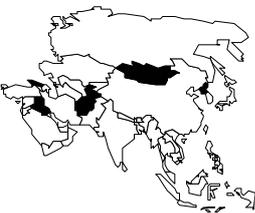


# FOODCROPS AND SHORTAGES

No.2

June 2003

	<p><b>AFRICA:</b> In eastern Africa, the food situation is grave in Ethiopia and Eritrea where the number of people in need food assistance now stands at 12.5 million and 2.3 million respectively. With the lean season just beginning, more food aid pledges and faster delivery are urgently required. In southern Africa, Zimbabwe faces acute food shortages with some 5.5 million people in need of assistance. In southern Mozambique some 950 000 people will require emergency food aid in 2003/04. In western Africa, the food situation of a large number of people in Mauritania, Liberia and Côte d'Ivoire is of serious concern.</p>
	<p><b>ASIA:</b> A serious humanitarian crisis persists in DPR Korea. In China, the outbreak of Severe Acute Respiratory Syndrome (SARS) has significantly affected the country's economy and agriculture. In Iraq, the outcome of the current crops is uncertain due to insecurity and shortages of spare parts for harvesting machinery. In Afghanistan prospects are for an improved cereal harvest this year. However, access to food remains a serious problem for a large number of people. The food situation in the West Bank and Gaza Strip continues to be grim due to disruptions caused by military operations.</p>
	<p><b>LATIN AMERICA AND THE CARIBBEAN:</b> In Central America, 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. In South America, prospects are poor for the 2003 maize crop in Ecuador due to adverse weather at planting. In Venezuela, the outlook is also poor for the coarse grain and paddy crops, mainly due to a shortage of farm inputs and scarce water availability, particularly for the paddy crop.</p>
	<p><b>EUROPE:</b> A reduction in wheat output is forecast in the EU in 2003 but outputs of other grains will change little compared to last year. Reduced cereal outputs are expected in several of the CEECs because of unfavourable weather for some of the winter grains and for spring planting in parts. Frost, thin snow cover and a late spring in the European CIS have compromised this year's cereal harvest. The harvest throughout the European CIS is seen significantly lower than the harvest in the past few years. In Moldova a very tight food supply is envisaged, following a severely cold winter and dry spring.</p>
	<p><b>NORTH AMERICA:</b> Cereal production in both the United States and Canada is set to recover sharply from last year's drought-reduced levels. Winter wheat is already being harvested in parts of the United States while planting of the spring/summer crops in the region has mostly been completed under satisfactory conditions. According to latest forecasts, output could increase by almost 50 percent in Canada and about 15 percent in the United States. In Canada, the bulk of the cereal crop has just been planted under generally satisfactory conditions.</p>
	<p><b>OCEANIA:</b> Cereal planting and production in 2003 should rebound sharply after last year's severely reduced output. Assuming a return to normal weather conditions after the El Niño-induced drought last year, the wheat crop is forecast to recover to 24 million tonnes, close to the record harvest in 2001. Conditions for the winter grain planting have been generally satisfactory so far but in early June some areas were still waiting to receive sufficient planting rains.</p>



## AFFECTED COUNTRIES <sup>1/</sup>

### COUNTRIES FACING FOOD EMERGENCIES (Total: 36 countries)

<u>Region/Country</u>	<u>Reason for Emergency</u>	<u>Region/Country</u>	<u>Reason for Emergency</u>
<b><u>AFRICA</u> (23 countries)</b>		<b><u>ASIA</u> (7 countries)</b>	
<b>Angola*</b>	Returnees	<b>Afghanistan*</b>	Effects of recent drought and war
<b>Burundi*</b>	Civil strife, IDPs	<b>Georgia</b>	Structural problems and input shortages
<b>Cape Verde</b>	Drought	<b>Iraq*</b>	Recent war, shortage of inputs, effects of recent drought
<b>Central Afr. Rep.</b>	Civil strife, IDPs	<b>Korea, DPR*</b>	Adverse weather, economic constraints
<b>Congo, Dem.Rep.*</b>	Civil strife, IDPs and refugees	<b>Mongolia*</b>	Harsh winters, drought
<b>Congo Rep. of*</b>	Civil strife, IDPs	<b>Tajikistan*</b>	Input and irrigation water shortages
<b>Côte d'Ivoire</b>	Civil strife, IDPs	<b>Timor-Leste</b>	Drought
<b>Eritrea*</b>	Drought, IDPs, returnees	<b><u>LATIN AMERICA</u> (4 countries)</b>	
<b>Ethiopia*</b>	Drought, IDPs	<b>El Salvador</b>	International coffee crisis
<b>Guinea*</b>	IDPs and refugees	<b>Guatemala</b>	International coffee crisis
<b>Kenya*</b>	Drought in parts	<b>Honduras</b>	International coffee crisis
<b>Lesotho</b>	Adverse weather in parts	<b>Nicaragua</b>	International coffee crisis
<b>Liberia*</b>	Civil strife, IDPs	<b><u>EUROPE</u> (2 countries)</b>	
<b>Madagascar</b>	Drought in parts, economic disruption	<b>Russian Federation</b>	
<b>Mauritania*</b>	Drought	<b>(Chechnya)</b>	Civil strife
<b>Mozambique</b>	Drought in southern parts	<b>Serbia &amp; Montenegro</b>	Refugees
<b>Sierra Leone*</b>	Civil strife, IDPs		
<b>Somalia*</b>	Civil strife, drought in parts		
<b>Sudan*</b>	Civil strife, drought in parts		
<b>Swaziland</b>	Drought in parts		
<b>Tanzania</b>	Drought in parts, refugees		
<b>Uganda</b>	Civil strife, IDPs, drought in parts		
<b>Zimbabwe*</b>	Drought, economic disruption		

### COUNTRIES WITH UNFAVOURABLE PROSPECTS FOR CURRENT CROPS

<u>Country</u>	<u>Main contributory factors</u>
<b>Central Afr. Rep.</b>	Civil strife
<b>Côte d'Ivoire</b>	Civil strife
<b>Ecuador</b>	Adverse weather
<b>Liberia*</b>	Civil strife
<b>Moldova</b>	Drought and frost
<b>Tanzania</b>	Dry weather
<b>Venezuela</b>	Economic constraints, drought

<sup>1/</sup> 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 June 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 June 2003, the number of countries facing serious food shortages throughout the world stands at 36, with 23 in Africa, 7 in Asia, 4 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. The recently published joint FAO/WFP Crop and Food Supply Assessments highlight this factor (<http://www.fao.org/WAICENT/faoinfo/economic/giews/english/fs/fstoc.htm>).

In **eastern Africa**, harvesting of the main season crop is underway in Tanzania, while elsewhere planting of the main season crops has begun. Recent heavy rains and floods in parts of Kenya, Ethiopia and Somalia killed a number of people, displaced thousands, destroyed or damaged crops and increased the likelihood of serious localised food shortages. In Eritrea, the smaller "azmera" season rainfall was poor in many parts, affecting land preparation. The main season rains are expected from end-June. More food aid pledges and faster deliveries are required to mitigate the severe food shortages affecting nearly two-thirds of the country's population. In Ethiopia, floods have affected tens of thousands of people in the south and east. In addition, serious food shortages persist, particularly in the south, due to last year's drought. In Kenya, heavy rains and floods have caused serious damage in parts while the effects of recent droughts are still being felt in many areas. In Somalia, flooding in Juba and Shabelle river basins in the south threatens the food security of the local populations. In north-western Somalia (Somaliland) and north-eastern Somalia (Puntland), despite some recent rainfall, severe water and food shortages remain. In Sudan, serious food shortages are reported in various parts of the country and food prices are higher than normal at this time of the year. In Tanzania, despite an overall stable food supply situation, there are food security concerns for the central, southern and northern coastal areas. In Uganda, the overall food supply situation is stable but it is precarious in the north and north-east due to persisting insurgency and poor harvests in recent seasons.

In **southern Africa**, harvesting of the 2003 cereal crops is well advanced. In most countries production has recovered from the reduced harvests of the previous two years. Despite a delay in the start of the rains and localized dry spells in the first part of the season, precipitation was adequate from February for crop development. Production of maize, the main staple, is estimated at average to above average levels in South Africa, Zambia, Mozambique, Malawi, Namibia and Angola. In contrast, cereal production in Zimbabwe, although considerably up on last year, remains well below average due to erratic rains and the impact of land reform activities. Production was also sharply reduced by dry weather in Botswana. In Swaziland, cereal output increased only marginally due to insufficient rains at low altitudes.

After a serious food crisis, the food supply situation in the sub-region has eased due to the new harvest. Maize prices have declined considerably, improving access to food for poorer and vulnerable segments of the population. However, in Zimbabwe some 5.5 million people will need food assistance during the 2003/04 marketing year (May/April). In other countries, while the food situation is satisfactory at the national level, there are pockets where the harvest was poor due to insufficient rain and food assistance is required, e.g. in the southern areas of Mozambique and Madagascar. Food assistance will also be needed for people weakened by HIV/AIDS in all countries, and in Angola where large numbers of people have been made vulnerable following almost three decades of civil war.

In **the Great Lakes region**, good rains in the past two months have improved prospects for the 2003 second season foodcrops. Normal cereal, bean and sweet potato production is forecast in Rwanda. In the Democratic Republic of Congo, food production in eastern parts will remain at low levels despite favourable weather conditions, due to intensified ethnic violence. In Burundi, the security situation has also deteriorated in recent months leading to renewed population displacements and disrupting agricultural activities and food aid distribution to vulnerable people.

In **central Africa**, the food security situation is still precarious in Central African Republic, and food production is not expected to increase this year due to persistent insecurity, notably in the north, and seed shortages are likely.

In **northern Africa**, harvesting of the sub-region's 2003 winter crops has started. Normal to abundant rains over the cereal growing areas led to good crops. Planted areas increased significantly. Aggregate cereal output in 2003 is forecast at 33 million tonnes, compared to last year's 28.3 million tonnes and to an average of 27.5 million tonnes over the past 5 years. Production of wheat, the main cereal in the sub-region, is expected to increase from 12.1 million tonnes in 2002 to 15.5 million tonnes. Significant increases are forecast in virtually every country.

In **west Africa**, the food situation remains precarious in several countries. In Mauritania, although emergency food aid distributions and subsidized sales of wheat have improved food supply in the worst-hit regions and prevented a severe food crisis, coarse grain supplies remain tight, while livestock prices continue to drop, seriously affecting the livelihood of pastoralists. In Senegal and the Gambia, coarse grain prices which increased sharply last year are still at high levels, making access to food very difficult for many households. In Côte d'Ivoire, although the overall security situation has improved, the food situation in the country remains critical, mainly in the rebel-controlled north and west. In Liberia, the current agricultural season has been disrupted by renewed fighting and mass population displacement, pointing to a further drop in rice production this year.

In **Asia**, maize production in Timor-Leste declined by 34 percent compared to last year due to a severe drought. In DPR Korea, notwithstanding a reasonable harvest in 2002, a large number of families are still unable to meet their food needs. China's winter wheat harvesting was delayed by up to two weeks due to extremely cool spring weather and the outbreak of Severe Acute Respiratory Syndrome (SARS). Sri Lanka suffered the worst floods in 50 years which damaged crops and left hundreds of thousands homeless. Harvest prospects this year in Afghanistan are favourable, owing to improved precipitation and a larger than average area under cereal cultivation. However, targeted food aid will be necessary for vulnerable groups such as returning refugees, the nomads and the disabled.

In the **Near East**, generally favourable weather conditions improved the outlook for the 2003 crop production, mainly wheat. In Iraq, the harvesting season is well underway but the outcome is uncertain due to insecurity and shortages of spare parts for harvesting machinery. An FAO/WFP Crop, Food Supply and Nutrition Assessment Mission is currently in the country assessing the food security situation. In the West Bank and Gaza Strip, food insecurity continues to be serious due to disruptions caused by military operations.

In the **Asian CIS**, a severe winter compromised crop production in Kazakhstan and Armenia, while the weather was favourable for crop production in the rest of the region. Many of the governments in the region have made concerted efforts to increase food production, but except in the past couple of years their efforts have been compromised by recurrent droughts.

In **Central America and the Caribbean** planting of the 2003/04 first (main) season cereal and bean crops has started with the arrival of the rains. In El Salvador, Guatemala, Honduras and Nicaragua, the impact of the coffee crisis continues to affect household food security. In Mexico, planting of the spring/summer maize crop is underway, while harvesting of the irrigated wheat crop is about to be completed. A slightly below-average wheat output is provisionally forecast due to inadequate water in reservoirs. Sowing of the sorghum crop is also underway in the main producing west central states. In the Dominican Republic, planting of the 2003/04 first season maize is underway with normal rains since April. Harvesting of the 2003 main paddy crop has started and an above-average output is anticipated. In Cuba, heavy rains in April disrupted sugarcane harvesting operations.

In **South America**, planting of the 2003 wheat crop has started in the southern areas, while harvesting of the 2003 maize crop is well advanced. In Argentina, a near average maize crop is anticipated, while in Brazil a record crop has been harvested. In Chile, an above-average maize harvest is expected, while in Uruguay, an average crop has been gathered. In Bolivia, harvesting of the 2003 first season maize crop is complete and a good output has been achieved. Planting of the second season crop is about to start. In Peru, harvesting of the 2003 white maize crop is virtually complete while harvesting of yellow maize is underway. In Ecuador, harvesting of the 2003 first (main) season maize crop, mostly yellow, is underway while planting of the second maize crop is about to start. Prospects are poor due to adverse weather. In Venezuela, sowing of the 2003 maize and sorghum crops, as well as the important irrigated paddy crop, is underway. However, the outlook is poor due to inadequate use of fertilizers and high quality seeds owing to low purchasing power of farmers. Prospects are also poor for the irrigated paddy crop, principally due to inadequate water caused by a three-year long drought.

In **Europe**, latest information continues to point to a reduction in wheat output in the EU in 2003 but similar outputs to the previous year for most of the coarse grains. The 2002/03 winter grain season in the CEECs has been characterized by delayed planting because of adverse weather last summer/autumn, which led to reduced winter grain areas in many countries. In addition, irregular winter weather, with sharp temperature swings has led to above-normal winterkill. Increased spring plantings may have compensated for part of the reduced winter cereal area but even the spring season has been unfavourable in parts where it arrived later than normal, thus restricting the planting window and limiting yield potential.

In the **European CIS**, severely cold weather conditions and inadequate snow cover compromised significant areas under winter cereals, whereas late and cold spring has significantly delayed spring planting. Winter-kill in the Russian Federation is estimated at more than 3 million hectares, while in the Ukraine winterkill is now estimated at 3.7 million hectares. Aggregate cereal harvest is seen to decline by about 14.2 million tonnes in Russia and by about 7 million tonnes in the Ukraine compared with the 2002 harvest. Crop losses in Moldova are estimated at

more than 50 percent of last year's harvest. The drop in cereal harvest will severely affect exports from the region, which was at a record high during the marketing year coming to an end. In the Baltic countries (Estonia, Latvia and Lithuania), cereal harvest is seen to match the harvest in the past couple of years.

In **North America**, cereal output is set to recover sharply in 2003 from last year's drought-reduced crops. The wheat crops in the United States and Canada are forecast to increase by 31 percent and 57 percent respectively, with strong gains expected in both harvested areas and yields. Likewise, the coarse grain crops in both countries are also expected recover from poor performance last year, with the most significant gain expected in the United States maize crop.

In **Oceania**, cereal planting and production should rebound sharply after last year's drought-reduced output. Planting got underway in May in some parts after the arrival of satisfactory rains. Although a normal winter rainfall season is expected given that the El Niño event, which brought last year's drought, is finished, as of early June, several areas were still awaiting the arrival of sufficient planting rains. Assuming more rains arrive in June and weather conditions are normal for the remainder of the season, the wheat crop in 2003 is forecast to reach 24 million tonnes, close to the record harvest in 2001.

