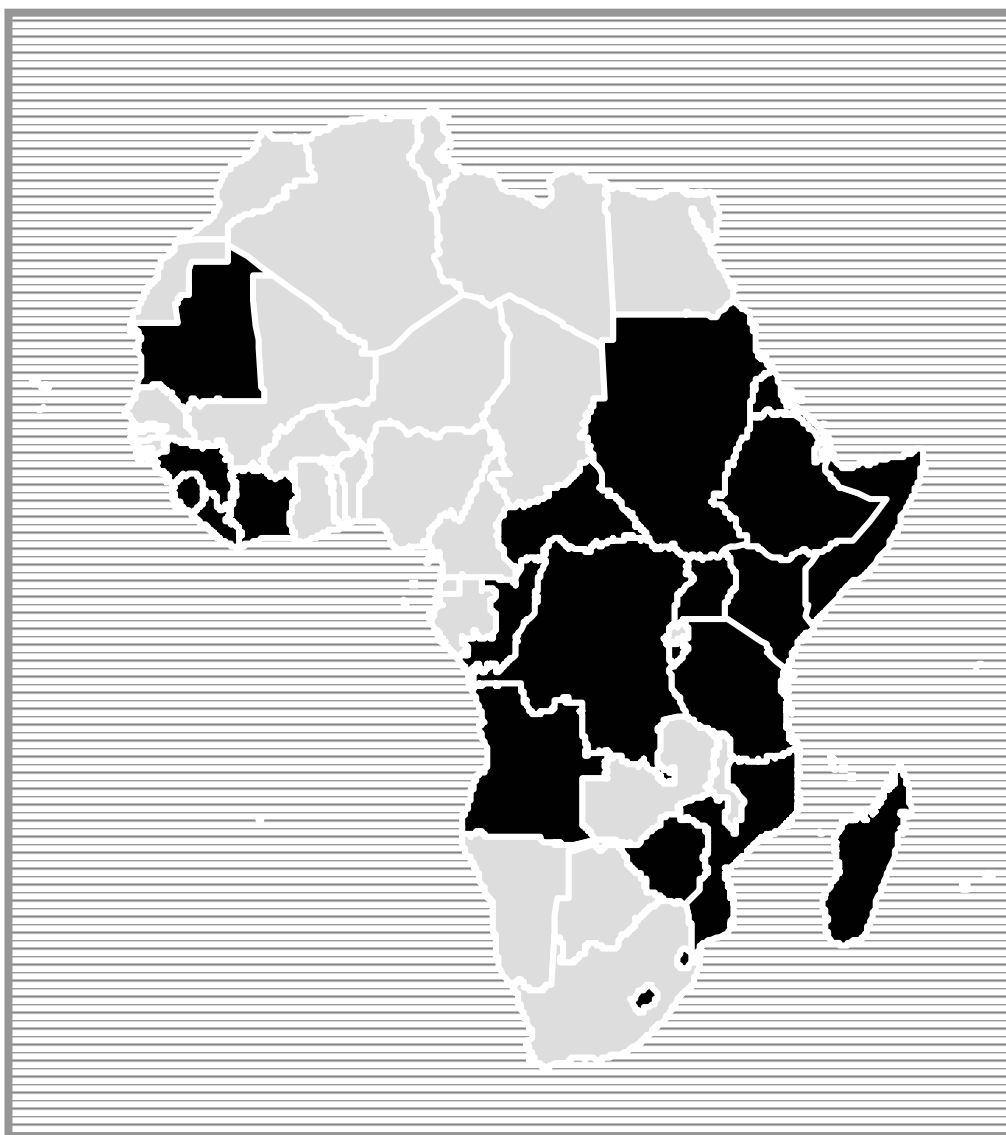


FOOD SUPPLY SITUATION AND CROP PROSPECTS IN SUB-SAHARAN AFRICA

No. 2

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Countries facing food emergencies:

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



FOOD AND AGRICULTURE ORGANIZATION OF THE UNITED NATIONS

INTRODUCTION

This is the second of the three 2003 issues of this report prepared by the FAO Global Information and Early Warning System (GIEWS) on the food supply situation, cereal import and food aid requirements for all countries in sub-Saharan Africa. The report is designed to provide the latest analysis and information on the food situation in these countries to governments, international organizations and other institutions engaged in humanitarian operations.

In this introductory part, countries in the sub-region facing serious food shortages are listed with principal causes of food insecurity. This is followed by the Highlights of the report. Part I provides a country-by-country review of the food supply situation by sub-region, as well as current crop prospects. The accompanying tables (Tables 1- 6) provide data on production, cereal import requirements and food aid needs. The information on food aid pledges, triangular transactions and local purchases is based on data transmitted to GIEWS as of end June 2003 by the World Food Programme.

Part II provides country cereal balance sheets (CCBS), highlighting cereal import and food aid requirements of individual countries, as well as other important data.

COUNTRIES FACING FOOD EMERGENCIES (Total: 23 countries)

<u>Country</u>	<u>Reasons for emergency</u>
Angola	Returnees
Burundi	Civil strife, IDPs
Cape Verde	Drought
Central Afr. Rep.	Civil strife, IDPs
Congo, Dem.Rep.	Civil strife, IDPs and refugees
Congo Rep. of	Civil strife, IDPs
Côte d'Ivoire	Civil strife, IDPs
Eritrea	Drought, IDPs, returnees
Ethiopia	Drought , IDPs
Guinea	IDPs and refugees
Kenya	Drought in parts
Lesotho	Adverse weather in parts
Liberia	Civil strife, IDPs
Madagascar	Drought in parts, economic disruption
Mauritania	Drought
Mozambique	Drought in southern parts
Sierra Leone	Civil strife, IDPs
Somalia	Civil strife, drought in parts
Sudan	Civil strife, drought in parts
Swaziland	Drought in parts
Tanzania	Drought in parts, refugees
Uganda	Civil strife, IDPs, drought in parts
Zimbabwe	Drought, economic disruption

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

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

HIGHLIGHTS

Eastern Africa

- Recent food aid pledges for Eritrea and Ethiopia have boosted the food aid pipeline, but deliveries need to be accelerated.
- Good rains in parts and favourable weather forecasts for major producing areas augur well for improved crop and livestock production prospects in the sub-region.
- Serious floods in some areas have displaced thousands of people and raised the possibility of localised food shortages.
- In Tanzania, despite an overall stable food situation, there are serious concerns for the central, southern and northern coastal areas where rainfall has been erratic.

Western Africa

- In Mauritania, although emergency food aid distributions and subsidized sales of wheat have improved the food situation in the worst-hit regions, grain supplies remain tight and livestock prices are falling, seriously limiting access to food for pastoralists and farming households.
- In Côte d'Ivoire, the food situation remains critical, particularly in the rebel-controlled north and west.
- In Liberia, intensified fighting has disrupted the current agricultural season and displaced thousands of families, pointing to a further drop in rice production this year, and hence increased food aid needs.

Central Africa

- In Central African Republic, the food security situation is precarious; food production is not expected to increase this year due to persistent insecurity, notably in the north.
- In the Democratic Republic of Congo, a serious humanitarian situation persists in the east and north-east due to inter-ethnic violence. Hundreds of people have been killed and thousands displaced.
- In Burundi and Rwanda, rains in late April and May improved conditions for the 2003 second season so good crops are in prospect. However, there were localized crop losses in some provinces due to unfavourable weather.

Southern Africa

- Despite substantial recovery in cereal production in 2003, Southern Africa still requires a significant amount of food aid in marketing year 2003/04. The HIV/AIDS pandemic is a major compounding factor in the sub-region's food security problems.
- In Zimbabwe, cereal production remained well below normal levels, and 5.5 million people, or half of the country's total population, need emergency food aid.
- In Mozambique, the overall cereal harvest was good but some 949 000 people in southern and parts of central regions will require food assistance due to near-total failure of the maize crop.
- In Angola, the 2003 cereal production increased substantially reflecting good weather, increased plantings following the return of IDPs to rural areas, and distribution of agricultural inputs. However, food aid will continue to be required for 1.4 million people, mainly returnees and vulnerable population, following three decades of civil war.

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PART I: POSITION BY SUB-REGION

SUB-SAHARAN AFRICA'S CROP CALENDAR

The crop calendar of sub-Saharan Africa is indicated below. The harvesting of the 2002/03 coarse grain crops is virtually complete in southern Africa. In most of eastern Africa, the main season crops are either being harvested or are in the ground. Coarse grain crops are maturing in parts of the coastal countries of western Africa and are at flowering or grain formation stages in parts of central Africa. In the Sahelian countries of western Africa main season cereal crops have recently been planted.

Cereal Crop Calendar

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

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

In **southern Africa**, the 2003 cereal production is forecast to increase by 6.6 percent over last year's average level to 21.6 million tonnes. A decline in South Africa, the largest producer, has been more than offset by a recovery in other countries. Cereal import requirements for 2003/04 have declined substantially relative to last year, and cereal surpluses in South Africa and trade among other countries will largely meet these requirements. Nevertheless, substantial amounts of emergency food aid are still required.

In **Zimbabwe**, although cereal output increased by 41 percent over the poor level of last year, it was 51 percent below the 2000/01 harvest, which was itself significantly below average. The impact of a severe drought during the growing season was compounded by the prevailing social, economic and political problems. The large-scale farm sector produced only one-tenth of its 1990s output.

The country faces a shortfall of close to 1.3 million tonnes of cereals. The Government controlled price of maize meal was raised almost four-fold in late May. This will greatly limit access to food for the most vulnerable population groups. An FAO/WFP Crop and Food Supply Assessment Mission in May 2003 estimated that 4.4 million people in rural areas and 1.1 million in urban areas will require food assistance in 2003/04 amounting to 610 000 tonnes of maize.

In **Mozambique**, an FAO/WFP Crop and Food Supply Assessment Mission in May 2003 estimated the 2003 cereal production at 1.8 million tonnes, some 3 percent above the good harvest of last year.

However, in southern and some of central provinces prolonged dry spells and high temperatures caused almost total failure of the main maize crop. As a result some 949 000 people face acute food shortages and will need 156 000 tonnes of emergency food assistance in marketing year 2003/04. The affected population represents 30 percent of the total population in the relevant districts but only 5 percent of the country's total population. A part of the food assistance could be procured locally in view of a maize surplus in northern and central areas but, because of high internal transport cost to southern parts, large amounts will need to be imported. Prices of maize that started to decline in northern and central markets in February stabilized at around last year's levels in June.

In **Zambia**, the 2003 cereal production was double the reduced harvest of last year and above average. Output of maize was estimated by an FAO/WFP Crop and Food Supply Assessment Mission in May 2003 at 1.16 million tonnes. The increase reflects favourable weather and subsidized inputs.

Maize prices have stabilized at levels well below their levels a year ago. This has generally improved access to food for the vulnerable populations. However, people in pockets where the harvest was poor will require targeted food assistance in 2003/04. The Government plans to increase its food reserve through local purchases and outstanding imports contracted in the last marketing year.

In **Malawi**, the overall food supply is satisfactory following a substantial increase in cereal production in 2003 and unprecedented levels of maize carry-over stocks. Market prices of maize have declined since March and are now lower than at the same time last year and below the Government's fixed price of 17 Kwacha/kg.

However, an FAO/WFP Crop and Food Supply Assessment Mission in April 2003 estimated that 400 000 people will need food assistance in marketing year 2003/04 (April/March), including those in areas that experienced crop failures and those seriously affected by HIV/AIDS. Emergency food aid needs amount to 30 600 tonnes of cereals. In view of the high levels of maize stocks in the country, the Mission recommended that aid should be procured locally.

In **Lesotho**, an FAO/WFP Crop and Food Supply Assessment Mission in April 2003 estimated the 2003 cereal output at 89 000 tonnes, an increase of 65 percent over the previous year. However, at that level production remained below average. Cereal import requirements were calculated at 321 000 tonnes, most of it to be covered on commercial basis.

The Mission also estimated that 32 000 tonnes of emergency cereal food aid will be needed for 270 000 people affected by localized crop failure and those affected by HIV/AIDS.

In **Swaziland**, the maize crop was estimated by an FAO/WFP Crop and Food Supply Assessment Mission in April 2003 at 73 000 tonnes, 4 percent above the poor crop of last year but still 27 percent below the average of the last five years. The harvest was poorest in the Lowveld which had been affected by dry weather during the growing season.

Although at the national level no cereal shortages are foreseen in 2003/04 due to improved commercial import capacity and lower prices in South Africa, the Mission estimates that 217 000 people would face food shortages and would need food assistance estimated at 24 000 tonnes of cereals.

In **Angola**, an FAO/WFP Crop and Food Supply Assessment Mission in May 2003 estimated that the 2003 cereal output increased by 23 percent over last year to 670 000 tonnes. This was the result of abundant and well distributed rains during the season, an increase in the area planted following the return of the internally displaced and refugees to their home areas and substantial distribution of agricultural inputs.

However, the number of people in need of food assistance in 2003/04 remains high at 1.4 million. This includes a large proportion of returning IDPs and refugees, and the ex-UNITA soldiers and their families. Total food aid requirements are estimated at 219 000 tonnes of cereals and 17 800 tonnes of pulses. WFP plans to assist 1.02 million people.

