter, notably maize
Logistics:	Adequate port, rail and road facilities
Major foodcrops:	Maize, wheat
Marketing year:	May/April; Lean season: February-April
Share of cereals in total calorie intake:	54 percent

CURRENT SITUATION

Harvest of the 2002 winter crops is well advanced and planting of the 2003 summer coarse grains has started. Latest production forecast of the 2002 wheat crop have been revised downward to 2.28 million tonnes, 8 percent lower than the good crop of last year but still average. The decline in production mainly reflects lower yields. By contrast, the minor barley crop is expected to increase by 15 percent due to higher plantings and yields.

Good rains in early December in the main maize growing areas, allowed resumption of planting of the 2003 maize crop, delayed by well below-average precipitation in November. Official reports on the first planting intentions indicate an increase of 9 percent in the area planted to maize to 3.081 million hectares. This reflects a rise of 19 percent in the area to white maize and a decline of 7 percent in the area to yellow maize. The likely increase in sowings is in response to higher price expectations, crop rotation practices and increased demand for white maize in other Southern Africa countries. Plantings of minor sorghum crop are expected to increase by 14 percent from last year's level to 86 000 hectares.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	2 163	3	9 272	11 438
Previous five years average exports	130	-	1 166	1296
<u>2002/03 Domestic Availability</u>	<u>2 352</u>	<u>2</u>	<u>9 513</u>	<u>11 867</u>
2002 Production (rice in paddy terms)	2 282	3	9 513	11 798
2002 Production (rice in milled terms)	2 282	2	9 513	11 797
Possible stock drawdown	70	-	-	70
<u>2002/03 Utilization</u>	<u>2 882</u>	<u>652</u>	<u>10 139</u>	<u>13 673</u>
Food Use	2 520	612	4 473	7 605
of which: local purchase requirement	-	-	-	-
Non-food use	102	40	4 351	4 493
Exports or Re-exports	260	-	1 220	1 480
Possible stock build up	-	-	95	95
<u>2002/03 Import Requirement</u>	<u>530</u>	<u>650</u>	<u>626</u>	<u>1 806</u>
Anticipated commercial imports	530	650	626	1 806
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: Delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/Year)</u>	<u>61</u>	<u>15</u>	<u>108</u>	<u>184</u>
<u>Indexes</u>				
2002 production as % of average:				103
2002/03 import requirement as % of average:				139

SUDAN

Area:	2.4 million sq km
Climate:	From north to south, arid, semi-arid and tropical wet-dry. Rainy season: May-October
Population:	33.70 million (2003 estimate); GNP per caput: US\$330 (2001)
Specific characteristics of the country:	Low-income food-deficit country; cereal production mainly in eastern and central areas.
Logistics:	Roads, railway and river transport inadequate
Major foodcrops:	Sorghum, millet, wheat, roots and tubers, oils
Marketing year:	November/October; Lean season: September-October
Share of cereals in total calorie intake:	51 percent

CURRENT SITUATION

Preliminary forecasts from the recently concluded FAO/WFP Crop and Food Supply Assessment Mission to Sudan indicate a significant decline in the 2002 cereal crop compared to last year's good crop due to conflict related displacements and erratic rainfall. Report of the Mission's findings will be issued soon.

Escalation of conflict in parts of southern Sudan during 2002 has exacerbated an already poor food security situation. 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.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	306	7	4 079	4 392
Previous five years average imports	903	34	103	1 040
<u>2002/03 Domestic Availability</u>	<u>232</u>	<u>6</u>	<u>4 149</u>	<u>4 387</u>
2002 Production (rice in paddy terms)	232	10	3 577	3 819
2002 Production (rice in milled terms)	232	6	3 577	3 815
Possible stock drawdown	-	-	572	572
<u>2002/03 Utilization</u>	<u>1 482</u>	<u>56</u>	<u>4 239</u>	<u>5 777</u>
Food use	1 432	55	3 423	4 910
of which: local purchase requirement	-	-	2	2
Non-food use	30	1	726	757
Exports or re-exports	-	-	90	90
Possible stock build up	20	-	-	20
<u>2002/03 Import Requirement</u>	<u>1 250</u>	<u>50</u>	<u>90</u>	<u>1 390</u>
Anticipated commercial imports	1 150	50	-	1 200
Food aid needs	100	-	90	190
<u>Current Aid Position</u>				
Food aid pledges	11	-	27	38
of which: delivered	-	-	10	10
Donor-financed purchases	-	-	2	2
of which: for local use	-	-	2	2
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>43</u>	<u>2</u>	<u>102</u>	<u>146</u>
<u>Indexes</u>				
2002 Production as % of average:				87
2002/03 Import requirement as % of average:				134