## COUNTRY REPORTS

### **AFRICA**

#### **NORTHERN AFRICA**

##### ALGERIA (30 May)

Normal to abundant rains at planting and during the development stage have benefited the 2003 winter cereal crops. Harvesting is about to start and output of wheat, the main cereal, is provisionally forecast at 2.2 million tonnes, far above the average of the past 5 years and a significant recovery from the 2002 drought affected crop of 1.5 million tonnes. An average barley output of some 450 000 tonnes is also tentatively forecast.

Wheat imports in marketing year 2003/04 (July/June) are expected to decrease from the previous year's volume of 5.3 million tonnes to some 4.7 million tonnes. Maize imports are also expected to decrease from 1.7 million tonnes to about 1.6 million tonnes in marketing year 2003/04 (July/June).

##### EGYPT (30 May)

Harvesting of the 2003 wheat crop has started while that of maize will start later in June. The outlook is good as the crops benefited from normal to abundant rains at planting and during growth. About 6.6 million tonnes of wheat are forecast, which compares to the past 5-year average of 6.4 million tonnes. This reflects a slight increase in wheat plantings in line with the Government's programme to help increase production. An average production of maize is also forecast. An above-average paddy production is anticipated which will increase the country's rice exports.

Despite the anticipated good wheat output, wheat imports in marketing year 2003/04 (July/June) are expected to increase from 6.5 million tonnes last year to about 6.6 million tonnes, in response to strong domestic demand. Maize imports are also expected to increase in marketing year 2003/04 (July/June) by some 100 000 tonnes over the 5.3 million tonnes imported in 2002/03 (July/June).

##### MOROCCO (26 May)

Normal to abundant rains at planting and during the crop development stage benefited the 2003 winter crops. Rains were regular and well distributed throughout the season, with the exception of some areas in the south, the southeast and parts of the Sahara, but cereal production in these areas is only a small part of aggregate domestic output. An increase in total cereal plantings for the country of about 13 percent compared to 2002 and 6 percent relative to the past 5-year average is reported. Harvesting of the 2003 wheat crop has started while that of barley is about to start. Early production forecasts point to a record 5.4 million tonnes of wheat and 2.6 million tonnes of barley largely due to the increased use of fertilizers and other inputs.

Wheat imports in marketing year 2003/04 (July/June) are forecast to decline from 2.7 million tonnes last year to about 2 million tonnes, while maize imports are anticipated to remain at the same level of 850 000 tonnes in marketing year 2002/03 (July/June).

##### TUNISIA (26 May)

Harvesting of the 2003 wheat crop is about to start while that of barley has already started. The crops benefited from normal to abundant rains at planting, which filled water reservoirs to adequate levels. Prospects are good and wheat output is forecast at 1.2 million tonnes, compared to an average of 1 million tonnes over the last five years and last year's low harvest of 423 000 tonnes. Production of barley in 2003 is expected to almost double the average of the past 5 years.

Wheat imports in marketing year 2003/04 (July/June) are forecast to decrease significantly from the previous year's high 1.8 million tonnes to one million tonnes. Maize imports are anticipated to decline from 750 000 tonnes to about 700 000 tonnes.

## **WESTERN AFRICA**

### **BENIN (30 May)**

The first rains came in March in the south, allowing planting of the first maize crop. Rains covered the entire country from mid-April and were widespread and above average in the north, benefiting emerging millet and sorghum crops. Precipitation decreased somewhat in May in the south.

Following well above average cereal harvest in 2002, the overall food supply situation in Benin is satisfactory. Markets are well supplied and prices of cereals are generally stable. Cereal imports for domestic use and re-exports during the 2003 marketing year are estimated at 140 000 tonnes and food aid requirements at 15 000 tonnes.

### **BURKINA FASO (29 May)**

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

Final estimates of the 2002 cereal production indicate a record harvest of 3.12 million tonnes, which is 22 percent above the average of the last five years. As a result, the overall food supply situation is satisfactory. However, the returnees and refugees from Côte d'Ivoire as well as people living in the food-deficit Northern and Sahelian areas will continue to need food assistance.

### **CAPE VERDE (29 May)**

**Seasonably dry conditions prevail. Planting of maize normally starts in July with the onset of rains on the main islands. Seed availability is likely to be a problem following the 2002 poor harvest.**

**A joint FAO/WFP Crop and Food Supply Assessment Mission in October 2002 estimated maize production at some 5 000 tonnes, only one fourth of the good 2001 harvest and similar to the poor crops in 1997 and 1998. The Mission estimated cereal import requirements for the marketing year 2002/03 (November/October) at 108 518 tonnes, of which 33 250 tonnes were expected to be imported commercially, leaving a food aid requirement of 75 268 tonnes.**

**A follow-up joint FAO/CILSS mission in January 2003 found that the Government had launched food for work programmes to improve access to food for the poor. However, the programmes are under-funded. Cape Verde is a beneficiary of WFP's Regional EMOP launched in December 2002 for 5 drought-affected countries in the west of the Sahel, with an allocation of 2 400 tonnes of food.**

### **CHAD (29 May)**

The growing season has started on time in the Sudanian zone. After first sporadic rains in late March, significant rains were registered in mid-April in the south. But the rainy season basically started in late May in the Sudanian zone, where planting of coarse grains is now underway. Land preparation is starting in the Sahelian zone. Pastures remain good. Seed availability is adequate following the 2002 average harvest.

The final official estimate of aggregate 2002 cereal production is about 1.21 million tonnes, which is 8 percent lower than the previous year's harvest but slightly above average. Cereal import requirement in 2002/03 (November/October), mostly rice and wheat, is forecast at 98 100 tonnes, including about 7 000 tonnes of food aid.

The overall food supply position is satisfactory. Prices of cereals declined following the harvest. However, people in the areas previously affected by floods and those living in the food deficit areas of Kanem and Bahr El Ghazel will continue to need food assistance. Moreover, signs of malnutrition have reportedly been observed among an estimated 41 000 people who have fled into the country to escape fighting in Central African Republic.

#### **CÔTE D'IVOIRE (29 May)**

**Following the start of rains in late February, abundant precipitation covered the entire country during April. However, rains decreased and remained generally below average in May, which may have affected maize development in the south and the planting and emergence of millet and sorghum crops in the north. Agricultural production is not expected to reach its pre-crisis level this year due to mass population displacement and likely seeds shortages, following the civil war.**

**Although the overall security situation has started to improve the food situation in the country remains critical, mainly in the rebel-controlled north and west. In the north, access to food is very difficult for cotton farmers who were unable to sell their crop because of the conflict. In the west, which has in the past few months suffered continuing attacks against civilians and further population displacement and where renewed fighting in Liberia has led to a new influx of displaced persons, farm families have limited access to their fields because of insecurity and few market outlets for their cash crops.**

**More than 1 million people have been displaced by the conflict. At least 800 000 people fled south from the north and centre and about 300 000 were displaced in the west around the city of Man. Another 200 000, mostly migrant workers from neighbouring Burkina Faso, Guinea, Liberia and Mali left the country. WFP has launched a Regional Emergency Operation to assist 588 600 people in Côte d'Ivoire and 275 000 people in transit/returnees to neighbouring countries (Ghana, Burkina Faso and Mali) for a period of 8 months (May-December 2003). Safe access to IDPs in Côte d'Ivoire, particularly in the west, remains a major problem for humanitarian agencies.**

#### **THE GAMBIA (30 May)**

Seasonably dry conditions prevail. Farmers are currently preparing their fields. Planting is expected to start in the weeks ahead with the onset of the rains.

Cereal production in 2002 is officially estimated at about 139 000 tonnes, 30 percent lower than last year and 7 percent below the average of the last five years. Millet prices which increased steeply last year remain at high levels, reflecting the 2002/03 poor harvest not only in the Gambia but also in the whole of the western Sahel. The high millet prices make household access to this basic staple, particularly in rural areas, exceedingly difficult.

The Gambia is a beneficiary of WFP's Regional EMOP launched in December 2002 for 5 drought-affected countries in the west of the Sahel, with an allocation of 2 340 tonnes of cereals.

#### **GHANA (30 May)**

First rains in the south in late February/early March permitted land preparation and planting of the first maize crop. They progressed to the north in April, allowing plantings and emergence of millet and sorghum crops. However, satellite images show that precipitation decreased in late April and remained below average in May.

Aggregate 2002 cereal production is estimated at about 1.62 million tonnes, 5 percent below the average of the last five years. The cereal import requirement for 2003 is estimated at 520 000 tonnes of which about 460 000 tonnes are anticipated to be covered by commercial imports. The government has increased import duty on rice from 20 percent to 25 percent this year, in order to support domestic rice production and reduce reliance on imported rice.

The effects of the crisis in Côte d'Ivoire on Ghana have mainly been an influx of third-country nationals in transit to their countries of origin, Ivorians seeking asylum and the return of Ghanaian nationals. An estimated 70 000 people have entered Ghana from Côte d'Ivoire since September 2002. The capacity of the government, the humanitarian community and host communities to respond to their needs is reported to be under heavy strain. The country is a beneficiary of WFP's Regional EMOP launched in May for Côte d'Ivoire and neighbouring affected countries.

#### **GUINEA\* (30 May)**

**First rains were registered in the south in late March, and subsequently covered the entire country in May, allowing land preparation and first plantings.**

**The first official estimate of 2002 cereal production, mostly rice, is about 1.04 million tonnes, which is average. The presence of a large refugee population and the persistent instability in the sub-region have exacted a heavy toll on the country, which currently hosts more than 100 000 Liberians and Sierra Leonean refugees. Since the civil war erupted in Côte d'Ivoire in September 2002, tens of thousands of people have entered the country, including returning Guinean nationals, Ivorians and Liberians. In addition, there are still some 82 000 IDPs in the country, displaced by the armed conflict over the period September 2000 to March 2001. The United Nations Children's Fund (UNICEF) appealed in early May for a further US \$3.1 million to help refugees in Guinea and Guineans displaced within their own country in view of a weakening economy and continuing conflict in neighbouring Côte d'Ivoire and Liberia.**

#### **GUINEA-BISSAU (30 May)**

Rains have not yet arrived.

The 2002 aggregate cereal production is officially estimated at about 151 400 tonnes, 8 percent lower than the previous year's harvest and slightly below average. The overall food supply situation is satisfactory. However, people living in the chronically food deficit areas along the northern border with Senegal continue to need food assistance.

#### **LIBERIA\* (30 May)**

**Persistent armed clashes that restrict access to most agricultural areas and lead to mass population displacement are a major cause of food insecurity in the country. The current agricultural season is being disrupted by renewed fighting, pointing to a further drop in rice production this year. Some 200 000 internally displaced persons from the north, northwest, and central regions are living in camps in other parts of the country, while thousands have fled into Sierra Leone following an upsurge of civil strife since February. At least 10 000 people have fled into Côte d'Ivoire to escape fighting around the Liberian port town of Harper, Maryland County, which fell to rebels in mid-May. WFP is providing food assistance to 182 347 people in the country.**

#### **MALI (30 May)**

The first significant rains were registered in the extreme south in mid-April. They progressed northwards and remained generally adequate in the south, allowing land preparation and first plantings of millet and sorghum to start.

The final official estimate of 2002 cereal production is about 2.5 million tonnes, which is average. Cereal import requirements in 2002/03 (November/October) are forecast at 279 000 tonnes of which about 261 000 tonnes or 93 percent are anticipated to be covered commercially. The overall food supply situation is satisfactory except in the west where it is tight, and the return of some 130 000 Malians from Côte d'Ivoire is putting considerable pressure on the available supply.

#### **MAURITANIA (31 May)**

**Seasonably dry conditions prevail. Planting will start following the onset of the rains in late June or July. Emergency provision of agricultural inputs such as seeds will be necessary to enable drought-affected farming families to resume agricultural production.**

**The 2002 aggregate cereal production is officially estimated at 116 200 tonnes, about 31 percent less than the average for the previous five years and 5 percent below the 2001 poor harvest. Cereal import requirements (including re-exports) for the marketing year 2002/03 (November/October) are estimated at some 323 000 tonnes, of which commercial imports are estimated at 258 000 tonnes, leaving a food aid requirement of 65 000 tonnes. Approximately 420 000 people throughout Mauritania need food assistance. In March 2002, WFP launched an EMOP valued at US\$ 7.5 million (16 230 tonnes of food) to assist 250 000 people most threatened by serious food shortages. A Regional EMOP jointly approved by FAO and WFP in mid-December for five drought-affected countries in the west of the Sahel (Cape Verde, The Gambia, Mali, Mauritania, Senegal) included an allocation of 43 632 tonnes of food for Mauritania. As of late May, over 81 percent of this amount was covered by pledges.**

**Distributions of emergency food aid and subsidized sales of wheat helped improve the food supply situation in Aftout, the Senegal River Valley and the central plateau area of Hodh El Chargui and Hodh El Gharbi where near-famine conditions and high malnutrition rates and related diseases have been reported. However, lack of pasture is accelerating distress sale of animals and stock movements. Animal prices continue to drop despite implementation of a Government programme of subsidized animal feeds. Small-scale pastoralists and single-crop farmers in these areas are considered highly food-insecure population groups.**

#### **NIGER (12 June)**

Following first rains in the extreme south-west in early April, the weather remained mostly dry until the third dekad of May, when rains progressed northwards in the south-west, allowing land preparation and first plantings to start. It is estimated that about 9 percent of the villages had finished their plantings as of 20 May, compared to only 2 percent last year and 28 percent in 2001. Seed availability is generally adequate following the 2002 record harvest. No significant pest activity has been reported.

Final estimates of the 2002 cereal production indicate a record harvest of 3.34 million tonnes, representing an increase of about 8 percent compared to 2001 record harvest and 31 percent compared to the previous five years average. Following this good harvest, the overall food supply situation is satisfactory. Cereal import requirements for marketing year 2002/03 are estimated at 377 000 tonnes. Subsidized sales of 12 000 tonnes of cereals and 2 000 tonnes of animal feeds helped improved access to food for poor households as well as livestock condition affected by limited availability of pastures.

#### **NIGERIA (30 May)**

Rains started in the south in early March, allowing land preparation and plantings of the first maize crop. They reached northern areas in late April/early May where they permitted planting of coarse grains. Paddy output is forecast to increase this year reflecting higher producer prices due to a rise in import duties imposed by the Government, which also set up a national rice security task force to boost local rice production.

The overall food supply situation is stable. However, some population groups, estimated to number some 750 000 people in the states of Benue, Nasarawa and Taraba remain food insecure following ethnic and religious conflicts in the last two years.

#### SENEGAL (2 June)

Seasonably dry conditions prevail in most parts.

Aggregate cereal production in 2002 is estimated at about 851 300 tonnes, 11 percent less than the previous year and 8 percent less than the average of the previous five years. Following this relatively poor harvest, supplies of coarse grains are very tight, notably in rural areas. As a result, cereal prices which increased sharply last year are still at the same high levels, which make access to food for many households very difficult.

In response to the tight food supply situation, the Government released CFA 15 billion (US\$ 23 million) for purchase and distribution of about 54 000 tonnes of rice to the most affected rural households. Senegal is a beneficiary of WFP's Regional EMOP launched in December 2002 for 5 drought-affected countries in the west of the Sahel, with an allocation of 3 000 tonnes of food for 23 300 most affected people.

#### SIERRA LEONE\* (31 May)

**Satellite images show that rainfall has been generally below average, with dry weather in most parts, which may have affected planting of the rice crop. However, paddy production is expected to increase further this year, reflecting an improved security situation and increased plantings by returning refugees and displaced farmers.**

**Cereal production in 2002 is estimated at some 417 000 tonnes, 20 percent above last year's level. The food supply situation is satisfactory, following this good harvest. The humanitarian situation in the country has also improved significantly following the end of the war. In 2002, over 100 000 Sierra Leonean refugees and 124 000 IDPs returned to their home areas. However, renewed civil strife in Liberia has caused at least 40 000 Liberians to cross into the country.**

#### TOGO (31 May)

Following above-normal rains in April and adequate precipitation in May, the first maize crop is developing satisfactorily in the south and the centre. Coarse grains are emerging in the north.

