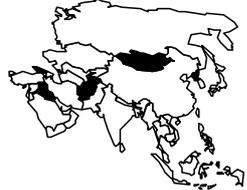


FOODCROPS AND SHORTAGES

No.1

March 2003

	<p>AFRICA: In eastern Africa, more than 13 million people face severe food shortages in Eritrea and Ethiopia mainly due to drought. Large amounts of food aid are urgently needed to stave off starvation. In southern Africa, the tight food supply situation has eased with improved food aid distributions. Prospects for the next harvest are generally favourable but production is anticipated to be reduced again in Zimbabwe. Poor rainfall is also reported in southern Mozambique. In western Africa, the food situation remains extremely serious in Mauritania, following three consecutive poor harvests.</p>
	<p>ASIA: A serious humanitarian crisis persists in DPR Korea due to chronic food shortages and food assistance is urgently required. Relief food assistance is required for people affected by natural and man-made disasters in Bangladesh, Nepal, Cambodia and Sri Lanka. In the Near East, food assistance continues to be needed in Afghanistan despite improved harvest last year. The food situation in the West Bank and Gaza Strip is grave due to continuing military operations and tense political situation.</p>
	<p>LATIN AMERICA AND THE CARIBBEAN: Food assistance continues to be provided in El Salvador, Guatemala, Honduras and Nicaragua to rural families affected by the severe crisis in the coffee sector. Food assistance is also being provided in Haiti to farmers in the southern departments affected by adverse weather. Heavy rains and flooding are reported in various parts of Bolivia and Peru with damage to crops. Emergency relief, including food assistance, is being distributed to the affected population.</p>
	<p>EUROPE: Winter wheat plantings have fallen marginally in the EU but crop conditions remain generally satisfactory. Among the central and eastern European countries the prospects for the winter grains are mixed. The outlook is least favourable in the northern countries. Prospects in Hungary and the Balkan countries to the south are generally satisfactory. In the European CIS severely cold weather conditions and inadequate snow cover have compromised larger than average areas under winter cereals.</p>
	<p>NORTH AMERICA: The winter wheat area increased in the United States but continuing dry weather raises concern for crop development this spring. Likewise, in Canada, the outcome of the main grain planting campaign this spring will depend largely on the level of spring precipitation as subsoil moisture levels are low after last year's drought.</p>
	<p>OCEANIA: The 2002 winter grain crop in Australia was sharply reduced by drought during the growing season and continuing dry conditions threaten the outcome of the 2003 summer coarse grain crop also. In Fiji, major damage has been inflicted on housing and crops by Cyclone "Ami" in January. An appeal for international assistance was launched by the Government. The Solomon Islands were affected by Cyclone "Zoe". Significant damage is reported to housing, infrastructure and crops. Relief assistance has been provided by the international community.</p>



AFFECTED COUNTRIES^{1/}

COUNTRIES FACING FOOD EMERGENCIES (Total: 38 countries)

<u>Region/Country</u>	<u>Reason for Emergency</u>	<u>Region/Country</u>	<u>Reason for Emergency</u>
AFRICA (25 countries)		ASIA (6 countries)	
Angola*	Internally displaced persons (IDPs)	Afghanistan*	Effects of recent drought and war
Burundi*	Civil strife, IDPs	Georgia	Drought and input shortages
Cape Verde	Drought	Iraq*	Shortage of inputs, effects of recent drought
Central Afr. Rep.	Civil strife, IDPs	Korea, DPR*	Adverse weather, economic constraints
Congo, Dem.Rep.*	Civil strife, IDPs and refugees	Mongolia*	Harsh winters, drought
Congo Rep. of*	Civil strife, IDPs	Tajikistan	Input and irrigation water shortages
Côte d'Ivoire	Civil strife, IDPs		
Eritrea*	Drought, IDPs, returnees	LATIN AMERICA (5 countries)	
Ethiopia*	Drought, IDPs	El Salvador	International coffee crisis
Guinea	IDPs and refugees	Guatemala	International coffee crisis
Kenya*	Drought in parts	Haiti	Drought, flooding
Lesotho	Adverse weather	Honduras	International coffee crisis
Liberia*	Civil strife, IDPs	Nicaragua	International coffee crisis
Madagascar	Drought in parts, economic disruption		
Malawi	Adverse weather	EUROPE (2 countries)	
Mauritania*	Drought	Russian Federation	
Mozambique	Drought and floods in parts	(Chechyna)	Civil strife
Sierra Leone*	Civil strife, IDPs	Fed. Rep. Yugoslavia	
Somalia*	Civil strife, drought in parts	(Serbia & Montenegro)	Refugees
Sudan*	Civil strife, drought in parts		
Swaziland	Drought in parts		
Tanzania	Drought in parts, refugees		
Uganda	Civil strife, IDPs, drought in parts		
Zambia	Drought in parts		
Zimbabwe*	Drought, economic disruption		

COUNTRIES WITH UNFAVOURABLE PROSPECTS FOR CURRENT CROPS

<u>Country</u>	<u>Main contributory factors</u>
Argentina	Economic constraints, adverse weather
Burundi*	Dry weather
Central Afr. Rep.	Dry weather, civil strife
Côte d'Ivoire	Dry weather, civil strife
Liberia*	Civil strife
Mauritania*	Drought
Zimbabwe	Drought

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

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

CROP AND FOOD SUPPLY SITUATION

OVERVIEW

As of March 2003, the number of countries facing serious food shortages throughout the world stands at 38, with 25 in Africa, 6 in Asia, 5 in Latin America and 2 in Europe. In many of these countries the food shortages are compounded by the impact of the HIV-AIDS pandemic on food production, marketing, transport and utilization. Upcoming joint FAO/WFP Crop and Food Supply Assessments will integrate this factor to the extent possible.

In **southern Africa**, prospects for the 2003 cereal crops have improved with normal to above normal rains in most parts during February, particularly in areas previously affected by dry spells and erratic precipitation. Overall, the outlook is favourable so far and good cereal crops are expected in most countries, provided rainfall continues into late March. However, prospects are poor in Zimbabwe due to prolonged dry conditions and further planting reductions in the commercial sector. A poor harvest is also anticipated in southern provinces of Mozambique, despite rather good prospects at the national level. In other areas affected by dry spells, namely Botswana, Namibia, parts of Lesotho and Swaziland and the Southern Province of Zambia, the outlook remains uncertain as the final outcome will depend on the rains continuing until early April. The weather and crop situation in these areas needs to be closely monitored in the coming weeks.

The tight food supply situation as a result of two consecutive poor harvests has eased with substantially improved food aid distributions in December, January and February, which have prevented a deterioration of the food crisis. Against WFP's appeal for 993 000 tonnes of food aid to assist 10.3 million most affected people in six countries of the sub-region until the end of March 2003, contributions by late February covered 90 percent. Large volumes of unrecorded commercial imports from Mozambique and Tanzania have significantly contributed to closing the cereal deficit in Malawi and Zambia. Prices of maize, the main staple, started to decline in most countries during February and are below their levels of a year ago.

In **the Great Lakes region**, crop production during the 2003 first season declined in Burundi following a late start of the rainy season and insecurity at planting time. Prices of beans and other food crops, including sweet potatoes and bananas, are well above their levels of a year ago particularly in rural markets. Food assistance will continue to be necessary for internally displaced and other vulnerable people during the first half of 2003. In the Democratic Republic of Congo, delayed rains in the Kivu region, coupled with persistent civil conflict, resulted in another reduced harvest during the 2003 first cropping season. The food and nutritional situation of large numbers of internally displaced people remains critical.

In **eastern Africa**, substantial crop and livestock losses in parts, mainly due to drought, have caused serious food shortages. The food situation is particularly serious in Eritrea and Ethiopia where large amounts of imports, mostly as food aid, are urgently required. In Eritrea, nearly two-thirds of the population face a severe food crisis due to a prolonged drought that seriously affected agricultural and livestock production in 2002. In addition, humanitarian assistance is required for a large number of people displaced by the war with neighbouring Ethiopia in 1998-2000 and returnees from Sudan. In Ethiopia, a recent FAO/WFP Crop and Food Supply Assessment Mission found that the 2002 grain production declined by about 25 percent due to drought. Large numbers of livestock have died and rates of malnutrition, particularly among children, have increased dramatically. In response the Government has appealed to the international community for 1.44 million tonnes of food to assist more 11 million people. In Sudan, an FAO/WFP Crop and Food Supply Assessment Mission last November/December found that cereal production in 2002 declined by about 30 percent compared to the previous year. This has exacerbated the food difficulties faced by vulnerable groups, particularly those internally displaced by conflict. An estimated 3.5 million people need about 230 000 tonnes in food assistance. In Kenya, despite improved secondary season crop prospects and good rains in the previously drought-affected areas, continued food security concerns are reported in some northern districts. In Uganda, the displacement of a large number of people in northern parts due to escalation of conflict coupled with drought induced crop failures in parts has aggravated food difficulties in the affected areas. Nearly 1.5 million people are currently being assisted by WFP in several parts of the country. By contrast, the overall food supply situation has improved in Somalia and Tanzania due to good harvests but localised food shortages persist due to drought and/or conflict.

In **central Africa**, a resurgence of fighting in Central Africa Republic has led to the displacement of thousands of people but humanitarian assistance is hampered by insecurity.

In **northern Africa**, planting is complete for most of the 2002/03 winter cereals to be harvested from April. Normal to abundant rains were registered in January for most of the region and the state of the crops is reported as generally favourable. In Algeria and Tunisia, a recovery in production is expected relative to 2002 when crops were severely affected by dry weather. The outlook is also favourable in Egypt and Morocco and average to above-average harvests are forecast.

In **west Africa**, serious food shortages have emerged in several parts mainly due to drought and the effects of past and ongoing conflicts.

In the west of the Sahel, the severe drought last year seriously undermined the food security of nearly 600 000 people in Cape Verde, the Gambia, Mali, Mauritania and Senegal. An estimated 420 000 people are facing food difficulties in Mauritania, the worst-hit country, where in addition to three consecutive years of severe drought, off-season rains last year killed tens of thousands of livestock, a major source of livelihood for many households. The on-going conflicts in Côte d'Ivoire and Liberia have led to mass displacement and undermined the food security of thousands of people across the sub-region. In Côte d'Ivoire at least one million people have been internally displaced, while another 200 000, mostly migrant workers from neighbouring Burkina Faso, Guinea, Liberia and Mali, have left the country. In Liberia, thousands of displaced people recently streamed into Sierra-Leone and Guinea which already host a large number of refugees and IDPs. This mass displacement has disrupted production and marketing activities, adversely impacting the food supply situation in the concerned countries.

In **Asia**, with generally unfavourable and erratic monsoon rains, rice, the major food grain in the region, suffered heavy losses (about 16 million tonnes) in 2002, with the bulk of the decline coming from the world's two major producing countries, namely India and China. This was partly offset by modest increases in wheat and other grains production in the region. Substantial improvement in food production for 2002/03 is estimated in Iran, Sri Lanka, Bangladesh, Vietnam, Democratic Republic of Timor-Leste and the Philippines, while unfavourable weather conditions are expected to reduce food production in India, Pakistan, Nepal, Mongolia and Thailand. China, a major grain producer, and other countries of the region are expected to maintain their normal production levels. DPR Korea with the largest per capita food assistance requirement in the region, has received very little external assistance in recent months in spite of WFP's emergency food appeals. The food supply situation in Mongolia has been adversely affected by the extreme winter weather conditions resulting in 665 000 people requiring emergency food assistance.

In the **Near East**, cereal harvest in Afghanistan is seen to match the recovered harvest of the previous year following improved precipitation and better growing conditions. However, food aid will be necessary for the returning refugees, the nomads, the disabled and other vulnerable households. Recent good rains in Syria and Jordan have improved prospects for the 2003 cereal crop to be harvested in April/May. In Iraq, the outlook for the 2003 crop production is generally uncertain due to prospects of a possible war. Furthermore, cereal production will be affected by serious shortages of fertilizers, spare parts for agricultural machinery and other agricultural inputs. The food situation in the West Bank and Gaza Strip is also serious due to food shortages and market disruption which are further aggravated by continued military operations and the current tense political situation.

In the **Asian CIS**, winter crop conditions are satisfactory following adequate soil moisture and improved precipitation throughout the region. The improvement in forecast harvest is seen more in the food deficit countries of the region, many of which have required some food aid in the recent past. Cereal harvest in Kazakhstan, the main cereal exporter in the region, is forecast to decline by about 2.6 million tonnes, owing to above average winter-kill and reduced area under cereals, particularly in the northern new lands of the country.

In **Central America**, land preparation is underway for planting of the 2003 first season coarse grain and bean crops. Aggregate cereal outputs in 2002 in Central American countries were some 600 000 tonnes above the average of the last five years. The situation, however, varies from country to country. The food supply situation continues to be tight in El Salvador, Guatemala, Honduras and Nicaragua, particularly for the thousands of rural workers who have lost their jobs in the coffee sector. Food assistance is being provided to the most affected groups. In the Caribbean, cereal production for the sub-region as a whole was some 200 000 tonnes above average, but in Haiti coarse grain and paddy outputs were below average due to adverse weather throughout the first half of 2002.

In **South America**, harvesting of the 2002 wheat crop has been completed in the southern areas while planting of the 2003 coarse grain crops is underway. Aggregate wheat output in 2002 was about 1 million tonnes below the average of the last five years, principally as a result of the decline in production in Argentina, the main wheat producer in the region. Generally normal conditions are reported for the developing maize crops. In the Andean countries, heavy rains and flooding are reported in various departments of Bolivia and southern Peru. A state of emergency has been declared in some of the affected areas. Generally normal weather conditions are reported in Ecuador, where harvesting of the 2003 first season maize crop is due to start from April. In Colombia, harvesting of the 2002/03 second season coarse crops is well advanced. In Venezuela, harvest of the 2002 coarse grain and paddy crops has been completed and below-average harvests are estimated.

In **Europe**, the winter wheat area in the EU could be marginally down from the previous year's level reflecting reduced price prospects for producers at planting time in the autumn and adverse weather for planting in some

parts. Among the central and eastern European countries (CEECs), prospects for the winter cereal crops are mixed. The outlook is least favourable in the northern countries such as Poland and the Czech and Slovak Republics, where adverse weather affected the winter grain sowing. However, the outlook remains generally favourable in Hungary and most of the Balkan countries further to the south, where the winter grain area remained close to the previous year's level and crop conditions are reported to be significantly better compared to the previous season.

In the European **CIS**, severely cold weather conditions and inadequate snow cover have compromised larger than average areas under winter cereals. Winter-kill in the Russian Federation is estimated at more than 2 million hectares, which would be replanted with spring cereals. Aggregate winter cereal harvest, mainly wheat, rye and barley, is likely to decline by nearly 10.4 million tonnes this year compared with 2002. In Ukraine winter crop damage has been significantly higher than average and nearly 1.6 million hectares of cereals are to be replanted in spring. Winter cereal harvest is seen to decline by about 2.8 million tonnes compared with the harvest last year.

In **North America**, continuing dry weather in the United States winter wheat plains is giving rise to concern over the prospects for this year's harvest. Although beneficial planting rains last autumn got the crops in most parts off to a good start, prevailing dry conditions throughout the winter, on top of last year's drought, have left soil moisture reserves well below desirable levels and significant rains are needed soon for the crops as they break dormancy. The United States winter wheat area is estimated to be up by 6 percent from the previous year, the largest area since 1998. In Canada, early indications for the main spring grain crops to be sown later this year, point to a sharp increase in area after a drought-reduced crop in 2002. However, the area sown will depend largely on the level of spring precipitation as subsoil moisture levels are reported to remain low across much of the main producing areas.

In **Oceania**, the 2002 winter grain output in Australia is estimated at 15.4 million tonnes, down 61 percent from the previous year's record crop and the lowest harvest since 1982, reflecting severe drought throughout the cropping season. The 2003 summer coarse grain crop also looks set to be significantly reduced by the drought, as plantings are about 20 percent down from the average and yield prospects are poor unless significant rainfall arrives soon for the developing crops.