In **Madagascar**, a severe drought in the southern provinces reduced foodcrops in 2003, mainly maize. Official estimates indicate that 600 000 persons are in need of food aid as a result. Coping mechanisms are being exhausted and current reports indicate an increase in the number of severely malnourished children. However, food aid distributions by WFP had to be suspended in May due to lack of resources. There is urgent need for additional food aid contributions to avoid a deterioration of the nutritional situation during the lean season from September.

In **eastern Africa**, harvesting of the 2003 main season cereal crops is about to start in southern parts of the sub-region while in northern parts crops are at varying stages of development. Heavy rains and floods earlier in the year 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 2003 main cropping season, "Kiremti", has started. The smaller spring (azmera) rains from March to May were generally inadequate. These short rains are beneficial for early land preparation and regeneration of pasture.

Serious food shortages persist with as many as two-thirds of the country's population severely affected due to last year's drought. 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 the Government's appeals for 476 000 tonnes of emergency food assistance remains a major concern to both the Government and humanitarian agencies. 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).

In **Ethiopia**, the main "meher" cropping season has started in almost all parts of the country. Harvesting of the 2003 short "belg" season crops has also started in the central highlands. Normally, the belg season crops are harvested from June to August and the crop accounts for some 10 percent of total grain production but in some areas it provides the main harvest. Heavy rains earlier in the season caused severe localised flooding that displaced many people and destroyed productive assets and property. People in low lying areas along the Wabi-Shebelle river in Gode zone in Somali Region were the most affected.

Following a review of the food security situation in several key areas, the Government and UN Country Team have revised the number of people in need of food assistance to 12.5 million from an earlier estimate of 11.3 million. An Emergency Operation worth about US\$ 205.5 million was jointly approved by FAO and WFP in March 2003 to assist 4.6 million most affected small scale farmers and pastoralists, for a period of twelve months (April 2003 – March 2004).

In **Kenya**, the long rains maize crop benefited from good rains in April and May. These rains counteracted somewhat the adverse impact on yields of delayed planting due to the late start of the season. Serious flooding, however, caused the displacement of tens of thousands of people and destroyed large cropped areas. The worst affected areas included the low-lying areas near Lake Victoria in western Kenya, where rivers burst their banks and submerged fields, and in Tana River District in the east.

Most pastoral areas also received above average rains in April and May. However, serious food problems remain in these areas, particularly in Turkana, Baringo and West Pokot Districts, where the effects of last year's drought remain.

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

The secondary "deyr" season cereal crop, harvested earlier in the year, is estimated at about 164 600 tonnes, nearly 80 percent above the post-war (1995-2001) average. 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 being 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.

In **Sudan**, estimates of the recently harvested wheat crop indicate a harvest of 296 000 tonnes, about 3 percent below 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 13 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).

In **Tanzania**, 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 dry weather at a critical stage in crop development. Improved rainfall from around mid-March may have come too late to prevent significant yield losses. The decline in production is in spite of a reported large increase in cultivated area for most food crops (up by 39 percent over last year) mainly in response to last year's high prices.

The overall national food supply situation, however, remains stable despite recently observed increases in staple food 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 food prices are expected to ease soon as current harvests start to reach markets.

In **Uganda**, 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 in several areas. Hailstorm damage was also reported in south-western parts, while a dry spell in the west has affected 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 but 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 in March and more than double compared to the long-term 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, and more recently in Katakwi and Soroti Districts in the east. The IDPs are concentrated in camps with limited access to water, sanitation and health facilities. 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. 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.

In **western Africa**, the food situation in the western Sahel is improving in countries following last year's severe drought. However, it remains precarious in Mauritania. In several coastal countries, food production and other economic activities continue to be disrupted by civil strife.

In **Mauritania**, seasonably dry conditions prevail. Planting will start following the onset of rains in 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 116 000 tonnes, about 31 percent less than the average for the previous five years and 5 percent below the 2001 poor harvest. Cereal import requirements 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 to assist 250 000 people most threatened by 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 June, 78 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 farmers in these areas are considered highly food-insecure population groups.

In **Senegal**, 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. Groundnut production, the main source of cash income for rural households, was estimated at some 260 700 tonnes, 71 percent below 2001 and 65 percent below average. Following this poor harvest, access to food is very difficult for rural households, notably in groundnut producing areas, although cereal prices which increased sharply last year have decreased somewhat, owing mainly to increased commercial rice imports.

In response to the tight food situation, the Government distributed about 54 000 tonnes of rice to rural households in 2002, and has just launched a new assistance programme including the distribution of 50 000 tonnes of rice and 13 000 tonnes of animal feeds, as well as subsidized sales of maize and groundnuts seeds which are also being distributed under an FAO project. 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.

In **Côte d'Ivoire**, precipitation was abundant in April, but decreased and remained generally below average in May, which may have affected crop development in the south and 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 seed shortages, following the civil war.

Although the overall security situation is improving, 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 suffers continuing attacks against civilians and 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 have few market outlets for their cash crops.

More than 1 million people have been displaced by the conflict. At least 800 000 fled south from the north and centre and about 300 000 have been 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 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.

In **Liberia**, persistent armed clashes that restrict access to most agricultural areas and cause 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. Until recently, some 200 000 internally displaced persons from the north, northwest, and central regions were living in camps in the suburbs of Monrovia; however, following the recent escalation of violence, most of them have fled to the city centre and are living in extremely difficult conditions. Thousands entered Sierra Leone and western Côte d'Ivoire. As of late May, WFP was providing food assistance to 182 347 people in the country.

In **The Gambia**, seasonably dry conditions prevail. Farmers are currently preparing their fields and planting is expected to start in the weeks ahead with the onset of rains.

Cereal production in 2002 is officially estimated at 139 000 tonnes, 30 percent lower than last year and 7 percent below the average of the last five years. Groundnut output also decreased steeply. Although cereal prices which increased sharply last year have decreased slightly, mainly in response to increased commercial rice imports, access to food for many households is still very difficult, notably in groundnut producing areas.

The Gambia is a beneficiary of WFP's Regional EMOP launched in December 2002 for 5 drought-affected countries in western Sahel, with an allocation of 2 340 tonnes of cereals. As of late June this amount was fully covered by pledges.

In **Cape Verde**, 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 of 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.

In **Guinea**, 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 neighbouring countries 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.

In **Sierra Leone**, 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 the previous 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 civil 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 50 000 Liberians to cross into the country.

In **Ghana**, first rains in the south in late February/early March allowed land preparation and planting of the first maize crop. Precipitation progressed northwards in April, allowing plantings and emergence of millet and sorghum crops. However, although rainfall has been adequate so far in terms of volume, distribution has been poor, with a three-week dry spell in May, which necessitated replantings in most regions. Planting of the first maize crop is still underway in several regions in the south. The government has increased the import duty on rice from 20 to 25 percent this year, in order to support domestic rice production and reduce reliance on imported rice.

Aggregate 2002 cereal production has been estimated at some 2.15 millions tonnes, 26 percent above last year. Production of root crops also increased significantly. As a result, the overall food supply situation is satisfactory. Real prices in Cedi have even decreased for most staple commodities. The effects of the crisis in Côte d'Ivoire and Liberia on Ghana have mainly been an influx of third-country nationals in transit to their home countries, Ivorians and Liberians seeking asylum and the return of Ghanaian nationals. An estimated 70 000 people have entered Ghana from Côte d'Ivoire since September 2002, while renewed fighting in Liberia has prompted a further influx of thousands of refugees and returnees. The capacity of the government, the humanitarian community and host communities to respond to their needs is reported to be under heavy strain.

In **Burkina Faso**, the rainy season has started on time in the south and southwest, where the first significant rains were registered in early April. Rains covered the entire country in May, and land preparation and sowing of millet and sorghum are underway.

Final estimates of the 2002 cereal production indicate a record harvest of 3.12 million tonnes, 22 percent above the average of the last five years. As a result, the overall food supply situation is satisfactory. However, returnees and refugees from Côte d'Ivoire as well as people living in the chronically food-deficit northern and Sahelian areas will continue to need food assistance in 2003.

In **Guinea-Bissau**, 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.

In **Mali**, the first significant rains were registered in the extreme south in mid-April, progressing northwards and 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. 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. Mali is included in the Regional EMOP with an allocation of 4 000 tonnes.

In **Nigeria**, rains started in the south in early March, allowing land preparation and planting of the first maize crop. They reached northern areas in late April/early May, permitting 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 around 750 000 people in the states of Benue, Nasarawa and Taraba remain food insecure following ethnic and religious conflicts in the last two years.

Elsewhere in western Africa, the food supply situation is satisfactory.

In **Central Africa**, civil strife and insecurity continue to undermine food security in several countries.

In **Central African Republic**, 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 local assessment in 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.

In **the Republic of Congo**, crop growing conditions are generally satisfactory for maize and root crops. However, insecurity continues to disrupt agriculture and rehabilitation activities. A resurgence of fighting in the Pool region (surrounding the capital Brazzaville) in March 2002 led to the displacement of at least 84 000 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 mission visited the region from 28 May to 7 June 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.

In the **Democratic Republic of Congo (DRC)**, harvesting of the 2003 second season food crops is underway in eastern and north-eastern parts. However, favourable growing conditions notwithstanding, production is expected to be sharply reduced following the escalation of the civil war in these areas, mainly in Ituri District. The UN Security Council authorised in late May the deployment of a 1 500 strong multinational emergency force to Bunia, the main town in Ituri.

In mid-June, FAO and WFP jointly approved an Emergency Operation to assist 483 000 worst affected in the northern and eastern parts of the country, including the internally displaced, returnees from neighbouring countries and vulnerable groups. The operation is for a period of six months starting mid-June 2003, and is to provide 32 236 tonnes of cereals and 9 934 tonnes of beans.

In **Burundi**, harvesting of the 2003 second season foodcrops, mainly sorghum and beans, is well advanced. A good bean crop is anticipated in the main growing regions of Kirundo, Muyinga and Ruyigi, where prices of beans have declined by about half with the arrival of the new harvest into the markets. However, in other regions, the late planted bean and sorghum crops were damaged by excessive rains and hail in May and by insufficient rains earlier in the season. Provinces worst affected by localized crop losses are Kirundo, Muyinga, Karuzi, Cankuzo, Makamba, Mwaro, Kayanza and Muramvya.

Food aid is being provided to populations affected by the escalation of the civil conflict in April and May.

In **Rwanda**, harvesting of the 2003 second season food crops, mainly sorghum and beans, is underway. A satisfactory harvest is anticipated following abundant rains in late April and May, which improved conditions for crops previously affected by erratic precipitation. Production of Irish potatoes and bananas is also expected to be normal. However, reduced crops have been harvested in the Bugesera Region, where rains were insufficient and the food situation is likely to deteriorate in the coming months. Localized crop losses are also reported in parts of Rukara District in Umutara province.

Elsewhere in Central Africa, the food situation is satisfactory.

UPDATE ON FOOD AID PLEDGES AND DELIVERIES

Cereal import requirements in sub-Saharan Africa in 2003 are expected to remain high, reflecting mainly the effects of last year's droughts in southern, eastern and western Africa. GIEWS latest estimates of 2002 production and 2002/03 import and food aid requirements are summarized in Table 1. Total food aid requirement is estimated at 3.8 million tonnes, against 2.0 million tonnes estimated in 2001/02. Cereal food aid pledges for 2002/03, including those carried over from 2001/02, amount to 2.3 million tonnes of which 2.05 million tonnes have so far been delivered.

For the African countries which have entered their new marketing year, 2003/04 import requirements are summarized in Table 2, while for the countries still in the 2002/03 marketing year, their cereal import and food aid requirements are summarized in Table 3.

Table 1. Cereal Import and Food Aid Requirements by sub-Region - 2002/03 or 2003 (in '000 tonnes)

Sub-Region	2002 Cereal Production 1/		2002/03 or 2003		
	Total	As % of average of previous 5 years	Cereal import requirements 2/	Anticipated commercial imports	Food aid requirements
Eastern Africa	22 587	102	5 168	3 477	1 691
Southern Africa	20 364	96	7 502	5 897	1 605
Western Africa	39 117	108	9 496	9 057	439
Central Africa	2 889	100	981	894	87
TOTAL	84 957	103	23 147	19 325	3 822

1/ Including rice in milled equivalent.

2/ Excluding re-exports.

Table 2. Cereal Import and Food Aid Requirements in 2003/04 for sub-Saharan Africa: countries which have entered the 2003/04 marketing year (in '000 tonnes)

Sub-Region/ Country	Marketing year	2003 Cereal Production 1/		2003/04		
		Total	As % of average of previous 5 years	Cereal import requirements 2/	Anticipated commercial imports	Food aid requirements
Eastern Africa		3 860	98	430	360	70
Tanzania	June/may	3 860	98	430	360	70
Southern Africa		20 768	100	5 903	4 755	1 148
Angola	April/March	661	118	709	490	219
Botswana	April/March	13	68	281	281	-
Lesotho	April/March	89	70	321	289	32
Madagascar	April/March	1 899	98	383	330	53
Malawi	April/March	2 110	100	64	59	5
Mozambique	April/March	1 744	107	744	539	205
Namibia	May/April	101	112	135	135	-
South Africa	May/April	11 742	103	1 786	1 786	-
Swaziland	May/April	73	72	128	103	24
Zambia	May/April	1 326	138	66	66	-
Zimbabwe	April/March	1 010	56	1 287	677	610
TOTAL		24 628	100	6 333	5 115	1 218

1/ Including rice in milled equivalent.