Reflecting generally favourable growing conditions during the 2002 rainy season, the aggregate 2002 cereal production is estimated at 740 519 tonnes, slightly above last year's level but 7 percent above average. The overall food supply situation is satisfactory. Cereal imports for domestic use and re-exports during the 2003 marketing year are estimated at 160 000 tonnes, to be covered commercially.

### CENTRAL AFRICA

#### CAMEROON (31 May)

Rains started in March in the south and became particularly abundant in the south and centre in April, permitting land preparation and first plantings. However, precipitation was generally below average in May.

Following an average 2002 cereal production, estimated at about 1.3 million tonnes, the overall food supply situation is satisfactory. Cereal import requirements for 2003 marketing year are estimated at some 367 500 tonnes, anticipated to be mainly covered commercially.

#### **CENTRAL AFRICAN REPUBLIC (31 May)**

Precipitation has been generally widespread and abundant since March, permitting land preparation and first plantings. However, food production is not expected to increase this year due to persistent insecurity, notably in the north, and likely seed shortages. A joint WFP/FAO/UNICEF emergency assessment mission that visited the most affected areas in early May estimated that only 50 percent of the fields were effectively planted compared to normal years.

The food security situation is still precarious following civil strife between October 2002 and March 2003. Widespread destruction of physical assets, looting, and population displacement have disrupted agricultural and economic activities. In mid-March WFP re-launched its appeal for US\$ 6.1 million, having received no pledges for its original appeal two months earlier. It is estimated that over 230 000 people have been displaced from their homes, including an estimated 41 000 who have taken refuge in Chad.

#### **CONGO, DEMOCRATIC REPUBLIC OF\* (30 May)**

Despite favourable weather conditions in eastern parts, agricultural production continues to be disrupted by the escalation of inter-ethnic fighting. In particular, in the northeastern Ituri Region, around the main city of Bunia, thousands of people have been displaced by the ethnic violence. The UN Security Council has authorized increased UN military presence in the region and troop reinforcements are arriving. WFP has recently completed the registration of 50 000 internally displaced people (IDPs) in North Kivu Province, among whom were many who fled fighting in Bunia. Another 100 000 IDPs displaced by earlier fighting in March in North Kivu region have been registered in Lubero, north of Goma city. The food supply situation of these people gives cause for serious concern. Persistent insecurity coupled with a shortfall in the food aid pipeline continue to hamper distributions.

While the food and nutritional situation is grave in eastern provinces, increased malnutrition is also reported from other regions. In Lubumbashi, the main city of Katanga province with 1.5 million inhabitants, recent assessments indicate that a combination of decreasing cash incomes and food availability has led to a nutrition crisis, with 20 percent of the population eating only once every other day and 50 percent eating once per day. A nutritional survey carried out in January this year found that 5.3 percent of children aged under five living in Lubumbashi suffered from acute malnutrition. Humanitarian assistance is urgently needed in this region to avert a crisis of major proportions.

#### **CONGO, REP OF (2 June)**

Growing conditions are generally satisfactory for maize and root crops. However, insecurity continues to disrupt agriculture and rehabilitation. A resurgence of fighting in the Pool region (surrounding the capital Brazzaville) in March 2002 led to the displacement of at least 74 000 people, but the exact number is unknown as most areas in the region were inaccessible to humanitarian agencies. Following a peace agreement between the government and rebels in mid-March 2003, a full-scale humanitarian mission visited the region from 28 May to 7 June, in order to identify the main humanitarian needs, with the objective of facilitating the eventual return of IDPs. WFP is facing a serious shortfall in resources and has stopped all rehabilitation programmes in order to concentrate on emergency assistance to the most vulnerable.

#### EQUATORIAL GUINEA (31 May)

Precipitation has been generally widespread and abundant since March. 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 (31 May)

Growing conditions are generally satisfactory. The main foodcrops are cassava and plantains but some maize is also produced (average 31 000 tonnes). The country imports commercially the bulk of its cereal requirement, estimated at around 88 000 tonnes in 2003.

#### SAO TOME AND PRINCIPE (5 June)

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

### **EASTERN AFRICA**

#### **BURUNDI\* (28 May)**

**Harvesting of the 2003 second season food crops, mainly sorghum and beans, is about to start. The outlook has improved with widespread abundant and regular rains in the second half of April. Despite a late start of the rainy season, about normal crops are expected.**

**Intensification of fighting in the past two months has resulted in fresh waves of population movements in search of safe areas, mainly in forests and hills where living conditions are harsh. The insecurity has hampered distribution of food aid to 262 000 most vulnerable people out of 566 000 people who need food assistance.**

#### **ERITREA\* (2 June)**

**The 2003 main cropping season has started in some central highland areas. With the exception of some isolated rains in the northern part of the central highlands, spring (azmera) rains from March to May were generally inadequate. These short rains are beneficial for early land preparation and replenishment of pasture.**

**Serious food shortages caused by last year's drought remain with as many as two-thirds of the country's population severely affected. Of these, an estimated 1.4 million need emergency food assistance. In addition, humanitarian assistance continues to be needed for large numbers of people internally displaced by the recent war with neighbouring Ethiopia, returning refugees from Sudan, and children benefiting from WFP's Emergency School Feeding Programme.**

**The slow response to appeals for emergency food assistance remains a major concern to both the Government and humanitarian agencies. Overall, the Government of Eritrea appealed for some 476 000 tonnes of emergency food late last year. As of 9 May 2003, only about 195 000 tonnes (41 percent) had been pledged while only 68 000 tonnes had been delivered. With the lean season just beginning, more food aid pledges and faster delivery are needed to mitigate the serious food shortages. FAO and WFP jointly approved in March 2003 an Emergency Operation (EMOP) worth US\$ 46.5 million to assist about 900 000 people for a period of ten months (May 2003 – February 2004).**

**ETHIOPIA\* (2 June)**

Prospects for the 2003 short "belg" season crops are mixed with some central highland areas receiving good rains while others, particularly the north-western part of the country, have received patchy rains or experienced prolonged dry spells. Normally, the belg season rains extend from February to May and the crop accounts for some 10 percent of total grain production but in some areas it provides most of the annual grain production. Furthermore, recent heavy rains in parts have caused severe localized flooding and resulted in the displacement of a large number of people and destruction of productive assets and housing. Most affected were people in low-lying areas along the Shebelle River in Gode zone in Somali Region. Relief operations for the flood victims were dispatched as soon as the roads became passable.

Severe food shortages continue to be reported in several parts of the country affected by last year's drought, particularly in the Southern Nations Nationalities and People's Region (SNNPR). The nutritional situation among children in these areas remains poor and calls for improved general and supplementary food distributions. Following a review of the food security situation in several key areas, the Government and UN Country Team have revised the food aid needs in 2003 from an earlier estimate of 1.44 million tonnes to 1.52 million tonnes. The number of people in need of assistance is now estimated at about 12.5 million in May and June and remains high in July at over 11 million, and through August and September at between 9 and 10 million; a mid-year belg assessment in late June may lead to a further adjustment of figures for those in need of food assistance up to the end of the year. In addition, non-food assistance, including seeds, water and animal health supplies, has been increased from US\$75 million to US\$ 81 million. In response, an Emergency Operation worth about US\$ 205.5 million was jointly approved by FAO and WFP in March 2003 to assist 4.6 million small scale farmers and pastoralists, for a period of twelve months (April 2003 - March 2004). Furthermore, Government appeal for seeds in 2003 stood at 23 300 tonnes of cereals and 7 200 tonnes of pulses at a cost of about US\$ 10 million. Although substantial pledges were made by several donors there is still a large gap that needs to be filled.

**KENYA\* (2 June)**

Heavy rains and floods in April and May 2003 displaced tens of thousands of people and left them destitute. Large cropped areas were also destroyed. The worst affected areas include the low-lying areas near Lake Victoria in western Kenya, where rivers burst their banks submerging fields, and Tana River District in the east. These crop losses coupled with an expected early end to the long season rains prompted a downward revision of the forecast long-rains maize output from the long-term average of 2.2 million tonnes to 1.8 million tonnes.

Most pastoral areas also received above average rains in April and May that caused some flooding. However, serious food problems remain, particularly in Turkana, Baringo and West Pokot Districts, where the effects of prolonged droughts remain. In addition, a rise in conflict and livestock raiding are exacerbating the food supply problems.

**RWANDA (6 June)**

The outlook for the 2003 second season foodcrops, about to be harvested, is generally favourable. Despite a delay in the start of the rainy season, abundant precipitation in April and May in most of the country led to the recovery of cereal and pulse crops affected by previous dry spells. However, production of the main sorghum crop could be below average due to reductions in the areas planted as a result of the late rains. By contrast, higher plantings of beans are likely to result in a good harvest. Although an average crop is expected at the national level, in parts of central and southern Kigali Rural province, particularly the Bugesera region, where rains arrived too late to prevent crop

losses, this season's harvest is anticipated to be reduced. In Kibungo and Umutara provinces, cassava mosaic virus has seriously affected the cassava crop.

Continued food assistance is likely to be required for vulnerable groups in the areas affected by dry weather, where food difficulties were already being experienced in the past months.

#### **SOMALIA\* (2 June)**

In Somalia, early prospects for the main "gu" cereal crops which accounts for some 70 to 80 percent of the annual production in normal years is reported to be mixed following heavy rains and floods on the one hand and localized dry conditions on the other.

The output of the recently harvested secondary "deyr" season cereal crop is estimated at about 164 600 tonnes, nearly 80 percent above the post-war (1995-2001) average. The total cereal production in 2002/03 is therefore estimated at about 376 000 tonnes, about 35 percent above the post-war average. The food supply situation in southern Somalia has generally improved with better "gu" and "deyr" harvests, but nutrition surveys indicate persistently high malnutrition rates. In north-western Somalia (Somaliland) and north-eastern Somalia (Puntland), severe water and food shortages are still reported despite improved rainfall. The shortages are most acute in the regions of Togdheer, Sool, Sanaag and the Hawd, as well as in several districts of Bari and parts of Nugal Region.

#### **SUDAN\* (2 June)**

Harvesting of the 2003 wheat crop is complete and output is forecast at 296 000 tonnes, about 27 percent above the previous five years' average. The 2002/03 total cereal production, estimated at about 3.8 million tonnes, is nearly 30 percent below the previous year's crop and about 14 percent below the average of the last five years.

Serious food shortages have emerged in several parts of the country and prices, particularly for sorghum, are higher than normal at this time of the year. Food security monitoring assessments conducted since January have confirmed that 1.9 million people in southern Sudan will need food assistance estimated at 101 000 tonnes until the next harvest in September 2003. About 700 000 of these were identified as highly food insecure and have been receiving food aid since January. In April 2003, an Emergency Operation was jointly approved by FAO and WFP worth about US\$ 130.97 million, for food assistance to nearly 3.25 million people for a period of twelve months (April 2003 to March 2004). Furthermore, an estimated 300 000 households are in dire need of farm-input assistance, worth nearly US\$ 3.7 million, to resume their farming activities in the upcoming season starting July 2003.

#### **TANZANIA (2 June)**

Preliminary forecasts of the 2002/03 food crop production indicate a 10 percent decline compared to last year mainly due to extended dry weather in eastern, central and southern parts between February and mid-March. Many areas experienced more than three weeks of dryness at a critical stage in crop development. Improved rainfall from around mid-March may have come too late to prevent significant yield losses. Such a decline in production is expected in spite of a reported large increase in cultivated area of most food crops (up by 39 percent over last year) mainly in response to last year's higher prices.

The overall national food situation, however, remains stable despite recently observed increases in staple prices that are unusual for the time of the year. In some areas livestock prices were also reported to be falling despite adequate availability of water and forage. Staple prices are expected to ease soon as current harvests start to reach markets.

## **UGANDA (2 June)**

Prospects for the 2003 main season cereal crops are uncertain due to below normal rains in February and March that delayed land preparation and planting of the main season crops in several areas. However, following the stabilization of the rains in most parts of the country, planting of the main crops is almost complete. Hailstorm damage was reported in some south western parts of the country while a dry spell in western Uganda has affected maturing crops. Livestock in much of the country have adequate access to drinking water and pasture. However, pasture conditions in Karamoja region (Kotido, Moroto and Nakapiripirit Districts) have yet to improve satisfactorily while access to water has improved.

The overall national food supply situation remains stable. However, the food situation is precarious in Karamoja region and is expected to improve only after July when the harvesting season commences. Cereal prices continued to rise during April 2003, averaging Ushs 410 per kilogram of sorghum, about Ushs 100 higher than March and more than double the average for the month of April. A poor banana crop in central Uganda is also expected to affect household income and food supply.

Insurgency continues to displace hundreds of people mainly in the districts of Gulu, Kitgum and Pader in northern Uganda. A recent assessment of Pader District found that nearly three-quarters of the population were displaced. A nutritional survey in the main district hospital found that 14 percent of the children under five years old were acutely malnourished while 29 percent were at risk of acute malnutrition. These results are similar to those found by a separate assessment in Gulu District in January 2003. In eastern Uganda, an assessment in March 2003 found that new attacks by the Karamojong pastoralists have displaced about 89 000 people in Katakwi District. The IDPs are concentrated in camps with limited access to water, sanitation and health facilities. Furthermore, the food situation of many households in Kotido, Moroto and Nakapiripirit Districts in the northeast is precarious due to poor harvests in the previous season. WFP is distributing food to the most affected households.

## **SOUTHERN AFRICA**

### **ANGOLA\* ( 2 June)**

Harvesting of the 2003 cereal crops is underway. The output is forecast to increase substantially from last year's reflecting higher plantings and yields. The end of the civil war in April 2002 allowed large numbers internally displaced people and refugees to return to their areas of origin and cultivate land. Despite a delay in the start of the rains, precipitation was abundant and regular during the growing season benefiting crop development. This, coupled with large and timely distribution of agricultural inputs by the Government and the international community, resulted in yield improvement. An FAO/WFP Crop and Food Supply Assessment Mission is currently in the country.

Almost three decades of civil war have devastated the country's economy and infrastructure leaving large sections of the population in need of protracted food assistance. International assistance is also required for the rehabilitation of the agricultural sector, including demining of rural areas. The Government launched an appeal for international assistance in February 2003.

### **BOTSWANA (2 June)**

The 2003 cereal crops, mainly sorghum, were sharply reduced by dry weather. Late and below average rains during the growing season resulted in reductions in the area planted and yields. Preliminary forecasts indicate an output of 13 000 tonnes, 42 percent below the normal crop of the

previous year. However, the food supply situation remains stable as even in good years the country imports commercially most of its cereal consumption requirements.

The dry weather has also adversely affected the important livestock sector through poor grazing conditions. The Government has extended drought relief interventions in the worst affected areas.

#### LESOTHO (30 May)

An FAO/WFP Crop and Food Supply Assessment Mission that visited the country from 22 April to 1 May 2003 estimated the 2002/03 cereal production at 89 100 tonnes. Maize production is estimated at 61 400 tonnes, wheat at 24 300 tonnes and sorghum at 3 400 tonnes. Compared to last year's FAO/WFP assessment mission figures, production this year will be 66 percent higher. The Mission estimated the total cropped area at 178 300 hectares, about 84 percent of the area in normal years and 33 percent higher than last year's figure. Some land was not planted because of the late arrival of subsidized inputs and the lack of tractors and machinery.

With an estimated total domestic cereal supply of 118 200 tonnes, and total utilization requirement of 438 900 tonnes, the country faces a shortfall of about 321 000 tonnes for 2003/04 marketing year. Commercial imports are forecast at 288 700 tonnes, leaving a gap of 32 000 tonnes to be covered as food aid. Against this requirement, WFP food aid in the pipeline for the current marketing year stand at 12 000 tonnes. Thus, there is an uncovered requirement of 20 000 tonnes which needs to be met by additional external food assistance.