COUNTRY REPORTS

AFRICA

NORTHERN AFRICA

ALGERIA (19 February)

Planting of the winter cereals for harvesting from June 2003 has been completed. The crops benefited from normal to abundant rains in January, particularly in the north-eastern parts of the country. Early prospects are good provided normal weather conditions persist. Aggregate cereal outputs in 2002 were low as the crops suffered severely at planting due to the late arrival of the rains. Plantings were reduced and lower than normal yields obtained. Production of wheat was particularly affected. Wheat output in 2002 was barely half the output in 2001 and some 23 per cent below the average of the past 5 years. Production of barley, the main coarse grain, dropped by almost 38 per cent from the high level in 2001 and was well below average.

Cereal imports in marketing year 2002/03 (July/June) are expected to increase from 7.2 million tonnes in 2001/02 to some 7.6 million tonnes, as a consequence of the drop in production.

EGYPT (19 February)

Planting of the 2003 wheat and barley crops has been completed under normal weather conditions, while land is being prepared for maize and paddy planting from April. The area planted to wheat has increased slightly from 2002 average level, largely as a consequence of the government's efforts to help increase production by means of an incentive programme to producers. Aggregate cereal production in 2002 was a high 20.3 million tonnes, which compares to 19.3 million tonnes in 2001 and the average of 18.9 million tonnes in the past 5 years. An above-average wheat output was collected in 2002 while production of paddy increased by more than 11 per cent compared to the average. Early prospects for the 2003 crops are good assuming normal conditions persist.

Wheat imports in 2002/03 (July/June) are expected to decrease to about 6.3 million tonnes from the 6.8 million tonnes imported in 2001/02. Maize imports are forecast to increase slightly from the previous year's level.

MOROCCO (18 February)

Normal to above-normal rains since December are reported for most of the growing areas, with the exception of some parts in the east and south-east of the country. Water reservoir levels are considered adequate although some low levels are reported in the dry areas. Planting of the winter cereals has been completed for harvesting from May, while sowing of the 2003 maize crop is underway. Above-average plantings of wheat and barley are provisionally estimated. Early forecasts point out to satisfactory outputs in 2003, similar to those in 2002 when aggregate cereal production was almost 25 per cent above the past 5-year average.

Imports of wheat in 2002/03 (July/June) are expected to decline by some 100 000 tonnes from the 3 million tonnes imported in marketing year 2001/02 (July/June), mainly as a result of the increase in production in 2002 compared to 2001. Maize imports are forecast to remain about the same level of 800 000 tonnes of the previous year. Imports of barley should decline from 700 000 tonnes to 500 000 tonnes reflecting a significant increase in production in 2002.

TUNISIA (19 February)

Above-normal rains in January were registered all over the country with localized flooding in the northern parts. Maximum water reservoir levels are reported. Planting of the winter cereals (wheat and barley) has been completed and the state of the crops is reported to be good. Higher than

normal yields are anticipated and a significant recovery from last year's poor crop is forecast. Aggregate cereal production in 2002 was a low 515 000 tonnes, which compares to the average of 1.4 million tonnes of the past five years.

Wheat imports in marketing year 2002/03 (July/June) are forecast to be about 1.8 million tonnes, some 500 000 tonnes above the volume imported in 2001/02 (July/June). Imports of barley should be about 600 000 tonnes, about similar to the previous year's volume.

WESTERN AFRICA

BENIN (21 February)

Seasonably dry conditions prevail. Land preparation for the first maize crop is underway in the South. Plantings will start with the arrival of rains, usually in March. Reflecting generally favourable growing conditions during the 2002 rainy season, an average to above-average harvest is estimated. The overall food supply situation is satisfactory.

BURKINA FASO (21 February)

Seasonably dry conditions prevail. A joint FAO/CILSS Crop Assessment Mission that visited the country in October 2002, 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.

Reflecting this good harvest, the overall food supply situation is satisfactory. However, the return of thousands of Burkinabé from Côte d'Ivoire and the closing of the border between the two countries since September 2002 will adversely impact the food situation.

CAPE VERDE (28 February)

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 that visited the country in October estimated 2002 maize production 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 2001 output and similar to the poor crops in 1997 and 1998. 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 37 300 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. The Government has launched an international appeal for assistance.

In response to this and following the poor cereal harvest forecast for the western part of the Sahel, an Emergency Operation (EMOP) was launched by FAO and WFP on 16 December 2002 for Cape Verde, the Gambia, Mali, Mauritania and Senegal. However, very few pledges have been received to date. A joint FAO/CILSS follow-up mission that visited the country recently observed that the Government has already launched its FAIMO labour-intensive infrastructural programmes funded from food aid counterpart funds. The FAIMO programmes improve access of poor people to food through the creation of thousands of jobs. However, these programmes are under-funded as a result of poor donor response to the Government's appeal.

CHAD (21 February)

A joint FAO/CILSS Crop Assessment Mission which visited the country in October 2002 provisionally estimated the aggregate output of cereals at 1.12 million tonnes, 15 percent below last year's above average level of 1.32 million tonnes and only fractionally lower than the average for the previous five years.

Despite this 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 Kanem and Bahr El Ghazel will continue to be in need of food assistance.

CÔTE D'IVOIRE (20 February)

Up to one million people have been displaced by the conflict that began with an attempted coup on September 19, 2002. Fighting broke out first in the capital Abidjan and the northern cities Bouake and Korogho and later in the west around Man. In Abidjan, thousands of people living in the shanty town areas were displaced when government forces burnt houses in a search of rebels. At least 800 000 people fled south from the north and center of the country and 300 000 had been displaced in the area around the western town of Man. Another 200 000, mostly migrant workers from neighbouring Burkina Faso, Guinea, Liberia and Mali have left the country. Displacement has continued to take place in various parts of the country rendering more and more people vulnerable and in desperate conditions.

A reduction in rice (total production estimated at 617 000 tonnes before the rebellion began) and other cereals is forecast this year as a result of unfavourable weather and the conflict that forced many farmers to leave their land and disrupted marketing activities. The regions most affected by the conflict in the north (Bouaké, Katiola, Bouna and Korhogo) usually provide about 80 per cent of national production of yams, 40 per cent of rice, and most of the millet, sorghum and fonio. Crops have reportedly been rotting in fields.

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. In the rebel-held central town of Bouake, over 60 percent of families do not have any income while the remainder have lost 80 percent of their purchasing power. Apart from nutritional imbalances, access to medical facilities and medicine is very poor and expensive. WFP has launched a Regional Emergency Operation to assist some 170 000 people affected by the conflict for an initial period of five months. The bulk of this operation will take place in Côte d'Ivoire but will also cover neighbouring countries of Burkina Faso, Mali and Ghana. While the conflict victims in central and northern areas have been provided with relief food through humanitarian corridors established by WFP in November, safe access to the west remains a critical source of concern to humanitarian agencies. In early February WFP was assisting approximately 91 000 vulnerable people including 46 000 persons in Bouaké and surrounding villages, 18 600 IDPs in Daloa and Duekoué and 7 000 IDPs in Yamoussoukro and surrounding villages.

THE GAMBIA (20 February)

The 2002 cereal production figures released by the government are significantly lower than the estimates of the joint FAO/WFP Crop and Food Supply Assessment Mission in October 2002 which indicated an average harvest. The aggregate output of cereals has been revised to some 139 000 tonnes, 30 percent less than last year and 8 percent below average.

An FAO/CILSS follow-up mission recently confirmed that millet prices, which increased steeply last year, are still at the same high level, reflecting the poor harvest in 2002/03 in the Gambia as well as in the whole of western Sahel region. These high local cereal prices make access to food difficult to many households, especially in rural areas.

Following the poor cereal harvest in the west of the Sahel, an Emergency Operation (EMOP) appeal was launched by FAO and WFP on 16 December 2002 for Cape Verde, the Gambia, Mali, Mauritania and Senegal. The equivalent of 2 340 tonnes in cereals has been allocated for the Gambia. However, no pledge has been received to date.

GHANA (21 February)

Land preparation for the first maize crop is underway in the South. Plantings will start with the arrival of rains, usually in March.

Some 40,000 people are estimated to have entered Ghana from Côte d'Ivoire since a failed coup attempt on 19 September 2002 led to a rebel war. Most passed through Ghana on their way to Burkina Faso, Mali, Niger and other countries.

GUINEA (20 February)

Following armed clashes in and around the country over the period September 2000 – March 2001, which led to massive population displacements, thousands of internally displaced Guineans returned to their home areas during 2002, encouraged by overall improvements in the security situation. However, there are still some 82 000 IDPs, mainly concentrated in Kissigougou, Macenta and Gueckedou Prefectures.

The presence of a large refugee population and the persistent instability in the sub-region have exacted a heavy toll on the country, which already hosted some 92 500 refugees (about 55 percent of them Liberian and 45 percent Sierra Leonean) before the Ivorian armed conflict. The latter has prompted an influx of various categories of displaced persons including Guinea evacuees, refugees and foreign nationals in transit. As of late January, some 52 000 Guineans arrivals from Côte d'Ivoire were registered.

GUINEA-BISSAU (21 February)

Seasonably dry conditions prevail. A joint FAO/CILSS 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 10 percent below last year's output and 5 percent below the average for the previous five years.

The overall food supply situation is satisfactory. However, the food situation of people living in the structural deficit areas along the northern border with Senegal should be closely monitored.

LIBERIA* (20 February)

Continued armed clashes in and the lack of access to the most agriculturally productive areas and the mass displacement of people who were largely subsistence farmers have continued to adversely impact the food security in the country. Further, because commercial imports cannot cover the food needs of the country, most of the population, especially the chronically poor, will continue to live on some form of assistance including food aid for the foreseeable future. The lack of arable land for agriculture activities coupled with the unavailability of farm implements for the internally displaced minimize their chances of complementing food aid received and sustaining themselves.

As a result of the persistent armed clashes, some 184 000 internally displaced persons from the north, northwest, and central regions are living in camps in other parts of the country. However, thousands of displaced Liberians streamed into Sierra Leone, following an upsurge of hostilities between Liberian Government troops and rebels in early February. Moreover, the continuing instability in Côte d'Ivoire has prompted an increasing number of the estimated 60 000 Liberian refugees still caught in the fighting to seek immediate repatriation or evacuation to neighboring countries. The UN High Commissioner for Refugees has

reiterated a call to West African countries to provide asylum to Liberian refugees, whose protection is not guaranteed in Côte d'Ivoire or in their home country. WFP continued to provide regular assistance to some 117 600 people in the country.

MALI (21 February)

The 2002 cereal production figures released by the government are significantly lower than the estimates of the joint FAO/CILSS Crop Assessment Mission in October 2002 which indicated an average harvest. The aggregate output of cereal has been revised to some 2 288 336 tonnes, 8 percent less than the average of last five years.

The overall food supply situation is tight notably in the west. The return of some 130 000 Malians from Côte d'Ivoire is putting additional pressure on food supply. However the national security stock has been reconstituted close to its optimal level of 35 000 tonnes. The Government also distributed 9 513 tonnes of food to vulnerable people.

MAURITANIA* (20 February)

A joint FAO/WFP Crop and Food Supply Assessment Mission which visited the country in October 2002, 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 2001 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. Approximately 420 000 people throughout Mauritania 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.

Famine conditions, which had previously been confined to the Aftout area, have spread to the Senegal River Valley and the central Plateau area of Hodh El Chargui and Hodh El Gharbi, affecting sedentary herders as well as farmers. Evidence of malnutrition abounds in the form of exhaustion and loss of weight, night blindness, scurvy, dehydration and diarrhoea and hunger-related deaths.

A joint FAO/CILSS follow-up mission that visited the country recently observed that cereal prices that had risen considerably on most markets last year remained high, while animal prices decreased steeply.

In March 2002, WFP launched an Emergency Operation (EMOP) valued at US\$ 7.5 million (16 230 tonnes of food) to assist 250 000 people most threatened by serious food shortages. In mid-December a regional EMOP, launched by FAO and WFP for the 5 countries in the west of the Sahel most affected by the 2002 drought, included the allocation of 43 632 tonnes of food to Mauritania. However, very few pledges have been received to date for the regional EMOP.

NIGER (21 February)

A joint FAO/CILSS Crop Assessment Mission in October 2002 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.

Following this good harvest, the overall food supply situation is satisfactory. Farmers should be able to reconstitute their stocks and for the government to replenish the national security stock to its optimum level of 35 000 tonnes.

NIGERIA (21 February)

Seasonably dry conditions prevail. Land preparation for the first maize crop is underway in the South. Plantings will start with the arrival of rains, usually in March. Reflecting generally favourable growing conditions during the 2002 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 2002, more than 85 000 IDPs have been resettled in their home villages in central region.

SENEGAL (21 February)

Seasonably dry conditions prevail. Final 2002 production figures have been released by the government and are significantly lower than the estimates of the joint FAO/WFP Crop and Food Supply Assessment Mission in October 2002 which estimated an average harvest. The aggregate output of cereals is now estimated at some 776 800 tonnes, 16 percent less than the average for the previous five years.

A joint FAO/CILSS follow-up mission that visited the country recently observed that local cereal prices which increased steeply over the last marketing year are still at the same high level, reflecting the poor harvest of 2002 in Senegal as well as in the whole western Sahel region. These high local cereal prices make access to food difficult to many households especially in rural areas.

Following this reduced crop and the tight food situation, the Government released CFA 15 billion (US\$ 23 million) in August 2002, which allowed the distribution of about 54 000 tonnes of rice to rural affected people. FAO and WFP launched in mid-December a regional EMOP for the 5 countries of western Sahel most affected by the 2002 drought. The Emergency Operation includes the allocation of 2 999 tonnes of food to 23 300 most affected people in Senegal. However, very few pledges have been received to date.

SIERRA LEONE* (20 February)

Cereal production in 2002 is estimated at some 417 000 tonnes, 20 percent above last year's level. This increase reflects 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.

The humanitarian situation in the country has improved significantly following the declaration of the end of the war: In 2002, over 100 000 Sierra Leonean refugee returnees and 124 000 IDPs resettled to their home areas. However, the renewed conflict in Liberia has caused at least 40 000 Liberians to cross into the country in 2002. Following an upsurge of hostilities between Liberian Government troops and rebels in early February, thousands of new displaced Liberians streamed into the country.

TOGO (21 February)

Seasonably dry conditions prevail. Land preparation for the first maize crop is underway in the South. Plantings will start with the arrival of rains, usually in March.

Reflecting generally favourable growing conditions during the 2002 rainy season, the aggregate 2002 cereal production is estimated at 740 519 tonnes, which is slightly above last year's level but well above average.

CENTRAL AFRICA

CAMEROON (21 February)

Seasonably dry conditions prevail. Planting of the first maize crop for harvest from July will begin in March in the south. Reflecting generally favourable growing conditions during the 2002 rainy season, an average to above-average harvest is anticipated. The overall food supply situation is satisfactory.

CENTRAL AFRICAN REPUBLIC (28 February)

In late October, fighting broke out in Bangui between government and rebel troops. Since then, the rebels took control of the North and the Centre and the east was isolated from the rest of the country. People have been fleeing from these zones into the bush, making for Bangui, or southern Chad. The Office of the United Nations High Commissioner for Refugees in Bangui reported in January that about 10 000 people, including at least 1 300 Central African Republic nationals had fled to southern Chad. The humanitarian situation was aggravated by a Government offensive in mid-February, resulting in further population displacement, and a change in the areas under rebel control, though the details are still not clear.

Due to insecurity in rebel-controlled zones, WFP remains unable to reach over 5 000 IDPs targeted in the framework of an Emergency Operation. By contrast, the relatively stable security situation in the southern part of Bangui allowed WFP to resume food distributions. In southern neighbourhoods of Bangui, over 44 000 vulnerable people affected by armed conflict have received 226 tonnes of food during the month of January, while 766 tonnes of food were distributed to about 830 500 people in December.

The food security situation has deteriorated significantly. Widespread destruction and looting, combined with non-availability of planting seeds and population displacement, means that preparations for the approaching agricultural season will be much worse than normal.

Providing the caseload does not increase, WFP has only enough food to assist the most vulnerable among the displaced population until the end of the year 2003. It has already stopped all rehabilitation programmes in order to focus on emergency assistance for the population affected by the on-going civil unrest.