2/ Excluding re-exports.

Table 3. Cereal Import and Food Aid Requirements for sub-Saharan Africa:

countries still in 2002/03 or 2003 marketing year (in '000 tonnes)

Sub-Region/ Country	Marketing year	2002 Cereal production 1/		2001/02 or 2002 imports			Position for 2002/03 or 2003		
		Total	As % of average of previous 5 years	Total imports 2/	As % of average of previous 5 years	Food aid	Cereal import require- ment 2/	Antici- pated commer- cial imports	Food aid require- ment
Eastern Africa		18 297	100	4 017	96	790	4 698	3 060	1 638
Burundi	Jan./Dec.	283	113	65	108	35	70	30	40
Comoros	Jan./Dec.	6	100	46	102	-	46	46	-
Djibouti	Jan./Dec.	-	-	78	86	20	63	55	8
Eritrea	Jan./Dec.	58	24	227	82	159	440	80	360
Ethiopia 4/	Jan./Dec.	8 699	109	390	54	246	745	145	600
Kenya	Oct./Sept.	2 897	101	1 287	85	124	1 510	1 210	300
Rwanda	Jan./Dec.	269	122	226	108	45	226	196	30
Seychelles	Jan./Dec.	-	-	13	102	-	13	13	-
Somalia	Aug./July	375	144	270	99	25	320	275	45
Sudan	Nov./Oct.	3 803	87	1 229	145	81	1 120	930	190
Uganda	Jan./Dec.	1 907	94	186	159	55	145	80	65
Southern Africa		2	100	308	111	-	280	280	-
Mauritius	Jan./Dec.	2	100	308	111	-	280	280	-
Western Africa		39 117	108	9 833	137	459	9 496	9 057	439
Coastal countries		28 117	106	7 215	146	266	6 867	6 630	237
Benin	Jan./Dec.	1 026	113	115	88	19	115	100	15
Côte d'Ivoire	Jan./Dec.	1 051	83	1 317	141	14	1 177	1 155	22
Ghana	Jan./Dec.	2 062	127	542	112	80	462	402	60
Guinea	Jan./Dec.	772	105	369	95	37	370	330	40
Liberia	Jan./Dec.	71	56	150	70	34	165	130	35
Nigeria	Jan./Dec.	22 146	105	4 310	179	13	4 170	4 170	-
Sierra Leone	Jan./Dec.	268	129	312	125	69	308	243	65
Togo	Jan./Dec.	721	107	100	83	-	100	100	-
Sahelian countries		11 000	113	2 618	117	193	2 629	2 427	202
Burkina Faso	Nov./Oct.	3 089	123	259	139	32	237	219	18
Cape Verde	Nov./Oct.	5	28	74	80	36	109	33	75
Chad	Nov./Oct.	1 170	104	91	112	6	98	91	7
Gambia	Nov./Oct.	132	95	149	117	6	142	137	5
Guinea-Bissau	Nov./Oct.	122	98	56	73	7	74	69	5
Mali	Nov./Oct.	2 296	101	246	220	9	279	261	18
Mauritania	Nov./Oct.	90	64	292	92	45	308	243	65
Niger	Nov./Oct.	3 310	131	391	92	35	377	375	2
Senegal	Nov./Oct.	786	94	1 060	130	17	1 006	999	7
Central Africa		2 889	100	966	115	95	981	894	87
Cameroon	Jan./Dec.	1 269	104	367	125	2	368	366	2
Cent.Afr.Rep.	Jan./Dec.	130	92	36	95	5	38	37	1
Congo, Dem. Rep of	Jan./Dec.	1 452	98	253	101	69	270	200	70
Congo, Rep.of	Jan./Dec.	5	125	191	129	14	190	180	10
Equat.Guinea	Jan./Dec.	-	-	15	126	-	15	15	-
Gabon	Jan./Dec.	32	103	92	101	-	88	88	-
Sao Tome	Jan./Dec.	1	100	12	113	5	12	8	4
TOTAL		60 305	105	15 124	121	1 343	15 455	13 291	2 164

Note: totals computed from unrounded data

1/ Including rice in milled equivalent.

2/ Excludes re-exports.

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

4/ Includes refugee needs.

Table 4. Triangular Transactions within sub-Saharan Africa in 2002/03 or 2003

(in '000 tonnes) 1/

Donor	Source of supply	Recipient Country	Total by donor
EC	South Africa	Angola (15.0), Congo, Dem.Rep. of (3.0), Mozambique (1.0), Zimbabwe (2.4)	21.8
	Tanzania	Burundi (0.4)	
NGOs	South Africa	Zimbabwe (6.4),	6.4
USA	Kenya	Somalia (0.1)	0.1
WFP	Kenya	Somalia (2.8)	11.5
	South Africa	Angola (7.2), Zimbabwe (1.5)	
TOTAL			39.8

1/ Based on information reported by WFP to GIEWS as of end June 2003.

Table 5. Local Purchases within sub-Saharan Africa in 2002/03 or 2003

(in '000 tonnes) 1/

Donor	Recipient Country	Total by donor
EC	Burkina Faso (0.5), Burundi (2.2), Congo, Dem.Rep.of (1.5), Ethiopia (50.7), Lesotho (0.4), Madagascar(0.3), Malawi (9.4), Mali (0.3), Sudan (12.0), Zambia (1.9)	79.2
NGOs	Kenya (0.1), Malawi (0.4), Mozambique (0.1), Zambia (3.4)	4.0
WFP	Angola (4.4), Benin (0.7), Burkina Faso (4.0), Burundi (2.3), Cameroon (1.3), Chad (1.0), Côte d'Ivoire (4.2), Kenya (76.6), Ethiopia (42.9), Lesotho (10.3), Madagascar (1.1), Malawi (1.7), Mali (1.5), Mozambique (9.7), Niger (3.6), Rwanda (2.3), Senegal (3.7), Sudan (9.4), Tanzania (27.9), Uganda (25.2), Zambia (11.3)	245.1
TOTAL		328.3

1/ Based on information reported by WFP to GIEWS as of end June 2003.

Table 6. Cereal Food Aid Pledges and Percent Delivered for sub-Saharan African Countries in 2002/03 or 2003 (in '000 tonnes)

Donor/Recipient	Canada	China	EC	Japan	Libyan Arab Jamahiriya	NGOs	U.S.A.	WFP	Food aid pledges	Percent delivered as of end June 2/
Eastern Africa	4.7	-	31.7	-	-	12.8	178.6	725.9	953.7	82
Burundi	-	-	0.4	-	-	-	-	43.4	43.8	77
Comoros	-	-	-	-	-	-	-	-	-	-
Djibouti	-	-	-	-	-	-	-	4.7	4.7	100
Eritrea	-	-	-	-	-	-	-	42.9	42.9	100
Ethiopia 1/	4.7	-	20.3	-	-	12.8	68.3	418.6	524.7	79
Kenya	-	-	-	-	-	-	69.0	35.0	104.0	78
Rwanda	-	-	-	-	-	-	9.2	4.6	13.8	33
Seychelles	-	-	-	-	-	-	-	-	-	-
Somalia	-	-	-	-	-	-	4.6	2.8	7.4	100
Sudan	-	-	11.0	-	-	-	6.4	80.6	98.0	87
Tanzania	-	-	-	-	-	-	3.7	37.9	41.6	100
Uganda	-	-	-	-	-	-	17.4	55.4	72.8	91
Southern Africa	-	-	55.8	11.9	-	27.7	164.0	889.5	1 148.9	98
Angola	-	-	15.2	-	-	0.2	25.9	182.6	223.9	100
Botswana	-	-	-	-	-	-	-	-	-	-
Lesotho	-	-	1.0	-	-	-	15.0	26.0	42.0	100
Madagascar	-	-	-	11.9	-	-	27.2	7.0	46.1	100
Malawi	-	-	2.5	-	-	1.6	4.1	236.5	244.7	91
Mauritius	-	-	-	-	-	-	-	-	-	-
Mozambique	-	-	32.4	-	-	-	41.5	20.8	94.7	100
Namibia	-	-	-	-	-	-	40.0	0.4	40.4	100
South Africa	-	-	-	-	-	15.0	-	-	15.0	100
Swaziland	-	-	-	-	-	-	-	12.8	12.8	100
Zambia	-	-	1.4	-	-	0.3	-	137.0	138.7	100
Zimbabwe	-	-	3.3	-	-	10.6	10.3	266.4	290.6	100
Western Africa	-	1.0	18.6	12.1	2.7	0.1	70.2	104.8	209.5	58
Coastal countries	-	-	-	-	-	-	42.8	41.3	84.1	43
Benin	-	-	-	-	-	-	8.2	-	8.2	-
Côte d'Ivoire	-	-	-	-	-	-	-	0.9	0.9	100
Ghana	-	-	-	-	-	-	34.6	1.0	35.6	3
Guinea	-	-	-	-	-	-	-	9.3	9.3	78
Liberia	-	-	-	-	-	-	-	17.5	17.5	81
Nigeria	-	-	-	-	-	-	-	-	-	-
Sierra Leone	-	-	-	-	-	-	-	12.6	12.6	100
Togo	-	-	-	-	-	-	-	-	-	-
Sahelian countries	-	1.0	18.6	12.1	2.7	0.1	27.4	63.5	125.4	69
Burkina Faso	-	-	-	7.8	-	0.1	2.7	2.8	13.4	42
Cape Verde	-	-	15.6	4.3	-	-	18.8	1.0	39.7	29
Chad	-	-	-	-	-	-	4.1	4.7	8.8	100
Gambia	-	-	-	-	-	-	-	2.2	2.2	100
Guinea-Bissau	-	-	-	-	2.7	-	-	5.7	8.4	100
Mali	-	-	-	-	-	-	-	6.9	6.9	100
Mauritania	-	1.0	3.0	-	-	-	0.2	14.1	18.3	84
Niger	-	-	-	-	-	-	1.6	0.6	2.2	100
Senegal	-	-	-	-	-	-	-	25.5	25.5	100
Central Africa	-	-	3.0	-	-	-	-	23.9	26.9	81
Cameroon	-	-	-	-	-	-	-	-	-	-
Cent.Afr.Rep.	-	-	-	-	-	-	-	1.1	1.1	73
Congo, Dem.Rep.of	-	-	3.0	-	-	-	-	20.3	23.3	82
Congo, Rep.of	-	-	-	-	-	-	-	2.0	2.0	100
Equat. Guinea	-	-	-	-	-	-	-	-	-	-
Gabon	-	-	-	-	-	-	-	-	-	-
Sao Tome	-	-	-	-	-	-	-	0.5	0.5	-
TOTAL	4.7	1.0	109.1	24.0	2.7	40.6	412.8	1 744.1	2 339.0	88

1/ Includes refugee needs.

2/ Percentages calculated from unrounded data.

**PART II: CEREAL SUPPLY/DEMAND SITUATION
IN INDIVIDUAL COUNTRIES**

(situation as of end June 2003)

An FAO/WFP Crop and Food Supply Assessment Mission in June estimated the 2003 cereal production 23 percent above last year's level reflecting both higher plantings and yields. Cereal import requirements at 709 000 tonnes are below last year as domestic supplies have increased. The annual per capita cereal consumption rate has been increased to reflect higher imports of wheat and rice in the past years and this season's improved maize production. Food aid requirements remain around last year's level.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003/04 MARKETING YEAR (April/March)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	-	-	546	546
Previous five years average production	4	6	550	560
Previous year imports	366	186	238	790
Previous five years average imports	309	125	179	613
<u>2003/04 Domestic Availability</u>	-	54	642	696
2003 Production (rice in paddy terms)	-	28	642	670
2003 Production (rice in milled terms)	-	19	642	661
Possible stock drawdown	-	35	-	35
<u>2003/04 Utilization</u>	380	156	869	1 405
Food use	380	154	741	1 275
Non-food use	-	2	128	130
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2003/04 Import Requirement</u>	380	102	227	709
Anticipated commercial imports	380	90	20	490
of which: received or contracted	-	-	2	2
Food aid needs	-	12	207	219
<u>Current Aid Position</u>				
Food aid pledges	-	-	34	34
of which: delivered	-	-	33	33
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	26	10	50	86
	[percentage]			
<u>Indexes</u>				
2003 Prod. compared to average (rice paddy terms)	-	467	117	120
2003/04 Import requirement compared to average	123	82	127	116
Cereal share of total calorie intake				32
<u>Additional Information</u>				
Major foodcrops	roots; tubers; maize; plantains			
Lean season	January-April			
Population (000s)	14 769			
GNP per capita in 2001 (US\$)	500			

Aggregate 2002 cereal production, mostly maize and sorghum, has been officially estimated at 1.05 million tonnes, which is 13 percent above the average of the last five years. Cereal imports for domestic use and re-exports during the 2003 marketing year are estimated at 140 000 tonnes including 15 000 tonnes of food aid, mainly rice.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	-	55	855	910
Previous five years average production	-	41	887	928
Previous year imports	58	84	3	145 1/
Previous five years average imports	54	81	3	138
<u>2003 Domestic Availability</u>	-	36	990	1 026
2002 Production (rice in paddy terms)	-	59	990	1 049
2002 Production (rice in milled terms)	-	36	990	1 026
Possible stock drawdown	-	-	-	-
<u>2003 Utilization</u>	58	116	992	1 166
Food use	52	87	678	817
Non-food use	1	9	244	254
Exports or re-exports	5	20	55	80
Possible stock build up	-	-	15	15
<u>2003 Import Requirement</u>	58	80	2	140 2/
Anticipated commercial imports	55	70	-	125
of which: received or contracted	-	21	-	21
Food aid needs	3	10	2	15
<u>Current Aid Position</u>				
Food aid pledges	1	7	1	8
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	1	1
of which: for local use	-	-	1	1
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	8	13	103	124
	[percentage]			
<u>Indexes</u>				
2002 Prod. compared to average (rice paddy terms)	-	144	112	113
2003 Import requirement compared to average	107	99	67	101
Cereal share of total calorie intake				36
<u>Additional Information</u>				
Major foodcrops	roots; tubers; maize			
Lean season	April-June			
Population (000s)	6 603			
GNP per capita in 2001 (US\$)	380			

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

2/ Includes 5 000 tonnes of wheat and 20 000 tonnes of rice for re-exports.