A combination of better though below normal domestic cereal production and improved commercial import capacity suggests that there will be no serious cereal shortages at the national level. Early this year the price of cereals began to decline as harvest prospects improved. It is expected that cereal prices will continue to decline over the course of the marketing year reflecting also good maize production in South Africa. However, the key issue remains physical and economic access to food for certain segments of the population. High unemployment and inflation rates, particularly in the rural areas, coupled with the impact of HIV/AIDS means that certain segments of the population do not have the purchasing power to access food even if it is available in the market.

The Mission estimated that 38 000 tonnes of mixed food commodities, including 32 000 tonnes of cereals, will need to be distributed as food aid to targeted households. The number of beneficiaries will vary from around 125 000 to about 270 000 during the lean period.

#### MADAGASCAR (30 May)

**Cyclone Manou, which battered the east coast of Madagascar in early May resulted in loss of life, damage to housing and infrastructure and flooded rice fields. By late May, many communities were still isolated. Emergency relief is needed in the affected areas.**

**Despite an overall satisfactory 2003 paddy production, drought conditions during the growing season in the traditionally food insecure southern provinces resulted in poor maize and cassava harvests, the main staples in the region. The Government has estimated that some 600 000 people in 18 districts between Toliara in the southwest and Tolagnaro in the southeast are in need of emergency assistance. Local reports indicate that severe malnutrition among young children has doubled in the last few months.**

**Despite a worsening situation, food aid pledges remain well below requirements. There is urgent need of additional and timely contributions to avert a deterioration of the nutritional conditions of the affected population.**

#### MALAWI (2 June)

A reasonably good harvest in 2003, high levels of maize carry-over stocks and currently low market prices for maize, all point to a better cereal supply position in Malawi during the 2003/04 marketing year than was the case in the past two years.

An FAO/WFP Crop and Food Supply Assessment Mission that visited Malawi from 6 to 26 April 2003, estimated production of the main staple maize at 1 900 350 tonnes, 22 percent higher than the reduced crop of last year. Better rainfall this year and increased use of improved maize seed and fertilizers largely account for this increase. Overall, cereal availability in the 2003/04 marketing year (April/March) is estimated at 2.3 million tonnes against an expected utilization requirement of 2.4 million tonnes. Unrecorded, but substantial amounts of informal maize and rice imports continue to enter Malawi from its neighbors because of the relatively higher cereal prices generally prevailing in the country. These imports, together with substantial stocks in the hands of the Government and production of other crops, should ensure an adequate food supply and obviate the need for formal cereal imports in the 2003/04 marketing year, apart from the usual wheat imports. At the time of the Mission's visit, the market price of maize was below the Government selling price of 17 Malawi Kwacha (MK) per kg. Malawi's production of roots and tubers is estimated to have increased substantially above the level achieved in the previous year. These commodities are becoming important contributors to overall household food security.

While overall food production has increased significantly, several locations have experienced crop failures for the third consecutive year. The Mission estimated that approximately 131 500 people will require food assistance from July 2003 peaking to 400 000 people in January 2004 with a total cereal requirement of 30 600 tonnes. In view of high levels of maize stocks in the country, food aid should be procured locally. Insufficient access to available food by a significant proportion of the population is a key food security concern. In particular, the HIV/AIDS infected, the destitute, and households which experienced crop failure will need assistance.

#### MOZAMBIQUE (13 June)

**An FAO/WFP Crop and Food Supply Assessment Mission that visited Mozambique in April/May 2003 estimated cereal production of the 2002/03 production season at 1.8 million tonnes, some 2.5 percent above last year's level. This includes 1.2 million tonnes of maize which remained around last year's good harvest. More than half of the cereal grain (56 percent) was produced in the central provinces, 38 percent in the north and only 6 percent in the drought-affected south. Cassava output is forecast at 6.1 million tonnes, an increase of 3.8 percent over last year. However, in most of southern and some of central provinces prolonged dry spells and high temperatures during the season resulted in almost total failure of the maize crop. Elsewhere, the situation was normal in Zambezia (centre) and in all of the northern provinces, where a bumper harvest has been obtained.**

**The skewed distribution of cereal production between regions will translate into serious food shortages in southern provinces and abundant supplies in the north and centre. Cereal prices at the end of marketing year 2002/03 were below their levels of a year ago but they were significant higher in southern markets. Prices are expected to remain depressed in the north, but to rise in the south reflecting surplus and deficit situations. High internal transport costs to move the maize crop from the north to the south, coupled with reduced export opportunities due to improved cereal harvests in neighbouring Zambia and Malawi, are likely to result in large stocks in the northern and central regions. The shortfall in the south and part of the centre is expected to be covered by food aid and commercial imports.**

**The Mission estimates that 949 000 people in 40 districts of southern and central Mozambique will require food aid through March 2004, due to the almost total failure of the 2003 harvest as a result of drought, the cumulative effect of four reduced harvests, the prevalence of animal diseases, the impact of chronic illness and HIV/AIDS, and structural**

**economic constraints. This population represents 30 percent of the total population of the two regions but only 5 percent of the country's total population. Most of the food aid requirement will have to be imported due to the current marketing problems, but the Mission recommends that efforts should be placed on local purchases in the North and Centre to support farmers in these regions.**

#### NAMIBIA (30 May)

Harvest of the 2003 cereal crop is just completed. Preliminary official estimates indicate a cereal output of 119 000 tonnes, 61 percent above the poor level of last year and above average. This include 77 600 tonnes of millet/sorghum, 31 800 tonnes of maize and 9 500 tonnes of wheat. Despite late and irregular rains during the season, abundant precipitation in February supported the recovery of cereal crops in parts. However, while a good output is forecast for the north central regions (Oshikoto, Ohangwena, Omusati, and Oshana), in the Caprivi region another poor harvest was gathered due to prolonged dry spells throughout the season that reduced plantings and yields of the maize crop. Late rains improved pastures and livestock conditions are reported to be generally fair, except in Omaheke, Karas and Hardap regions where grazing conditions are poor. As a result, livestock sales have increased while prices are declining.

At the forecast production level, the country has an import requirement of 108 000 tonnes of cereals, which will be covered by commercial imports. While at national level the food supply situation is expected to be satisfactory in marketing year 2003/04 (May/April) it will remain difficult in areas affected by a second consecutive poor harvest, in particular the Caprivi region.

#### SOUTH AFRICA (30 May)

Harvest of the 2003 main coarse grain crops, mainly maize, is well advanced. The fourth official crop forecast indicates a maize harvest of some 9.2 million tones, which is 9 percent or 855 000 tonnes lower than last year but still above average. The area planted increased slightly on 2002 but yields have been reduced by dry spells in northern parts of the maize belt. Exportable surpluses of maize are expected to remain around last year's levels reflecting an increase in white maize production and a decline in that of yellow maize.

Planting of the 2003 wheat crop is about to start. Planting intentions point to a decline of 11 percent in the area planted to 841 000 hectares, in response to lower prices. Production is anticipated to be lower than in 2002.

#### SWAZILAND (30 May)

An FAO/WFP Crop and Food Supply Assessment Mission visited the country from 1 to 10 May 2003. The Mission estimated production of the main maize crop at about 73 000 tonnes, 6 percent above last year but 30 percent below the average of the last five years. This reflects an increase in the area planted of 19 percent over last year, mainly in response to higher prices, and lower yields. Yields were adversely affected by a late start of the rainy season and a sharp drop in rainfall in January, coupled with a heat wave in the middle of the month. This coincided with the critical flowering stage for later planted maize crops in the Lowveld, Lubombo Plateau and dry Middleveld, where production is reduced. Overall, domestic cereal supply in 2003/04 is estimated at 78 100 tonnes, while total national consumption requirement is estimated at 205 800 tonnes, resulting in an import requirement of 127 700 tonnes. Commercial imports are forecast at 103 400 tonnes and food aid at 24 300 tonnes that is to be covered by current Government and WFP stocks and pipeline. Cereal prices have declined due to relatively better domestic production and a good maize harvest in South Africa. While a combination of better though below average domestic cereal production and improved commercial import capacity suggests that there will be no cereal shortages at the national level, economic access to food for certain segments of the population remains very difficult. Swaziland is undergoing a serious socio-economic crisis due to the continuing spread of HIV/AIDS that is further exacerbating the already severe impact of high unemployment, income inequality and poverty. The Mission estimates that 132 250 people require food assistance immediately, increasing

to 157 750 for 6 months (July-December), and increasing further to 217 000 during the lean period (January-March). The total amount of food aid required will be about 24 300 tonnes, which is fully met by the current Government and WFP stocks and pipeline.

#### ZAMBIA (1 June)

An FAO/WFP Crop and Food Supply Assessment Mission that visited the country from 21 April to 10 May 2003, found that there has been a substantial recovery in the 2003 cereal production from the reduced levels of the past two years. Production of maize, the country's main staple crop, was estimated at about 1.16 million tonnes, almost double the output of 2002 season (602 000 tonnes) and about 28 percent of the average for the last five years. Production of other crops, mainly cassava and sweet potatoes, was also satisfactory. In cereal equivalent the aggregate crop production is estimated at 1.5 million tonnes, markedly better than the 1 million tonnes during 2002/03. This reflects more favourable rainfall over much of the country, highly effective fertilizer distribution programme by the Government (with 50 percent subsidy) and the combined effort of various national and international NGOs and the Government in providing seeds of various crops. In the Southern province, affected by dry spells and floods during the growing season, maize production revived from last year's very low level to a more normal level of about 210 000 tonnes achieved in 2001. There are, however, localized pockets of poor harvest due to either lack of adequate rainfall or flooding. WFP plans to provide food assistance to 128 044 people, or approximately 20 000 households. The requirements will be met through local purchases.

#### ZIMBABWE\* (1 June)

An FAO/WFP Crop and Food Supply Assessment Mission that visited the country from 21 April to 10 May 2003 estimated cereal output at 980 000 tonnes, 41 percent higher than last year's poor harvest. Production of maize, the main staple, was estimated at 803 000 million tonnes, 61 percent up compared to last year, but 46 percent lower than in 2000/01. The major causes of the much lower than normal production of cereals this year include erratic rainfall, limited availability of seed and fertilizer, particularly in view of two or three replantings needed in many areas, and the newly settled farmers not being able to utilize all the land due to lack of access to adequate capital and inputs, or collateral to procure them. Following the land reform programme, the large-scale commercial sector now produces only about one tenth of its output in the 1990s.

Although national cereal production is considerably up on last year, a significant food gap remains, particularly affecting those who lost their crops mainly due to erratic weather in different parts of the country. Coping mechanisms are seriously stressed or largely exhausted after the severe shortages last year. Cereal import requirements for the marketing year 2003/04 are estimated at 1.3 million tonnes, of which maize accounts for 980 000 tonnes. Taking into account an anticipated commercial cereal import of 677 000 tonnes (370 000 tonnes of maize, 298 000 tonnes of wheat and 9 000 tonnes of rice) there is a deficit of 610 000 tonnes to be covered by food aid. Against this requirement, food aid in pipeline amounts to 140 000 tonnes. There is need of additional pledges for 470 000 tonnes, all maize. There is a severe shortage of maize seed in Zimbabwe, which if not addressed will greatly limit plantings in the coming season. Appropriate varieties of maize and also small grain seeds need to be sourced immediately for delivery in September 2003.

### ASIA

#### AFGHANISTAN (3 June)

FAO, in collaboration with the Government of Afghanistan and WFP, conducted a crop planting survey and is in the process of conducting a pre-harvest survey. Early analysis of information show that this year's harvest will be significantly higher than last year's owing primarily to improved precipitation in most of the country and larger areas planted with cereals. Area under rainfed wheat has, in particular, increased significantly this year in view

of favourable growing conditions for rainfed cereals and reportedly at the expense of some grazing and marginal lands. FAO and WFP are in the process of fielding a joint Crop and Food Supply Assessment Mission starting from mid-June. A report will be issued soon after the mission.

Despite an expected good harvest this year, access to food remains difficult for a large number of vulnerable households. 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. WFP, in partnership with FAO, various government agencies and other stakeholders, is about to launch a National Risk and Vulnerability Assessment to further refine information on food needs and the identification of the most vulnerable population in need of assistance.

#### **ARMENIA\* (2 June)**

Aggregate cereal harvest this year is estimated at about 337 000 tonnes, which is nearly 80 000 tonnes lower than the harvest in 2002. Wheat harvest is estimated at 260 000 tonnes compared with 340 000 tonnes last year. Potato harvest, an important staple crop after wheat, is seen to decline by 80 000 tonnes this year compared with 2002. An unusually cold winter with significant frost affected wheat yields, whereas orchards in most of the country have been significantly damaged. Orchards in some areas of the country are the main source of livelihood. Therefore, access to food for a large number of the population will be compromised as well as capacity to import food. Aggregate cereal utilization requirement is estimated at about 820 000 tonnes, which leaves a deficit of 354 000 tonnes. Food aid and assistance to rehabilitate orchards will be necessary to meet the deficit and restore the capacity to access food.

#### **AZERBAIJAN (2 June)**

Prospects for this year's crops are favourable despite some damage caused by early spring floods. Aggregate cereal harvest is now estimated at about 2.3 million tonnes, which is some 140 000 tonnes lower than the highly improved harvest of 2002. Azerbaijan continues to plant record areas with cereals in a drive to achieve food self sufficiency. The estimated aggregate cereal harvest includes some 1.8 million tonnes of wheat, 242 000 tonnes of barley and 150 000 tonnes of maize. Aggregate cereal utilization is estimated at about 3.5 million tonnes and the import requirement of about 574 000 tonnes will be mostly commercially procured.

#### **BANGLADESH (27 May)**

The 2002 paddy output is estimated at 39.5 million tonnes, up 8.5 percent on the previous year, a result of more cultivation of high-yielding varieties, uninterrupted supply of fertilizer, smooth irrigation, and favourable weather. The 2003 paddy production is forecast to have a slight increase to 39.6 million tonnes.

A storm in May caused a number of deaths and hundreds of houses flattened. Seasonal storms are common in Bangladesh, one of the world's poorest countries. Weather experts are predicting three or four more storms and a couple of cyclones are likely to hit the country. Continued food aid is needed to meet the uncovered cereal imports.

#### **CAMBODIA (1 June)**

Harvesting of dry season paddy crops has been completed and planting/transplanting of main wet season rice for harvesting from October/November is underway. Total paddy production in 2002 is estimated at 3.74 million tonnes, a drop of about 9 percent from a year earlier due to reduced area and lower yield. The target rice output in 2003 was indicated by Ministry of Agriculture at 4.5 million tonnes. The Government of Cambodia is set to develop the rice sector and boost rice exports as a critical component of the country's national development strategy. Currently about 80 percent of the

country's population is involved in agricultural production, accounting for nearly 40 percent of the country's gross domestic product.

#### CHINA (1 June)

China's winter wheat harvest, which normally starts at the end of May has been delayed due to extremely cool spring weather and insufficient sunshine. Wet and cold weather swept across most of the major wheat-producing regions during April and early May when winter wheat was in the final growing stage. Temperatures fell 5 to 9 degrees Celsius in northern China, northwestern China and northeastern China. Windy and stormy weather occurred in northeastern China. The cold and wet weather negatively affected the yield potential of winter wheat and increased the incidence of pest and plant diseases. Winter wheat output is estimated slightly lower than the previous year. Spring wheat production, which only accounts for a small proportion of aggregate output (less than 10 percent) is likely decline further this year. The overall wheat output for 2003 is forecast to be reduced by some 5.2 percent compared to the previous year.

Planting of the early rice crop, the smallest of the country's three rice crops, has been completed and the area is estimated to have fallen by 1.2 percent. The planting of the intermediate crop is expected to be completed soon. Overall, rice area in 2003 is expected to contract by some 4 percent based on a smaller area.