CONGO, DEMOCRATIC REPUBLIC OF* (25 February)

The persistent civil conflict continues to adversely affect the agriculture and food situation throughout the country. In the Kasai Oriental Province, an intensification of fighting between Mayi-Mayi militias and the "Rassemblement congolais pour la democratie-Goma" rebel movement along the western bank of the River Lomami since late 2002, has resulted in over 30 000 new internally displaced people by January 2003. Following repeatedly looting and burning of crops, these populations had been forced to abandon their farms and seek refuge in the areas around Tshumbe, Wembonyama, Lubefu and Katoko Kombe. Fighting in late February in the northeastern province of Bunia, bordering Uganda, also resulted in fresh waves of internally displaced populations. In the Kivu provinces, insecurity coupled with a late start of the rainy season has resulted in another reduced 2003 first season foodcrops. The nutritional situation of large numbers of internally displaced in eastern parts of the country gives cause for serious concern.

CONGO, REP OF* (28 February)

A resurgence of fighting in the Pool region (surrounding the capital Brazzaville) in March 2002 led to the flight of at least 84 000 people. The exact number of IDPs within the Pool region, cut off from humanitarian aid since late March 2002, is unknown. Best estimates placed the figure at 60 000.

WFP has only enough food to assist people until March 2003. It has already stopped all rehabilitation programmes in order to focus on emergency assistance for those deemed most vulnerable. The displacement of people and disruption of marketing activities have seriously affected the food supply situation. In December the UN country team warned that the humanitarian situation in the country could become dire. 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 was extended until December 2002.

EQUATORIAL GUINEA (21 February)

The staple crops are sweet potatoes, cassava and plantains. The country imports on average 5 000 tonnes of rice and 10 000 tonnes of wheat.

GABON (21 February)

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 in 2002

SAO TOME AND PRINCIPE (21 February)

The staple foodcrops are roots, plantains and tubers. There are no reports of any threat to food security.

EASTERN AFRICA

BURUNDI* (28 February)

A crop assessment mission organized by the Government and international agencies at local level in January 2003, estimated foodcrops production of the 2003 first season at 1 million tonnes, a decline of 6 percent from the level of the same season last year. Production of cereals at 82 000 tonnes is 5 percent lower and that of pulses at 56 000 tonnes decreased 18 percent. A serious delay in the start of the rainy season, coupled with insecurity at planting time mainly in Bujumbura-Rural, Ruyigi, Gitega, Muramvya and Bubanza provinces which resulted in massive displacements of population, reduced the area planted this season. Insufficient seed availability in provinces affected by insecurity further contributed to lower plantings and yields, specially for pulses and Irish potatoes. Frosts and heavy winds during the season resulted in losses of bananas in several areas.

Prices of beans and other food crops, including sweet potatoes and bananas are well above their levels of a year ago, particularly in rural markets. Food assistance will continue to be necessary for internally displaced and other vulnerable population during the first half of 2003.

The security situation continues to deteriorate in late February with renew fighting near the capital city Bujumbura resulting in several and casualties.

ERITREA* (28 February)

A severe food crisis has emerged in Eritrea due to a prolonged drought that seriously affected crop and livestock production. Nearly two-thirds of the population are now estimated to be in need of urgent food assistance. Large numbers of those affected are already showing signs of severe malnutrition.

The Eritrean government, which has appealed for some 476 000 tonnes of emergency relief food, has called for a greater contribution from the international community. The World Food Programme (WFP) recently reported that supplies would run out in April and that donors have pledged only a quarter of the US\$ 150 million needed to support Eritrea until the end of the year. In addition, humanitarian assistance is required for a large number of people displaced by the border war with neighbouring Ethiopia in 1998-2000, returning refugees from Sudan, and 80 000 children benefiting from WFP Emergency School Feeding programme.

ETHIOPIA* (28 February)

A recent FAO/WFP Crop and Food Supply Assessment Mission found that grain production has declined sharply mainly due to drought. Large numbers of livestock have died and rates of malnutrition, particularly among children, have increased dramatically. The Mission forecast total pulse and cereal production at about 9.27 million tonnes, comprising 8.92 million tonnes from the main "meher" season harvest and a predicted 350 000 tonnes from the secondary "belg" season harvest in 2003. At this level, cereal and pulse production is about 25 percent below last year and 21 percent below the average for the previous five years. The population in need of emergency assistance is estimated to peak at over 11 million in 2003 and will need some 1.44 million tonnes of food, including 1.3 million tonnes of cereals. While donors have so far pledged 57 percent of the overall food relief requirements, pledges for supplementary food stand at only 35 percent of requirements. This is particularly worrying given the very poor nutritional status being reported in many areas of the country.

KENYA* (19 February)

Prospects for the 2002/03 secondary "short rains" cereal crop which is being harvested have improved due to favourable rains late last year. This crop provides the main source of food in parts of Central and Eastern provinces and accounts for some 15 percent of the country's annual production. Recent official forecasts indicate a maize output of about 450 000 tonnes which is about average for the secondary season. The output of the 2002 main "long rains" cereal crop, harvested late last year, was estimated at 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, food difficulties are reported in Baringo, parts of Marsabit, West Pokot, Turkana and Mandera Districts.

RWANDA (25 February)

The results of a crop assessment mission organized by the Government and international agencies at local level in January 2003 to estimate the outcome of the 2003 first season food crops are still unavailable. However, despite a significant delay in the start of the rainy season and shortages of sweet potatoes cuttings, unofficial results point to an increase in this season output. This could be explained by an apparent underestimation of last year's same season production in the light of a downward revision of the country's total population.

Prices of main staple sweet potato have increased sharply from its level of a year earlier and those of cassava and banana remain at high. Food difficulties are expected in provinces where food

production was insufficient, namely Gikongoro, Butare and Kibuye and in pockets affected by dry weather during the growing season.

SOMALIA* (28 February)

Harvesting of the 2002/03 secondary "deyr" season cereal crop, which normally accounts for 25 to 30 percent of annual cereal production, is almost complete. The outlook has generally improved with good rains in major growing areas.

A recent report from the Food Security Assessment Unit (FSAU) indicated that the good deyr season may reverse earlier predictions of a poor food security situation in Hiran. The area under production is above normal and yields are expected to be good. Livestock condition has also improved. However, the longer term food security issues (poverty, low income levels, difficulties accessing food) remain. Similarly, Gedo region, which has been food insecure for several consecutive years due to inadequate rainfall, is now experiencing a period of some recovery. The effect of the dry "jilaal" season, which has just started, on poorer households is still cause for some concern. During January WFP distributed more than 900 tonnes of food, mainly in the form of Food for Work in several parts of the country.

SUDAN* (19 February)

An FAO/WFP Crop and Food Supply Assessment Mission which visited the country late last year estimated a well below average cereal production following late and poorly distributed seasonal rains. Total cereal production in 2002, estimated at 3.8 million tonnes, is about 30 percent below the previous year and 15 percent below average. As a result, the cereal import requirement in the 2002/03 (November/October) marketing year is estimated at nearly 1.3 million tonnes of which about 1.1 million tonnes are anticipated to be imported commercially. Increased export earnings from oil in the last five years and the recent resumption of livestock exports to countries in the Arabian Peninsula, mainly Saudi Arabia, following the lifting of an import ban on account of Rift Valley Fever, have all resulted in favourable outlook for the economy at both macro and micro levels. Furthermore, the on-going peace talks in Machakos (Kenya) to end the long running civil war in Sudan, including the signing of a Memorandum of Understanding on 15 October 2002, augur well for resolving the conflict peacefully and this would boost agricultural and other economic activities in southern Sudan.

Most zones in southern Sudan face serious food deficits mainly due to population displacement and poor harvests. In northern Sudan, parts of greater Kordofan and Darfur and Red Sea State also suffer from successive poor harvests. Emergency food aid needs in 2003 are estimated at about 214 000 tonnes. Furthermore, timely assistance is required to support the agricultural sector in the next cropping season that starts in April/May in the South and June/July in the North. A budget revision of an existing Emergency Operation was jointly approved on 10 February 2003 by FAO and WFP for food assistance to more than half a million people affected by war and drought, worth about US\$ 30.7 million, for a period of twelve months (April 2002 to March 2003).

TANZANIA (19 February)

Harvesting of the 2002/03 short "Vuli" season cereal crops in the bi-modal rainfall areas is well advanced. The overall outlook is favourable. The aggregate 2002/03 production of cereals is forecast at 4.29 million tonnes, about 10 percent above last year's good harvest.

The overall food situation remains satisfactory. Nationally, maize prices are stable. Adequate availability of water and forage has also improved the food security of most pastoralists. However, localized food shortages are anticipated in some northern parts of the country due to crop failures. Insufficient pasture and water is also predicted in these areas.

UGANDA (28 February)

Harvesting of the 2002 second season crop is complete and maize production is expected to decline compared to last year due to reduced acreage. The output of the main season crop, harvested earlier in the year was below average and aggregate cereal production in 2002 is forecast to be 12 percent below the previous five years average.

Despite a stable food supply situation nationally, the displacement of a large number of people in northern districts due to escalation of conflict coupled with drought induced crop failures in parts have aggravated the food difficulties. About 800 000 displaced persons in Northern Uganda can not harvest the season's crop as result of the escalating insecurity, that could also affect land preparation and planting for the next season beginning March/April 2003. In the drought-prone north-eastern Karamoja region, effects of the mild El-Nino resulted in failure of the rains at critical periods in the development of the cereal crop. A below-average cereal production was forecast leading to an extended 'hunger period' from January to June 2003, assuming a normal/near normal season. It is estimated that about 350 000 persons will be affected and will require food aid intervention. For 2003, WFP will require 210 000 tonnes of food commodities to meet the combined needs of displaced and drought-affected people, including 140 400 refugees currently assisted in-country. Nearly 1.5 million people are currently assisted by WFP in several regions of the country.

SOUTHERN AFRICA

ANGOLA* (10 March)

Normal to above normal precipitation since late January generally benefited the 2003 cereal and non-cereal developing crops. Civil war for nearly three decades has devastated the country's economy and infrastructure and it is estimated that close to two million people, including returnees, vulnerable population and demobilised soldiers are in need of food assistance. A major feature of the post-Peace Accords situation in Angola is the substantial redistribution of population over space. Up to October 2002, for example, large numbers of people had returned to their areas of origin, and taken up farming again. On the other hand, many people who left camps and intermediate staging areas have not yet found productive occupations. Inadequate road networks and extensive landmine distribution also continue to hamper access to the affected population and fledgling attempts at domestic trade in basic foodstuffs.

BOTSWANA (27 February)

Abundant precipitation in the second and third dekads of February, following dry weather, provided relief to stressed cereal crops, mainly sorghum. However, the precipitation may have arrived too late to prevent yield reductions. The final outcome of the harvest from April will depend on the rains in the remainder of the season. The recent precipitation benefited grazing land for the important livestock sector.

The food supply situation remains stable. The country normally covers most of its cereal requirements through commercial imports. Following reported outbreaks of Foot and Mouth Disease in the country, the Government of South Africa banned livestock products from Botswana on 10 January 2003.

LESOTHO (25 February)

Prospects for the 2003 cereal crops, to be harvested from April, are uncertain. Rainfall was below normal at the beginning of the cropping season in October and virtually ceased in November. This adversely affected land preparation and planting. In addition, in the main

maize growing districts of Maseru, Leribe, Berea and Butha-Buthe, planting was further delayed due to late importation of fertilizers and seed and provision of ploughing services by the Government, all of which were subsidized at the rate of 50 percent, with the balance as credit to be repaid after harvest. The objective of the subsidy was to boost maize production following two consecutive years of poor harvests. As a result of late planting, most maize in these districts was at the vegetative stage in mid-February, when it should have been at flowering and silking stage. There is, therefore, the risk that the crop may not have reached maturity at the normal end of the rains in early April. But if the rains continue through April, a good harvest can be expected. The crop needs to be intensively monitored in order to keep decision makers fully briefed on the evolution of the season and the food security implications.

In the mountain districts of Thaba-Tseka, Mokhotlong and Qacha's Nek, where rains normally start earlier than in the above districts, planting was generally on time and without waiting for subsidized inputs. As a result, maize (a local highland variety) especially in Thaba-Tseka was at the grain-filling stage or approaching maturity in mid-February. In Mokhotlong, however, a recurrence of frost in December and January destroyed a large part of the maize, pea and potato crops, and the food outlook for 2003/04 is unfavourable. However, the production of the winter wheat crop (planted in June/July 2002 and now being harvested) is quite favourable.

In the southern districts of Mafeteng, Mohale's Hoek and Quthing, which together average less rainfall than the other regions of the country, crop prospects are unfavourable due to insufficient and erratic rainfall, and the food outlook is poor. Targeted food assistance will continue to be necessary through 2003.

The overall food supply situation remains tight, with the level of maize meal prices reported to be among the highest in southern Africa. This is in part due to inadequate milling capacity which is constraining availability of maize meal from grain imported both commercially and as food aid.

MADAGASCAR (28 February)

Torrential rains in western parts due to a tropical storm in late February, in the wake of heavy rains in previous weeks, has led to saturated soil conditions and the possibility of local flooding. Overall, however, the abundant rains during the season in northern and central rice growing areas have benefited the 2003 main paddy crop and the outlook for the harvest is promising. In southern maize growing areas, rains have been erratic and prospects are uncertain.

Food distributions to 394 250 most vulnerable people, including those worst affected by the political crisis of last year, those who gathered a poor harvest in southern districts and those affected by Cyclone Kesiny, continue until the end of March.

MALAWI (28 February)

Prospects for the 2003 cereal crops, to be harvested from April, are favourable so far. This reflects overall good rains during the cropping season and substantially higher agricultural input availability.

The start of the rainy season was delayed by almost one month in the maize growing southern and central regions. However, substantial and widespread rains in mid-December allowed planting and replanting operations. Despite heavy rains associated to Cyclone Defina in January and localized crop losses, rains in January and early February have been favourable for crop development. Preliminary assessments of the flood damage indicated that 23 500 hectares of foodcrops had been affected but following subsequent good weather about 50 percent of the crops have recovered. The maize crop, which ranges from tasseling to cobbing and maturing stages according to region, is reported in generally good condition.

However, by late February a one-week dry spell was affecting central parts and more rains were needed. The overall outlook is also satisfactory as a result of a considerable expansion in the Government's TIP free inputs distribution programme which has targeted close to 3 million households, comparing with 1.8 million last year. Additional distributions by NGOs and other humanitarian organizations, coupled with market supplies, have resulted in record levels of fertilizer availability this season.

Preliminary official forecast prepared in January, pointed to a 2003 maize crop of 2 million tonnes, well above the reduced crops of 1.5 million tonnes last year. The expected increase in production reflects an expansion of 4 percent in the area planted and a recovery in yields.

As a result of the 2002 reduced cereal harvest, and following severe food shortages in the previous year, the Government imported 233 000 tonnes of maize, to be sold at a subsidized price of 17 kwacha/kg, plus 27 000 tonnes for the Strategic Grain Reserve for free distribution. Food aid requirement was estimated at 208 000 tonnes of cereals, all of which has been pledged and distributions until the end of the 2002/03 marketing year (April/March) are projected at over 200 000 tonnes. In addition to these volumes, substantial amounts of maize (estimated at least at 100 000 tonnes) have been imported informally from Mozambique and Tanzania. While these high levels of imports have stabilized market prices at around 17 kwacha/kg during the marketing year, large amounts of stocks will be carried over into the next marketing year. By late February, only 25 000 tonnes of the 233 000 tonnes of maize the Government was offering at subsidized prices through ADMARC, had been sold. The Government plans to increase the Strategic Grain Reserve up to 100 000 tonnes while at the same time is trying to sell part of the remaining stocks. The large carry-over stocks, coupled with an expected good harvest, are likely to result in a sharp decline in prices and could adversely affect plantings in the next season. By the end of February prices of maize were declining in most markets and were well below their levels of a year ago.

MOZAMBIQUE (28 February)

Heavy precipitation in the third dekad of February eased dry conditions in parts of southern provinces of Gaza, Maputo and Inhambane affected by severe dry weather since the beginning of the season. However, rains are likely to have arrived too late to prevent significant reductions in yield potential of cereal crops. Elsewhere in the country, the abundant rains in February benefited crops in central parts, stressed by a dry spell in previous weeks, and maintained abundant soil moisture in the main growing areas of the north, where torrential rains resulted in floods earlier in the season.

Prices of maize, which declined sharply after the good 2002 cereal harvest, have increased steadily since June, but the expected demand from neighbouring countries, mainly Malawi, is expected to be much lower than a year ago.