SWAZILAND

Area:	17 000 sq km
Climate:	Highland rainy climate. Rainy season: October-April; cool temperatures in May- September
Population:	1.06 million (2002 estimate); G.N.P. per caput: US\$1 300 (2001)
Specific characteristics of the country:	Low-income food-deficit country; land-locked country
Logistics:	Good road network; imports through Mozambique or South Africa
Major foodcrops:	Maize
Marketing year:	May/April; Lean season: February-April
Share of cereals in total calorie intake:	55 percent

CURRENT SITUATION

Prolonged dry weather in November and early December is delaying planting of the 2003 cereal crops. More rains are urgently needed to avoid a sharp reduction in the area planted.

The food supply situation is difficult as a result of three consecutive years of below-average harvests. Some 265 000 people are estimated to be in need of food assistance until next harvest. Against a food aid requirement of some 15 000 tonnes of cereals, 10 000 have been received in the country by late November. Additionally, the Government has distributed 500 tonnes. However, commercial imports have only reached 27 000 tonnes against an expected level of 96 000 tonnes. Prices of maize are on the increase.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	1	108	109
Previous five years average imports	40	7	30	77
<u>2002/03 Domestic Availability</u>	<u>9</u>	<u>-</u>	<u>68</u>	<u>77</u>
2002 Production (rice in paddy terms)	-	-	68	68
2002 Production (rice in milled terms)	-	-	68	68
Possible stock drawdown	9	-	0	9
<u>2002/03 Utilization</u>	<u>45</u>	<u>4</u>	<u>139</u>	<u>188</u>
Food use	45	4	135	184
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	4	4
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002/03 Import Requirement</u>	<u>36</u>	<u>4</u>	<u>71</u>	<u>111</u>
Anticipated commercial imports	36	4	56	96
Food aid needs	-	-	15	15
<u>Current Aid Position</u>				
Food aid pledges	-	-	10	10
of which: delivered	-	-	10	10
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>42</u>	<u>4</u>	<u>127</u>	<u>173</u>
<u>Indexes</u>				
2002 Production as % of average:				62
2002/03 Import requirement as % of average:				144

TANZANIA

Area:	886 000 sq km
Climate:	Tropical wet-dry climate with two rainy seasons in north (November-December and March-May) and one in south (November-April)
Population:	34.77 million (2002 estimate); G.N.P. per caput: US\$270 (2001)
Specific characteristics of the country:	Low-income food-deficit country; cereal surplus production in south and south-west; cereal deficit in central and north-west. Distribution difficulties
Logistics:	Serious shortage of rolling stock, fuel and spare parts
Major foodcrops:	Maize, roots, tubers, sorghum, pulses, plantains, rice
Marketing year:	June/May; Lean season: February-April
Share of cereals in total calorie intake:	60 percent

CURRENT SITUATION

Planting of the 2002/03 short season "vuli" crops in the bi-modal northern areas is underway. The 2002 total cereal production (maize, rice, wheat, sorghum and millet) at 4.3 (milled basis) million tonnes, is about 10 percent above last year's harvest due to favourable rains. Similarly, production of non-cereal crops (pulses, potatoes, cassava and plantains) is reported to be good.

The overall food situation remains satisfactory with increased on-farm stocks and market supplies. However, current wholesale prices for maize in major maize producing regions (including Rukwa, Mbeya, and Iringa in the Southern Highlands, and Dodoma in central Tanzania) were higher this month than the previous five-year average. Also, on some other markets such as Kilimanjaro and Tanga (northern Tanzania), wholesale prices for maize have already started to rise at earlier dates relative to their five-year average trends.