The planting of maize in the major growing provinces in Northeast China has been affected by an extremely severe drought in May. Some maize area has been re-planted. The 2003/04 maize output is provisionally forecast at 119 million tonnes, 3.3 percent lower than last year, reflecting the contracted area and reduced yield.

#### CYPRUS (2 June)

The 2003 aggregate output of wheat and barley, being harvested, is forecast at 97 000 tonnes, slightly lower than the average for the previous five years. Cereal production normally covers less than one-third of total domestic requirements.

Imports of cereals in 2003/04 (May/April), mainly wheat and barley, are forecast at about 645 000 tonnes, similar to the previous year.

#### GEORGIA (2 June)

**Latest reports point to an aggregate cereal harvest of about 667 000 tonnes, which is slightly below the harvest in 2002. This estimate is tentative and much depends on weather conditions during the critical months of early summer. Inadequate precipitation, irrigation water shortages and wind storms usually damage significant areas of maize, which is together with wheat the most important staple crop in Georgia. Aggregate maize harvest is tentatively forecast at 400 000 tonnes and wheat harvest at 206 000 tonnes. Aggregate cereal utilization requirement is estimated at 1.27 million tonnes. Cereal import requirement is estimated at 545 000 tonnes, which is to be met by commercial imports and food aid.**

**The current WFP PRRO began in April 2003, which is scheduled to end by March 2006. By the end of the current PRRO 50 493 tonnes of food will have been distributed to 209 500 vulnerable people. The current PRRO aims to target Chechen refugees in Eastern Georgia (Pankisi Gorge) as well as pensioners and other vulnerable groups. Nearly 70 percent of the aggregate food aid will be distributed to 160 000 vulnerable people through food for work activities in six regions of the country.**

#### INDIA (8 June)

The June-September monsoon is crucial to India's economic performance as farm production depends heavily on the timely arrival and distribution of rains. The monsoon rains which account for 80 percent of the annual rainfall, normally sets in over the southern state of Kerala by 1 June. This year the monsoon was delayed for about a week and eastern India has suffered a three-week deadly heat wave which has killed about 1 400 people.

India was the world's second largest rice exporter in 2002/03 exporting approximately 4 million tonnes, and is expected to export another 3 million tonnes in 2003/04.

#### INDONESIA (2 June)

The harvesting of the 2003 main paddy crop has been completed. The 2003 paddy output is forecast at 51.4 million tonnes, slightly higher than the previous year. With the aim of encouraging rice farmers to increase rice production, the Government has increased the rice farm-gate price. Fertilizer has been subsidized and the import tariff for rice has been increased from zero percent to 30 percent.

The harvesting of the 2003 maize crop was completed in April. The 2003 maize output is estimated at 9.66 million tonnes, up 1.5 percent on a year earlier, due to a slight increase in area and yield.

Overall food situation in the country continues to stabilize. The rice import in 2003/04 is forecast at 3.4 million tonnes, 0.1 million tonnes above the previous year. The maize import is projected at 1.4 million tonnes based on the increasing demand from the livestock sector.

#### IRAN, ISLAMIC REPUBLIC OF (5 June)

Harvesting of wheat and planting of the paddy crop due for harvest from August are underway in Iran. The 2003 wheat output is estimated at 12.8 million tonnes, 2.8 percent and 26.4 percent above the previous year and the average of previous five years, respectively, mainly due to the favorable weather resulting in the higher yield. Two consecutive good harvests after several years of drought have significantly improved the country's wheat supply situation. The wheat import in 2003/04 is forecast at 2.2 million tonnes, compared to an average of 6.5 million tonnes from 1999/00 to 2001/02.

Prospects for rice, barley, and maize production in 2003 are also expected to be favorable. The output of paddy, barley, and maize are forecast at 2.8 million tonnes, 3 million tonnes, and 1.25 million tonnes, respectively. The total cereal import requirement in 2003/04 is forecast at 4.13 million tonnes down from 4.43 million tonnes a year earlier and 8.93 million tonnes two years ago.

#### IRAQ\* (2 June)

**Harvesting of winter grain (mainly wheat and barley) in Iraq normally begins in May/June. The performance of the 2003 crop is still uncertain and will only be determined with successful completion of a planned FAO/WFP Crop and Food Supply Assessment Mission in June/July 2003.**

**In 2002, production of cereals (mainly wheat and barley) was estimated at about 1.7 million tonnes, about 7 percent higher than the previous year due to improved weather. Weather conditions in the current cropping season were also favourable. 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 oil-for-food deal have led to significant improvements in the overall food supply situation. However, nutritional deficiencies remain a serious problem. A Security Council Resolution on 22 May 2003 lifted sanctions against Iraq and extended provisions of earlier resolutions for a six month period during which the Oil-for-Food Programme is to be terminated, with transfer of responsibility to the Authority in Iraq.

A revised Emergency Operation was jointly approved on 11 June 2003 by FAO and WFP for expanded emergency assistance to the public distribution system, Iraqi refugees, IDPs and vulnerable groups for a total of 2.18 million tonnes, worth a total of about US\$ 1.48 billion tonnes for a period of 5 months.

#### ISRAEL (2 June)

Harvesting of the 2003 wheat crop is almost complete and the output is forecast at about 170 000 tonnes, 38 percent above the average for the previous five years, as a result of favourable weather conditions.

Total imports of cereals in the just ending marketing year 2002/03 (July/June) are estimated at some 2.88 million tonnes, slightly lower than the previous year.

#### JAPAN (2 June)

Paddy production in 2002 is officially estimated to fall by 1.9 percent from the previous year to 11.11 million tonnes, reflecting a 1.1 percent reduction in the area planted and a slight decrease in yields. Planting of the 2003 rice crop started in May, for harvest in October-November.

Maize utilization in 2003/04 is forecast to increase to 16.4 million tonnes from 16.3 million tonnes a year earlier due to a slight increase in demand in the livestock sector. However, maize imports in 2003/04 are projected down to 16.2 million tonnes from 16.5 million tonnes last year due to large carry-in stocks. Japan is the world's largest maize importer.

#### JORDAN (2 June)

Aggregate output of wheat and barley in 2003 is forecast at 147 000 tonnes, about 20 percent above last year's crop and nearly three times the previous five years average mainly due to favourable weather. This is despite heavy rains, floods and snow storms earlier in the year that resulted in heavy crop damage. 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, slightly lower than last year. Coarse grain imports are forecast at 800 000 tonnes, about the same as in 2001/02.

#### KAZAKHSTAN (2 June)

Latest reports point to a reduced cereal harvest of 13.4 million tonnes, which is nearly 2.5 million tonnes lower than the harvest in 2002. Aggregate wheat harvest is now estimated at 10.8 million tonnes, nearly 2 million tonnes down on 2002. Barley harvest is seen to decline from 2.2 million tonnes in 2002 to 1.8 million tonnes in 2003. Significant winter kill due to harsh winter in the northern new lands of the country and smaller area planted with wheat have contributed to this year's relatively low cereal harvest. Aggregate cereal exports during the 2003/04 marketing year are forecast at about 4.4 million tonnes, including 4 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. Aggregate cereal exports in 2002/03 marketing year are now estimated at about 5.7 million tonnes.

**KOREA, DEMOCRATIC PEOPLE'S REPUBLIC OF\* (2 June)**

The main agricultural activities currently are transplanting of rice and planting and weeding of maize. Most provinces reported that wheat and barley are growing well, although the agricultural season is about two weeks behind compared to last year. Wheat and barley production in 2002 is provisionally estimated at 204 000 tonnes, 2.5 percent above the previous years' harvest of 199 000 tonnes. Total cereal production available for consumption in the current marketing year ending in October 2003 is estimated at 3.4 million tonnes, up 9 percent from last year. Potato output in 2002 is estimated at about 500 000 tonnes.

Notwithstanding the reasonably good harvest in 2002, a significant number of families in DPR Korea are still unable to meet their food needs. About 6 million people require about 500 000 tonnes food assistance. The Public Distribution System (PDS) ration for May remained at 250 grams/person/day. This cereal ration covers only about 42 percent of the minimum daily energy requirement and is expected to continue until the next main crop harvested in September/October.

**KOREA, REPUBLIC OF (29 May)**

Planting of the paddy crop, the most important cereal crop grown in the country, is underway. The planted area is expected to contract to 1 003 000 hectares for the 2 003 rice crop, down 4.7 percent and 6 percent compared to last year and the average of previous five years, respectively, mainly due to government policy. Starting from 2003, the Korean Government implements a rice area reduction programme which is designed to provide direct payments to farmers who do not cultivate any commercial crop on previously existing rice acreage.

As the world second largest maize importer, just behind Japan, Korea maize import is expected to increase to 9.2 million tonnes in 2003/04 from about 8.6 million tonnes a year earlier to meet domestic feed demand.

Wheat imports in marketing year 2003/04 are forecast at 3.5 million tonnes, 6.7 percent below the previous year.

**KYRGYZ REPUBLIC (2 June)**

Preliminary estimates point to about 1.85 million tonnes of cereal harvest this year, which compares with the significantly improved harvest of 1.9 million tonnes in 2002. This aggregate includes some 1.2 million tonnes of wheat and 573 000 tonnes of coarse grains (barley and maize). The government had hoped for a bumper crop this year, but harsh weather conditions in winter compromised significant cereal areas, in particular wheat. Cereal import requirement in 2003/04 marketing year is estimated at 179 000 tonnes, mainly milling wheat, which will be commercially procured. Whereas cereal exports are estimated at 40 000 tonnes.

**LAOS (30 May)**

Laos has a stable economy and the country's GDP is expected to grow more than 6 percent in 2003.

Aggregate 2002 paddy production, estimated at 2.41 million tonnes, 3.3 percent above the previous year due to the good weather. Total 2002 cereal production is estimated at 1.56 million tonnes on milled rice basis, virtually covers the country's food consumption requirement. Planting of the 2003 main rainfed paddy crop is underway and the rice output this year is forecast at 2.5 million tonnes, reflecting the recovery in rice area.

LEBANON (2 June)

The output of the 2003 wheat and barley, now being harvested, is expected to be about 84 000 tonnes, slightly lower than last year. The country depends heavily on imports (around 90 percent) to meet demand for rice, sugar and milk powder.

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

MALAYSIA (31 May)

Harvesting of the main paddy crop, normally accounting for 60 percent of total, and planting of the irrigated secondary paddy crop has been completed. The aggregate 2003 paddy output is estimated at 2.4 million tonnes, 14.8 percent higher than the 2002 crop, due to a combination of larger area and higher yield.

Normally a third of domestic rice consumption requirements are imported, whilst wheat and maize are almost entirely imported. The 2003 rice import requirement is reduced by 140 000 tonnes from the previous year to 500 000 tonnes reflecting an increase in rice production.

Wheat import in 2003/04 is projected at 1.35 million tonnes, unchanged from the previous year, while maize import is expected at 2.5 million tonnes, slightly higher than last year based on domestic demand changes.

**MONGOLIA\* (29 May)**

**Planting of 2003 wheat, the major cereal grown in the country, has recently been completed.**

**Production of wheat in 2002 is estimated at 159 000 tonnes, 20 000 tonnes above the previous year under the harsh winter, but still 79 000 tonnes below the level in 1997. Total cereal production at 161 000 tonnes, covers only about 41 percent of domestic cereal requirements, leaving an import requirement of 238 000 tonnes.**

**Mongolia requires international assistance for nearly 665 000 people affected by last summer's drought and extreme winter weather.**

MYANMAR (31 May)

Planting of main season rice, accounting for around 85 percent of aggregate production, will start with the arrival of the southwest monsoon rain. The remaining 15 percent of the paddy crop comes from the second or dry season crop. The aggregate 2002 paddy production is estimated at 22.8 million tonnes, some 4 percent above the previous year's output, due to an increase in area and yield. Rice export is also up from 0.95 million tonnes to 1.1 million tonnes. The 2003 paddy output and export are projected to increase further.

The 2002 wheat output is estimated at 103 000 tonnes, virtually unchanged from the previous year. The 2002 coarse grains are estimated at 837 000 tonnes, a record in the last five years as a result of expanded area. The wheat import and maize export in 2002/03 are estimated at 30 000 tonnes and 168 000 tonnes, respectively.

NEPAL (31 May)

Planting of the main paddy crop is underway. The paddy output in 2002 is estimated at 4.13 million tonnes, about 1 percent down from the previous year because of unfavourable weather conditions. The wheat crop harvested in April 2003 is estimated at 1.3 million tonnes, 7 percent higher than last year due to yield increase.

**PAKISTAN (9 June)**

The harvesting of the 2003 wheat crop is completed and the planting of the paddy and coarse grains crops are underway. The 2003 wheat output is tentatively estimated at 19.5 million tonnes, about 1.5 million tonnes less than expected before due to the failure of the wheat crop in Punjab and Sindh caused by the prevailing drought. The wheat import requirement is estimated at 3 million tonnes to meet the wheat shortfall. The damage to the wheat crop in Punjab has been reported on a much higher scale as compared to Sindh. WFP continues its assistance to drought-affected people, including 157 000 in Sindh and 108 000 in Balochistan.

**PHILIPPINES (5 June)**

Harvesting of the secondary rice and maize crops is underway. Paddy production in 2003 is estimated at 13.5 million tonnes, up 2.3 percent from the previous year due to a larger area. Maize production in 2003 is estimated at 4.61 million tonnes, 6.7 percent above the previous year.

Wheat, rice, and maize import requirements in 2003/04 are estimated at 3.2 million tonnes, 1.1 million tonnes, and 0.4 million tonnes, respectively.

Tropical storm Chedeng has killed 18 people in the Philippines and caused damage worth some US\$ 630 000. However, there was no damage to the rice crop as harvesting had just finished. The storm brought an end to a long dry spell caused by the El Niño phenomenon.

**SAUDI ARABIA (2 June)**

Aggregate output of wheat and barley in 2003 is forecast at 1.89 million tonnes, slightly higher than last year. Imports of coarse grains (mainly barley and maize) in 2002/03 (July/June) are forecast at 6.7 million tonnes.

**SRI LANKA (22 May)**

The output of 2003 Maha rice harvested in March is estimated at 1.3 million tonnes, much higher than the previous year's harvest of 1.1 million tonnes due to favourable weather. Land preparation and sowings of the mostly irrigated Yala dry season paddy crop are completed and the yield will depend on the weather in the next several months.

Due to torrential rains with high gales, Western and Southern parts of Sri Lanka have been experiencing severe floods and landslides in the last several days, reported as the worst floods in 50 years, over 200 persons dead and over 177 000 families have been left homeless. The impact on rice and livestock would be severe, but not be assessed yet. The emergency need for food aid may be large. FAO is planning to help the farmers to rehabilitate the lost crop through interventions by providing the necessary inputs such as seeds, fertilizer and implements.

**SYRIA (2 June)**

The output of wheat in 2003, now being harvested, is forecast at 4.5 million tonnes, about 6 percent below last year's good crop but 16 percent above the average for the previous five years. Barley harvest is also estimated at an above average one million tonnes.

Imports of cereals, mainly wheat, in the just ending marketing year 2002/03 (July/June) are forecast at a total of 1.8 million tonnes, more than a quarter above the previous year.

**TAJIKISTAN\* (2 June)**

**Latest reports indicate that Tajikistan will be able to match last year's significantly improved cereal harvest estimated at 614 000 tonnes. The government had hoped for a larger crop this**

**year even compared with the improved harvest in 2002, however, mudslides during early spring in the southern parts of the country somewhat compromised cereal harvest this year. This aggregate includes 530 000 tonnes of wheat and 53 000 tonnes of coarse grains. Despite improved cereal production Tajikistan needs to import some 440 000 tonnes of wheat, including 100 000 tonnes in food aid, to meet domestic cereal requirement.**

THAILAND (31 May)

Planting of the 2003 main season crops and harvesting of the second season paddy crop are underway. Paddy production in 2003 is forecast at 27 million tonnes, about 1.1 million tonnes higher than the peak in 2001, mainly due to normal weather conditions this year and price-led expansion in area. Thailand, the world largest rice exporter, is expected to export 7.5 million tonnes rice in 2003/04, virtually unchanged from the previous year.