The number of vulnerable people in need of food assistance in southern provinces, affected by a succession of reduced harvests, and parts of central provinces, has been revised upwards to 660 000 (less than 4 percent of the total population). Against food aid requirements of 50 000 tonnes in 2002/03 (April/March), all has been pledged.

NAMIBIA (25 February)

Crop prospects in Namibia are uncertain. Rainfall in the first half of the growing season (October-December) was erratic in the northern crop-growing areas, adversely affecting crop germination and establishment. A shortage of draught power and high prices of maize seed at planting particularly in Caprivi and Kavango regions in the north-east may have significantly reduced planted area. However, the rainfall situation has improved since mid-January. An assessment of the crop situation has been undertaken by the National Early Warning Unit from 13-26 February and the results are expected to be available by mid-March. The condition of livestock is reported to be fair to good.

The overall food supply situation is satisfactory, reflecting a steady flow of commercial maize imports. However, some 350 000 people who were seriously affected by a poor harvest last season are receiving food assistance from the Government.

SOUTH AFRICA (28 February)

Heavy rains in late February brought relief to the north-eastern parts of the maize belt, affected by below normal precipitation in previous weeks. Overall prospects for the maize crop remain favourable. The total area planted to maize is estimated at 3.5 million hectares, which is 4 percent higher than last year. The area planted to white maize is 2 million hectares, of which 42 percent are in the North-West Province and 37 percent in the Free State. Following a dry spell in parts in late January/early February average yields are expected to be lower than in the previous season. The second official crop forecast point to a 2003 maize production of 8.8 million tonnes, virtually unchanged from last year's average level. This forecast includes only production in the commercial sector as figures from the developing agriculture are still not available.

SWAZILAND (25 February)

The country is divided into four agro-ecological zones in descending order of rainfed agricultural potential, viz: highveld, middleveld, plateau and lowveld. In the lowveld, a severe dry and hot spell in November completely destroyed the maize crop at its early stage. Those farmers who still had some seed or could purchase it from local markets replanted, but it is estimated that up to 85 percent will not harvest any maize at all. Targeted food assistance will therefore be necessary in 2003/04. Elsewhere in the country early prospects point to a satisfactory cereal crop this year. On the plateau and middleveld, although November was also dry (but less hot), fair to good harvests are expected, while in the highveld a very good crop is in prospect if the remainder of the season is normal.

The food supply situation is tight and maize meal prices are rising. This reflects a rather slow pace of commercial maize imports. As of 31 January 2003, some 32 000 tonnes of maize out of the planned imports of 56 000 tonnes (or 57 percent) had arrived. One major reason for the slow pace is the high price of maize grain charged to millers by the country's sole maize importer, National Maize Corporation (NMC), which currently charges R1950 per tonne compared to the landed cost of R1285 per tonne.

ZAMBIA (28 February)

Abundant rains in February in the Southern Province and parts of the Western and Lusaka provinces, previously affected by below average and erratic precipitation, have resulted in a remarkable improvement of the crops which are at different stage of development. While crops planted in November with the first rains were lost to dry weather, most farmers replanted in December and January. Because of the very erratic precipitation this season and the diverse planting times, crops ranged from vegetative to grain filling stages by late February. If good rains continue until late March a generally satisfactory harvest, well above last year's poor crop, can still be obtained in Southern Province. An intensified monitoring of the rains and crop conditions is necessary until the end of the rainy season, particularly in areas where crops were worst stressed by dry weather. In these pocket areas, there is a risk that crops may not have reached maturity by early April when the rains normally end.

Elsewhere, including the main growing northern areas, cereal crops are reported in good condition and the overall prospects for the 2003 cereal harvest are favourable. After delay in the start of the rainy season, widespread good precipitation in December provided adequate soil moisture for planting and replanting. Abundant rains in February resulted in localized floods in Eastern and Central Provinces but generally benefited crops at the grain filling stage. In general, cumulative precipitation since the beginning of the season has been normal to above normal in most provinces.

The food situation has eased with improved distributions of food aid since December. About 23 000 tonnes of cereals were distributed in January and similar quantities are projected for February and March. Overall, against food aid needs of 224 000 tonnes, deliveries until the end of April are expected to reach some 130 000 tonnes of cereals. The gap reflects delays in distributions due to the Government's decision not to accept food aid of GMO maize. Formal commercial imports have been reduced as most of the country's food deficit has been filled by substantial informal cross-border inflows from Tanzania and Mozambique. Prices of maize, which had increased from November, have started to decline in anticipation of a good harvest. Traders and millers expect a substantial reduction in prices in the new marketing year.

ZIMBABWE* (27 February)

Prospects for this year's cereal crops are poor. In the maize growing areas of the north, good rains in late January and February provided relief to crops affected by prolonged dry spells earlier in the season but they are likely to have arrived too late to prevent yield reductions. However, the final outcome will depend on the rains until early April. In southern and western areas, the worst affected by dry weather during the cropping season, precipitation was insufficient to reverse severe drought conditions. The outlook for the cereal crops, mainly maize, is also unfavourable due to serious shortages of agricultural inputs and reduced plantings following land reforms in the commercial sector. While last year the commercial sector accounted for one third of the reduced production of 498 000 tonnes, this year only 15 000 tonnes are expected from commercial farmers. Early forecasts point to a maize crop around last year's level. An assessment of the crop conditions is currently being undertaken by the National Early Warning Unit.

Food shortages are becoming critical in rural and urban areas following the reduced cereal harvest of last year and the country's economic crisis that hampers food imports. High inflation levels continue to undermine access to food for the majority of the population. Against an exceptional maize deficit of some 1.7 million tonnes in marketing year 2002/03 (April/March), the Government has contracted 1 million tonnes but by early December only some 700 000 tonnes had been received in the country. Food aid distribution was stepped up during February with WFP delivering close to 55 000 tonnes to 3.4 million beneficiaries, more than double the previous highest level. Distributions until the end of the marketing year in March are projected at 278 000 tonnes of food. Despite the improvement, the uncovered food deficit remains huge, particularly in view of increasing numbers of vulnerable people, which recent assessments revised upwards to 7.2 millions or more than half of the total population. There is urgent need to expedite commercial imports.

ASIA

AFGHANISTAN* (5 February)

Latest reports point to slightly higher areas planted to winter crops compared to the past few drought years. Improved precipitation and sufficient soil moisture, particularly in the north of the country, as well as improved access to purchased inputs have contributed to larger areas being planted to winter cereals. Snow-cover, snow-melt and precipitation during spring and summer are the most critical factors for crop production in most of Afghanistan.

Access to food is very limited for thousands of households, in particular the nomads, widows, disabled persons and the returning refugees. Significant de-stocking of livestock over the past few drought years has eroded the only source of livelihood for an estimated 1.5 million nomads (Kuchis), while the returning displaced people commence their lives with very few assets, if any. Therefore, targeted food assistance in conjunction with concerted

efforts to increase food production in the country will be necessary to meet the food requirements in the coming year.

ARMENIA (5 February)

Latest official reports indicate that the areas planted to winter cereals for harvest in 2003 were similar to that of the year before. Aggregate area under cereals this year is estimated at 187 000 hectares, which includes 130 000 hectares of wheat and 51 000 hectares of barley. Potato is the second most important food crop, which has been planted on 32 000 hectares of land, similar to last year. Cereals and potatoes are drought prone so the realization of the currently estimated harvest of 340 000 tonnes of wheat, 62 000 tonnes of barley and 400 000 tonnes of potatoes depends on the level of precipitation and irrigation water availability in spring and summer. Armenia is a food deficit country with the estimated import requirement of 344 000 tonnes of cereals to meet consumption requirements.

AZERBAIJAN (5 February)

Latest reports indicate that Azerbaijan has again planted a record 752 000 hectares to winter cereals, which is similar to 2002. This aggregate includes some 630 000 hectares of wheat and 122 000 hectares of barley. Provided favourable weather conditions persist during the critical spring and early summer, Azerbaijan is set to produce another record harvest of 2.43 million tonnes of grains in 2003. The forecast harvest, similar to 2002 harvest, includes 1.91 million tonnes of wheat, 292 000 tonnes of barley and 150 000 tonnes of maize. Domestic cereal utilisation is estimated at about 3 million tonnes and the import requirement of about 631 000 tonnes, mostly commercially procured.

BANGLADESH (6 March)

The outlook for the boro irrigated paddy crop, planted from late-November into January and to be harvested from mid-April, is favourable reflecting adequate availability of agricultural inputs. Generally good post-monsoon rainfall has had a positive effect on the current crop. The boro harvest, that normally accounts for some 45 percent of the total paddy production, is forecast at some 19.5 million tonnes. Together with the Aus and Aman crops harvested last August and December respectively, aggregate paddy production in 2002/03 marketing year (July/June) is forecast at a record 38.5 million tonnes, equivalent to 25.7 million tonnes of milled rice. This level of production would be 1.8 percent higher than the previous year and 14 percent more than the average for the preceding five years. Reflecting a 7 percent rise in the area sown, wheat output in 2002 is estimated to increase by 9 percent to 1.75 million tonnes the year before.

Reflecting adequate level of government-held food grain stocks and good harvest prospects, the overall food supply situation remains satisfactory. Nevertheless, the import requirement in the marketing year ending June 2003 is expected to rise, by some 0.3 million tonnes, to 2.4 million tonnes (1.7 million tonnes of wheat and rice 0.7 million tonnes of rice and maize 0.1 million tonnes).

About 700 people were reported to have died due to the month long cold spell in January 2003. Flood victims and vulnerable groups continue to require food relief.

CAMBODIA (18 February)

The harvest of the rainfed main season paddy crop, representing some 80 percent of the aggregate paddy output, is now complete. The output from this crop is estimated to decline by some 22 percent to 2.5 million tonnes as a result of a reduction in the area sown and unfavourable weather early in the season. By contrast, an above-average output is expected from the dry season irrigated paddy crop, due for harvest in March-April, primarily due to an increase in area sown by 200 000 hectares as encouraged by the Government. Hence, aggregate production of paddy in 2002 is estimated at 3.37 million tonnes or 2.09 million tonnes of milled rice, a reduction of about 0.73 million tonnes, or

18 percent, compared to last year's record crop. Preparation of land and seedling is underway for the minor maize crop to be planted from April.

The Government reports that drought and floods in 2002 affected some 3.4 million people. Of these, according to WFP, 671 000 require food assistance. Moreover, even in years of normal weather conditions, about one third of the population lives below the poverty line and are chronically food insecure and in need of food relief.

CHINA (18 February)

The output from the late season rice crop, recently harvested, is officially estimated at 36 million tonnes of paddy, some 9 percent lower than production in 2001/02 mainly due to a reduction of the area sown. Similar decrease was reported for production of the early rice crop, estimated at 31 million tonnes. These reduced outputs were only partially offset by an increase in the output of the intermediate main crop by four percent, to a level of 108.5 million tonnes. As a result, the aggregate paddy production in 2002 is estimated at 177.5 million tonnes, or 121.7 million tonnes of milled rice, fractionally lower than the previous year and some 9 percent below the average of the five previous years.

The prospects for the 2003 winter wheat to be harvested from May are unfavourable as a result of late planting, some 5 percent decrease in the area sown and an earlier than usual dormancy. Thus, production of winter wheat is estimated to decline, for the fifth consecutive year, by some 3 percent to 80.6 million tonnes. Production of coarse grains in 2002, mainly maize, is estimated to be less than previously reported due to a reduction of one million tonnes for the maize output on account of lower than expected production in the provinces of Shandong, Jilin, Hebei and Shanxi. Output from the 2002 maize crop is estimated at 124.2 million tonnes. However, this level of production is still higher by 10 million tonnes than the previous year. Thus the aggregate grain production in 2002 in China was 402.2 million tonnes or about 1 percent higher than the previous year. Reflecting this good crop and high export prices, the 2002/03 exports of maize are expected to increase from the level of 8.6 million tonnes exported in the previous year.

CYPRUS (19 February)

Sowing of the 2002/03 wheat and barley crops for harvest from May has been completed under generally favourable weather. Production of barley in 2002 has gone up to 130 000 tonnes, compared to 117 000 tonnes in 2001. Imports of cereals in 2002/03 (May/April), mainly wheat and barley are forecast at the previous years' level of some 644 000 tonnes.

GEORGIA (28 February)

Latest reports indicate that area planted to wheat this year, at 139 000 hectares, is similar to the area planted in 2002. Wheat and maize are the two main staple cereals in the country. Provided weather conditions remain favourable, aggregate cereal harvest is forecast at 677 000 tonnes, which is similar to the harvest in 2002. This aggregate includes 216 000 tonnes of wheat and 400 000 tonnes of maize. Domestic cereal utilisation is estimated at 1.25 million tonnes, which is nearly twice as much as the country's production. Commercial imports and targeted food aid are used to cover the deficit.

The current WFP Protracted Relief and Rehabilitation Operation (PRRO) is scheduled to end by March 2003. By then a total of 27 600 tonnes of food will have been distributed to 226 600 beneficiaries.

Within the framework of the operation Chechen refugees receive relief food assistance in collaboration with UNHCR; orphans, the disabled and other vulnerable groups receive WFP meals in government institutions; elderly pensioners and other destitute people are assisted through soup kitchens run by local municipalities and NGOs; recovery food for work projects

are implemented in five most vulnerable regions targeted on the basis of the vulnerability assessments.

New phase of PRRO starts in April 2003 and will cover a three-year period up to March 2006. Contributions thus far towards the new operation represent only 5 % of total commitment and together with small carryover stocks will allow the maintenance of vital relief projects for only the first couple of months. Donor assistance is urgently needed for WFP to continue to meet the basic food needs of most vulnerable groups of population after June 2003.

INDIA (18 February)

Sowing of the Rabi crops in many parts of the country was affected by low soil moisture resulting from below normal rainfall during the post-monsoon months of October 2002 to January 2003. Sowing of Rabi wheat, sorghum, pulses and oilseeds has shown deficit compared to previous season and some shift in the cropping pattern is likely in some drought-stricken states. Consequently, according to the Ministry of Agriculture, production of wheat, the major Rabi crop due for harvest in March is expected to be around 68.9 million tonnes, well below the 71.8 million tonnes estimated for 2002. With the drought in Rajasthan in the northwest and Orissa in the east, the total Rabi grain output is projected at 92.9 million tonnes this year.

By contrast, good pre-sowing rains in October in most part of the southern peninsula improved soil moisture, ground water resources and availability of water for irrigation, thus favouring plantings in these areas. Sowings of the Rabi rice, due for harvest in March-May 2003 has been completed in Andhra Pradesh, Kerala, Karnataka and West Bengal. The output from the Rabi rice (milled) is estimated at 10.3 million tonnes. This, together with the Kharif rice (milled), harvested in September-November 2002 and estimated at 67.4 million tonnes, gives an aggregate production in 2002/03 of 77.7 million tonnes of milled rice. Total foodgrain production for 2002/03 estimated at 183.2 million tonnes (rice in milled equivalent) is the worst in last five years and 13.6 percent lower than the record harvest of 212.0 million tonnes in 2001/02.

The Government and the local and international organizations continue to provide food relief and medical assistance to the populations of the states affected by serious floods last year, while State governments are implementing food-for-work programmes for drought affected people. A death toll from a month long cold spell in January 2003 was 900 primarily in the northeastern states of Bihar and Uttar Pradesh. Much of the north was affected by the unusually cold weather this winter.

The overall national food supply position remains satisfactory despite food deficits in many areas due to reduced production. Record or near record procurement of rice and wheat in previous seasons, prompted by government policies, resulted in a level of cereal stocks almost three times the officially desired buffer stock level. To reduce the financial burden of the large stockpile, exports of rice and wheat are encouraged. The Government has reportedly allocated about 9 million tonnes of wheat and 6.6 million tonnes of rice for export. In the April-October 2002 period, the country exported 2.86 million tonnes of wheat. In addition, in November 2002, India donated one million tonnes of wheat for WFP's under-funded emergency operation in Afghanistan.

INDONESIA (18 February)

The harvesting of the 2003 main paddy crop will start in March. Despite a delay in the onset of the rainy season, the area sown under the main rice crop is expected to remain unchanged from previous year. Paddy production in the current year, including the minor secondary crop now being sown and due for harvest from July, has been projected at 51.4 million tonnes (32 million tonnes of milled rice), just fractionally higher than the year before. Imports of rice in the current marketing year ending in March are estimated at 3.5 million tonnes, of which 1 million tonnes to be imported by BULOG (National Logistic Planning Agency) and the rest by private importers.