BOTSWANA

The 2003 cereal production, mainly sorghum, was sharply reduced by dry weather and import requirements have increased substantially. However, even in normal years, the country covers most of its consumption requirements on commercial basis.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003/04 MARKETING YEAR (April/March)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	-	-	25	25
Previous five years average production	-	-	18	18
Previous year imports	72	-	188	260
Previous five years average imports	69	-	191	260
<u>2003/04 Domestic Availability</u>	-	-	13	13
2003 Production (rice in paddy terms)	-	-	13	13
2003 Production (rice in milled terms)	-	-	13	13
Possible stock drawdown	-	-	-	-
<u>2003/04 Utilization</u>	73	-	221	294
Food use	66	-	217	283
Non-food use	-	-	2	2
Exports or re-exports	7	-	-	7
Possible stock build up	-	-	2	2
<u>2003/04 Import Requirement</u>	73	-	208	281
Anticipated commercial imports	73	-	208	281
of which: received or contracted	-	-	29	29
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	39	-	127	165
	[percentage]			
<u>Indexes</u>				
2003 Prod. compared to average (rice paddy terms)	-	-	72	72
2003/04 Import requirement compared to average	106	-	109	108
Cereal share of total calorie intake				51
<u>Additional Information</u>				
Major foodcrops	sorghum; pulses; vegetables			
Lean season	January-March			
Population (000s)	1 715			
GNP per capita in 2001 (US\$)	3 100			

BURKINA FASO

Final estimates of the 2002 cereal production indicate a harvest of 3.12 million tonnes, which is similar to the previous year but 22 percent above average. Cereal import requirement in 2002/03 (November/October), mostly rice and wheat, is forecast at 237 000 tonnes, including 18 000 tonnes as food aid.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (November/October)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	-	110	2 999	3 109
Previous five years average production	-	97	2 456	2 553
Previous year imports	70	180	10	259
Previous five years average imports	66	133	19	218
<u>2002/03 Domestic Availability</u>	-	59	3 030	3 089
2002 Production (rice in paddy terms)	-	89	3 030	3 119
2002 Production (rice in milled terms)	-	59	3 030	3 089
Possible stock drawdown	-	-	-	-
<u>2002/03 Utilization</u>	68	218	3 040	3 325
Food use	67	207	2 414	2 688
Non-food use	1	11	461	472
Exports or re-exports	-	-	55	55
Possible stock build up	-	-	110	110
<u>2002/03 Import Requirement</u>	68	159	10	237
Anticipated commercial imports	62	154	4	219
of which: received or contracted	-	2	-	2
Food aid needs	6	5	7	18
<u>Current Aid Position</u>				
Food aid pledges	1	9	3	13
of which: delivered	1	2	3	6
Donor-financed purchases	-	-	5	5
of which: for local use	-	-	5	5
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	6	17	201	224
	[percentage]			
<u>Indexes</u>				
2002 Prod. compared to average (rice paddy terms)	-	92	123	122
2002/03 Import requirement compared to average	102	120	53	108
Cereal share of total calorie intake				75
<u>Additional Information</u>				
Major foodcrops	millet; sorghum; pulses; maize			
Lean season	July-September			
Population (000s)	12 009			
GNP per capita in 2001 (US\$)	220			

BURUNDI

The 2003 second season cereal harvest was generally good. Cereal import requirements in 2003 are estimated at 70 000 tonnes, including 40 000 tonnes of food aid. Against the food aid requirement, 44 000 tonnes of cereals have already been pledged.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	9	61	233	303
Previous five years average production	8	55	216	279
Previous year imports	25	5	35	65
Previous five years average imports	25	4	41	70
<u>2003 Domestic Availability</u>	9	41	224	274
2003 Production (rice in paddy terms)	9	61	223	293
2003 Production (rice in milled terms)	9	41	223	273
Possible stock drawdown	-	-	1	1
<u>2003 Utilization</u>	34	46	264	344
Food use	32	38	232	302
Non-food use	2	8	32	42
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2003 Import Requirement</u>	25	5	40	70
Anticipated commercial imports	10	5	15	30
of which: received or contracted	-	-	-	-
Food aid needs	15	-	25	40
<u>Current Aid Position</u>				
Food aid pledges	-	-	44	44
of which: delivered	-	-	34	34
Donor-financed purchases	-	-	5	5
of which: for local use	-	-	5	5
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	5	5	32	42
	[percentage]			
<u>Indexes</u>				
2003 Prod. compared to average (rice paddy terms)	113	111	103	105
2003 Import requirement compared to average	100	125	98	100
Cereal share of total calorie intake				16
<u>Additional Information</u>				
Major foodcrops	pulses; plantains; roots; tubers; maize; sorghum			
Lean season	November-December			
Population (000s)	7 186			
GNP per capita in 2001 (US\$)	100			

CAMEROON

Aggregate 2002 cereal production is estimated at about 1.3 million tonnes, which is average, reflecting generally favourable growing conditions during the rainy season. Cereal import requirements for 2003 marketing year are estimated at some 368 000 tonnes, anticipated to be covered mainly by commercial imports.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	-	86	1 183	1 270
Previous five years average production	-	87	1 173	1 260
Previous year imports	220	130	17	367
Previous five years average imports	219	117	12	348
<u>2003 Domestic Availability</u>	-	59	1 209	1 269
2002 Production (rice in paddy terms)	-	87	1 209	1 297
2002 Production (rice in milled terms)	-	59	1 209	1 269
Possible stock drawdown	-	-	-	-
<u>2003 Utilization</u>	220	189	1 226	1 636
Food use	206	179	970	1 355
Non-food use	4	10	251	266
Exports or re-exports	10	-	5	15
Possible stock build up	-	-	-	-
<u>2003 Import Requirement</u>	220	130	18	368
Anticipated commercial imports	220	128	18	366
of which: received or contracted	7	32	-	39
Food aid needs	-	2	-	2
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	1	1
for export	-	-	1	1
<u>Estimated Per Caput Consumption (kg/year)</u>	13	11	59	83
	[percentage]			
<u>Indexes</u>				
2002 Prod. compared to average (rice paddy terms)	-	100	103	103
2003 Import requirement compared to average	100	111	146	106
Cereal share of total calorie intake				43
<u>Additional Information</u>				
Major foodcrops	roots; tubers; coarse grains; fruit			
Lean season	June-August			
Population (000s)	16 325			
GNP per capita in 2001 (US\$)	580			

CAPE VERDE

A joint FAO/WFP Crop and Food Supply Assessment Mission in October 2002 estimated maize production at some 5 000 tonnes, which is only one fourth of 2001 output and similar to the poor crops in 1997 and 1998. The Mission estimated cereal import requirements for the marketing year 2002/03 at 108 518 tonnes. Taking into account anticipated commercial cereal imports of 33 250 tonnes and 40 000 tonnes of food aid pledges, the total uncovered deficit for the year is about 35 700 tonnes.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (November/October)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	-	-	20	20
Previous five years average production	-	-	18	18
Previous year imports	19	24	30	74
Previous five years average imports	21	30	33	84
<u>2002/03 Domestic Availability</u>	-	-	5	5
2002 Production (rice in paddy terms)	-	-	5	5
2002 Production (rice in milled terms)	-	-	5	5
Possible stock drawdown	-	-	-	-
<u>2002/03 Utilization</u>	24	31	58	114
Food use	24	31	57	113
Non-food use	-	-	1	1
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002/03 Import Requirement</u>	24	31	53	109
Anticipated commercial imports	5	17	11	33
of which: received or contracted	-	9	-	9
Food aid needs	20	14	42	75
<u>Current Aid Position</u>				
Food aid pledges	8	10	22	40
of which: delivered	3	1	7	11
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	52	67	123	242
<u>Indexes</u>	[percentage]			
2002 Prod. compared to average (rice paddy terms)	-	-	28	28
2002/03 Import requirement compared to average	115	104	161	129
Cereal share of total calorie intake				50
<u>Additional Information</u>				
Major foodcrops	maize; rice; pulses			
Lean season	n.a since 90% of requirements covered by imports			
Population (000s)	466			
GNP per capita in 2001 (US\$)	1 340			

CENTRAL AFRICAN REPUBLIC

Following unfavourable weather and armed conflicts that disrupted economic activities, aggregate 2002 cereal production is estimated at some 137 000 tonnes (including rice in paddy terms), which is 7 percent lower than average. Cereal import requirement in 2003 is forecast at 38 000 tonnes, mostly wheat. While cereal deficits used to be mainly covered by commercial imports, more external food assistance may be needed this year due to the impact of the conflict.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	-	25	125	150
Previous five years average production	-	21	127	148
Previous year imports	30	3	3	36
Previous five years average imports	32	3	3	38
<u>2003 Domestic Availability</u>	5	14	117	136
2002 Production (rice in paddy terms)	-	20	117	137
2002 Production (rice in milled terms)	-	13	117	130
Possible stock drawdown	5	1	-	6
<u>2003 Utilization</u>	35	19	120	174
Food use	34	16	102	152
Non-food use	1	2	18	22
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2003 Import Requirement</u>	30	5	3	38
Anticipated commercial imports	30	5	2	37
of which: received or contracted	2	-	-	2
Food aid needs	-	-	1	1
<u>Current Aid Position</u>				
Food aid pledges	-	-	1	1
of which: delivered	-	-	1	1
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	9	4	27	40
	[percentage]			
<u>Indexes</u>				
2002 Prod. compared to average (rice paddy terms)	-	95	92	93
2003 Import requirement compared to average	94	167	100	100
Cereal share of total calorie intake				22
<u>Additional Information</u>				
Major foodcrops	roots; tubers; tree nuts; coarse grains; fruit			
Lean season	May-July			
Population (000s)	3 817			
GNP per capita in 2001 (US\$)	260			

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 98 000 tonnes, including about 7 000 tonnes of food aid.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (November/October)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	4	127	1 192	1 322
Previous five years average production	4	118	1 042	1 164
Previous year imports	64	23	4	91
Previous five years average imports	57	13	13	83
<u>2002/03 Domestic Availability</u>	4	92	1 094	1 190
2002 Production (rice in paddy terms)	4	135	1 074	1 212
2002 Production (rice in milled terms)	4	92	1 074	1 170
Possible stock drawdown	-	-	20	20
<u>2002/03 Utilization</u>	69	117	1 102	1 288
Food use	64	96	879	1 039
Non-food use	1	21	207	228
Exports or re-exports	-	-	16	16
Possible stock build up	5	-	-	5
<u>2002/03 Import Requirement</u>	65	24	9	98
Anticipated commercial imports	65	24	2	91
of which: received or contracted	4	-	-	4
Food aid needs	-	-	7	7
<u>Current Aid Position</u>				
Food aid pledges	6	-	3	9
of which: delivered	6	-	3	9
Donor-financed purchases	-	-	1	1
of which: for local use	-	-	1	1
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	8	12	111	131
<u>Indexes</u>	[percentage]			
2002 Prod. compared to average (rice paddy terms)	100	114	103	104
2002/03 Import requirement compared to average	114	187	68	118
Cereal share of total calorie intake				54
<u>Additional Information</u>				
Major foodcrops	millet; sorghum; roots; tubers; tree nuts			
Lean season	August-September			
Population (000s)	7 940			
GNP per capita in 2001 (US\$)	200			

The country imports nearly all its cereal requirements, mostly rice, on a commercial basis.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	-	3	4	7
Previous five years average production	-	3	4	7
Previous year imports	6	40	-	46
Previous five years average imports	6	40	1	47
<u>2003 Domestic Availability</u>	-	2	5	7
2002 Production (rice in paddy terms)	-	3	4	7
2002 Production (rice in milled terms)	-	2	4	6
Possible stock drawdown	-	-	1	1
<u>2003 Utilization</u>	6	42	5	53
Food use	6	42	3	51
Non-food use	-	-	2	2
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2003 Import Requirement</u>	6	40	-	46
Anticipated commercial imports	6	40	-	46
of which: received or contracted	-	7	-	7
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	7	50	4	60
	[percentage]			
<u>Indexes</u>				
2002 Prod. compared to average (rice paddy terms)	-	100	100	100
2003 Import requirement compared to average	100	100	-	98
Cereal share of total calorie intake				44
<u>Additional Information</u>				
Major foodcrops	rice; roots; tubers; bananas; coconuts			
Lean season	January-December			
Population (000s)	845			
GNP per capita in 2001 (US\$)	380			