The 2003 maize crop is estimated at 4.28 million tonnes, 1.6 percent above the previous crop due to favourable weather and a shift in area from unattractive crops like sugar cane. Thailand used to be a large maize exporter, but has changed to a small exporter or importer recently due to declining production and increasing domestic feed demand.

**TIMOR-LESTE, DEMOCRATIC REPUBLIC OF (26 May)**

**The harvest of maize, the main staple food crop of the country is complete and the maize output is estimated to decline by about 34 percent to 70 000 tonnes in 2003 from 106 000 tonnes the year before due to the severe drought at the beginning of the season. Maize production was affected by the late onset of rains, shortage of maize seeds and other inputs, reduced planted area and generally unfavourable rainfall.**

**Part of the shortfall in maize production of maize is estimated to be offset by the projected increase of 12 percent in rice production to 40 000 tonnes, primarily due to an increase in the area under irrigation.**

**As a result of the lower overall cereal production, cereal import requirements for the marketing year 2003/04 area estimated at 68 000 tonnes. All of the rice import requirement of about 33 000 tonnes is expected to be met by the private sector. The deficit in maize is anticipated to be covered about half-half by private and public imports. 20 000 tonnes food aid are need to cover the food needs of 150 000 vulnerable people according to estimation by an FAO/WFP Mission to Timor-Leste in April/May, 2003.**

TURKEY (2 June)

Output of the 2003 wheat crop is provisionally estimated at 21 million tonnes compared to 20 million tonnes in 2002. Good winter rains and snow cover have helped boost yields.

Wheat imports in 2002/03 (July/June) are forecast at 800 000 tonnes similar to the previous year. Maize imports, however, are forecast to decline by nearly 400 000 tonnes to 800 000 tonnes compared to the previous year. Exports of wheat and barley in the year ending June 2003 are expected to increase by more than 300 000 tonnes to 1.7 million tonnes.

TURKMENISTAN (2 June)

The prospects for this year's cereal harvest are favourable, owing much to significantly improved precipitation and water availability. Aggregate cereal harvest is estimated at about 2.1 million tonnes, which is some 100 000 tonnes down on last year's harvest. This total includes some 2 million tonnes of wheat, 20 000 tonnes of maize and 60 000 tonnes of barley. Area under cereals has steadily increased over the past few years at the expense of cotton and encroachment on virgin lands. Given the forecast harvest materializes, Turkmenistan will be able to meet domestic cereal needs and export a limited quantity of wheat.

#### UZBEKISTAN (2 June)

Latest reports point to another record cereal harvest estimated at about 5.4 million tonnes, similar to last year's harvest. This aggregate includes some 4.9 million tonnes of wheat, 150 000 tonnes of barley, 130 000 tonnes of maize and 103 000 tonnes of rice. Summer cereals such as rice, maize and spring wheat will depend on precipitation and irrigation water availability. Uzbekistan has made significant efforts to increase cereal production in order to meet domestic consumption requirements by increasing area under cereals at the expense of area under cotton. Cereal import requirement, mainly milling wheat and rice, is estimated at 268 000 tonnes during the ensuing marketing year.

#### VIET NAM (31 May)

In the Southern provinces, the winter/spring paddy crop is being harvested, while in Northern provinces the winter/spring crop planting has been completed.

Crop production is expected to increase as a result of higher input use and marginal rice land being converted to other crops or aquaculture. The aggregate paddy production in 2003 is projected at 34.2 million tonnes, slightly above the previous year and a record production in the last five years.

Viet Nam is the third largest rice exporter behind Thailand and India. The rice export target for this year is 4.0 million tonnes compared to 3.9 million tonnes in 2002. In the first five months 1.91 million tonnes were exported, up 47.4 percent from last year.

#### YEMEN (2 June)

Planting of the main sorghum and millet crops to be harvested towards the end of the year is almost complete. Good rains in parts have boosted soil moisture. 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 2.4 million tonnes, slightly lower than the previous year.

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

#### COSTA RICA (30 May)

The early arrival of seasonal torrential rains has resulted in some localized flooding, particularly in the Atlantic coastal city of Limón and its surroundings, with consequent damage to housing and road infrastructure. Heavy rains and flooding are also reported in the northwestern province of Guanacaste. Additional abundant rains are expected in the weeks ahead. Sowing of the 2003/04 first season cereal and bean crops has started. White maize planting is forecast to increase from last year's low to an average level. The intended area planted to paddy is also anticipated to be about the average of the past five years.

Wheat imports in marketing year 2003/04 (July/June) are forecast at about 200 000 tonnes, similar to the previous year. Imports of maize, mostly yellow, are also expected to remain close to 2002/03 level of 565 000 tonnes. Rice imports should be some 75 000 tonnes in 2003 (January/December). Imports of beans, an important staple in the population diet, are forecast to be about 30 000 tonnes in 2003/04 (July/June), close to the volume imported in 2002/03.

#### CUBA (30 May)

Above-normal rains were reported in April, particularly in the far eastern provinces and in the central parts of the island. The rains helped replenish soil moisture in various areas that had been long affected by drought; yet, there were parts which did not fully benefit from the April rains, particularly in the western province of Pinar del Rio and the provinces of Holguin, Las Tunas and Santiago. These particular areas have been affected by drought since the beginning of the year, with significant damage to coffee crops.

The heavy rains disrupted harvesting operations of the 2002/03 sugar crop. It has been a blow to a crop affected by a variety of problems, mainly the critical shortage of agricultural inputs. Sugar output is believed to have sharply fallen from the already low 2001/02 crop of 3.6 million tonnes.

Sowing of the 2003 spring (main) paddy and maize crops has benefited from the heavy rains, and average plantings for both crops are forecast.

#### DOMINICAN REPUBLIC (30 May)

Normal and well distributed rains in April benefited the 2002/03 third season maize crop, currently being harvested, as well as planting of the 2003/04 first season maize crop. The rains have been particularly beneficial in the north, the northwest and the eastern parts of the country. Maize output in 2002 is provisionally estimated at an above average 42 000 tonnes. Harvesting of the 2003 main paddy crop has started and an above-average production, close to last year's record output, is tentatively forecast. Good outturns are also anticipated for other minor foodcrops such as roots, plantains and fruits.

Wheat imports in marketing year 2003/04 (July/June) are forecast at 325 000 tonnes, close to the previous year's level. A high 700 000 tonnes of maize should be imported in marketing year 2003/04 (July/June) in response to the strong demand from the animal feed industry. About 30 000 tonnes of beans will be imported in 2003, to meet the high demand for this staple, which together with rice make for the basic food items in the population's diet.

#### EL SALVADOR (30 May)

**Planting of the 2003/04 first (main) season maize, paddy and bean crops has started with the arrival of the first rains from mid-May. The intended area planted to maize, the main cereal, and to sorghum should be close to the average of the past 5 years. Heavy rains are forecast in the weeks ahead and contingency measures are being adopted in various localities to cope with likely flooding and landslides. The country continues to be affected by the international coffee crisis which enters its third consecutive year. Local officials indicate the loss of about 90 000 jobs in the sector and the accumulation of massive debts by farmers. It is reported that a number of children have died from malnutrition, and the cause is largely attributed to the inability of the unemployed parents to buy the minimum amount of food required by their children. Food and health assistance continues to be delivered by the international community, in collaboration with national authorities, particularly in support of affected children.**

#### GUATEMALA (30 May)

**With the arrival of the rainy season, heavy rains are reported in various parts of the country, particularly in the central and southern coastal areas. Emergency measures are being adopted by the government, especially in the vicinity of river basins in Escuintla, Suchitepéquez, Retalhuleu, Santa Rosa and some others, in anticipation of more heavy rains and likely flooding currently forecast. Planting of the 2003/04 coarse grain crops, principally maize, has started and average plantings of some 610 000 hectares are forecast. Production is not enough to meet domestic demand for maize and imports of about 620 000 tonnes are**

forecast in marketing year 2003/04 (July/June), which compares to about 590 000 tonnes in marketing year 2002/03 (July/June). Food assistance is still provided to unemployed coffee workers, affected by the international price crisis which for three years has stricken the coffee sector. Cases of children suffering from acute malnutrition are reported. Assistance from the World Food Programme has been provided to some 25 000 children, as well as their families between February 2002 and March 2003. In the last few weeks, particular assistance has been given to malnourished children in some municipalities in the departments of Chiquimula and Alta Verapaz.

#### HAITI (30 May)

Normal to above-normal rains in April benefited planting of the 2003 first season rainfed maize and paddy crops, as well as sowing of bean and other minor food crops. Harvest of the maize crop is due to start from June while that of the rainfed paddy crop is due from September. The outlook is good and some recovery is expected from the 2002 drought affected crops. Prospects are also good for the important irrigated paddy crop to be harvested from June.

Wheat imports in marketing year 2003/04 (July/June) should remain similar to the volume of 295 000 tonnes imported in the previous year, while maize imports are expected to decline slightly from the 70 000 tonnes imported in 2002/03 (July/June). Rice imports in 2003 are also anticipated to decrease from the 250 000 tonnes imported in 2002 to about 230 000 tonnes.

#### HONDURAS (30 May)

**Planting of the 2003/04 first season cereal and bean crops started with the arrival of the first seasonal rains around mid-May. The rains have been particularly heavy in the capital and its surroundings, with consequent damage to housing and urban infrastructure. Emergency relief has been provided to the affected population and measures adopted to cope with further probable heavy rains and likely flooding which are forecast for the weeks ahead. Plantings of maize, the main cereal, should be about the average of the past five years. Despite the government's financial support to small coffee producers, large numbers of coffee plantation workers are unemployed as a result of the international price crisis which for three consecutive years is affecting the sector. Food assistance from the international community continues to be distributed to the most affected households.**

#### JAMAICA (30 May)

Planting of the 2003 maize and paddy crops started in April with the arrival of the first seasonal rains. Average outputs are tentatively forecast, assuming normal weather conditions prevail. Growing conditions are satisfactory for other food crops such as yams, eddoes, fruits and vegetables, which are important staples in the population diet.

Wheat imports in marketing year 2003/04 (July/June) should be about 230 000 tonnes, similar to the volume of imports in the previous year, while maize imports are expected to increase slightly above the 2002/03 imports level of 195 000 tonnes. Rice imports in 2003 (January/December) are anticipated to be about 90 000 tonnes, close to 2002 imports.

#### MEXICO (30 May)

Harvesting of the 2003 irrigated wheat crop in the large producing northwestern areas is underway. Output is forecast at a slightly less than 3 million tonnes which compares to the past 5-year average of 3.3 million tonnes. The decline is principally due to inadequate water supplies in the main producing states of Sinaloa and Sonora, which resulted in slightly below-average plantings in these states and considerably lower than normal yields. By contrast, normal to abundant rains are benefiting planting of the important spring/summer maize crop, currently underway and for harvesting from October through December, in the main producing states of Jalisco, México, Michoacán, Chiapas and Puebla. As an incentive to producers, it is reported that the small industry

has been encouraged by the government in some states to enter into forward contract purchases. Harvesting of the 2002/03 fall/winter maize crop (planted from October through February) is underway in the main producing states of Sinaloa, Sonora and Chihuahua. The outlook is poor since 40 per cent of the crop is irrigated and water reservoir levels were extremely low at planting. Nevertheless, it is expected that the decrease in output from the 2002/03 fall/winter maize crop will be offset by the anticipated good outturns from the 2003 spring/summer crop. Overall, an average maize output of some 19 million tonnes in 2003 is tentatively forecast. Planting of the 2003 sorghum crop, for harvesting in the fall, is also underway in the main producing west central states of Guanajato, Jalisco and Michoacán. The bulk of the fall harvest is produced in these states. Plantings are forecast to decrease slightly from the past five-year average, largely as a result of farmers' decision to shift their sorghum plantings to maize as a more profitable crop. The other main, and the largest sorghum producing state in the country, is Tamaulipas, in the northeast, where sowing takes place between February and March for harvesting early in the summer. Water availability is reported adequate and an increase in production is anticipated from 2002. However, the increase in production in Tamaulipas will not likely compensate for the anticipated decline in output from the west central states, and a slightly below average sorghum aggregate output in 2003 is tentatively forecast.

#### **NICARAGUA (30 May)**

**Early seasonal rains have been reported since mid-May, but the rains have been irregular and ill distributed. Planting of the 2003/04 first season cereal and bean crops is about to start. Average to above-average plantings of maize, the main cereal, and sorghum are tentatively forecast. The area planted to paddy is also anticipated to be above-average. Food assistance from the international community continues to be provided to rural households affected by the crisis in the coffee sector. Large numbers of coffee plantation workers continue to be unemployed. International assistance is also focused on the prevention of increased malnutrition among children.**

#### **PANAMA (30 May)**

Seasonal heavy rains and flooding are reported since mid-May with consequent damage to housing and infrastructure. About 1 000 persons have been affected in the coastal city of Colón and its surroundings, and relief assistance has been provided to the local population. Other localities in the proximity of the border with Costa Rica were also affected by the torrential rains. Emergency measures are being adopted in other communities to cope with the heavy rains which are forecast for the next weeks. Sowing of the 2003 maize and paddy crops has started and average plantings are tentatively forecast.

### **SOUTH AMERICA**

#### **ARGENTINA (30 May)**

Planting of the 2003 wheat crop is about to start in the main producing central and southern areas of the country. The intended area planted is provisionally forecast at 6 to 6.3 million hectares which compares to the past 5-year average of 6.2 million hectares. More intensive use of fertilizers than in 2002 is expected this year. Wheat producers were uncertain last year about the market and largely abstained from the purchase of farm inputs, leading the lowest wheat output since the 1996/97 campaign. Heavy rains in recent weeks disrupted harvesting operations of the 2003 maize crop. About 74 per cent of the crop had been harvested by mid-May. Production is expected to be about 15 million tonnes, an increase over last year's 14.7 million tonnes but some 1 million tonnes below the average of the past 5 years. This is mainly the result of reduced plantings. Production of sorghum is expected to be slightly below average in 2003. Paddy output this year is provisionally estimated at 770 000 tonnes, which compares to the 5-year average of 1 million tonnes. The decline is principally due to below-average plantings, largely reflecting farmers' decision to switch to more profitable crops. Relief programmes of the government, in collaboration with international welfare

organization, have helped alleviate the tight food supply situation that parts of the population were facing due to the difficult economic problems which have affected the country.

#### BOLIVIA (30 May)

Heavy rains at the end of March in Larecaja, in the Department of La Paz, in the northwest, resulted in landslides with severe damage to village housing. About 700 families are reported to be affected. Relief assistance from international organizations in collaboration with local authorities has been provided. Harvesting of the summer wheat crop (planted in October/November 2002) has been completed in the main producing eastern Department of Santa Cruz, while planting of the winter crop for harvesting from September is well advanced. Early forecasts indicate that an average wheat output (both crops) will be collected. Harvesting of the 2003 first maize crop, planted in the fall of 2002, has been virtually completed and a good output collected, while planting of the 2003 second season crop is about to start. An above-average maize output (both crops) is early forecast.

Wheat imports in marketing year 2003/04 (July/June) are forecast to remain similar to the level of 250 000 tonnes imported in the previous year.