The output from the 2002 maize crop is estimated at 9.8 million tonnes, some 5 percent higher than the previous year. To meet increasing demand for feed for the poultry industry, imports of maize are expected to increase somewhat to 1.3 million tonnes.

Notwithstanding an overall satisfactory food supply situation, a large numbers of internally displaced, poor people and refugees face hunger and malnutrition. To cover part of their needs, WFP is providing relief to 2.1 million most affected people until the end of 2003. In addition, with the peace agreement between the Government and the separatist rebels in the northwest province of Aceh signed in December, WFP is planning to distribute 10 000 tonnes of rice to the victims of the conflict beginning in February.

IRAN, ISLAMIC REPUBLIC OF (19 February)

As a result of ample and widespread precipitation, favourable weather, a substantial increase in financial allocation to agriculture sector by the government and efforts made by the farmers, production of all crops in 2002 increased significantly over the previous years' drought affected output. The 2002 wheat output is estimated at a record 12.5 million tonnes, over 30 percent higher than 9.5 million tonnes gathered the year before. The output of recently harvested paddy crop also showed a sizeable increase over the previous crop notably in the main producing provinces of Mazandaran and Gilan, which together account for about 70 percent of the total production. The aggregate paddy output in 2002 is expected to be 2.7 million tonnes, well above the average production of 2.3 million tonnes.

Reflecting a sizeable increase in cereal output in 2002, the imports of wheat and rice in 2002/03 are expected to sharply decline from the high levels of the previous drought years.

The prospects for the recently planted wheat and barley crops for harvest in mid-2003 are favourable with early onset of rains and snowfall in most parts of the country. In the 12 major wheat producing provinces, which together account for about 80 percent of the total production, overall precipitation in the last decade of December equalled the good level at the same period in the previous year.

The overall food supply situation in the country is stable and per caput food intakes are expected to increase in 2003 reflecting higher supplies.

In the areas of the Qazvin province which were seriously affected by earthquake last June reconstruction and rehabilitation activities are well underway. Distribution of FAO assistance for emergency agricultural rehabilitation is underway in the affected areas. This assistance worth US\$ 224 000 is intended to support the food security of 2 218 earthquake affected households (or a total of about 11 000 beneficiaries), through the provision of seed, fertilizer and animal feed. An Emergency Operation by WFP has provided food assistance to 25 000 earthquake affected people whose houses suffered 60 to 100 percent destruction. The food assistance included 250 tonnes of wheat flour, 75 tonnes of rice, 25 tonnes of pulses, 12.5 tonnes of sugar and 5 tonnes of vegetable oil.

IRAQ* (19 February)

The outlook for the 2003 winter grain crops in Iraq are generally uncertain due to prospects of possible war. Furthermore, cereal production may be affected by serious shortages of fertilizers, spare parts for agricultural machinery and other agricultural inputs. Production of cereals (mainly wheat and barley) in 2002 is estimated at about 1.7 million tonnes, about 7 percent higher than the previous year but slightly lower than the previous five years average.

Iraq's total cereal production has averaged below 2 million tonnes in the last five years, less than half the level in 1990. Agricultural productivity, particularly in the major producing regions of central and southern Iraq, has continued to suffer from limited investment, shortage of inputs and deteriorating irrigation infrastructure. Three consecutive years of

severe drought (1999-2001) have also devastated agricultural production. In 2002, improved weather resulted in increased cereal production.

Cereals imported under the SCR 986 oil-for-food deal have led to significant improvements in the overall food supply situation. However, nutritional problems remain a serious problem. An Emergency Operation was jointly approved on 17 February 2003 by FAO and WFP for emergency pre-positioning of food in neighbouring countries for 900 000 people, worth about US\$ 11.8 million, for a period of ten weeks.

ISRAEL (19 February)

Early prospects for the 2003 wheat and barley crops, to be harvested from April are favourable so far, reflecting improved precipitation in December. Domestic production of wheat in normal years covers less than one-fifth of total requirement, the rest being imported commercially. Aggregate production of wheat and barley in 2002 is estimated at 183 000 tonnes, more than 30 percent above the previous year and above average. Imports of cereals in 2002/03 (July/June) are forecast at 2.7 million tonnes.

JAPAN (18 February)

The main rice crop sown in May-June was harvested in October-November and the wheat crop sown in September-October will be collected in June-July. Reflecting favourable growing conditions, above average yields for the 2002 paddy crop are estimated in most areas. However, as part of the rice area adjustment programme, the output of paddy is estimated to decline by two percent from the 11.3 million tonnes (8.2 million tonnes milled rice) harvested in 2001. Wheat production in 2002 is estimated at 0.7 million tonnes, virtually unchanged from the previous year.

The import requirement for cereals in 2002/03 (July/June) is provisionally estimated at 26.5 million tonnes (coarse grains 19.9 million tonnes, wheat 5.9 million tonnes and rice 0.7 million tonnes) unchanged from the previous year.

The Government is planning to terminate the current 30 year-old rice production control programme by 2008. A new system will be introduced for which producers and agricultural organizations would determine their own rice output. In fiscal year 2003 the Ministry of Agriculture would be cutting back on the area under rice cultivation by another 50 000 hectares to reach the area reduction target of 1.06 million hectares.

JORDAN (19 February)

The sowing of the 2003 winter grains was completed in December under generally improved weather conditions. Average to above average precipitation in December and January has improved soil moisture and bode well to the development of crops.

Aggregate production of wheat and barley in 2002 was estimated at 133 000 tonnes, nearly three times more than the reduced crop of the previous year. Domestic cereal production normally meets only a small proportion of consumption requirements the rest being covered by imports. Imports of wheat in 2002/03 (July/June) are forecast at 840 000 tonnes, about the same as last year. Coarse grain imports are forecast at 800 000 tonnes, slightly lower than last year.

KAZAKHSTAN (5 February)

Official estimates point to a reduction in area under wheat by about 1.2 million hectares, from 11.7 million hectares in 2002 to 10.5 million hectares in 2003. Deteriorating terms of trade for cereals in the face of declining international wheat prices and stiff competition from Russia and Ukraine are reportedly the main reasons for reduced area under wheat this year. Tentative forecasts put cereal harvest at 13.3 million tonnes, which includes 10.5 million tonnes of wheat, 1.95 million tonnes of barley and 300 000 tonnes of maize. Aggregate cereal exports in the current marketing year is

estimated at 5.4 million tonnes, including 5 million tonnes of wheat and 389 000 tonnes of barley. Kazakhstan has been targeting non-traditional export markets such as the Middle East, North Africa and Brazil.

KOREA, DEMOCRATIC PEOPLE'S REPUBLIC OF* (18 February)

Currently field preparation activities for spring double crops (wheat, barley and potatoes) are underway. Winter wheat and barley crops, sown in October last year, will remain dormant until March when wheat and barley spring crops will be sown. Due to harsh climatic conditions, only one crop of rice and maize, the main staples, is grown in the country. These crops are planted from March for harvest in September-October. Barring any substantial decline in yields, the 2003 output from the wheat and barley crops, to be harvested next June, is expected to improve over previous year if the projected 10 percent increase in the area planted is realized. Aggregate cereal production in 2002/03, including a forecast for June harvests and production of potatoes in cereal equivalent, is estimated at 3.84 million tonnes. This is 4.9 percent higher than output in 2001/02, mainly reflecting more favourable rainfall, improved irrigation, adequate availability of fertilizers and pesticides and priority given by the Government in timely allocation of seeds and other farm inputs to the agricultural sector. Decline in potato output was more than offset by increase in other cereal crops, particularly maize.

Despite two consecutive years of improved harvests, domestic food production will once more fall below minimum food needs and the country will again have to depend on substantial external food assistance for the year ending in October 2003. Against a deficit of 1.08 million tonnes^{1/} (1.30 million tonnes in the previous year) the commercial import capacity is estimated at only 100 000 tonnes, leaving a food aid need in cereals of 0.98 million tonnes. Part of this is already covered by concessional imports of 300 000 tonnes and food aid pledges of 126 000 tonnes. Hence, there remains an uncovered deficit of 558 000 tonnes which needs to be met by additional food aid pledges and/or concessional imports. Presently, WFP stocks are all but depleted (only 19 000 tonnes of stocks) and only 97 000 tonnes of pledges are in the pipeline. Due to the shortfall in donations, in February WFP had to cut assistance to 2.9 million vulnerable people primarily in the east of the country. To avert an exacerbation of the already widespread hunger and malnutrition donor allocations of more than 77 000 tonnes of food aid are urgently required to cover the already reduced WFP operation up to first half of 2003.

KOREA, REPUBLIC OF (18 February)

At this time of the year the only cereals in the ground are barley and wheat, planted towards the end of last year and due for harvest from April. Rice, the main cereal, is sown from mid-May and harvested from mid-September. The 2002 paddy crop is officially estimated at 6.7 million tonnes or 5 million tonnes of milled rice, some 11 percent down compared to the previous year. This level of production is the lowest in the last four years and virtually the same level of the crop harvested in 1998. This reduction is partly due to adverse weather but also follows policy measures to limit the area under rice and thus decrease the surplus production and huge stocks. However, per capita consumption of rice, due to change in the dietary patterns, has steadily declined from 119.6 kg in 1990 to 87.3 kg in 2002. Feed grains, the most important being barley grown as a winter crop, are also produced. Annual production of these coarse grains is estimated at 0.4 million tonnes.

Import requirement of cereals in the 2002/03 marketing year (October/September) is estimated at 3.9 million tonnes of wheat, 8.5 million tonnes of maize and 0.3 million tonnes of other grains, almost same as the previous year.

^{1/} Please note this estimate of import requirement is based on FAO/WFP Mission report of 25 October 2002 and is different from the import requirement figure published in "Food Outlook", February 2003. This estimate is based on the revised population and per capita consumption figures.

KYRGYZ REPUBLIC (5 February)

Latest reports point to about 1.85 million tonnes of cereal harvest this year, which compares with 1.9 million tonnes in 2001. Cereal harvest this year includes 1.3 million tonnes of wheat and 533 000 tonnes of coarse grains (barley and maize). Cereal import requirement in 2002/03 marketing year is estimated at 179 000 tonnes, which will be commercially procured, while exports are estimated at 35 000 tonnes.

LAOS (18 February)

Harvesting of the wet season paddy crop, planted in mid-May to early-July last year is completed. This crop, which is mainly grown in the Mekong River basin, accounts for some 75 percent of total paddy output. The second paddy crop, grown under irrigation in the dry season, is planted from mid-November to January and harvested in April.

The output from the rice crop in 2002, estimated at 2.41 million tonnes of paddy (1.45 million tonnes of milled rice) is fractionally higher than production in the previous year. Continuous increase in the use of high yielding varieties in recent years has resulted in a rising production trend since 1996.

LEBANON (19 February)

The sowing of the wheat and barley crops, due for harvest from June, was completed under generally improved weather. Production of cereals in 2002 is estimated at 94 000 tonnes which is about average.

Imports of cereals, mainly wheat, in 2002/03 (July/June) are forecast at some 0.76 million tonnes, slightly higher than the previous year.

MALAYSIA (18 February)

The main paddy crop, sown until November last year, developed under normal rainfall conditions. The harvesting, which started in December in some areas, will be completed in April. The output from this crop that usually accounts for 60 percent of total paddy production is expected to be average. The remainder secondary crop is planted from March for the bulk of the harvest in July. Assuming normal weather conditions for this crop, an aggregate production of 2.1 million tonnes of paddy, or 1.4 million tonnes of milled rice, is forecast for 2003, virtually unchanged from the previous two years. This level of domestic production covers only about two thirds of the total rice consumption. The balance has to be covered by imports of some 0.7 million tonnes. Imports of wheat and maize in the 2002/03 marketing year (July/June) are estimated at 1.4 million tonnes and 2.4 million tonnes, respectively, similar to imports in the previous three years.

MONGOLIA* (18 February)

The main staple cereal food crops grown in the country are wheat and barley but the latter is only 1 percent of the wheat output. Despite an increase in the area planted, last season's unfavourable growing conditions (i.e. less than 50 percent of normal rainfall and high temperatures) seriously affected yields. The wheat crop harvested in September last year is estimated at 159 000 tonnes, higher than drought affected previous year but 25 percent less than the average crops harvested in the early 1990s. Production of potatoes and other vegetables is also reported to be much below normal. Last year a severe drought which affected 70 percent of the country, was followed by early snowfall in December heralding another harsh winter.

This year extreme winter weather, the dzud as it is called in Mongolia, following the drought during the previous summer months, has reportedly threatened livelihood of 665 000 people.

According to the Mongolian Red Cross and the State Emergency Commission up to 2.5 million animals are expected to die before the next spring for lack of sufficient fodder.

To cover domestic consumption needs of cereals in the marketing year ending in September 2003 the country will have to import 220 000 tonnes of wheat, 13 000 tonnes of rice, and 5 000 tonnes of maize. The country has a serious balance of payment problem, thus commercial imports will only cover part of this requirement and food aid allocations will be necessary to meet the uncovered needs.

MYANMAR (18 February)

Growing conditions have been generally satisfactory for both the main season rice crop harvested until December last year and for the secondary crop currently in the ground and due for harvest from mid-March. The current estimate for the aggregate paddy production in 2002/03 is put at some 21.8 million tonnes (13.9 million tonnes of milled rice) similar to the year before. Output from the wheat and coarse grains (mostly maize) crops, currently being harvested, is estimated at 90 000 tonnes and 540 000 tonnes, respectively, unchanged from last year. Reflecting steady increases in paddy production in the last several years, the country has re-entered the world market as a major rice exporter. Exports in 2002 are estimated at about 1 million tonnes.

NEPAL (19 February)

The preliminary estimate of the 2002 rice harvest, completed in December, is 4.0 million tonnes of paddy (2.6 million tonnes of rice) some 4 percent below the previous year's bumper crop of 4.2 million tonnes. The aggregate output of coarse grains is estimated at 1.8 million tonnes, about the same as the last year's production. Winter wheat crop currently in the field will be harvested in March 2003. With drier than usual past few months and a month long cold spell in January, the early forecast of the output is set at 1.26 million tonnes, virtually unchanged from the year before.

Floods caused by heavy monsoon rains in northeastern district washed away many farmlands in July subsequently resulting in a sharp decline in crop production and current food shortages in the district. Also severe food shortages are reported in Parbat district in central Nepal requiring food assistance. WFP is providing food assistance to the country's food sufficiency programmes and to Bhutanese refugees living in camps in Nepal.

PAKISTAN (18 February)

Below normal rainfall during October, November and December 2002 was observed in Pakistan. Sindh and Baluchistan provinces are facing drought and Punjab and Sindh provinces are experiencing water shortages for irrigation. Although, heavy rains in February have improved water availability for the current wheat crop. For now, less than normal wheat and other grain production is expected in 2003 similar to the drought affected output level of 2002. Pakistan produced about 19 million tonnes of wheat in 2002, about 3 million tonnes less than the record harvest in 2001. The country has exported 1.6 million tonnes of wheat since April 2001 from the surplus production of 2001.

The coarse grains crop harvested in November 2002, recovered due to good rains in September 2002, is estimated to yield an average production of some 2.1 million tonnes, unchanged from the previous year.

An FAO/WFP Mission visited Balochistan and Sindh provinces from 3 November to 2 December, 2002 to assess the impact of drought on agriculture, livestock and household food security and to identify emergency needs of the affected population. The mission estimated the losses in rain-fed agriculture to be 60 to 100 percent and the number of people in need of emergency food assistance to be 496 000 in the two provinces. Assistance to drought affected populations and to Afghan refugees is being provided through WFP emergency operation.

PHILIPPINES (18 February)

With the harvesting of the main season completed, the 2002 paddy rice production in the Philippines is now expected to be at a record level of about 13.2 million tonnes, up by 1.1 percent from the previous year. Drier weather caused by El Niño was seen as more conducive during ripening stage of the paddy crop. Consequently the rice imports for 2003 are set at some 17 percent lower (in the order of 1 million tonnes) than 2002 imports. For the first time, some of these imports (225 000 tonnes) will be allowed through the private sector, dismantling the monopoly of the National Food Authority to import rice since 1993.