WFP distributed over 3 900 tonnes of food in end-October to early-November to almost 529 000 refugees in Ngara, Kibondo, Kasulu and Lugufu camps.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	89	788	3 135	4 012
Previous five years average imports	278	72	92	442
<u>2002/03 Domestic Availability</u>	<u>179</u>	<u>507</u>	<u>3 704</u>	<u>4 390</u>
2002 Production (rice in paddy terms)	79	780	3 704	4 563
2002 Production (rice in milled terms)	79	507	3 704	4 290
Possible stock drawdown	100	-	-	100
<u>2002/03 Utilization</u>	<u>299</u>	<u>587</u>	<u>3 774</u>	<u>4 660</u>
Food use	271	537	3 304	4 112
of which: local purchase requirement	-	-	60	60
Non-food use	8	50	370	428
Exports or re-exports	20	-	50	70
Possible stock build up	-	-	50	50
<u>2002/03 Import Requirement</u>	<u>120</u>	<u>80</u>	<u>70</u>	<u>270</u>
Anticipated commercial imports	117	80	20	217
Food aid needs	3	-	50	53
<u>Current Aid Position</u>				
Food aid pledges	3	-	14	17
of which: delivered	3	-	14	17
Donor-financed purchases	-	-	19	19
of which: for local use	-	-	19	19
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>8</u>	<u>15</u>	<u>95</u>	<u>118</u>
<u>Indexes</u>				
2002 Production as % of average:				114
2002/03 Import requirement as % of average:				61

TOGO

Area:	56 790 sq km
Climate:	Tropical wet-dry; two rainy seasons in south (March-June and October) and one in North (May-October)
Population:	4.87 million (2002 estimate) G.N.P. per caput: US\$270 (2001)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports and roads adequate; gateway to Burkina Faso and Niger
Major foodcrops:	Roots and tubers, coarse grains, fruit
Marketing year:	January/December; Lean season: April-July
Share of cereals in total calorie intake:	40 percent

CURRENT SITUATION

Following generally widespread precipitation during the rainy season, rains ceased in late October over the northern half of the country. In the south, the second maize crop is developing satisfactorily. In the north, coarse grains are being harvested.

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

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	74	612	686
Previous five years average imports	56	157	15	228
<u>2002 Domestic Availability</u>	<u>:-</u>	<u>41</u>	<u>651</u>	<u>693</u>
2001 Production (rice in paddy terms)	-	61	651	712
2001 Production (rice in milled terms)	-	41	651	693
Possible stock drawdown	-	-	-	-
<u>2002 Utilization</u>	<u>60</u>	<u>151</u>	<u>651</u>	<u>863</u>
Food use	56	69	413	538
of which: local purchase requirement	-	-	-	-
Non-food use	2	12	213	228
Exports or re-exports	2	70	15	87
Possible stock build up	-	-	10	10
<u>2002 Import Requirement</u>	<u>60</u>	<u>110</u>	<u>:-</u>	<u>170^{1/}</u>
Anticipated commercial imports	60	105	-	165
Food aid needs	-	5	-	5
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>12</u>	<u>14</u>	<u>85</u>	<u>110</u>
<u>Indexes</u>				
2001 Production as % of average:				104
2002 Import requirement as % of average:				75

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

UGANDA

Area:	200 000 sq km
Climate:	North-east is semi-arid, rest of the country is tropical wet-dry; main rainy period is March-October
Population:	22.39 million (2002 estimate); G.N.P. per caput: US\$280 (2001)
Specific characteristics of the country:	Low-income food deficit country
Logistics:	Ports: Mombasa (Kenya) and Dar es Salaam (Tanzania); roads and railways inadequate
Major foodcrops:	Roots, tubers, plantains, pulses, maize, millet, sorghum
Marketing year:	January/December; Lean season: April-May
Share of cereals in total calorie intake:	35 percent

CURRENT SITUATION

Delayed onset of the secondary season rainfall coupled with sharp increase in fighting in northern Uganda has severely affected the food supply situation with more than half a million people requiring immediate humanitarian assistance. Crop failure in the north-eastern region of Karamoja due to long dry spells in the recently concluded only cropping season of the region has also aggravated the food difficulties.