#### BRAZIL (30 May)

Weather conditions are favouring planting of the 2003 wheat crop in the large producing states in the south. Enlarged plantings and the use of better quality seeds are anticipated. In line with the government wheat production expansion programme, harvesting is due to start from August, and early official forecasts indicate that a record 4.1 million tonnes should be produced, far above the past five-year average of 2.5 million tonnes. The anticipated increase will help reduce the country reliance on wheat imports which, on the average, are estimated at about 7 million tonnes per year. Harvesting of the 2003 second season maize crop or "zafrihna" is underway and a bumper crop of some 9 million tonnes of maize is expected. Maize output for 2003 (first and second season crops) should be a record 42.8 million tonnes, the result of enlarged plantings with respect to the average and, principally, the higher than normal yields so far obtained. Harvesting of the 2003 paddy crop has been recently completed and 11.1 million tonnes have been collected, which compares to the past five-year average of 10.5 million tonnes and to the volume of 10.7 million tonnes harvested in 2002.

#### CHILE (30 May)

Sowing of the 2003 wheat crop has started under generally dry weather conditions. Slightly above-average plantings are tentatively forecast, close to 2002 level. Harvesting of the 2003 maize crop is about to finish and an above-average output of some 920 000 tonnes to 940 000 tonnes is provisionally estimated.

Wheat imports in marketing year 2002/03 (December/November) are forecast at about 300 000 tonnes close to the previous year, while maize imports in marketing year 2003/04 (February/January) should be between 1.2 million tonnes and 1.3 million tonnes.

#### COLOMBIA (30 May)

Normal to abundant rains, principally along the Caribbean coastal areas and in the northwest, have favoured planting of the 2003/04 first season cereal crops currently underway. The intended area planted to wheat is forecast to be similar to the previous year's 17 000 hectares.

Planting of the 2003 first (main) maize crop has started. Plantings, as well as expected yields, are tentatively forecast to increase slightly from the average level reached in 2002. Harvesting of the 2003 irrigated paddy crops in the central department of Tolima and northwestern department of Cordoba has been recently completed. The other important paddy crop, the rainfed paddy crop grown in the eastern plains of Los Llanos, is harvested towards the end of the summer. Aggregate paddy output in 2003 is tentatively forecast at a slightly above-average 2.4 million tonnes.

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.

Wheat imports in marketing year 2003 (January/December) should increase slightly from the 1.1 million tonnes imported in the previous year. Maize imports are also expected to increase from 2.1 million tonnes to 2.2 million tonnes in 2003(January/December). Rice imports are expected to be similar to the volume of 160 000 tonnes imported in marketing year 2002 (January/December).

#### **ECUADOR (30 May)**

**Harvesting of the 2003 first (main) season maize crop, mostly yellow, is underway. Prospects are poor as plantings were affected by dry weather late in 2002 and January 2003 and, subsequently, by intense rains during February and March. Planting of the white maize crop is due to start from June. Adverse weather has affected maize crops for three consecutive years. Aggregate maize production in 2003 is expected to be low.**

**Wheat imports in marketing year 2003/04 (July/June) are forecast to increase from 460 000 tonnes in the previous year to some 475 000 tonnes. Maize imports should remain at the same high level of 2002 (January/December) of 350 000 tonnes.**

#### **PARAGUAY (30 May)**

Planting of the 2003 wheat crop is delayed due to the lack of adequate and regular rains. An above-average 250 000 hectares are intended to be planted to wheat, mainly the result of attractive prices to farmers. Sowing has started in some of the producing areas; however, the outlook is uncertain as the rains have stopped and sowing operations consequently interrupted. By end-May, some 15 to 20 days only were left as appropriate timing for planting. The lack of available water is severe in some of the affected areas, such as the departments of Alto Paraguay, Boquerón and Presidente Hayes in the west, where relief assistance is being provided by international organizations.

#### **PERU (26 May)**

Harvesting of the 2003 wheat crop is underway, mainly in the southern highlands, where it is grown for direct local consumption. An above-average output of nearly 190 000 tonnes is tentatively forecast. Harvesting of the 2003 white maize crop is nearly completed, while the bulk of the harvesting operations for the important yellow maize crop (about 80 per cent of total domestic maize production) is underway. An above-average maize (white and yellow) output is also provisionally forecast. Harvesting of the important paddy crop continues in the main producing departments of Lambayeque and Piura, in the north, and Arequipa in the south. Output is expected to be close to the average of the past five years.

Wheat imports in 2003 (January/December), mostly for flour and pasta production, are forecast to increase slightly from the relatively high volume of some 1 250 000 tonnes imported in 2002, thus reflecting the strong demand for this staple. The country is the second largest pasta consumer in the sub-region. Imports of maize should stay at the same 2002 year level of 600 000 tonnes, largely to fill the demand from the poultry feeding industry.

#### **URUGUAY (30 May)**

Normal to abundant rains in April have favoured planting of the 2003 wheat and barley crops, which has only started, while harvesting of the 2003 maize and sorghum crops is about to be completed. Average coarse grain outputs are provisionally estimated. Harvesting of the important 2003 paddy crop is also about to be completed. Production is also provisionally estimated at about 1 million tonnes which compares to the past five-year average of 1.1 million tonnes.

### **VENEZUELA (30 May)**

Planting of the 2003 maize and sorghum crops has only started for harvesting from September. Prospects are poor largely as a consequence of the lack of fertilizers and quality seeds caused by financial constraints to farmers. White maize is mostly grown for human consumption, and a reduction in per capita consumption is likely expected in view of the anticipated fall in production. Maize imports, mainly yellow maize, are for the animal feed industry. No significant amounts of white maize imports are anticipated in view of the difficult economic situation faced by the country. Planting of the important irrigated paddy crop is underway. The outlook is also poor due to inadequate water availability in the main producing areas, the result of a three-year drought.

### **EUROPE**

#### **EU (2 June)**

Latest information continues to point to a reduction in wheat output in 2003 but similar outputs to the previous year for most of the coarse grains. However, much will still depend on the weather in the coming weeks. The arrival of some significant rains across northern countries in May benefited crops after previously dry conditions. FAO maintains its previous forecast for the EU aggregate wheat output at about 103 million tonnes, some 1 million tonnes less than the 2002 harvest. While a smaller harvested area this year is fairly sure, given significant planting reductions in France and Germany in particular, the two biggest producers, and reports of significant winter frost damage in several northern parts, the prospects for yields remain quite uncertain. The aggregate coarse grain crop in the EU is forecast at almost 107 million tonnes, virtually unchanged from last year. The 2003 paddy season is getting underway in the EU rice producers. An overall area expansion is tentatively forecast, mostly on account of larger anticipated plantings in Italy. Production is forecast to recover in those member states affected by drought last year, namely France Portugal and Spain. Accordingly, aggregate output for the EU is currently forecast at 2.7 million tonnes, up 2.4 percent from 2002.

#### **ALBANIA (2 June)**

Above-normal autumn and winter precipitation has generally favoured the winter wheat crop after exceptionally dry conditions last year and output of wheat in 2003 will likely recover closer to the average of the past few years. However, reduced precipitation since March is likely to have had negative effect on the spring planted grains. Under the Balkans regional emergency operation WFP will continue to assist food insecure people in the country during 2003.

#### **BELARUS (28 May)**

Latest reports indicate that aggregate cereal harvest will be just over 5 million tonnes, which is about one million tonnes under the 2002 harvest. Relatively cold winter and spring have compromised barley and rye, the two main cereal crops. Aggregate cereal harvest estimates include some 1.8 million tonnes of barley, 1.4 million tonnes of rye and more than one million tonnes of wheat.

#### **BOSNIA-HERZEGOVINA (3 June)**

Latest reports point to a somewhat reduced cereal harvest this year, 1.2 million tonnes compared with 2.3 million tonnes in 2002. Wheat yields are relatively lower than last year and harvest is seen at 195 000 tonnes, which is some 100 000 tonnes down on last year's harvest. Maize is the main cereal crop and the expected harvest of 908 000 tonnes depends on summer floods and precipitation, which quite often affect summer crops in the region. Aggregate cereal utilization is estimated at about 1.9 million tonnes. The estimated deficit of 510 000 tonnes is to be met by commercial imports and 100 000 tonnes in food aid.

#### BULGARIA (2 June)

Prospects for the winter grain crops are poor following reduced and late planting, and unfavourable winter weather, which led to higher than normal estimated levels of winterkill. Wheat production is forecast at just 2.4 million tonnes compared to 3.6 million tonnes last year. Similarly, the winter barley crop is also expected to be significantly reduced to about 520 000 tonnes (2002:1.1 million tonnes).

#### CROATIA (3 June)

Latest information indicate that aggregate cereal harvest this year estimated at just over 3 million tonnes is some 650 000 tonnes down on 2002 harvest. Maize harvest is forecast to drop to 2 million tonnes, which is some 500 000 tonnes lower than last year's harvest. The tentative forecast for maize is based on relatively lower areas planted with maize and a late spring. However, much will depend on weather conditions and yields. Wheat harvest is estimated at 840 000 tonnes compared with 988 000 tonnes last year.

#### CZECH REPUBLIC (2 June)

The winter grain area fell and several areas have been damaged by adverse winter weather, mainly flooding. Cereal output is expected to be somewhat below the average of recent years.

#### ESTONIA (2 June)

Latest reports point to aggregate cereal harvest of 525 000 tonnes, which is slightly below last year's harvest. This aggregate includes some 150 000 tonnes of wheat and 375 000 tonnes of coarse grains, mainly barley. Aggregate cereal import requirement for the ensuing marketing year is estimated at 243 000 tonnes, including 104 000 tonnes of wheat and 139 000 tonnes of coarse grains.

#### FORMER YUGOSLAV REPUBLIC OF MACEDONIA (2 June)

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 (2 June)

The winter wheat area is estimated close to the previous year's level and crops were reported to be in satisfactory condition coming out of the winter. Despite the late arrival of spring, yields may improve somewhat over last year's drought-reduced levels and output is forecast at 4.2 million tonnes (2002: 3.9 million tonnes). However, the late onset of spring is expected to significantly affect the size of this year's barley crop. Lengthy delays in completing spring fieldwork, in many cases beyond the latest date for sowing barley, will likely have led to a significant shift from barley to maize although final planting figures are not yet available.

#### LATVIA (2 June)

Latest reports point to a slightly reduced cereal harvest this year, 980 000 tonnes, compared with just over one million tonnes in 2002. Harsh weather conditions in winter compromised some crop areas. Aggregate cereal utilization is estimated at 1.3 million tonnes and commercial import requirement is estimated at 151 000 tonnes for the 2003/04 marketing year.

#### LITHUANIA (2 June)

Aggregate cereal harvest is estimated at 2.4 million tonnes this year, which is some 100 000 tonnes below the harvest in 2002. Winter wheat was compromised by harsh weather conditions and the output is reduced from 900 000 tonnes in 2002 to 800 000 tonnes this year. Aggregate coarse grain harvest is seen to amount to 1.6 million tonnes, which is similar to last year. Cereal exports during the 2003/04 marketing year is estimated at 168 000 tonnes, while imports is estimated at 105 000 tonnes.

#### **MOLDOVA (3 June)**

**Latest government reports indicate large winter cereal losses to frost, while an unusually long winter prohibited spring planting and replanting of wheat, barley and maize. In addition, during the past two critical months there have been near drought conditions, which affected winter cereal crops and significantly delayed spring sowing. The government estimates that almost all of the winter barley and three-quarters of winter wheat have been lost to frost and drought in the past couple of months. Aggregate cereal harvest is, therefore, estimated at less than 50 percent of last year's harvest of 2.3 million tonnes. Maize harvest is tentatively forecast at 900 000 tonnes, but this will highly depend on summer precipitation and input availability. Winter frost has also damaged significant areas of fruit trees, a major source of foreign exchange earnings and source of income for a large number of households. This will significantly compromise household access to food and the capacity to import food. Assistance will be needed to ward off the repercussions of such losses on a large proportion of the population.**

#### **POLAND (2 June)**

As in several other parts of the region, winter grains have suffered from the prolonged and harsh winter. Winter wheat plantings are estimated to have been down about 3 percent on the previous year and winterkill losses could be up to 5 percent of this. Increased spring wheat plantings may offset some of the reduced winter area but the overall area for harvest in 2003 is likely to be somewhat below that in 2002. Yields are also expected to be down and the wheat harvest is currently forecast at 8.4 million tonnes, compared to 9.3 million tonnes last year. Regarding coarse grains, the winter rye and barley crops are expected to be reduced for the same reasons as wheat. However, plantings of spring barley and maize are expected to increase in compensation for the lost winter grain area and attractive feed grain prices. Aggregate coarse grains output is forecast to remain close to the previous years level at about 17.1 million tonnes.

#### **ROMANIA (2 June)**

In Romania, the outlook for the 2003 winter grain crops has also deteriorated after a promising start to the season at planting time. Adverse weather during the winter has caused the forecast wheat output to be reduced from earlier expectations to 6 million tonnes. This would, nevertheless, still be well up from the previous year's drought-reduced harvest. Although spring planting has been significantly delayed by the prolonged winter weather ample soil moisture reserves will favour development of this year's maize crop.

#### **RUSSIAN FEDERATION (29 May)**

Latest reports point to a significantly lower aggregate cereal output this year (not exceeding 70.5 million tonnes), compared with the improved harvest of the past couple of years (85 million tonnes in 2002). Aggregate wheat harvest is seen to amount to about 36.5 million tonnes, which is some 28 percent lower than the harvest in 2002. Barley output forecast at 17.5 million tonnes is about one million tonnes lower than last year's harvest. The main reasons for the decline in cereal production are a severely cold winter and insufficient snow cover during December and January as well as a late spring. Winterkill is estimated at 3 million hectares of cereal area and late spring planting will have repercussions for yields.

Cereal exports during the ensuing marketing year, 2003/04, is forecast at best not to exceed 5 million tonnes, including 3 million tonnes of wheat and 2 million tonnes of barley. Aggregate cereal exports during the marketing year coming to an end is now estimated at about 16.8 million tonnes, including 13.5 million tonnes of wheat and almost 3.2 million tonnes of barley.

**Targeted food aid continues to be necessary for the internally displaced and vulnerable population in Chechnya, in view of the ongoing civil strife and military operations. WFP has begun distributing an estimated 34 011 tonnes of basic food commodities to some 290 500 internally displaced and vulnerable population in Chechnya and Ingushetia.**

#### SERBIA AND MONTENEGRO (3 June)

Aggregate cereal harvest is seen to drop by more than 400 000 tonnes, compared with last year's good harvest estimated at about 8.2 million tonnes. Following a relatively cold winter and a late spring, wheat harvest is estimated at 2 million tonnes compared with 2.24 million tonnes in 2002. Whereas maize harvest is forecast at about 5 million tonnes, which is some 500 000 tonnes down on last year's harvest. The maize estimates are tentative and much depends on summer precipitation and floods.

WFP is currently assisting some 96 844 refugees in Serbia and Montenegro, while ICRC is currently assisting some 59 000 internally displaced persons (IDP).

#### SLOVAK REPUBLIC (2 June)

Winter grain prospects in the Slovak Republic are similar to elsewhere in the region with a reduced output expected, but the spring planting season has been generally favourable.

#### UKRAINE (28 May)

Severely cold winter, inadequate snow cover and a rather cold and late spring have significantly compromised this year's cereal harvest. Nearly 3.7 million hectares of winter cereals were lost to frost last winter. Aggregate cereal harvest is now optimistically estimated at just over 29 million tonnes compared with 36 million tonnes last year. FAO estimates aggregate wheat harvest at about 10.5 million tonnes, which is more than 46 percent down on last year's harvest. In contrast barley harvest estimated at 11.3 million tonnes is higher than last year's harvest by about one million tonnes. This is in view of the resilience of barley to a relatively cold spring and larger areas planted with spring barley. Maize harvest forecast at about 4.2 million tonnes is up by more than 1.1 million tonnes.

Aggregate cereal export during the 2003/04 marketing year is forecast at about 6.6 million tonnes, which is only 54 percent of the export during the marketing year coming to an end. Wheat exports are estimated at 2.5 million tonnes during the ensuing marketing year compared with an estimated 8 million tonnes during the 2002/03 marketing year.