Maize production in 2002 is estimated at 4.3 million tonnes, about 4.6 percent lower than the previous year output. The 2003 production, on the other hand, is expected to be around 5 million tonnes due to more plantings of maize, substituting rice, on account of El Niño weather pattern and the use of genetically-modified and high-yielding maize seeds. According to the Government the imports of maize in 2003 are expected to be over 0.2 million tonnes as opposed to 0.4 million tonnes in 2002. The country does not produce wheat. In 2002 wheat imports were about 3.4 million tonnes.

The Food Insecurity and Vulnerability Information and Mapping Systems (FIVIMS) analysis in the country indicates that upward trend in the incidence of poverty started since the financial crisis of 1997 has continued in recent years.

SAUDI ARABIA (19 February)

Growing conditions for the 2003 wheat and barley crops due for harvest from April have improved due to recent precipitation. Production of wheat in 2002 is estimated at 1.8 million tonnes, similar to the previous year, which together with stocks, will be sufficient to cover the country's requirements. Imports of coarse grains (mainly barley and maize) in 2002/03 (July/June) are forecast at about 6.4 million tonnes.

SRI LANKA (18 February)

Maha season paddy crop planted in October-November will be harvested in March and April 2003. Early indications point to a bumper harvest of nearly 2 million tonnes, or about 15 percent higher than the 2002 Maha output. The continuing peace process enabled cultivation of more lands and transportation of seed, fertilizer and other inputs particularly in the north and the east, the conflict affected areas of the country. Above-average rainfall since October 2002 also benefited the current paddy crop. The Maha crop generally accounts for about two-thirds of annual rice output. The second rice planting of "Yala season" begins in April-May.

Maha season maize to be harvested in February-March 2003 is expected to be better than average level of about 30 000 tonnes.

Last local media report dated 19/12/2002 indicated that torrential rains forced almost 100 000 families from their homes and disrupted transport in northern and eastern areas. The United Nations Needs Assessment Phase II is currently underway primarily in the conflict affected areas of the north and the east of the island. The UN consolidated appeals projects aimed at reconstruction and rehabilitation of agriculture and other sectors of the economy are to be presented at a donor conference in Japan in June 2003.

SYRIA (19 February)

Reflecting improved weather conditions, the prospects for the wheat and barley crops to be harvested from May are favourable. Production of wheat in 2002 is estimated at an above average level of 4.5 million tonnes. Barley output is also estimated at an above average 800 000 tonnes but nearly 15 percent below the previous year's good crop.

Imports of wheat and rice in 2002/03 (July/June) are forecast at a total of 235 000 tonnes, nearly the same as last year while those of maize are forecast at 500 000 tonnes, nearly 40 percent below the previous year.

TAJKISTAN (5 February)

Latest reports indicate that area planted to winter cereals increased by 94 000 hectares in 2003 compared with 2002. Land has continuously been diverted from cotton to cereals, as the country strives to meet its domestic food requirements through production. Wheat is the most important food crop and has been planted on 348 000 hectares of land. Provided that favourable weather conditions persist in spring and summer, Tajikistan is set to produce some 713 000 tonnes of grains, which is more than 91 000 tonnes higher than the improved harvest in 2002. The tentative forecast for this year includes 600 000 tonnes of wheat, 40 000 tonnes of maize, and 23 000 tonnes of barley. Given above average forecast harvest and domestic cereal utilisation, import requirement for 2003/04 is estimated at 526 000 tonnes of cereals, including 103 000 tonnes of estimated food aid.

THAILAND (18 February)

Harvesting of the 2002 main season paddy has completed. The main growing season in 2002 has seen excessive rains and flash flooding during August, November and December and below normal rains during July and October. The annual production of paddy for 2002 is projected to be about 25.8 million tonnes (17.1 million tonnes milled rice). This is with the assumption that the second season (May-July harvesting) which is mostly irrigation dependent and normally accounts for about 25 percent of the annual production will follow a normal production pattern.

Harvesting of coarse grains, mainly maize, is also complete; the 2002 output is expected to be around 4.2 million tonnes. This harvest is 11 percent lower than the 4.7 million tonnes produced in 2001 primarily due to dry weather conditions in some maize growing areas in the north.

Thailand is world's top rice exporter with 7.3 million tonnes of exports during 2002. However, rice exports in January and February 2003 were down compared to the same period in 2002.

TIMOR-LESTE, DEMOCRATIC REPUBLIC OF (18 February)

Harvesting of maize, the main staple food crop of the country, is underway. Output is provisionally forecast to be somewhat higher than last year's estimate of 106 000 tonnes, reflecting larger area sown following adequate availability of agricultural inputs and improved security conditions. The paddy crop, planted from December on, normally produces some 50 000 tonnes.

Reliable estimates on production of roots, tubers and pulses are not available. Considering the total cereal production, the import requirement (food gap) of about 28 000 tonnes or 17 percent of the overall national consumption requirement is estimated for 2002/03 marketing year (April/March). Incidents of food shortages and malnutrition, particularly among returning refugees, have been reported.

Two people were killed and several others injured in clashes that broke out early in December in Dili. Violence was reported to be the worst since the country of some 800 000 inhabitants became independent in May 2002.

TURKEY (19 February)

Early prospects for the 2003 wheat and barley have improved with recent heavy rain and snowfall. Production of wheat in 2002, estimated at 20 million tonnes, was about 1 million tonnes higher than in 2001 due to favourable weather. Output of coarse grains (mostly barley and maize) decreased by about 60 000 tonnes to 10.1 million tonnes. Paddy production is forecast at 380 000 tonnes slightly

higher than the previous year. Wheat imports in 2002/03 (July/June) are forecast at 400 000 tonnes compared with one million tonnes estimated for the previous year. Maize imports are also forecast to decrease by 400 000 tonnes to 800 000 tonnes. Exports of wheat and barley in the year ending June 2003 are expected to increase.

TURKMENISTAN (6 February)

Area under cereals, in particular wheat, has been significantly increased in line with the stated policy of the government to achieve food self-sufficiency. Latest reports indicate that 798 000 hectares have been planted to winter cereals, which is similar to last year. Provided sufficient precipitation and average water flows in Amu and Murghab Rivers, the country is expected to produce some 2.1 million tonnes of cereals. This total includes 2 million tonnes of wheat, 60 000 tonnes of barley, 20 000 tonnes of rice and 20 000 tonnes of maize. Given the forecast harvest materialises, Turkmenistan will be able to meet domestic cereal needs and export a limited quantity of wheat in 2003.

UZBEKISTAN (5 February)

Uzbekistan has made significant efforts to increase cereal production in order to meet domestic consumption requirements. Area under cereals has steadily increased in recent years at the expense of cotton. Area under winter cereals increased from 1.2 million hectares in 2002 to 1.3 million hectares this year. Provided favourable weather conditions persist and there is sufficient water flow in the Mau and Sir rivers, Uzbekistan is set to produce a record 5.5 million tonnes of cereals this year, compared with an improved harvest of 5.4 million tonnes in 2002. The aggregate forecast cereal harvest this year includes 5 million tonnes of wheat, 140 000 tonnes of barley, 155 000 tonnes of rice and 130 000 tonnes of maize. Cereal import requirement for the current marketing year, estimated at about 412 000 tonnes, is mainly for the high quality wheat and rice.

VIET NAM (19 February)

Harvesting of the summer-autumn and the Lua Mua paddy crops (or the "tenth month" crop harvested in December-January) has been completed. Summer crop had suffered some damage due to flooding in the Mekong River Delta in southern region while dry conditions prevailed in the central part of the country. However, good rainfall during the last few months of the year benefited the Lua Mua crop grown in the northern part of the country. Due to the reduced plantings in the Mekong Delta where farmers have diversified into other crops, the area under paddy crop was reduced slightly. Consequently, with a combined effect of all the factors, the total paddy production for 2002 is estimated at 34.1 million tonnes (22.7 million tonnes of milled rice) about 6.5 percent higher than the year before.

On account of the increased acreage and generally favourable growing conditions, the 2002 maize production is estimated at 2.3 million tonnes or 6 percent above the previous year.

Exports of rice in 2002 were 3.23 million tonnes, 7 percent down over the year before. Vietnam is a third largest rice exporter behind Thailand and India.

YEMEN (19 February)

Land preparation for the sowing of the main sorghum and millet crops to be harvested towards the end of the year is about to start. The output from the 2002 sorghum crop is estimated at some 268 000 tonnes, about 30 percent lower than the previous year. Output from the wheat crop also decreased slightly to 150 000 tonnes. Maize production estimated at 50 000 tonnes was similar to that of 2001. Imports of cereals in 2003 - mainly wheat - are forecast at 2.5 million tonnes, about the same level as the previous year.

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

COSTA RICA (14 February)

Harvesting of the 2002/03 second season maize crop (mostly white) has been completed under seasonally dry weather. Maize output of the first and the second season crops is provisionally estimated at a low 12 000 tonnes, largely due to below-average plantings aggravated by moisture deficits throughout the season. Also, as a result of the reduced plantings mainly caused by the uncertainty of the government import policy poor output of paddy, the main cereal, has been collected. Production of beans, an important staple in the country, is estimated at an average level of about 14 000 tonnes.

Wheat imports in marketing year 2002/03 (July/June) are forecast at about 200 000 tonnes, similar to the previous year, while maize imports (mostly yellow), are expected to increase slightly from 560 000 tonnes in 2001/02 (July/June). Rice imports in 2003 are tentatively forecast at some 75 000 tonnes, but they could increase to about 100 000 tonnes, depending on the outcome of the 2003 first season paddy crop.

CUBA (15 February)

Harvesting of the 2002/03 second season maize crop is about to start while that of the paddy crop (planted from April through August) has been completed. A satisfactory maize output is anticipated. Production of paddy in 2002, by contrast, is provisionally estimated at a below-average 281 000 tonnes, close to the poor output collected in the previous year. Rice imports in 2003 are forecast to remain at the same relatively high level of 480 000 tonnes imported in 2002.

Prospects for the 2003 sugar cane crop, the main agricultural export, are uncertain. Harvest is underway following some delays in the start of the harvest, caused mainly by the lack of machinery parts, fuel, repairs to the infrastructure, etc. Thus the indications are that output could be much lower than the planned 3.6 million tonnes of raw sugar, similar to the 2002 crop. Last year's crop was one of the poorest in the past 50 years. The country's recovery from the economic crisis in the early 1990s faltered in 2002, when foreign exchange earners such as tourism and remittances from abroad dramatically dropped and the severe impact of two strong hurricanes in late September was felt.

DOMINICAN REPUBLIC (14 February)

Harvest of the 2002/03 second season coarse grains and paddy have been virtually completed. Production of maize is estimated at an average 32 000 tonnes while that of paddy at a record 740 000 tonnes. The increase in paddy output is principally due to the government policy to make the country self-sufficient in rice production and thus eliminate the need for imports of this important staple. Financial incentives were provided, as well as minimum prices guaranteed to producers. Production has by far exceeded domestic demand of some 390 000 tonnes to 400 000 tonnes, and surplus rice stocks are reported which are expensive to maintain. Exports to neighbouring countries are anticipated.

Land is being prepared for planting of the 2003/04 first coarse grain crops from March, while planting of the 2003 first paddy crop is underway. Intended plantings of paddy are forecast to decrease from the 2002 record level.

EL SALVADOR (14 February)

Harvesting of the 2002/03 second season coarse grain crops has been completed and the aggregate maize output for the year (both crops) is provisionally estimated at a well above-average 637 000 tonnes. Production of sorghum is about 139 000 tonnes, similar to last year but below the past five-year average of 168 000 tonnes. Production of beans, an important staple, is estimated at 82 000 tonnes, as compared to last year's well above-average volume of 84 000 tonnes. The coffee crisis is still affecting the sector and is likely to continue in the months ahead. Cases of severe malnutrition among children are reported, particularly in the provinces of Ahuachapan and Sonsonate in the west. Food assistance from the international community is being provided to some 2 200 families. The possibility of food assistance in other coffee producing areas is also being considered.

Wheat imports in marketing year 2002/03 (August/July) are expected to be about 195 000 tonnes, similar to the volume imported in the previous year. Maize imports are forecast at 335 000 tonnes, considerably above the volume of imports in 2001/02.

GUATEMALA (14 February)

Harvesting of the 2002/03 second season coarse grain and bean crops has been completed. Production of maize, the main cereal, is provisionally estimated at 1.1 million tonnes, some 4 per cent above the average of the past 5 years. An average sorghum output has also been collected. Food assistance from the international community continues to be provided to rural families in some areas in the west, whose first season crops in 2002 were severely affected by adverse weather. Food assistance is also delivered to thousands of workers who have lost their jobs in coffee plantations as a result of the international price crisis which is still severely affecting the sector. Cases of serious malnutrition among children are reported.

Wheat imports in marketing year 2002/03 (November/October) are forecast at 540 000 tonnes, slightly above the previous year's volume of 510 000 tonnes. Maize imports in marketing year 2002/03 (July/June) are expected to be 590 000 tonnes, slightly less than the imports during the year before.

HAITI (14 February)

Harvest of the 2002/03 second season cereal crops has been completed while planting of the irrigated paddy crop has only started. Land is also being prepared for planting of the rainfed maize and paddy crop beginning March. A below-average maize and paddy production was obtained in 2002. Drought followed by heavy rains and flooding affected the crops throughout the first part of the year, resulting in crop failures in various localities of the Département de la Grand'Anse and the Département du Sud. Food is reported to be scarce in the affected areas and prices of certain food items have sharply risen. The food situation is also reported difficult in the Département of the Nord-Ouest, the most drought affected area in the country. Food assistance from the international community is being distributed and is likely to continue in the months ahead.

Wheat imports in 2002/03 marketing year (July/June) are expected to be about 295 000 tonnes, slightly above the previous year's volume. Imports of rice in 2003 are forecast at 230 000 tonnes.

HONDURAS (14 February)

Harvesting of the 2002/03 second season coarse grain crops has been completed and output of maize, the main cereal, is provisionally estimated at about 500 000 tonnes, about 4 percent below the past five-year average of 519 000 tonnes. The decline is partly due to drought

incurred losses to first season crops. Production of sorghum is at an average level of 74 000 tonnes. Thousands of coffee plantation workers are still unemployed as a consequence of the international price crisis which continues to affect the coffee sector. Food assistance is being distributed to the most affected families in various localities of the department of Ocotepeque, Lempira, El Paraiso and Olancho.

Wheat imports in marketing year 2002/03 (July/June) are expected to be about 250 000 tonnes, compared to some 210 000 tonnes in the previous year. Maize imports are forecast to be slightly higher than the 230 000 tonnes that was imported in 2001/02.

MEXICO (14 February)

Water reservoir levels and weather conditions are reported adequate for the irrigated 2003 wheat crops in the northwestern areas of the country (planted October/December 2002). The area planted is slightly higher than the past five-year average of 718 000 hectares. Harvest is due to start from April and early forecasts point to an average production of about 3.3 million tonnes. Harvesting operations of the important summer crop (planted in spring/summer 2002) is far advanced. Prospects are good and total maize production for 2002 (crops planted fall/winter 2001/02 and spring/summer 2002) is early forecast at 19 million tonnes which is slightly better than the past five-year average of 18.3 million tonnes. Harvesting of 2002 sorghum crop has been completed and the output is estimated at about 5.5 million tonnes, below the 5.9 million tonnes collected in 2001 and about 6 per cent below average. The decline has been due to severe dry weather in the main producing state of Tamaulipas.

NICARAGUA (14 February)

Harvesting of the 2002/03 third season crop ("apante") is about to be completed. Maize output for the whole year is early forecast at a record 485 000 tonnes, largely reflecting increased plantings and improved yields. Production of sorghum is also high at 98 000 tonnes. The output of beans is provisionally estimated at a record 144 000 tonnes.

Wheat imports in marketing year 2002/03 (July/June) are forecast at about 120 000 tonnes, similar to the previous year. Imports of maize in 2002/03 (July/June) are expected to decline considerably from 2001/02 level as a consequence of the significant increase in production.

The coffee sector is still affected by the international price crisis and thousands of workers from coffee plantations continue to be unemployed. Food assistance from the international community is being delivered to the stricken families.