CONGO, DEMOCRATIC REPUBLIC OF

The 2003 food aid requirement is estimated at 70 000 tonnes. A recently approved WFP Emergency Operation to assist 483 000 worst affected population in Northern and Eastern parts of the country, for a period of six months starting mid-June 2003 amounts to 32 236 tonnes of cereals, still to be funded.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	18	326	1 194	1 538
Previous five years average production	18	346	1 234	1 598
Previous year imports	140	50	63	253
Previous five years average imports	150	50	57	257
<u>2003 Domestic Availability</u>	18	240	1 194	1 452
2002 Production (rice in paddy terms)	18	360	1 194	1 572
2002 Production (rice in milled terms)	18	240	1 194	1 452
Possible stock drawdown	-	-	-	-
<u>2003 Utilization</u>	158	290	1 274	1 722
Food use	150	244	1 008	1 402
Non-food use	8	43	264	315
Exports or re-exports	-	-	-	-
Possible stock build up	-	3	2	5
<u>2003 Import Requirement</u>	140	50	80	270
Anticipated commercial imports	140	50	10	200
of which: received or contracted	-	-	-	-
Food aid needs	-	-	70	70
<u>Current Aid Position</u>				
Food aid pledges	-	-	23	23
of which: delivered	-	-	19	19
Donor-financed purchases	-	-	2	2
of which: for local use	-	-	2	2
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	3	5	21	29
<u>Indexes</u>	[percentage]			
2002 Prod. compared to average (rice paddy terms)	100	104	97	98
2003 Import requirement compared to average	93	100	140	105
Cereal share of total calorie intake				18
<u>Additional Information</u>				
Major foodcrops	roots; tubers; coarse grains; fruit			
Lean season	north: October; south: November-December			
Population (000s)	48 067			
GNP per capita in 2001 (US\$)	80			

CONGO, REPUBLIC OF

The country produces on average 4 000 tonnes of cereals and imports commercially the bulk of its cereal requirement, estimated at around 190 000 tonnes in 2003.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	-	1	4	5
Previous five years average production	-	1	3	4
Previous year imports	150	36	5	191
Previous five years average imports	131	39	5	175
<u>2003 Domestic Availability</u>	-	1	4	5
2002 Production (rice in paddy terms)	-	1	4	5
2002 Production (rice in milled terms)	-	1	4	5
Possible stock drawdown	-	-	-	-
<u>2003 Utilization</u>	150	36	9	195
Food use	145	34	7	186
Non-food use	5	2	2	9
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2003 Import Requirement</u>	150	35	5	190
Anticipated commercial imports	150	25	5	180
of which: received or contracted	21	9	-	30
Food aid needs	-	10	-	10
<u>Current Aid Position</u>				
Food aid pledges	-	2	-	2
of which: delivered	-	2	-	2
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	45	11	2	58
<u>Indexes</u>	[percentage]			
2002 Prod. compared to average (rice paddy terms)	-	100	133	125
2003 Import requirement compared to average	115	90	100	109
Cereal share of total calorie intake				30
<u>Additional Information</u>				
Major foodcrops	roots; tubers; fruit			
Lean season	September-November			
Population (000s)	3 193			
GNP per capita in 2001 (US\$)	640			

Aggregate 2002 cereal production is estimated at some 1.38 million tonnes, 19 percent lower than average, reflecting mainly the impact of armed conflict that forced many farmers to leave their land and disrupted economic activities. Importation of 1.18 million tonnes of cereals will be necessary to meet the country's needs. Normally, about 1.15 million tonnes are commercially imported, but in view of the continuing conflict, commercial imports may drop this year, leading to higher needs for external food assistance.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	-	1 055	730	1 785
Previous five years average production	-	971	740	1 711
Previous year imports	270	1 040	7	1 317
Previous five years average imports	287	798	9	1 094
<u>2003 Domestic Availability</u>	5	541	612	1 158
2002 Production (rice in paddy terms)	-	818	560	1 378
2002 Production (rice in milled terms)	-	491	560	1 051
Possible stock drawdown	5	50	52	107
<u>2003 Utilization</u>	275	1 441	619	2 335
Food use	270	1 268	453	1 991
Non-food use	5	123	161	288
Exports or re-exports	-	50	5	55
Possible stock build up	-	-	-	-
<u>2003 Import Requirement</u>	270	900	7	1 177
Anticipated commercial imports	270	880	5	1 155
of which: received or contracted	-	447	-	447
Food aid needs	-	20	2	22
<u>Current Aid Position</u>				
Food aid pledges	-	1	-	1
of which: delivered	-	1	-	1
Donor-financed purchases	-	-	4	4
of which: for local use	-	-	4	4
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	17	81	29	128
	[percentage]			
<u>Indexes</u>				
2002 Prod. compared to average (rice paddy terms)	-	84	76	81
2003 Import requirement compared to average	94	113	78	108
Cereal share of total calorie intake				41
<u>Additional Information</u>				
Major foodcrops	roots; tubers; fruit; rice; maize			
Lean season	April-July			
Population (000s)	15 594			
GNP per capita in 2001 (US\$)	630			

The country relies entirely on imports to meet its cereal consumption needs.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	-	-	-	-
Previous five years average production	-	-	-	-
Previous year imports	55	20	3	78
Previous five years average imports	43	23	3	69
<u>2003 Domestic Availability</u>	-	-	-	-
2002 Production (rice in paddy terms)	-	-	-	-
2002 Production (rice in milled terms)	-	-	-	-
Possible stock drawdown	-	-	-	-
<u>2003 Utilization</u>	40	20	3	63
Food use	40	20	2	62
Non-food use	-	-	1	1
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2003 Import Requirement</u>	40	20	3	63
Anticipated commercial imports	35	20	-	55
of which: received or contracted	-	4	-	4
Food aid needs	5	-	3	8
<u>Current Aid Position</u>				
Food aid pledges	-	5	-	5
of which: delivered	-	5	-	5
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	62	31	3	96
<u>Indexes</u>	[percentage]			
2002 Prod. compared to average (rice paddy terms)	-	-	-	-
2003 Import requirement compared to average	93	87	100	91
Cereal share of total calorie intake				53
<u>Additional Information</u>				
Major foodcrops	vegetables			
Lean season	January-December			
Population (000s)	648			
GNP per capita in 2001 (US\$)	890			

EQUATORIAL GUINEA

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.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	-	-	-	-
Previous five years average production	-	-	-	-
Previous year imports	10	5	-	15
Previous five years average imports	9	6	-	15
<u>2003 Domestic Availability</u>	-	-	-	-
2002 Production (rice in paddy terms)	-	-	-	-
2002 Production (rice in milled terms)	-	-	-	-
Possible stock drawdown	-	-	-	-
<u>2003 Utilization</u>	10	5	-	15
Food use	10	5	-	15
Non-food use	-	-	-	-
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2003 Import Requirement</u>	10	5	-	15
Anticipated commercial imports	10	5	-	15
of which: received or contracted	-	-	-	-
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	21	10	-	31
	[percentage]			
<u>Indexes</u>				
2002 Prod. compared to average (rice paddy terms)	-	-	-	-
2003 Import requirement compared to average	111	83	0	100
Cereal share of total calorie intake				15
<u>Additional Information</u>				
Major foodcrops	cassava; sweet potatoes; plantains			
Lean season	September-November			
Population (000s)	488			
GNP per capita in 2001 (US\$)	700			

Domestic cereal availability in 2003 marketing year (January/December) is estimated at 68 000 tonnes against total utilization requirements of 508 000 tonnes. Cereal import requirement is thus estimated at 440 000 tonnes. With commercial imports anticipated at 80 000 tonnes, food aid needs are estimated at 360 000 tonnes. As of end June, the amount of food aid pledged stood at 43 000 tonnes all of which have been delivered.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	25	-	161	186
Previous five years average production	23	-	219	242
Previous year imports	171	15	41	227
Previous five years average imports	208	8	61	277
<u>2003 Domestic Availability</u>	12	-	56	68
2002 Production (rice in paddy terms)	2	-	56	58
2002 Production (rice in milled terms)	2	-	56	58
Possible stock drawdown	10	-	-	10
<u>2003 Utilization</u>	207	15	286	508
Food use	202	15	256	473
Non-food use	5	-	10	15
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	20	20
<u>2003 Import Requirement</u>	195	15	230	440
Anticipated commercial imports	35	15	30	80
of which: received or contracted	8	-	-	8
Food aid needs	160	-	200	360
<u>Current Aid Position</u>				
Food aid pledges	41	-	2	43
of which: delivered	41	-	2	43
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	59	4	74	138
	[percentage]			
2002 Prod. compared to average (rice paddy terms)	9	-	26	24
2003 Import requirement compared to average	94	188	377	159
Cereal share of total calorie intake				79
<u>Additional Information</u>				
Major foodcrops	sorghum; teff; millet; maize; pulses			
Lean season	August-November			
Population (000s)	3 440			
GNP per capita in 2001 (US\$)	160			

ETHIOPIA

The 2003 domestic cereal availability is estimated at 8.98 million tonnes against total utilization requirements of about 9.73 million tonnes. Total cereal import requirement is thus estimated at 745 000 tonnes. With commercial imports anticipated at 145 000 tonnes, food aid needs amount to 600 000 tonnes, mostly wheat. As of end June food aid pledges stood at 525 000 tonnes of which 412 000 tonnes had been delivered.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	1 596	-	8 040	9 636
Previous five years average production	1 243	-	7 294	8 537
Previous year imports	330	25	35	390
Previous five years average imports	696	16	70	782
<u>2003 Domestic Availability</u>	1 290	-	7 694	8 984
2002 Production (rice in paddy terms)	1 250	-	7 449	8 699
2002 Production (rice in milled terms)	1 250	-	7 449	8 699
Possible stock drawdown	40	-	245	285
<u>2003 Utilization</u>	1 740	15	7 974	9 729
Food use	1 615	15	7 134	8 764
Non-food use	125	-	820	945
Exports or re-exports	-	-	20	20
Possible stock build up	-	-	-	-
<u>2003 Import Requirement</u>	450	15	280	745
Anticipated commercial imports	50	15	80	145
of which: received or contracted	56	1	-	56
Food aid needs	400	-	200	600
<u>Current Aid Position</u>				
Food aid pledges	497	1	27	525
of which: delivered	387	1	24	412
Donor-financed purchases	-	-	94	94
of which: for local use	-	-	94	94
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	24	-	105	129
<u>Indexes</u>	[percentage]			
2002 Prod. compared to average (rice paddy terms)	101	-	102	102
2003 Import requirement compared to average	65	94	400	95
Cereal share of total calorie intake				68
<u>Additional Information</u>				
Major foodcrops	maize; teff; barley; sorghum; wheat; pulses; enset (false banana)			
Lean season	August-November			
Population (000s)	68 128			
GNP per capita in 2001 (US\$)	100			

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.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	-	1	31	32
Previous five years average production	-	1	31	32
Previous year imports	54	35	3	92
Previous five years average imports	47	35	2	84
<u>2003 Domestic Availability</u>	-	1	31	32
2002 Production (rice in paddy terms)	-	1	31	32
2002 Production (rice in milled terms)	-	1	31	32
Possible stock drawdown	-	-	-	-
<u>2003 Utilization</u>	50	36	34	120
Food use	49	36	26	110
Non-food use	1	-	8	9
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2003 Import Requirement</u>	50	35	3	88
Anticipated commercial imports	50	35	3	88
of which: received or contracted	-	17	-	17
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	38	28	20	85
	[percentage]			
<u>Indexes</u>				
2002 Prod. compared to average (rice paddy terms)	-	100	100	100
2003 Import requirement compared to average	106	100	150	105
Cereal share of total calorie intake				26
<u>Additional Information</u>				
Major foodcrops	roots; tubers			
Lean season	September-November			
Population (000s)	1 293			
GNP per capita in 2001 (US\$):	3 160			

The 2002 cereal production figures released by the Government are significantly lower than the estimates of the joint FAO/WFP Crop and Food Supply Assessment Mission in October 2002 which indicated an average harvest. Thus, aggregate output of cereals has been revised down to some 139 000 tonnes, 30 percent less than last year and 7 percent below average.