### **NORTH AMERICA**

#### CANADA (2 June)

Cereal production is forecast to recover sharply in 2003 after a drought-reduced output in the previous year. The official March seeding intentions survey points to a marginal increase in the overall wheat area in 2003. A record winter wheat area in Ontario would more than offset the expected decrease in plantings of spring wheat in western Canada. However, the overall harvested area is expected to increase by about 25 percent due to lower abandonment, and average yields are expected to rise by 32 percent. Thus, production is forecast at 24.6 million tonnes, 57 percent up from 2002. Coarse grain output should also recover sharply in 2003 despite a decrease in plantings. Lower abandonment should lead to a significant increase in the harvested area compared to 2002

and improved yields are also expected. The aggregate coarse grains output is forecast at 27.4 million tonnes.

#### UNITED STATES (2 June)

In the United States, wheat production in 2003 is officially forecast to rebound strongly to 57.5 million tonnes, 31 percent up from the previous year due to gains in both area and yields. The latest survey-based forecast of winter wheat production points to a 37 percent increase from 2002 because of increased plantings, reduced abandonment, and higher yields. Also, the assumed 5-year average harvested-to-planted ratios and yields result in higher spring wheat production, despite the lower planting intentions reported in the March 31 Prospective Plantings report. As for wheat, the 2003 coarse grain production is also forecast to rebound from last year's drought-reduced level to 278.5 million tonnes, almost 14 percent up from the previous year. Of the total, maize is forecast to account for 255.5 million tonnes, with gains in both harvested area and yields expected. Larger sorghum, barley and oats crops are also expected. The bulk of the 2003 paddy crop has been planted, although there have been reports of some delays in the major growing state of California. The latest USDA forecast puts production at just over 9 million tonnes, down almost 6 percent from the 2002 level, reflecting a sharp fall in long-grain plantings. The fall in the overall paddy area was mainly induced by the unattractive producer prices.

### **OCEANIA**

#### AUSTRALIA (2 June)

Planting of the 2003 winter wheat and coarse grain crops has started in many areas following rains in May. However, although latest weather indications are generally in favour of a normal winter rainfall season given that the El Niño event, which brought drought in the previous season, is finished, as of early June, some areas were still awaiting the arrival of sufficient precipitations. Early indications of farmers' planting intention point to a significant increase in the winter grain area this year to compensate for last year's drought reduced production and returns. Given the satisfactory start of planting, and assuming normal weather for the remainder of the season, a wheat crop of some 24 million tonnes is forecast, close to the record in 2001. The winter coarse grain crop is also seen to rebound sharply from the previous year's reduced level. The 2003 rice crop, harvesting of which is almost complete, was severely affected by last year's drought. Output is officially forecast at just 370 000 tonnes, down over 70 percent from the 2002 level, and one of the lowest harvests on national record.

ESTIMATED CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/  
a) 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
<b>AFRICA</b>		<b>32 473.4</b>	<b>1 883.2</b>	<b>34 356.6</b>	<b>34 953.9</b>	<b>16 993.6</b>	<b>1 755.2</b>	<b>15 238.4</b>
<b>Northern Africa</b>		<b>16 796.0</b>	<b>43.0</b>	<b>16 839.0</b>	<b>15 986.0</b>	<b>11 033.2</b>	<b>24.1</b>	<b>11 009.1</b>
Egypt	July/June	12 238.5	34.5	12 273.0	11 820.0	8 523.5	19.7	8 503.8
Morocco	July/June	4 557.5	8.5	4 566.0	4 166.0	2 509.7	4.4	2 505.3
<b>Eastern Africa</b>		<b>3 538.1</b>	<b>931.5</b>	<b>4 469.6</b>	<b>5 285.0</b>	<b>1 411.5</b>	<b>746.4</b>	<b>665.1</b>
Burundi	Jan./Dec.	47.5	17.5	65.0	70.0	24.1	24.1	0.0
Comoros	Jan./Dec.	46.0	0.0	46.0	46.0	2.6	0.0	2.6
Djibouti	Jan./Dec.	58.2	19.8	78.0	63.0	5.5	1.8	3.7
Eritrea	Jan./Dec.	87.2	121.0	208.2	440.0	51.2	42.9	8.3
Ethiopia	Jan./Dec.	97.6	292.4	390.0	745.0	409.8	359.2	50.6
Kenya	Oct./Sept.	1 113.6	136.4	1 250.0	1 640.0	215.1	104.0	111.1
Rwanda	Jan./Dec.	198.0	28.0	226.0	226.0	21.3	11.3	10.0
Somalia	Aug./July	251.7	18.3	270.0	320.0	9.1	6.9	2.2
Sudan	Nov./Oct.	1 148.5	101.7	1 250.2	1 120.0	204.1	95.9	108.2
Tanzania	June/May	383.9	116.3	500.2	470.0	410.0	41.6	368.4
Uganda	Jan./Dec.	105.9	80.1	186.0	145.0	58.7	58.7	0.0
<b>Southern Africa</b>		<b>1 967.3</b>	<b>361.0</b>	<b>2 328.3</b>	<b>3 237.0</b>	<b>3 111.3</b>	<b>784.8</b>	<b>2 326.5</b>
Angola	April/March	401.7	169.7	571.4	725.0	667.1	228.0	439.1
Lesotho	April/March	178.2	2.8	181.0	338.0	234.0	42.0	192.0
Madagascar	April/March	364.4	28.6	393.0	255.0	250.8	46.1	204.7
Malawi	April/March	144.3	6.6	150.9	550.0	672.5	222.5	450.0
Mozambique	April/March	550.3	133.7	684.0	642.0	750.0	94.7	655.3
Swaziland	May/April	76.8	1.2	78.0	111.0	104.9	12.8	92.1
Zambia	May/April	251.6	18.4	270.0	616.0	432.0	138.7	293.3
<b>Western Africa</b>		<b>9 387.0</b>	<b>455.8</b>	<b>9 842.8</b>	<b>9 553.4</b>	<b>1 364.4</b>	<b>176.6</b>	<b>1 187.8</b>
<b>Coastal Countries</b>		<b>6 948.3</b>	<b>271.3</b>	<b>7 219.6</b>	<b>6 925.0</b>	<b>950.6</b>	<b>70.2</b>	<b>880.4</b>
Benin	Jan./Dec.	96.1	18.9	115.0	115.0	29.0	8.2	20.8
Côte d'Ivoire	Jan./Dec.	1 302.8	14.2	1 317.0	1 177.0	275.5	0.9	274.6
Ghana	Jan./Dec.	463.5	78.6	542.1	520.0	131.5	35.6	95.9
Guinea	Jan./Dec.	327.3	45.5	372.8	370.0	4.3	4.3	0.0
Liberia	Jan./Dec.	117.8	32.2	150.0	165.0	18.8	14.2	4.6
Nigeria	Jan./Dec.	4 297.5	12.5	4 310.0	4 170.0	474.0	0.0	474.0
Sierra Leone	Jan./Dec.	243.3	69.4	312.7	308.0	15.3	7.0	8.3
Togo	Jan./Dec.	100.0	0.0	100.0	100.0	2.2	0.0	2.2
<b>Sahelian Countries</b>		<b>2 438.7</b>	<b>184.5</b>	<b>2 623.2</b>	<b>2 628.4</b>	<b>413.8</b>	<b>106.4</b>	<b>307.4</b>
Burkina faso	Nov./Oct.	227.2	30.4	257.6	236.5	15.0	13.4	1.6
Cape Verde	Nov./Oct.	37.4	36.6	74.0	108.5	41.7	39.7	2.0
Chad	Nov./Oct.	84.1	3.5	87.6	98.1	10.6	7.0	3.6
Gambia	Nov./Oct.	143.2	5.7	148.9	142.3	8.4	2.2	6.2
Guinea Bissau	Nov./Oct.	49.3	7.0	56.3	73.5	8.4	8.4	0.0
Mali	Nov./Oct.	237.2	13.4	250.6	279.0	6.9	6.9	0.0
Mauritania	Nov./Oct.	261.6	40.1	301.7	308.0	87.6	18.3	69.3
Niger	Nov./Oct.	356.2	29.9	386.1	377.0	8.7	2.2	6.5
Senegal	Nov./Oct.	1 042.5	17.9	1 060.4	1 005.5	226.5	8.3	218.2
<b>Central Africa</b>		<b>785.0</b>	<b>91.9</b>	<b>876.9</b>	<b>892.5</b>	<b>73.2</b>	<b>23.3</b>	<b>49.9</b>
Cameroon	Jan./Dec.	365.2	2.2	367.4	367.5	21.4	0.0	21.4
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	270.0	15.3	15.3	0.0
Congo, Rep.	Jan./Dec.	176.8	11.1	187.9	190.0	30.3	2.0	28.3
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/  
a) 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
<b>ASIA</b>		<b>32 811.5</b>	<b>3 581.0</b>	<b>36 392.5</b>	<b>37 316.0</b>	<b>25 576.5</b>	<b>2 163.9</b>	<b>23 412.6</b>
Afghanistan	July/June	1 183.2	323.8	1 507.0	1 396.0	676.9	340.1	336.8
Armenia	July/June	191.0	34.0	225.0	299.0	113.4	46.9	66.5
Azerbaijan	July/June	721.0	17.0	738.0	597.0	541.7	24.8	516.9
Bangladesh	July/June	1 624.4	531.6	2 156.0	2 179.0	2 012.2	341.2	1 671.0
Bhutan	July/June	47.8	6.2	54.0	71.0	2.9	2.9	0.0
Cambodia	Jan./Dec.	66.6	51.7	118.3	105.0	59.5	40.5	19.0
China 2/	July/June	9 929.4	70.6	10 000.0	9 600.0	5 000.7	57.7	4 943.0
Georgia	July/June	416.0	100.0	516.0	505.0	403.5	13.4	390.1
India	April/March	11.5	216.1	227.6	380.0	380.0	165.4	214.6
Indonesia	April/March	6 638.2	225.0	6 863.2	8 802.0	9 163.7	218.7	8 945.0
Korea, D.P.R.	Nov./Oct.	882.4	1 020.8	1 903.2	1 359.0	535.8	470.3	65.5
Kyrgyz Republic	July/June	120.0	89.0	209.0	161.0	91.8	7.9	83.9
Laos	Jan./Dec.	26.9	21.1	48.0	37.0	30.0	20.5	9.5
Maldives	Jan./Dec.	38.0	0.0	38.0	38.0	14.6	14.6	0.0
Mongolia	Oct./Sept.	181.6	56.3	237.9	238.0	80.3	0.0	80.3
Nepal	July/June	96.9	8.1	105.0	100.0	50.7	0.7	50.0
Pakistan	May/April	288.6	94.4	383.0	380.0	380.5	52.5	328.0
Philippines	July/June	4 533.5	249.5	4 783.0	4 900.0	3 377.9	87.8	3 290.1
Sri Lanka	Jan./Dec.	967.8	95.2	1 063.0	1 040.0	208.1	1.2	206.9
Syria	July/June	1 432.7	13.3	1 446.0	1 830.0	1 456.6	6.6	1 450.0
Tajikistan	July/June	453.0	189.0	642.0	486.0	479.0	112.3	366.7
Turkmenistan	July/June	46.0	8.0	54.0	58.0	45.1	0.0	45.1
Uzbekistan	July/June	525.0	48.0	573.0	320.0	270.7	125.9	144.8
Yemen	Jan./Dec.	2 390.0	112.3	2 502.3	2 435.0	200.9	12.0	188.9
<b>CENTRAL AMERICA</b>		<b>4 006.7</b>	<b>302.7</b>	<b>4 309.4</b>	<b>4 497.0</b>	<b>2 314.2</b>	<b>380.8</b>	<b>1 933.4</b>
Cuba	July/June	1 730.8	6.0	1 736.8	1 800.0	569.3	1.2	568.1
Guatemala	July/June	1 028.3	126.7	1 155.0	1 180.0	746.5	155.2	591.3
Haiti	July/June	458.6	91.4	550.0	615.0	362.6	105.2	257.4
Honduras	July/June	548.6	28.0	576.6	625.0	365.6	38.3	327.3
Nicaragua	July/June	240.4	50.6	291.0	277.0	270.2	80.9	189.3
<b>SOUTH AMERICA</b>		<b>910.5</b>	<b>142.8</b>	<b>1 053.3</b>	<b>1 129.0</b>	<b>746.6</b>	<b>194.2</b>	<b>552.4</b>
Bolivia	July/June	195.9	73.4	269.3	269.0	131.1	119.3	11.8
Ecuador	July/June	714.6	69.4	784.0	860.0	615.5	74.9	540.6
<b>OCEANIA</b>		<b>418.0</b>	<b>0.0</b>	<b>418.0</b>	<b>399.0</b>	<b>2.0</b>	<b>0.0</b>	<b>2.0</b>
Kiribati	Jan./Dec.	8.0	0.0	8.0	8.0	0.0	0.0	0.0
Papua New Guinea	Jan./Dec.	355.0	0.0	355.0	336.0	2.0	0.0	2.0
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
<b>EUROPE</b>		<b>951.8</b>	<b>148.2</b>	<b>1 100.0</b>	<b>1 040.0</b>	<b>254.4</b>	<b>81.6</b>	<b>172.8</b>
Albania	July/June	320.3	42.7	363.0	383.0	200.0	27.2	172.8
Bosnia&Herzegovina	July/June	375.4	104.6	480.0	400.0	54.4	54.4	0.0
Macedonia, FYR	July/June	256.1	0.9	257.0	257.0	0.0	0.0	0.0
<b>TOTAL</b>		<b>71 571.9</b>	<b>6 057.9</b>	<b>77 629.8</b>	<b>79 334.9</b>	<b>45 887.3</b>	<b>4 575.7</b>	<b>41 311.6</b>

SOURCE: FAO

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

ESTIMATED CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/  
b) 2003/04 estimates (in thousand tonnes)

COUNTRY	Marketing year	2002/03			2003/04			
		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
<b>AFRICA</b>		<b>2 694.9</b>	<b>826.4</b>	<b>3 521.3</b>	<b>2 821.4</b>	<b>159.4</b>	<b>131.3</b>	<b>28.1</b>
<b>Eastern Africa</b>		<b>368.4</b>	<b>41.6</b>	<b>410.0</b>	<b>430.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>
Tanzania	June/May	368.4	41.6	410.0	430.0	0.0	0.0	0.0
<b>Southern Africa</b>		<b>2 326.5</b>	<b>784.8</b>	<b>3 111.3</b>	<b>2 391.4</b>	<b>159.4</b>	<b>131.3</b>	<b>28.1</b>
Angola	April/March	439.1	228.0	667.1	656.0	0.0	0.0	0.0
Lesotho	April/March	192.0	42.0	234.0	320.7	22.4	12.0	10.4
Madagascar	April/March	204.7	46.1	250.8	383.0	29.3	26.1	3.2
Malawi	April/March	450.0	222.5	672.5	94.0	0.0	0.0	0.0
Mozambique	April/March	655.3	94.7	750.0	744.0	86.8	83.9	2.9
Swaziland	May/April	92.1	12.8	104.9	127.7	12.6	9.3	3.3
Zambia	May/April	293.3	138.7	432.0	66.0	8.3	0.0	8.3
<b>ASIA</b>		<b>9 487.6</b>	<b>436.6</b>	<b>9 924.2</b>	<b>12 390.0</b>	<b>522.9</b>	<b>279.0</b>	<b>243.9</b>
India	April/March	214.6	165.4	380.0	250.0	210.5	210.5	0.0
Indonesia	April/March	8 945.0	218.7	9 163.7	8 940.0	146.6	31.9	114.7
Pakistan	May/April	328.0	52.5	380.5	3 200.0	165.8	36.6	129.2
<b>TOTAL</b>		<b>12 182.5</b>	<b>1 263.0</b>	<b>13 445.5</b>	<b>15 211.4</b>	<b>682.3</b>	<b>410.3</b>	<b>272.0</b>

SOURCE: FAO

for footnotes, see previous page.

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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.

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

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