PANAMA (14 February)

Despite adverse weather throughout the 2002/03 agricultural season, production of maize and paddy was good. Output of paddy, a main staple in the diet, is provisionally estimated at a high 320 000 tonnes which compares to the past five-year average of 253 000 tonnes. An above-average maize output was also harvested.

Land is being prepared for planting of the 2003/04 cereal crops. Dry weather conditions are reported, and some rural localities are being affected by the lack of water. Contingency measures are being adopted by the government.

SOUTH AMERICA

ARGENTINA (15 February)

Harvest of the 2002/03 wheat crop was completed by mid-January under generally dry weather conditions. About 5 890 000 hectares have been harvested which compares to 6 840 000 hectares in the 2001/02 campaign. Output collected is estimated between 12.2 million and 13 million tonnes, a considerable decline from the previous season output of 15.3 million tonnes and from the past five-year average of 14.9 million tonnes. Besides the reduction in plantings, the drop in production is also attributed to the adverse weather, particularly the heavy rains in the main producing areas of southeastern Buenos Aires province.

Normal to heavy rains resumed by the end of January, thus benefiting the 2002/03 maize crop which had been affected earlier by the dry weather conditions. Planting has been completed and the harvest is due to start from March. Despite the beneficial rains, the decline reflects a reduction in the planted area as compared to 2001/02 as well as to the past five-year average plantings. Early forecasts indicate a 2003 maize output of about 14 million tonnes, well below the average of 16 million tonnes of the past five years and the 14.7 million tonnes harvested in 2002.

Planting of the 2003 paddy crop was completed by the end of January. The total area planted is provisionally estimated at about 138 000 hectares, an increase over the 124 000 hectares planted in 2002 but well below the average of 213 000 hectares. Production of paddy in 2002 was 0.7 million tonnes which compares to a five-year average of 1.1 million tonnes.

BOLIVIA (15 February)

Heavy rains and flooding during January and the first half of February in the main producing eastern Department of Santa Cruz, have affected the developing 2003 crops. Heavy rains and flooding in January were also reported in the vicinity of La Paz with similar adverse effect on the crops. By contrast, a severe drought in January was reported in the valleys of the central Department of Cochabamba and southern Department of Chuquisaca. Damage to the recently planted wheat and coarse grain crops has been registered. It is officially reported that more than 34 350 hectares of farm land has been affected by the adverse weather. A state of emergency has been declared by the government and food from the international community is presently being distributed to the vulnerable groups. Prospects are uncertain for the 2003 first season wheat and coarse grains to be harvested from March.

Wheat imports in marketing year 2002/03 (July/June) are forecast at 250 000 tonnes, similar to the previous year's volume.

BRAZIL (15 February)

Harvesting of the 2002 wheat crop was completed in December and output collected is estimated at 2.9 million tonnes, short of the 3.3 million tonnes harvested in 2001 but still above the past five-year average of 2.4 million tonnes. A higher output had been forecast earlier but adverse weather (frost, drought and late rains) affected the crops in the main producing states of Paraná and Rio Grande do Sul. The increase in production with respect to the average was due to the government incentive programme for farmers, implemented in an effort to reduce the country reliance on imports. Annually, about 7 million tonnes of wheat is imported. Sowing of the 2003 wheat crop is due to start from late March and, in line with the government expanding programme, enlarged plantings are expected

Planting of the 2002/03 main maize crop (summer crop) has been virtually completed. Despite a slight decline in plantings with respect to the previous year, output of the 2003 main maize crop is officially forecast to increase to about 29.8 million tonnes, reflecting the good conditions of the crop and anticipated improved yields. Planting of the 2003 second season crop ("zafrihna") in the large producing central and southern states is about to start while in the north-eastern states it has been completed. Financial incentives are also provided to maize growers in order to boost maize production. Production of maize in 2002 dropped significantly to 35.5 million tonnes from the near record level of 41.4 million tonnes reached in 2001. Output from the first (summer) and the second season crops ("zafrihnas") in 2003 is estimated at about 37.1 million tonnes.

Harvesting of the 2003 paddy crop is about to start and an average output is forecast.

CHILE (15 February)

Harvesting of the 2003 crop has been recently completed and output collected is provisionally estimated at an average 1.5 to 1.6 million tonnes. A higher estimate had been earlier forecast, but the crop was affected by excess humidity and lower yields obtained. Planting of the 2003 maize crop has been also completed and the area planted is officially estimated at 96 790 hectares which shows an increase over the 87 270 hectares sown in 2002. The increase in plantings is due to attractive prices to producers. Harvesting is about to start and an above-average output is forecast. The area planted to barley increased with respect to that of the previous year but still remains below average. Above-average plantings of oats are also reported for 2003.

Wheat imports in marketing year 2002/03 (December/November) are forecast to remain at 300 000 tonnes, similar to the level in marketing year 2001/02. Imports of maize in 2003/04 (February/January) are early forecast at 1.1 million tonnes.

COLOMBIA (15 February)

Harvesting of the 2002/03 second season cereal crops is well advanced. Production of maize, the main coarse grain, is expected to be some 1.15 million tonnes, slightly above the output collected in 2001 and the past five-years average of about 1 million tonnes. An average output of sorghum of 250 000 tonnes is anticipated. Production of paddy, the main cereal, in 2002 is estimated at 2.35 million tonnes which compares to the average of 2.1 million tonnes.

Wheat imports in 2003 are forecast to decline from 1.2 million tonnes in the previous year, mostly as a consequence of higher international prices. Maize imports in 2003 are expected to remain at about 2.1 million tonnes due to the strong demand of the animal feed sector.

Food assistance from the international community continues in various parts of the country to the internally displaced population, the victims of the civil strife which for long is affecting the country.

ECUADOR (15 February)

Planting of the 2003 main wheat crop, which is only grown in the highlands, is underway while harvesting of the 2003 first (winter crop) yellow maize crop is due to start from April. The winter maize crop is principally grown in the coastal areas of the provinces of Esmeraldas, Manabi, Guayas, Los Rios and El Oro and accounts for about 65 to 70 per cent of total annual maize production. Planting of the main paddy crop is also underway in the coastal areas of these provinces for harvesting from April. Dry weather conditions were reported for the first half of February, following modest rainfall in the previous month; however, heavy rains were registered in some of the coastal provinces in the first days of February leaving some communities in isolation. Provided normal rains resume, early prospects for the crops are good.

Wheat imports in 2002/03 marketing year (July/June) are expected to increase from 450 000 tonnes in 2001/02 (July/June) to some 460 000 tonnes. Imports of maize in 2003 (January/December) are forecast to increase from 240 000 tonnes in 2002 (January/December).

Food assistance is being distributed to refugees from Colombia, the victims of the civil strife affecting their country.

PERU (15 February)

Heavy rains and flooding were reported in early February in the southeastern parts of the country, particularly in the departments of Cusco, Madre de Dios and Puno. A number of casualties and considerable damage to housing and infrastructure was reported. A state of emergency has been declared in some of the regions and relief is being provided to the affected population. Planting of the 2003 wheat crop, a soft type mainly grown in the highlands for local consumption and not valid for milling, is underway. Early forecasts indicate that the area planted should be about the same as last year's above-average level. Planting of the 2003 yellow maize crop is underway while the bulk of the planting of white maize has been completed. Both white and yellow maize are grown all year around, principally along the coast and the eastern slopes of the Andean mountain range. Total maize plantings are expected to be close to the record level of 560 000 hectares reached in 2002. Water reservoir levels for planting of the 2003 irrigated paddy crop are considered adequate in the major producing areas of Lambayeque and Piura in the north. Sowing operations are underway for harvesting from May.

Similar to the level of imports in 2002 wheat imports in 2003 are forecast to be about 1.3 million tonnes. Maize imports in 2003 are expected to remain unchanged at 1 million tonnes.

URUGUAY (15 February)

Harvesting of the 2002 wheat crop has been recently completed and the output is provisionally estimated at about 280 000 tonnes, almost twice the flood-affected harvest of 2001 but still below the past five-year average. Harvest of the 2002 barley crop has also been completed and production is estimated at about an average 170 000 tonnes. Harvesting of the 2003 coarse grain crops, as well as that of the important paddy crop, is due to start from March. A recovery in paddy production is anticipated. Paddy output in 2002 was a below-average 940 000 tonnes, largely the result of unattractive prices and constraints to producers.

VENEZUELA (15 February)

Harvest of the 2002 coarse grain crops has been completed and maize output is provisionally estimated at a near average level, while production of sorghum is expected to be below average. The decline in production has been largely due to adverse weather in the main producing areas during the agricultural season. Production of paddy, the main cereal, in 2002 was 0.6 million tonnes. This is considerably below the past five-year average of 0.7 million tonnes. The drop in paddy production is the result of the scarce availability of irrigation water in the important producing areas of the central state of Guárico. Although rice stocks are sufficient to meet domestic demand in the forthcoming months, it is likely that some 25 000 tonnes of imports would nevertheless be required towards the end of 2003.

EUROPE

EU (17 February)

Latest information indicates that the overall winter wheat area could be marginally down from the previous year's level. Wheat prices in the EU in the latter part of 2002 were under pressure from large volumes of imports from other parts of Europe, thus reducing the incentive for EU producers to plant wheat, while wet conditions in northern Europe and parts of Spain and Portugal hampered fieldwork.

ALBANIA (17 February)

After particularly dry conditions for last year's cereal production, above normal precipitation so far this season has improved soil moisture conditions for the winter wheat crop and prospects for the

spring cereals. Under the Balkans regional emergency operation WFP continues to assist poor families in Albania who can not meet their basic food needs.

BELARUS (4 February)

Area planted to winter cereals this year is similar to the past two years. However, winter cereals are in critical condition following severe cold in December and January, inadequate snow cover and frost. Spring cereals are the most important crops in the agricultural calendar of the country and severely damaged winter cereal areas are replanted in the spring. Therefore, the aggregate harvest is seen to decline only by about 390 000 tonnes in 2003 compared with 2002 harvest. The 2003 forecast cereal harvest includes 2.1 million tonnes of barley, 1.7 million tonnes of rye and 970 000 tonnes of wheat. Cereal import requirement during the current marketing year is estimated at 651 000 tonnes, which includes 405 000 tonnes of wheat, 135 000 tonnes of maize and 71 000 tonnes of rye.

BOSNIA-HERZEGOVINA (6 February)

Winter grains have been planted on similar areas to last year and winter crops are reportedly in satisfactory condition. Aggregate harvest in 2003 is forecast at slightly over 1.1 million tonnes, which is similar to the harvest in 2002. The forecast harvest includes some 340 000 tonnes of wheat, 640 000 tonnes of maize and 55 000 tonnes of barley. Cereal import requirement for the current marketing year is estimated at 230 000 tonnes, including 80 000 tonnes of estimated food aid.

BULGARIA (17 February)

The winter wheat area is officially reported to be about 900 000 hectares, down from the average of about 1 million hectares. The decline is attributed to adverse weather during the peak planting period last autumn, and poor returns on last year's crops for most small to medium sized wheat producers. Weather conditions for crops since planting are reported to have been generally satisfactory, apart from some frost damage reported in minor producing north-eastern parts. Prospects for the spring cereal planting are seen to be favourable, with soil moisture reserves generally improved compared to the previous year's situation.

CROATIA (6 February)

Latest reports indicate a satisfactory winter crop. Similar areas have been planted to winter cereals as last year. Provided that favourable weather conditions prevail, aggregate cereal output this year is seen to match the significantly improved harvest of the preceding year, which was estimated at 3.3 million tonnes. The forecast aggregate cereal harvest includes some 2.1 million tonnes of maize, 988 000 tonnes of wheat and 171 000 tonnes of barley. Cereal exports in the current marketing year are estimated at 450 000 tonnes.

CZECH REPUBLIC (17 February)

In the Czech Republic, the outlook is somewhat uncertain: a new wave of flooding in early January may have further stressed some crops following the impact of adverse weather already during planting last autumn. As a result of the wet conditions at planting time, the country's winter wheat area for harvest this summer is estimated to have fallen to about 700 000 hectares, 100 000 less than the previous year's area.

ESTONIA (5 February)

Aggregate area planted to cereals are planned to remain similar to 2002 levels. Spring cereals are the most important in the country's cropping calendar. Cereal harvest is tentatively forecast at 531 000 tonnes, which is similar to the harvest in 2002. The forecast cereal harvest includes 240 000 tonnes of barley and 150 000 tonnes of wheat. Cereal import requirement in the current

marketing year is estimated at 243 000 tonnes, including 104 000 tonnes of wheat, 60 000 tonnes of maize and 45 000 tonnes of barley.

FORMER YUGOSLAV REPUBLIC OF MACEDONIA (17 February)

Early prospects for the next 2002/03 winter grain season are satisfactory with substantial rainfall during part of the summer ensuring replenishment of soil moisture levels after the previous dry season.

HUNGARY (17 February)

The winter wheat area in Hungary is estimated to be similar to that of the previous year. However, the condition of the crop is reported to be significantly better, pointing to an increase in production from last year's below average level, should the weather be normal during the remainder of the season.

LATVIA (5 February)

Area planted to winter cereals is similar to last year at 144 000 hectares. Aggregate cereal harvest is tentatively estimated at 990 000 tonnes, which is some 30 000 tonnes higher than the 2002 harvest. This forecast includes some 400 000 tonnes of wheat, 295 000 tonnes of barley and 150 000 tonnes of rye.

LITHUANIA (5 February)

Latest reports indicate that similar areas have been planted to winter cereals this year compared with 2002. Aggregate grain harvest is tentatively forecast at 2.5 million tonnes, which is similar to the 2002 harvest. This total includes, just over one million tonnes of barley, 800 000 tonnes of wheat and 450 000 tonnes of rye. Cereal exports during the current marketing year are estimated at 168 000 tonnes and imports at 105 000 tonnes.

MOLDOVA (5 February)

Area planted to winter cereals, at 476 000 hectares, this year is similar to 2002 and no significant damages have been reported to winter crops this year. Winter and spring crops are almost equally important. Preliminary estimates put aggregate grain harvest at about 2.7 million tonnes in 2003, which is similar to the harvest in 2002. The forecast harvest includes some 1.19 million tonnes of wheat, 1.2 million tonnes of maize and 230 000 tonnes of barley. The government of Moldova with the help of the international community is attempting to increase agricultural production, in particular cereals, in the near future. Moldova has already exported about 395 000 tonnes of cereals during the current marketing year, which is a post Soviet record. Consequently, wheat stocks are low and the country might need to import wheat to meet the deficit.

POLAND (17 February)

Official estimates put the overall winter grain area at 4.4 million hectares, 3.5 percent down from the previous year. Of the total, winter wheat accounts for 1.9 million hectares, just marginally down from last year's area.

ROMANIA (17 February)

In contrast to many other parts of the region, the winter grain planting campaign last autumn benefited from generally favourable weather. The total wheat area is estimated at about 2.1 million hectares, similar to the previous year's area, and with the bulk of the crop planted within the optimum date the yields prospects are good.

RUSSIAN FEDERATION (3 February)

Area under winter cereals is more than 7 percent lower this year compared with 2002. In addition, severe cold weather in December and insufficient snow cover have compromised large areas of

winter grains and winter crops are reportedly in critical condition. FAO, therefore, tentatively estimates aggregate cereal harvest at 75.5 million tonnes in 2003, which is about 9.6 million tonnes less than the harvest in 2002. The aggregate cereal harvest in 2003 includes some 42.5 million tonnes of wheat, 17.7 million tonnes of barley, 5 million tonnes of rye, 7.5 million tonnes of oats and about 1.6 million tonnes of maize. During the past two years Russia has witnessed significantly improved grain harvest. Cereal exports during the current marketing year are estimated at 13 million tonnes, including 10 million tonnes of wheat and 3 million tonnes of barley.

The internally displaced and vulnerable population in Chechnya continues to require food aid and other assistance. WFP has begun distributing an estimated 34 000 tonnes of basic food commodities to some 290 500 internally displaced and vulnerable population in Chechnya and Ingushetia. This EMOP is expected to be completed by the end of December 2003.

SLOVAK REPUBLIC (17 February)

Wet conditions in the autumn last year disrupted winter grain (mostly wheat) planting and the area sown is estimated to be sharply down from normal. Moreover, weather conditions throughout the winter so far have also been unfavourable for the dormant crops and production looks set to be significantly reduced this year.