Cereal import requirements for marketing year 2002/03 (November/October) are estimated at some 142 000 tonnes, anticipated to be covered commercially.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (November/October)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	-	36	163	199
Previous five years average production	-	30	120	150
Previous year imports	39	108	2	149
Previous five years average imports	45	89	2	136
<u>2002/03 Domestic Availability</u>	-	13	135	149
2002 Production (rice in paddy terms)	-	20	118	139
2002 Production (rice in milled terms)	-	13	118	132
Possible stock drawdown	-	-	17	17
<u>2002/03 Utilization</u>	40	113	138	291
Food use	24	100	117	242
Non-food use	1	3	20	24
Exports or re-exports	15	10	-	25
Possible stock build up	-	-	-	-
<u>2002/03 Import Requirement</u>	40	100	2	142
Anticipated commercial imports	40	96	1	137
of which: received or contracted	-	7	-	7
Food aid needs	-	4	1	5
<u>Current Aid Position</u>				
Food aid pledges	-	1	1	2
of which: delivered	-	1	1	2
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	16	69	80	166
	[percentage]			
<u>Indexes</u>				
2002 Prod. compared to average (rice paddy terms)	-	68	99	93
2002/03 Import requirement compared to average	89	112	123	105
Cereal share of total calorie intake				55
<u>Additional Information</u>				
Major foodcrops	rice; millet; sorghum			
Lean season	July-September			
Population (000s)	1 460			
GNP per capita in 2001 (US\$)	320			

Aggregate 2002 cereal production is officially estimated at some 2.15 million tonnes, 26 percent above the average of the last five years. The cereal import requirement for 2003 is estimated at 462 000 tonnes of which about 402 000 tonnes are anticipated to be covered by commercial imports.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	-	284	1 352	1 636
Previous five years average production	-	225	1 482	1 707
Previous year imports	288	220	34	542
Previous five years average imports	245	218	37	500
<u>2003 Domestic Availability</u>	-	187	1 875	2 062
2002 Production (rice in paddy terms)	-	280	1 875	2 155
2002 Production (rice in milled terms)	-	187	1 875	2 062
Possible stock drawdown	-	-	-	-
<u>2003 Utilization</u>	250	387	1 887	2 524
Food use	247	343	1 201	1 791
Non-food use	3	34	407	443
Exports or re-exports	-	10	200	210
Possible stock build up	-	-	80	80
<u>2003 Import Requirement</u>	250	200	12	462
Anticipated commercial imports	210	190	2	402
of which: received or contracted	61	118	5	183
Food aid needs	40	10	10	60
<u>Current Aid Position</u>				
Food aid pledges	25	1	10	36
of which: delivered	-	1	-	1
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	12	17	60	90
	[percentage]			
<u>Indexes</u>				
2002 Prod. compared to average (rice paddy terms)	-	124	127	126
2003 Import requirement compared to average	102	92	32	92
Cereal share of total calorie intake				28
<u>Additional Information</u>				
Major foodcrops	roots; tubers; coarse grains; rice			
Lean season	April-June			
Population (000s)	19 904			
GNP per capita in 2001 (US\$)	290			

GUINEA

Aggregate 2002 cereal production, mostly rice, is estimated at about 1.04 million tonnes, which is average. Cereal import requirements for marketing year 2002/03 are estimated at 370 000 tonnes, mostly rice (250 000 tonnes) and wheat (115 000 tonnes). Commercial imports are projected at 330 000 tonnes, leaving a food aid requirement of 40 000 tonnes.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	-	820	237	1 057
Previous five years average production	-	798	222	1 020
Previous year imports	110	250	9	369
Previous five years average imports	117	242	5	364
<u>2003 Domestic Availability</u>	-	532	241	772
2002 Production (rice in paddy terms)	-	798	241	1 038
2002 Production (rice in milled terms)	-	532	241	772
Possible stock drawdown	-	-	-	-
<u>2003 Utilization</u>	115	782	246	1 142
Food use	112	632	199	943
Non-food use	3	120	46	169
Exports or re-exports	-	30	-	30
Possible stock build up	-	-	-	-
<u>2003 Import Requirement</u>	115	250	5	370
Anticipated commercial imports	95	235	-	330
of which: received or contracted	-	2	-	2
Food aid needs	20	15	5	40
<u>Current Aid Position</u>				
Food aid pledges	3	1	5	9
of which: delivered	1	1	5	7
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	15	83	26	124
	[percentage]			
<u>Indexes</u>				
2002 Prod. compared to average (rice paddy terms)	-	100	108	102
2003 Import requirement compared to average	98	103	100	102
Cereal share of total calorie intake				44
<u>Additional Information</u>				
Major foodcrops	rice; roots; tubers; coarse grains			
Lean season	July-September			
Population (000s)	7 644			
GNP per capita in 2001 (US\$)	410			

Aggregate 2002 cereal production is estimated at 151 400 tonnes, 8 percent lower than the previous year and slightly below average. Cereal import requirements for 2002/03 (November/October) amount to 74 200 tonnes of which about 69 000 tonnes are anticipated to be imported commercially.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (November/October)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	-	88	76	164
Previous five years average production	-	92	63	155
Previous year imports	8	47	1	56
Previous five years average imports	10	53	2	65
<u>2002/03 Domestic Availability</u>	-	59	69	127
2002 Production (rice in paddy terms)	-	88	64	151
2002 Production (rice in milled terms)	-	59	64	122
Possible stock drawdown	-	-	5	5
<u>2002/03 Utilization</u>	11	121	69	201
Food use	11	101	58	170
Non-food use	-	11	10	21
Exports or re-exports	-	5	-	5
Possible stock build up	-	5	-	5
<u>2002/03 Import Requirement</u>	11	63	-	74
Anticipated commercial imports	9	60	-	69
of which: received or contracted	-	27	-	27
Food aid needs	2	3	-	5
<u>Current Aid Position</u>				
Food aid pledges	3	4	1	8
of which: delivered	3	4	1	8
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	9	82	48	138
	[percentage]			
<u>Indexes</u>				
2002 Prod. compared to average (rice paddy terms)	-	96	101	98
2002/03 Import requirement compared to average	110	118	-	113
Cereal share of total calorie intake				58
<u>Additional Information</u>				
Major foodcrops	rice; coarse grains; oils; fats; roots; tubers			
Lean season	May-August			
Population (000s)	1 228			
GNP per capita in 2001 (US\$)	160			

KENYA

Domestic cereal availability in 2003 is estimated at 3.19 million tonnes against total utilization requirements of 4.7 million tonnes. Thus, total cereal import requirement is estimated at 1.51 million tonnes, of which commercial imports are estimated at 1.2 million tonnes, leaving a food aid requirement of 300 000 tonnes. As of end June, food aid pledges amounted to 104 000 tonnes of which 81 000 tonnes had been delivered.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (October/September)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	252	45	2 993	3 290
Previous five years average production	238	51	2 600	2 889
Previous year imports	577	210	500	1 287
Previous five years average imports	589	114	760	1 463
<u>2002/03 Domestic Availability</u>	272	29	2 886	3 187
2002 Production (rice in paddy terms)	252	45	2 616	2 913
2002 Production (rice in milled terms)	252	29	2 616	2 897
Possible stock drawdown	20	-	270	290
<u>2002/03 Utilization</u>	872	239	3 586	4 697
Food use	837	213	3 198	4 248
Non-food use	35	26	388	449
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002/03 Import Requirement</u>	600	210	700	1 510
Anticipated commercial imports	500	210	500	1 210
of which: received or contracted	83	59	20	162
Food aid needs	100	-	200	300
<u>Current Aid Position</u>				
Food aid pledges	80	-	24	104
of which: delivered	61	-	20	81
Donor-financed purchases	-	-	80	80
of which: for local use	-	-	77	77
for export	-	-	3	3
<u>Estimated Per Caput Consumption (kg/year)</u>	26	7	98	131
	[percentage]			
<u>Indexes</u>				
2002 Prod. compared to average (rice paddy terms)	106	88	101	101
2002/03 Import requirement compared to average	102	184	92	103
Cereal share of total calorie intake				50
<u>Additional Information</u>				
Major foodcrops	maize; wheat; pulses; roots; tubers			
Lean season	June-July			
Population (000s)	32 522			
GNP per capita in 2001 (US\$)	350			

An FAO/WFP Crop and Food Supply Assessment Mission in April forecast the 2003 cereal production at 89 100 tonnes, about 65 percent above the poor level of the previous year. Despite the improved production the country needs to import 321 000 tonnes of cereals to cover domestic consumption requirements, including 32 000 tonnes of food aid for vulnerable groups and those who gathered a reduced harvest.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003/04 MARKETING YEAR (April/March)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	14	-	40	54
Previous five years average production	20	-	107	127
Previous year imports	57	-	177	234
Previous five years average imports	59	3	164	226
<u>2003/04 Domestic Availability</u>	31	-	68	99
2003 Production (rice in paddy terms)	24	-	65	89
2003 Production (rice in milled terms)	24	-	65	89
Possible stock drawdown	6	-	3	10
<u>2003/04 Utilization</u>	96	-	324	419
Food use	94	-	320	414
Non-food use	2	-	4	6
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2003/04 Import Requirement</u>	65	-	256	321
Anticipated commercial imports	65	-	224	289
of which: received or contracted	-	-	22	22
Food aid needs	-	-	32	32
<u>Current Aid Position</u>				
Food aid pledges	-	-	12	12
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	2	2
of which: for local use	-	-	2	2
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	42	-	143	185
	[percentage]			
<u>Indexes</u>				
2003 Prod. compared to average (rice paddy terms)	122	-	61	70
2003/04 Import requirement compared to average	110	-	156	142
Cereal share of total calorie intake				78
<u>Additional Information</u>				
Major foodcrops	maize; sorghum; vegetables			
Lean season	February-April			
Population (000s)	2 237			
GNP per capita in 2001 (US\$)	530			

LIBERIA

2002 rice production has been estimated at some 109 000 tonnes, 13 percent lower than average, due to continuing armed conflict that has restricted access to agriculturally most productive areas and displaced large numbers of rural households. Cereal import requirements in 2003 are estimated at 165 000 tonnes, about one-quarter of which is anticipated to be covered by food aid.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	-	145	-	145
Previous five years average production	-	125	-	125
Previous year imports	55	85	10	150
Previous five years average imports	63	90	17	170
<u>2003 Domestic Availability</u>	-	71	-	71
2002 Production (rice in paddy terms)	-	109	-	109
2002 Production (rice in milled terms)	-	71	-	71
Possible stock drawdown	-	-	-	-
<u>2003 Utilization</u>	55	171	10	236
Food use	53	154	10	217
Non-food use	2	16	-	18
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2003 Import Requirement</u>	55	100	10	165
Anticipated commercial imports	30	100	-	130
of which: received or contracted	-	6	-	6
Food aid needs	25	-	10	35
<u>Current Aid Position</u>				
Food aid pledges	10	-	8	18
of which: delivered	7	-	7	14
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	17	50	3	70
	[percentage]			
<u>Indexes</u>				
2002 Prod. compared to average (rice paddy terms)	-	87	-	87
2003 Import requirement compared to average	87	111	59	97
Cereal share of total calorie intake				36
<u>Additional Information</u>				
Major foodcrops	rice; roots; tubers; oils			
Lean season	July-August			
Population (000s)	3 108			
GNP per capita in 2001 (US\$)	140			

MADAGASCAR

The 2003 main paddy crop is forecast at 2.55 million tonnes, 5 percent below last year's level but average. The coarse grain crop, mainly produced in southern parts, is estimated to be reduced by 14 percent compared to last year due to drought. Higher cereal imports and food aid needs are forecast in the new marketing year as a result of the lower paddy production.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003/04 MARKETING YEAR (April/March)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	10	2 670	181	2 861
Previous five years average production	10	2 530	173	2 713
Previous year imports	101	134	16	251
Previous five years average imports	94	163	14	271
<u>2003/04 Domestic Availability</u>	10	1 734	155	1 899
2003 Production (rice in paddy terms)	10	2 550	155	2 715
2003 Production (rice in milled terms)	10	1 734	155	1 899
Possible stock drawdown	-	-	-	-
<u>2003/04 Utilization</u>	115	1 984	183	2 282
Food use	115	1 864	162	2 141
Non-food use	-	120	21	141
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2003/04 Import Requirement</u>	105	250	28	383
Anticipated commercial imports	80	240	10	330
of which: received or contracted	-	-	3	3
Food aid needs	25	10	18	53
<u>Current Aid Position</u>				
Food aid pledges	25	3	5	33
of which: delivered	-	3	4	7
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	7	108	9	124
	[percentage]			
<u>Indexes</u>				
2003 Prod. compared to average (rice paddy terms)	100	101	90	100
2003/04 Import requirement compared to average	112	153	200	141
Cereal share of total calorie intake				53
<u>Additional Information</u>				
Major foodcrops	rice; roots; tubers; maize; fruit			
Lean season	February-March			
Population (000s)	17 292			
GNP per capita in 2001 (US\$)	260			

Final official estimates of the 2003 cereal harvest have been revised slightly upwards to 2.11 million tonnes, including 1.98 million tonnes of maize. No imports of maize will be necessary in the 2003/04 marketing year because of the satisfactory production and unprecedented levels of maize carry-over stocks.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003/04 MARKETING YEAR (April/March)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	2	95	1 557	1 654
Previous five years average production	2	87	2 058	2 147
Previous year imports	50	3	620	673
Previous five years average imports	42	1	191	234
<u>2003/04 Domestic Availability</u>	1	57	2 162	2 220
2003 Production (rice in paddy terms)	1	88	2 052	2 141
2003 Production (rice in milled terms)	1	57	2 052	2 110
Possible stock drawdown	-	-	110	110
<u>2003/04 Utilization</u>	60	57	2 167	2 284
Food use	60	48	1 815	1 923
Non-food use	-	9	352	361
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2003/04 Import Requirement</u>	59	-	5	64
Anticipated commercial imports	59	-	-	59
of which: received or contracted	-	-	-	-
Food aid needs	-	-	5	5
<u>Current Aid Position</u>				
Food aid pledges	-	3	-	3
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	5	4	156	165
	[percentage]			
<u>Indexes</u>				
2003 Prod. compared to average (rice paddy terms)	50	101	100	100
2003/04 Import requirement compared to average	140	-	3	27
Cereal share of total calorie intake				58
<u>Additional Information</u>				
Major foodcrops	maize; pulses; roots; tubers; rice			
Lean season	February-March			
Population (000s)	11 657			
GNP per capita in 2001 (US\$)	160			