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. However, minimal livestock migration to dry season grazing areas were reported. Recent rainfall in the south-western "cattle corridor" has also replenished water and pasture.

Overall stable crop prices continue to favour household access to food. However, the intensification of conflict and insecurity in northern parts have displaced a large number people, adding to the large IDP population. Nearly 75 000 people are currently being assisted in several parts of the country.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	10	91	1 816	1 917
Previous five years average imports	65	41	41	147
<u>2002 Domestic Availability</u>	<u>24</u>	<u>76</u>	<u>2 181</u>	<u>2 281</u>
2002 Production (rice in paddy terms)	14	114	2 181	2 309
2002 Production (rice in milled terms)	14	76	2 181	2 271
Possible stock drawdown	10	-	-	10
<u>2002 Utilization</u>	<u>100</u>	<u>121</u>	<u>2 246</u>	<u>2 467</u>
Food use	99	121	1 624	1 844
of which: local purchase requirement	-	-	10	10
Non-food use	1	-	252	253
Exports or re-exports	-	-	300	300
Possible stock build up	-	-	70	70
<u>2002 Import Requirement</u>	<u>76</u>	<u>45</u>	<u>65</u>	<u>186</u>
Anticipated commercial imports	50	45	-	95
Food aid needs	26	-	65	91
<u>Current Aid Position</u>				
Food aid pledges	26	1	53	79
of which: delivered	4	-	47	50
Donor-financed purchases	-	-	10	10
of which: for local use	-	-	10	10
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>4</u>	<u>5</u>	<u>73</u>	<u>82</u>
<u>Indexes</u>				
2002 Production as % of average:				120
2002 Import requirement as % of average:				127

ZAMBIA

Area:	741 000 sq km
Climate:	Tropical wet-dry; rainy season: November-April
Population:	10.87 million (2002 estimate); G.N.P. per caput: US\$320 (2001)
Specific characteristics of the country:	Low-income food-deficit country; land-locked country
Logistics:	Imports through Dar es Salaam (Tanzania); inadequate rail and road connections
Major foodcrops:	Maize, roots, tubers
Marketing year:	May/April; Lean season: March-May
Share of cereals in total calorie intake:	70 percent

CURRENT SITUATION

Rains in early December, particularly in western parts, provided needy soil moisture for planting of the 2003 cereals crop which had been delayed by dry weather in November. However, more rains are still needed in eastern areas to avoid reductions in the area planted. To support this season's maize production, following two consecutive poor harvests, the Government has implemented a programme to distribute 48 000 tonnes of fertilizers at subsidized prices to 120 000 small farmers.

Harvesting of winter maize, provisionally estimated at 15 000 tonnes, is temporarily easing the tight food supply situation following the reduced 2002 main season maize output and delayed commercial imports and food aid distributions. Against maize import requirements in marketing year 2002/03 (May/April) of 575 000 tonnes, planned commercial imports by private millers amount to 150 000 tonnes and the Government granted tenders to private traders for additional 300 000 tonnes. However, imports received in the country are much lower and by early November amounted to about 50 000 tonnes - mostly informal trade from Mozambique and Tanzania. Prices of maize, which have remained stable during October have increased markedly in November. The situation could deteriorate rapidly if more imports are not received soon, as millers stocks are expected to last only until early next year.

The number of people in need of relief assistance is estimated at 2.9 million, or one-quarter of the population. The food situation is particularly serious for vulnerable groups in remote areas which have exhausted their food stocks. While WFP monthly food aid requirements are 21 000 tonnes, only half of the targeted population could be reached in October due to shortages in the food aid pipeline. Pledges of food aid by early December amounted to 106 000 tonnes. WFP is using recent cash contributions to purchase maize in the region.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	77	17	1 004	1 098
Previous five years average imports	44	20	243	307
<u>2002/03 Domestic Availability</u>	<u>75</u>	<u>6</u>	<u>673</u>	<u>754</u>
2002 Production (rice in paddy terms)	75	10	663	748
2002 Production (rice in milled terms)	75	6	663	744
Possible stock drawdown	-	-	10	10
<u>2002/03 Utilization</u>	<u>115</u>	<u>17</u>	<u>1 248</u>	<u>1 380</u>
Food use	111	17	1 067	1 195
of which: local purchase requirement	-	-	7	7
Non-food use	4	-	171	175
Exports or re-exports	-	-	10	10
Possible stock build up	-	-	-	-
<u>2002/03 Import Requirement</u>	<u>40</u>	<u>11</u>	<u>575</u>	<u>626</u>
Anticipated commercial imports	40	11	350	401
Food aid needs	-	-	225	225
<u>Current Aid Position</u>				
Food aid pledges	6	-	100	106
of which: delivered	-	-	46	46
Donor-financed purchases	-	-	7	7
of which: for local use	-	-	7	7
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>10</u>	<u>2</u>	<u>98</u>	<u>110</u>
<u>Indexes</u>				
2002 Production as % of average:				68
2002/03 Import requirement as % of average:				204