UKRAINE (3 February)

Winter crop damages have been reported significantly higher than the damages during the past six years. Relatively warmer weather conditions and insufficient snow cover have resulted in severe frost in most parts of the country, compromising winter cereals. It is estimated that more than 20 percent of the winter cereal areas (7.78 million hectares) will be replanted in spring, while yields from the remainder of the winter cereals are expected to be below average. The 2003 cereal harvest is, therefore, tentatively estimated at about 35 million tonnes, which is about 3.4 million tonnes less than the 2002 harvest. This year's aggregate cereal harvest includes 18.9 million tonnes of wheat, 8.7 million tonnes of barley and 4.8 million tonnes of maize. Cereal exports in the current marketing year are estimated at 12.2 million tonnes, including 8 million tonnes of wheat and 3.3 million tonnes of barley.

YUGOSLAVIA, FED. REP. OF (SERBIA AND MONTENEGRO) (6 February)

Area planted to winter cereals, mainly wheat and barley, is similar to last year, and winter crops are reportedly in satisfactory condition. Cereal harvest in 2002 is estimated at 8.1 million tonnes, which is about 300 000 tonnes lower than the 2001 harvest. This year's forecast harvest includes 2.1 million tonnes of wheat, 5.6 million tonnes of maize and 303 000 tonnes of barley. Aggregate cereal exports in the current season is estimated at 700 000 tonnes, including 250 000 tonnes of wheat and 450 000 tonnes of maize.

Under a Protracted Relief and Recovery Operation since July this year, WFP has been assisting on average some 134 000 refugees, 130 000 of whom are in Serbia and 4 000 in Montenegro. This operation will continue until the end of December 2003. ICRC will continue to assist the Internally Displaced Persons (IDP) until the end of March 2003.

NORTH AMERICA

CANADA (17 February)

The relatively small winter wheat crop for harvest in 2003 has already been sown and the area is estimated at a record high of 400 000 ha, 67 percent up from last year, in response to the high wheat prices last autumn. Early indications for the main spring crop to be sown later this year also point to a sharp increase in the area sown by about 7 percent. Assuming weather conditions return to normal this year, there will also be a significant reduction in the rate of abandonment and a recovery in the average yield. As a result, the overall area of wheat harvested in 2003 could be as much as 25 percent up from that in 2002, and production could be up by about 60 percent.

Production of coarse grains is also expected to increase in 2003, recovering from the drought-reduced level in 2002. However, for all cereals, the actual seeded area will depend largely on spring precipitation, as subsoil moisture levels are reported to remain low across much of the main producing areas.

UNITED STATES (17 February)

Predominantly dry weather in the main winter wheat growing areas since last October is leading to increased concern over the prospects for this year's harvest. Worst hit is the northern part of the Great Plains where soil moisture conditions are reported to be worse than last year's already below-normal levels. Elsewhere, in the central and southern plains, crop conditions throughout the winter have remained much better than those a year ago after a beneficial rainfall at the start of the season, but the accumulated dryness since then could start to show an impact as crops break dormancy in the spring and need moisture for development. According to the USDA Seeding Report in January, the winter wheat area for the 2003 harvest has increased by 6 percent from the previous year to 17.9 million hectares, the largest area since 1998. The increase is mostly attributed to higher wheat prices during the peak planting time last August. The level of spring wheat and coarse grain sowings, which start from March in some states, will depend greatly on the amount of rainfall in the coming few weeks.

OCEANIA

AUSTRALIA (19 February)

The estimate of the 2002 aggregate winter grain production have been revised downward since December, largely as a result of poorer than expected outturns in Western Australia and South Australia. Countywide, the 2002 winter grain crops have been devastated by severe drought, and in the ABARE February crop report, the total winter grain production in 2002 is now put at 15.4 million tonnes, down 61 percent from the previous year's record crop and the lowest harvest since 1982. Of the total, wheat is estimated to account for 9.4 million tonnes, 62 percent down from 2001. The 2003 summer coarse grain crop also looks set to be affected by the drought. ABARE reports that the total area planted to summer maize and sorghum crops is just over 500 000 hectares, about 40 percent down from the previous year 20 percent less than the average of the past five years. Yield prospects are also poor unless significant rainfall arrives soon for the developing crops.

FIJI (19 February)

The Islands were hit by Cyclone "Ami" on 13 January, leaving a number of casualties and causing major damage to housing, crops and infrastructure. The island of Vanua Levu, the second largest island of the Fiji Group, accounting for one-fourth of the archipelago's population, was the worst affected, followed by other islands known as the Lau Group. The capital of the island, Labasa, was submerged by the flash floods brought about by the hurricane with heavy rains and winds. A state of disaster was declared and an appeal for international assistance was launched by the government on 23 January. About 53 000 people are reported to be affected. Emergency relief has been provided by the international community.

SOLOMON ISLANDS (19 February)

Solomon Islands were severely hit by tropical Cyclone "Zoe", one of the worst on record, on 28 and 29 December. Immense damage to housing and crops, as well as to water supply systems and other community facilities was reported, particularly in coastal villages. The islands of Tikopia (located about 600 miles from the capital of the Archipelago), Anuta, Fataka and parts of Santa Cruz were the worst affected. No loss of life was reported but about 2 000 people were affected. Relief assistance and logistical support was provided by the international community. The food security of the population has been threatened and close monitoring in the next few months is recommended.

ESTIMATED CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/
2002/03 or 2003 estimates (in thousand tonnes)

COUNTRY	Marketing year	2001/02 or 2002			2002/03 or 2003			
		Actual imports			Total import requirements (excluding re-exports)	Import position		
		Commercial purchases	Food aid	Total commercial and aid		Total commercial and aid	Food aid allocated committed or shipped	Commercial purchases
AFRICA		31 389.6	1 882.4	33 272.0	35 010.2	10 271.2	1 064.7	9 206.5
Northern Africa		16 871.4	43.0	16 914.4	16 123.0	7 657.4	7.5	7 649.9
Egypt	July/June	12 238.5	34.5	12 273.0	11 810.0	6 152.7	7.5	6 145.2
Morocco	July/June	4 632.9	8.5	4 641.4	4 313.0	1 504.7	0.0	1 504.7
Eastern Africa		3 394.9	931.5	4 326.4	6 268.0	520.5	255.7	264.8
Burundi	Jan./Dec.	43.5	17.5	61.0	65.0	0.0	0.0	0.0
Comoros	Jan./Dec.	46.0	0.0	46.0	46.0	0.0	0.0	0.0
Djibouti	Jan./Dec.	58.2	19.8	78.0	63.0	0.0	0.0	0.0
Eritrea	Jan./Dec.	87.2	121.0	208.2	440.0	12.2	12.2	0.0
Ethiopia	Jan./Dec.	87.6	292.4	380.0	1 645.0	97.4	97.4	0.0
Kenya	Oct./Sept.	1 043.6	136.4	1 180.0	1 640.0	79.4	50.0	29.4
Rwanda	Jan./Dec.	142.0	28.0	170.0	190.0	0.0	0.0	0.0
Somalia	Aug./July	251.7	18.3	270.0	320.0	8.3	8.3	0.0
Sudan	Nov./Oct.	1 145.5	101.7	1 247.2	1 264.0	115.5	41.0	74.5
Tanzania	June/May	383.7	116.3	500.0	450.0	188.2	27.3	160.9
Uganda	Jan./Dec.	105.9	80.1	186.0	145.0	19.5	19.5	0.0
Southern Africa		1 967.3	361.0	2 328.3	3 237.0	1 915.6	728.6	1 187.0
Angola	April/March	401.7	169.7	571.4	725.0	403.8	182.8	221.0
Lesotho	April/March	178.2	2.8	181.0	338.0	184.3	38.3	146.0
Madagascar	April/March	364.4	28.6	393.0	255.0	55.1	43.5	11.6
Malawi	April/March	144.3	6.6	150.9	550.0	548.9	215.9	333.0
Mozambique	April/March	550.3	133.7	684.0	642.0	308.7	101.7	207.0
Swaziland	May/April	76.8	1.2	78.0	111.0	84.8	16.4	68.4
Zambia	May/April	251.6	18.4	270.0	616.0	330.0	130.0	200.0
Western Africa		8 414.5	455.0	8 869.5	8 559.7	165.8	61.2	104.6
Coastal Countries		5 973.2	271.3	6 244.5	5 867.0	47.8	2.1	45.7
Benin	Jan./Dec.	95.1	18.9	114.0	115.0	0.0	0.0	0.0
Cote d'Ivoire	Jan./Dec.	1 263.0	14.2	1 277.2	1 117.0	0.6	0.6	0.0
Ghana	Jan./Dec.	474.2	78.6	552.8	520.0	0.0	0.0	0.0
Guinea	Jan./Dec.	292.3	45.5	337.8	350.0	1.0	1.0	0.0
Liberia	Jan./Dec.	117.8	32.2	150.0	165.0	0.1	0.1	0.0
Nigeria	Jan./Dec.	3 457.5	12.5	3 470.0	3 270.0	0.0	0.0	0.0
Sierra Leone	Jan./Dec.	173.3	69.4	242.7	230.0	0.4	0.4	0.0
Togo	Jan./Dec.	100.0	0.0	100.0	100.0	45.7	0.0	45.7
Sahelian Countries		2 441.3	183.7	2 625.0	2 692.7	118.0	59.1	58.9
Burkina faso	Nov./Oct.	227.2	30.4	257.6	241.6	11.8	11.8	0.0
Cape Verde	Nov./Oct.	39.0	35.8	74.8	108.5	4.2	4.2	0.0
Chad	Nov./Oct.	84.1	3.5	87.6	98.1	5.8	5.8	0.0
Gambia	Nov./Oct.	143.2	5.7	148.9	142.3	0.0	0.0	0.0
Guinea Bissau	Nov./Oct.	49.8	7.0	56.8	69.2	5.3	5.3	0.0
Mali	Nov./Oct.	237.2	13.4	250.6	279.0	2.4	2.4	0.0
Mauritania	Nov./Oct.	261.6	40.1	301.7	322.5	27.3	14.7	12.6
Niger	Nov./Oct.	356.7	29.9	386.6	375.0	14.9	14.9	0.0
Senegal	Nov./Oct.	1 042.5	17.9	1 060.4	1 056.5	46.3	0.0	46.3
Central Africa		741.5	91.9	833.4	822.5	11.9	11.7	0.2
Cameroon	Jan./Dec.	320.3	2.2	322.5	322.5	0.0	0.0	0.0
Cent.Afr.Rep.	Jan./Dec.	32.0	5.0	37.0	38.0	0.8	0.8	0.0
Congo, Dem.Rep.	Jan./Dec.	189.7	67.9	257.6	250.0	5.7	5.7	0.0
Congo, Rep.	Jan./Dec.	178.2	11.1	189.3	185.0	0.0	0.0	0.0
Eq. Guinea	Jan./Dec.	15.0	0.0	15.0	15.0	0.2	0.0	0.2
Sao Tome	Jan./Dec.	6.3	5.7	12.0	12.0	5.2	5.2	0.0

ESTIMATED CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/
2002/03 or 2003 estimates (in thousand tonnes)

COUNTRY	Marketing year	2001/02 or 2002			2002/03 or 2003			
		Actual imports			Total import requirements (excluding re-exports)	Import position		
		Commercial purchases	Food aid	Total commercial and aid		Total commercial and aid	Food aid allocated committed or shipped	Commercial purchases
ASIA		32 412.4	3 592.0	36 004.4	36 657.0	14 762.0	1 874.2	12 887.8
Afghanistan	July/June	1 182.5	323.8	1 506.3	1 396.0	352.2	188.4	163.8
Armenia	July/June	306.0	39.0	345.0	344.0	102.3	47.1	55.2
Azerbaijan	July/June	721.0	17.0	738.0	631.0	255.7	17.2	238.5
Bangladesh	July/June	1 624.1	531.6	2 155.7	2 510.0	1 390.8	194.3	1 196.5
Bhutan	July/June	47.8	6.2	54.0	71.0	0.0	0.0	0.0
Cambodia	Jan./Dec.	30.4	51.7	82.1	55.0	59.5	40.5	19.0
China 2/	July/June	9 529.4	70.6	9 600.0	9 600.0	3 977.0	44.0	3 933.0
Georgia	July/June	443.0	100.0	543.0	575.0	172.2	26.1	146.1
India	April/March	11.5	216.1	227.6	300.0	326.7	317.9	8.8
Indonesia	April/March	6 509.0	225.0	6 734.0	8 640.0	3 816.7	239.4	3 577.3
Korea, D.P.R.	Nov./Oct.	882.4	1 020.8	1 903.2	1 084.0	296.8	284.7	12.1
Kyrgyz Republic	July/June	197.0	89.0	286.0	179.0	62.0	15.3	46.7
Laos	Jan./Dec.	19.9	21.1	41.0	37.0	30.0	20.5	9.5
Maldives	Jan./Dec.	37.0	0.0	37.0	37.0	14.6	14.6	0.0
Mongolia	Oct./Sept.	181.7	56.3	238.0	238.0	12.6	0.0	12.6
Nepal	July/June	76.9	8.1	85.0	100.0	50.0	0.0	50.0
Pakistan	May/April	388.6	94.4	483.0	630.0	165.8	36.6	129.2
Philippines	July/June	4 460.5	249.5	4 710.0	4 800.0	1 641.4	87.8	1 553.6
Sri Lanka	Jan./Dec.	948.8	95.2	1 044.0	1 120.0	793.0	92.0	701.0
Syria	July/June	1 406.9	13.3	1 420.2	745.0	765.3	2.0	763.3
Tajikistan	July/June	451.0	191.0	642.0	656.0	264.1	83.6	180.5
Turkmenistan	July/June	46.0	8.0	54.0	27.0	25.7	0.0	25.7
Uzbekistan	July/June	521.0	52.0	573.0	412.0	186.3	120.9	65.4
Yemen	Jan./Dec.	2 390.0	112.3	2 502.3	2 470.0	1.3	1.3	0.0
CENTRAL AMERICA		4 007.1	302.7	4 309.8	4 375.0	1 399.6	296.3	1 103.3
Cuba	July/June	1 730.8	6.0	1 736.8	1 705.0	235.6	1.2	234.4
Guatemala	July/June	1 028.3	126.7	1 155.0	1 180.0	499.5	113.0	386.5
Haiti	July/June	458.6	91.4	550.0	595.0	251.9	102.5	149.4
Honduras	July/June	549.0	28.0	577.0	625.0	261.5	24.4	237.1
Nicaragua	July/June	240.4	50.6	291.0	270.0	151.1	55.2	95.9
SOUTH AMERICA		867.5	142.8	1 010.3	1 059.0	539.1	116.1	423.0
Bolivia	July/June	195.9	73.4	269.3	269.0	46.2	41.2	5.0
Ecuador	July/June	671.6	69.4	741.0	790.0	492.9	74.9	418.0
OCEANIA		397.8	0.0	397.8	383.0	0.0	0.0	0.0
Kiribati	Jan./Dec.	8.0	0.0	8.0	8.0	0.0	0.0	0.0
Papua New Guinea	Jan./Dec.	334.8	0.0	334.8	320.0	0.0	0.0	0.0
Samoa	Jan./Dec.	17.0	0.0	17.0	17.0	0.0	0.0	0.0
Solomon Isl.	Jan./Dec.	26.0	0.0	26.0	26.0	0.0	0.0	0.0
Tuvalu	Jan./Dec.	1.0	0.0	1.0	1.0	0.0	0.0	0.0
Vanuatu	Jan./Dec.	11.0	0.0	11.0	11.0	0.0	0.0	0.0
EUROPE		761.8	148.2	910.0	870.0	160.2	79.4	80.8
Albania	July/June	320.3	42.7	363.0	383.0	105.8	25.0	80.8
Bosnia&Herzegovina	July/June	185.4	104.6	290.0	230.0	54.4	54.4	0.0
Macedonia, FYR	July/June	256.1	0.9	257.0	257.0	0.0	0.0	0.0
TOTAL		69 836.2	6 068.1	75 904.3	78 354.2	27 132.1	3 430.7	23 701.4

SOURCE: FAO

1/ Includes food deficit countries with per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. U.S.\$ 1 445 in 2000), which is in accordance with the guidelines and criteria agreed to by the CFA should be given priority in the allocation of food aid. 2/ Includes import requirements of Taiwan Province.

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DEFINITIONS:

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

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

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

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