2002 aggregate cereal production is estimated at 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 return of some 130 000 Malians from Côte d'Ivoire is putting additional pressure on national food supply.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (November/October)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	9	940	1 634	2 583
Previous five years average production	6	741	1 761	2 508
Previous year imports	62	170	14	246
Previous five years average imports	53	80	6	139
<u>2002/03 Domestic Availability</u>	7	471	1 819	2 296
2002 Production (rice in paddy terms)	7	693	1 819	2 518
2002 Production (rice in milled terms)	7	471	1 819	2 296
Possible stock drawdown	-	-	-	-
<u>2002/03 Utilization</u>	70	649	1 857	2 575
Food use	69	519	1 525	2 113
Non-food use	1	90	276	368
Exports or re-exports	-	40	25	65
Possible stock build up	-	-	30	30
<u>2002/03 Import Requirement</u>	63	178	38	279
Anticipated commercial imports	63	178	20	261
of which: received or contracted	-	-	-	-
Food aid needs	-	-	18	18
<u>Current Aid Position</u>				
Food aid pledges	-	-	7	7
of which: delivered	-	-	7	7
Donor-financed purchases	-	-	2	2
of which: for local use	-	-	2	2
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	6	48	139	193
	[percentage]			
<u>Indexes</u>				
2002 Prod. compared to average (rice paddy terms)	108	94	103	100
2002/03 Import requirement compared to average	119	223	633	201
Cereal share of total calorie intake				73
<u>Additional Information</u>				
Major foodcrops	millet; sorghum; rice; maize			
Lean season	July-September			
Population (000s)	10 938			
GNP per capita in 2001 (US\$)	230			

MAURITANIA

Aggregate 2002 cereal production is estimated at about 116 000 tonnes, about 31 percent lower than the average for the previous five years and 5 percent below 2001 poor harvest. The rainfed crop, which represents more than 80 percent of planted areas or 60 percent of total cereal production in a normal year, decreased by 80 percent to only 8 000 tonnes. Cereal import requirement in marketing year 2002/03 (November/October) is estimated at 323 000 tonnes, of which wheat accounts for 74 percent. The anticipated commercial imports of 258 000 tonnes and 18 000 tonnes of pledged food assistance leave a deficit of about 41 000 tonnes to be covered by additional food assistance.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (November/October)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	3	59	60	122
Previous five years average production	1	81	87	169
Previous year imports	265	37	4	307 ^{1/}
Previous five years average imports	250	44	5	299
<u>2002/03 Domestic Availability</u>	20	52	39	110
2002 Production (rice in paddy terms)	-	77	39	116
2002 Production (rice in milled terms)	-	52	39	90
Possible stock drawdown	20	-	-	20
<u>2002/03 Utilization</u>	259	99	75	433
Food use	219	89	68	375
Non-food use	25	9	7	41
Exports or re-exports	15	1	1	17
Possible stock build up	-	-	-	-
<u>2002/03 Import Requirement</u>	239	48	37	323 ^{1/}
Anticipated commercial imports	233	18	8	258
of which: received or contracted	65	-	4	69
Food aid needs	6	30	29	65
<u>Current Aid Position</u>				
Food aid pledges	18	-	-	18
of which: delivered	15	-	-	15
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	81	33	25	139
<u>Indexes</u>	[percentage]			
2002 Prod. compared to average (rice paddy terms)	-	96	45	69
2002/03 Import requirement compared to average	96	108	730	108
Cereal share of total calorie intake				54
<u>Additional Information</u>				
Major foodcrops	wheat; rice; millet; sorghum			
Lean season	July-September			
Population (000s)	2 712			
GNP per capita in 2001 (US\$)	360			

^{1/} Includes 15 000 tonnes of wheat for re-exports.

The country imports commercially its entire cereal consumption requirements.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	-	-	2	2
Previous five years average production	-	-	2	2
Previous year imports	156	70	82	308
Previous five years average imports	154	71	44	269
<u>2003 Domestic Availability</u>	3	-	8	11
2002 Production (rice in paddy terms)	-	-	2	2
2002 Production (rice in milled terms)	-	-	2	2
Possible stock drawdown	3	-	6	9
<u>2003 Utilization</u>	153	70	68	291
Food use	107	70	3	180
Non-food use	6	-	65	71
Exports or re-exports	40	-	-	40
Possible stock build up	-	-	-	-
<u>2003 Import Requirement</u>	150	70	60	280
Anticipated commercial imports	150	70	60	280
of which: received or contracted	-	1	31	32
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	90	59	2	151
	[percentage]			
<u>Indexes</u>				
2002 Prod. compared to average (rice paddy terms)	-	-	100	100
2003 Import requirement compared to average	97	99	136	104
Cereal share of total calorie intake				45
<u>Additional Information</u>				
Major foodcrops	vegetables			
Lean season	January-December			
Population (000s)	1 191			
GNP per capita in 2001 (US\$)	3 830			

MOZAMBIQUE

An FAO/WFP Crop and Food Supply Assessment Mission in May estimated the 2003 cereal production at over 1.8 million tonnes, some 2.5 percent above last year's level. Import requirements are estimated at 744 000 tonnes, mainly rice and wheat, but also maize meal for southern areas, because moving maize from the surplus areas of North to the South remains uncompetitive due to high internal transport costs. Commercial imports are estimated at 539 000 tonnes and food aid at 205 000 tonnes, of which 121 000 tonnes are emergency food aid for large numbers affected by drought in southern provinces. Local purchases of maize will complement the emergency food aid requirements.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003/04 MARKETING YEAR (April/March)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	-	164	1 600	1 764
Previous five years average production	2	172	1 513	1 687
Previous year imports	241	252	257	750
Previous five years average imports	207	164	160	531
<u>2003/04 Domestic Availability</u>	-	133	1 611	1 744
2003 Production (rice in paddy terms)	-	200	1 611	1 811
2003 Production (rice in milled terms)	-	133	1 611	1 744
Possible stock drawdown	-	-	-	-
<u>2003/04 Utilization</u>	289	393	1 806	2 488
Food use	274	359	1 383	2 016
Non-food use	5	34	303	342
Exports or re-exports	-	-	90	90
Possible stock build up	10	-	30	40
<u>2003/04 Import Requirement</u>	289	260	195	744
Anticipated commercial imports	205	248	86	539
of which: received or contracted	15	1	28	44
Food aid needs	84	12	109	205
<u>Current Aid Position</u>				
Food aid pledges	84	12	36	132
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	15	19	74	108
<u>Indexes</u>	[percentage]			
2003 Prod. compared to average (rice paddy terms)	-	116	106	107
2003/04 Import requirement compared to average	140	159	122	140
Cereal share of total calorie intake				43
<u>Additional Information</u>				
Major foodcrops	roots; tubers; maize			
Lean season	February-April			
Population (000s)	18 634			
GNP per capita in 2001 (US\$)	210			

Latest official production estimates indicate a 2003 cereal crop of 101 000 tonnes, 36 percent above the reduced level of 2002. Cereal import requirements have declined from last year to 135 000 tonnes, to be covered on commercial basis.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003/04 MARKETING YEAR (May/April)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	10	-	64	74
Previous five years average production	6	-	85	91
Previous year imports	93	-	90	183
Previous five years average imports	64	-	91	155
<u>2003/04 Domestic Availability</u>	20	-	102	122
2003 Production (rice in paddy terms)	10	-	91	101
2003 Production (rice in milled terms)	10	-	91	101
Possible stock drawdown	10	-	11	21
<u>2003/04 Utilization</u>	70	-	187	256
Food use	69	-	177	246
Non-food use	1	-	10	10
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2003/04 Import Requirement</u>	50	-	85	135
Anticipated commercial imports	50	-	85	135
of which: received or contracted	-	-	6	6
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	35	-	90	125
	[percentage]			
<u>Indexes</u>				
2003 Prod. compared to average (rice paddy terms)	158	-	107	111
2003/04 Import requirement compared to average	78	-	93	87
Cereal share of total calorie intake				64
<u>Additional Information</u>				
Major foodcrops	millet; maize; sorghum; wheat			
Population (000s)	1 970			
GNP per capita in 2001 (US\$)	1 960			

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. Farmers should be able to replenish their stocks and the government to reach the national optimum stock level of 35 000 tonnes. Cereal import requirements for marketing year 2002/03 are estimated at 377 000 tonnes.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (November/October)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	7	60	3 028	3 094
Previous five years average production	9	60	2 486	2 555
Previous year imports	57	166	168	391
Previous five years average imports	58	134	274	466
<u>2002/03 Domestic Availability</u>	13	52	3 255	3 320
2002 Production (rice in paddy terms)	3	80	3 255	3 338
2002 Production (rice in milled terms)	3	52	3 255	3 310
Possible stock drawdown	10	-	-	10
<u>2002/03 Utilization</u>	58	204	3 435	3 697
Food use	52	194	2 831	3 078
Non-food use	1	10	499	509
Exports or re-exports	5	-	55	60
Possible stock build up	-	-	50	50
<u>2002/03 Import Requirement</u>	45	152	180	377
Anticipated commercial imports	45	150	180	375
of which: received or contracted	2	5	-	7
Food aid needs	-	2	-	2
<u>Current Aid Position</u>				
Food aid pledges	-	2	-	2
of which: delivered	-	2	-	2
Donor-financed purchases	-	-	4	4
of which: for local use	-	-	4	4
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	4	16	238	259
<u>Indexes</u>	[percentage]			
2002 Prod. compared to average (rice paddy terms)	37	133	131	131
2002/03 Import requirement compared to average	78	113	66	81
Cereal share of total calorie intake				69
<u>Additional Information</u>				
Major foodcrops	millet; sorghum; pulses; roots; tubers			
Lean season	July-September			
Population (000s)	11 903			
GNP per capita in 2001 (US\$)	180			

NIGERIA

Aggregate 2002 cereal production has been estimated at about 23 million tonnes, which is average. Cereal import requirements in 2003 marketing year are estimated at about 4 million tonnes, mostly wheat and rice, expected to be covered commercially.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	50	3 367	19 614	23 031
Previous five years average production	49	3 350	19 026	22 425
Previous year imports	2 400	1 840	70	4 310
Previous five years average imports	1 843	1 051	77	2 971
<u>2003 Domestic Availability</u>	50	2 200	19 896	22 146
2002 Production (rice in paddy terms)	50	3 667	19 896	23 613
2002 Production (rice in milled terms)	50	2 200	19 896	22 146
Possible stock drawdown	-	-	-	-
<u>2003 Utilization</u>	2 450	3 900	19 966	26 316
Food use	2 398	3 260	15 859	21 517
Non-food use	52	440	3 978	4 470
Exports or re-exports	-	100	130	230
Possible stock build up	-	100	-	100
<u>2003 Import Requirement</u>	2 400	1 700	70	4 170
Anticipated commercial imports	2 400	1 700	70	4 170
of which: received or contracted	499	135	-	634
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	20	27	133	180
	[percentage]			
<u>Indexes</u>				
2002 Prod. compared to average (rice paddy terms)	102	109	105	105
2003 Import requirement compared to average	130	162	91	140
Cereal share of total calorie intake				46
<u>Additional Information</u>				
Major foodcrops	roots; tubers; coarse grains; rice			
Lean season	April-May			
Population (000s)	119 557			
GNP per capita in 2001 (US\$)	290			

RWANDA

The recently harvested 2003 second season cereal crops, mainly sorghum, was good. Cereal import requirements in 2003 are estimated at 226 000 tonnes, including 30 000 tonnes of food aid.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	6	21	249	276
Previous five years average production	5	13	211	229
Previous year imports	15	26	185	226
Previous five years average imports	18	26	172	216
<u>2003 Domestic Availability</u>	6	12	245	263
2003 Production (rice in paddy terms)	6	18	245	269
2003 Production (rice in milled terms)	6	12	245	263
Possible stock drawdown	-	-	-	-
<u>2003 Utilization</u>	21	38	430	489
Food use	21	35	348	404
Non-food use	-	3	82	85
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2003 Import Requirement</u>	15	26	185	226
Anticipated commercial imports	15	26	155	196
of which: received or contracted	-	10	1	11
Food aid needs	-	-	30	30
<u>Current Aid Position</u>				
Food aid pledges	1	-	13	14
of which: delivered	-	-	5	5
Donor-financed purchases	-	-	2	2
of which: for local use	-	-	2	2
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	2	4	37	43
	[percentage]			
<u>Indexes</u>				
2003 Prod. compared to average (rice paddy terms)	120	138	116	117
2003 Import requirement compared to average	83	100	108	105
Cereal share of total calorie intake				17
<u>Additional Information</u>				
Major foodcrops	roots; tubers; pulses; plantains; sorghum; maize			
Lean season	November-December			
Population (000s)	9 479			
GNP per capita in 2001 (US\$)	220			