ZIMBABWE

Area:	387 000 sq km
Climate:	Centre and north-east tropical wet-dry; south and west semi-arid; rainy season: November-March
Population:	13.02 million (2002 estimate); G.N.P. per caput: US\$480 (2001)
Specific characteristics of the country:	Land-locked country; exporter and importer of grain
Logistics:	Exports and imports through Mozambique or South Africa
Major foodcrops:	Maize, wheat, millet, sorghum
Marketing year:	April/March; Lean season: February-April
Share of cereals in total calorie intake:	66 percent

CURRENT SITUATION

Light rains in early December in northern growing areas improved soil moisture for planting of the 2003 cereal crops which have been delayed by severe dry weather in the two last decades of November. Substantial rains are urgently needed in southern parts to avoid reductions in the area planted. Prospects are also poor reflecting disruption in the agricultural sector following land acquisition activities and prices of seeds being beyond the reach of large numbers of farmers.

The grave food situation is worsening, following a sharply reduced maize harvest coupled with the country's prevailing economic crisis. Shortages of basic foods including bread, maize, milk and sugar are reported in urban and rural areas, with bakeries closing due to lack of wheat. Increasing cases of malnutrition are reported from different locations. About half of the population, or 6.7 million people, are in need of emergency food assistance until next March, mostly in rural areas. Against an exceptional maize deficit of some 1.7 million tonnes in marketing year 2002/03 (April/March) the Government announced contracts for almost 1 million tonnes at the end of September, but by late October, only 480 000 tonnes had been received. Food aid distributions are being delayed and only 167 000 tonnes have been received. In urban areas, soaring inflation, which reached 137 percent by the end of September, and unemployment have further curtailed access to food for the majority of the population.

There is urgent need to expedite commercial imports and delivery of additional food assistance to avoid a further deterioration of the country's food security situation.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	285	-	1 889	2 174
Previous five years average imports	142	25	140	307
<u>2002/03 Domestic Availability</u>	<u>328</u>	<u>1</u>	<u>536</u>	<u>865</u>
2002 Production (rice in paddy terms)	213	2	536	751
2002 Production (rice in milled terms)	213	1	536	750
Possible stock drawdown	115	-	-	115
<u>2002/03 Utilization</u>	<u>398</u>	<u>13</u>	<u>2 241</u>	<u>2 652</u>
Food use	388	13	1 775	2 176
of which: local purchase requirement	-	-	-	-
Non-food use	10	-	319	329
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	147	147
<u>2002/03 Import Requirement</u>	<u>70</u>	<u>12</u>	<u>1 705</u>	<u>1 787</u>
Anticipated commercial imports	70	12	1 016	1 098
Food aid needs	-	-	689	689
<u>Current Aid Position</u>				
Food aid pledges	-	-	218	218
of which: delivered	-	-	167	167
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>29</u>	<u>1</u>	<u>133</u>	<u>163</u>
<u>Indexes</u>				
2002 Production as % of average:				35
2002/03 Import requirement as % of average:				582

TERMINOLOGY

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

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

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

"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.

"Low-Income Food-Deficit Countries" (LIFDCs): Includes all food deficit countries with per caput income below the level used by the World Bank to determine eligibility for IDA assistance (e.g. US\$1 445 in 2000), which in accordance with guidelines and criteria agreed to by the CFA should be given priority in the allocation of food aid.

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