SAO TOME AND PRINCIPE

The staple foodcrops are roots, plantains and tubers.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	-	-	1	1
Previous five years average production	-	-	1	1
Previous year imports	3	7	2	12
Previous five years average imports	3	6	2	11
<u>2003 Domestic Availability</u>	-	-	1	1
2002 Production (rice in paddy terms)	-	-	1	1
2002 Production (rice in milled terms)	-	-	1	1
Possible stock drawdown	-	-	-	-
<u>2003 Utilization</u>	3	7	3	13
Food use	3	7	3	13
Non-food use	-	-	-	-
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2003 Import Requirement</u>	3	7	2	12
Anticipated commercial imports	3	3	2	8
of which: received or contracted	-	-	-	-
Food aid needs	-	4	-	4
<u>Current Aid Position</u>				
Food aid pledges	-	-	1	1
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	19	45	19	83
	[percentage]			
<u>Indexes</u>				
2002 Prod. compared to average (rice paddy terms)	-	-	100	100
2003 Import requirement compared to average	100	117	100	109
Cereal share of total calorie intake				33
<u>Additional Information</u>				
Major foodcrops	bananas; breadfruit; cocoyam			
Lean season	January-December			
Population (000s)	157			
GNP per capita in 2001 (US\$)	280			

SENEGAL

The final official estimate of aggregate 2002 cereal production is about 851 300 tonnes, 8 percent lower than the average for the previous five years. Imports needed to cover the shortfall between domestic availability and total utilization amount to about 1 million tonnes, expected to be covered commercially.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (November/October)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	-	244	718	962
Previous five years average production	-	217	708	925
Previous year imports	270	707	83	1 060
Previous five years average imports	244	566	52	862
<u>2002/03 Domestic Availability</u>	-	153	637	790
2002 Production (rice in paddy terms)	-	218	633	851
2002 Production (rice in milled terms)	-	153	633	786
Possible stock drawdown	-	-	4	4
<u>2002/03 Utilization</u>	257	809	729	1 795
Food use	252	783	630	1 666
Non-food use	5	26	99	130
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002/03 Import Requirement</u>	257	657	92	1 006
Anticipated commercial imports	257	650	92	999
of which: received or contracted	-	361	50	411
Food aid needs	-	7	-	7
<u>Current Aid Position</u>				
Food aid pledges	24	2	-	26
of which: delivered	24	2	-	26
Donor-financed purchases	-	-	4	4
of which: for local use	-	-	4	4
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	25	76	61	162
<u>Indexes</u>	[percentage]			
2002 Prod. compared to average (rice paddy terms)	-	101	89	92
2002/03 Import requirement compared to average	105	116	177	117
Cereal share of total calorie intake				61
<u>Additional Information</u>				
Major foodcrops	millet; sorghum; rice; maize; wheat			
Lean season	August-September			
Population (000s)	10 272			
GNP per capita in 2001 (US\$)	490			

SEYCHELLES

The cultivated area of only some 6 000 hectares is used mainly for coconuts, cinnamon and tea. Other crops, of secondary importance, include fruit and vegetables. The cereal needs for human consumption and feed are all imported commercially. Cereal import requirements in 2003 are estimated at 13 000 tonnes.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	-	-	-	-
Previous five years average production	-	-	-	-
Previous year imports	2	5	6	13
Previous five years average imports	2	5	6	13
<u>2003 Domestic Availability</u>	-	-	-	-
2002 Production (rice in paddy terms)	-	-	-	-
2002 Production (rice in milled terms)	-	-	-	-
Possible stock drawdown	-	-	-	-
<u>2003 Utilization</u>	2	5	6	13
Food use	2	5	1	8
Non-food use	-	-	5	5
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2003 Import Requirement</u>	2	5	6	13
Anticipated commercial imports	2	5	6	13
of which: received or contracted	-	-	-	-
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	24	61	12	97
	[percentage]			
<u>Indexes</u>				
2002 Prod. compared to average (rice paddy terms)	-	-	-	-
2003 Import requirement compared to average	100	100	100	100
Cereal share of total calorie intake				34
<u>Additional Information</u>				
Major foodcrops	coconuts; fruit; vegetables			
Lean season	January-December			
Population (000s)	83			
GNP per capita in 2001 (US\$)	6 530			

Cereal production in 2002 is estimated at some 417 000 tonnes, 20 percent above last year's level. This increase reflects an improved security situation, increased plantings by returning refugees and farmers previously displaced, as well as improved conditions for the distribution of agricultural inputs. Cereal import requirement in 2003, mostly rice, is forecast at 308 000 tonnes, including a food aid requirement of 65 000 tonnes.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	-	311	37	348
Previous five years average production	-	299	37	336
Previous year imports	80	220	12	312
Previous five years average imports	66	150	18	234
<u>2003 Domestic Availability</u>	-	224	44	268
2002 Production (rice in paddy terms)	-	373	44	417
2002 Production (rice in milled terms)	-	224	44	268
Possible stock drawdown	-	-	-	-
<u>2003 Utilization</u>	75	444	57	576
Food use	75	385	47	507
Non-food use	-	49	10	59
Exports or re-exports	-	-	-	-
Possible stock build up	-	10	-	10
<u>2003 Import Requirement</u>	75	220	13	308
Anticipated commercial imports	25	218	-	243
of which: received or contracted	-	8	-	8
Food aid needs	50	2	13	65
<u>Current Aid Position</u>				
Food aid pledges	9	-	4	13
of which: delivered	9	-	4	13
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	14	73	9	96
	[percentage]			
<u>Indexes</u>				
2002 Prod. compared to average (rice paddy terms)	-	125	120	124
2003 Import requirement compared to average	114	147	72	132
Cereal share of total calorie intake				54
<u>Additional Information</u>				
Major foodcrops	rice; roots; tubers			
Lean season	July-August			
Population (000s)	5 279			
GNP per capita in 2001 (US\$)	140			

The total cereal import requirement in 2002/03 (August/July) is estimated at 320 000 tonnes. Commercial imports are estimated at 275 000 tonnes, leaving a food aid requirement of 45 000 tonnes. As of end June food aid pledges amounted to 7 000 tonnes, all of which have been delivered.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (August/July)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	-	2	255	257
Previous five years average production	-	2	258	260
Previous year imports	100	100	70	270
Previous five years average imports	111	106	68	285
<u>2002/03 Domestic Availability</u>	10	1	374	385
2002 Production (rice in paddy terms)	-	2	374	376
2002 Production (rice in milled terms)	-	1	374	375
Possible stock drawdown	10	-	-	10
<u>2002/03 Utilization</u>	110	101	494	705
Food use	110	91	343	544
Non-food use	-	10	41	51
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	110	110
<u>2002/03 Import Requirement</u>	100	100	120	320
Anticipated commercial imports	100	100	75	275
of which: received or contracted	-	2	-	2
Food aid needs	-	-	45	45
<u>Current Aid Position</u>				
Food aid pledges	-	-	7	7
of which: delivered	-	-	7	7
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	17	14	52	83
	[percentage]			
<u>Indexes</u>				
2002 Prod. compared to average (rice paddy terms)	-	100	145	145
2002/03 Import requirement compared to average	90	94	176	112
Cereal share of total calorie intake				34
<u>Additional Information</u>				
Major foodcrops	maize; sorghum; sesame			
Lean season	June-August			
Population (000s)	6 543			
GNP per capita in 2001 (US\$)	n.a.			

SOUTH AFRICA

Latest official estimates of the main maize crop have been revised slightly downwards to 9.2 million tonnes, and those of sorghum slightly upwards to 185 978 tonnes. In aggregate, the coarse grain crop is average, although lower than in 2002. However, export availability is expected to remain around last year's level.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003/04 MARKETING YEAR (May/April)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	2 321	3	10 478	12 802
Previous five years average production	2 157	3	9 214	11 374
Previous year imports	689	550	1 125	2 364
Previous five years average imports	567	530	583	1 680
<u>2003/04 Domestic Availability</u>	2 250	2	9 590	11 842
2003 Production (rice in paddy terms)	2 150	3	9 590	11 743
2003 Production (rice in milled terms)	2 150	2	9 590	11 742
Possible stock drawdown	100	-	-	100
<u>2003/04 Utilization</u>	2 890	552	10 269	13 711
Food use	2 560	512	4 515	7 587
Non-food use	130	40	4 464	4 634
Exports or re-exports	200	-	1 135	1 335
Possible stock build up	-	-	155	155
<u>2003/04 Import Requirement</u>	640	550	596	1 786
Anticipated commercial imports	620	550	596	1 766
of which: received or contracted	-	47	13	60
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	3	3
of which: for local use	-	-	-	-
for export	-	-	3	3
<u>Estimated Per Caput Consumption (kg/year)</u>	61	12	108	181
	[percentage]			
<u>Indexes</u>				
2003 Prod. compared to average (rice paddy terms)	100	100	104	103
2003/04 Import requirement compared to average	113	104	102	106
Cereal share of total calorie intake				54
<u>Additional Information</u>				
Major foodcrops	maize; wheat			
Lean season	February-April			
Population (000s)	41 844			
GNP per capita in 2001 (US\$)	2 820			

SUDAN

Based on an estimated domestic cereal availability of about 4.44 million tonnes and total utilization requirement of about 5.56 million tonnes, the total cereal import requirement in 2002/03 (November/October) is estimated at 1.12 million tonnes, mostly wheat. With commercial imports anticipated at 930 000 tonnes, the food aid requirement amounts to 190 000 tonnes. As of end June, food aid pledges stood at 98 000 tonnes of which 86 000 had been delivered.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (November/October)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	247	18	5 087	5 352
Previous five years average production	306	8	4 077	4 391
Previous year imports	1 118	33	78	1 229
Previous five years average imports	903	36	99	1 038
<u>2002/03 Domestic Availability</u>	326	13	4 104	4 443
2002 Production (rice in paddy terms)	296	20	3 494	3 810
2002 Production (rice in milled terms)	296	13	3 494	3 803
Possible stock drawdown	30	-	610	640
<u>2002/03 Utilization</u>	1 326	43	4 194	5 563
Food use	1 295	42	3 540	4 877
Non-food use	31	1	564	596
Exports or re-exports	-	-	90	90
Possible stock build up	-	-	-	-
<u>2002/03 Import Requirement</u>	1 000	30	90	1 120
Anticipated commercial imports	900	30	-	930
of which: received or contracted	103	19	-	122
Food aid needs	100	-	90	190
<u>Current Aid Position</u>				
Food aid pledges	36	-	62	98
of which: delivered	25	-	61	86
Donor-financed purchases	-	-	21	21
of which: for local use	-	-	21	21
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	38	1	105	145
	[percentage]			
2002 Prod. compared to average (rice paddy terms)	97	250	86	87
2002/03 Import requirement compared to average	111	83	91	108
Cereal share of total calorie intake				56
<u>Additional Information</u>				
Major foodcrops	sorghum; millet; wheat; roots; tubers; oils			
Lean season	September-October			
Population (000s)	33 697			
GNP per capita in 2001 (US\$)	340			

SWAZILAND

An FAO/WFP Crop and Food Supply Assessment Mission in April 2003 estimated cereal production at 73 000 tonnes. This is 4 percent above the poor crop of last year but still 30 percent below the average level. Cereal import requirements have increased to 128 000 tonnes, including 24 000 tonnes of food aid.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003/04 MARKETING YEAR (May/April)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	-	-	70	70
Previous five years average production	-	-	100	100
Previous year imports	44	8	53	105
Previous five years average imports	41	8	36	85
<u>2003/04 Domestic Availability</u>	-	1	73	74
2003 Production (rice in paddy terms)	-	-	73	73
2003 Production (rice in milled terms)	-	-	73	73
Possible stock drawdown	-	-	-	-
<u>2003/04 Utilization</u>	46	7	149	201
Food use	46	7	139	191
Non-food use	-	-	4	4
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	5	6
<u>2003/04 Import Requirement</u>	46	6	76	128
Anticipated commercial imports	46	6	52	103
of which: received or contracted	-	-	7	7
Food aid needs	-	-	24	24
<u>Current Aid Position</u>				
Food aid pledges	-	1	9	10
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	42	6	127	175
	[percentage]			
<u>Indexes</u>				
2003 Prod. compared to average (rice paddy terms)	-	-	73	73
2003/04 Import requirement compared to average	112	75	211	150
Cereal share of total calorie intake				44
<u>Additional Information</u>				
Major foodcrops	maize			
Lean season	February-April			
Population (000s)	1 093			
GNP per capita in 2001 (US\$)	1 300			

Domestic cereal availability in 2002/03 (June/May) is estimated at 4.2 million tonnes against total utilization of 4.63 million tonnes. The cereal import requirement is thus estimated at 430 000 tonnes. With commercial imports estimated at 360 000 tonnes, the food aid requirement is 70 000 tonnes. As of end June, food aid pledges and deliveries amounted to 22 000 tonnes.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003/04 MARKETING YEAR (June/May)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	79	780	3 704	4 563
Previous five years average production	83	834	3 330	4 247
Previous year imports	200	140	70	410
Previous five years average imports	295	84	94	473
<u>2003/04 Domestic Availability</u>	271	456	3 474	4 200
2003 Production (rice in paddy terms)	71	701	3 334	4 106
2003 Production (rice in milled terms)	71	456	3 334	3 860
Possible stock drawdown	200	-	140	340
<u>2003/04 Utilization</u>	391	616	3 624	4 630
Food use	363	566	3 243	4 172
Non-food use	8	50	381	439
Exports or re-exports	20	-	-	20
Possible stock build up	-	-	-	-
<u>2003/04 Import Requirement</u>	120	160	150	430
Anticipated commercial imports	120	160	80	360
of which: received or contracted	-	-	-	-
Food aid needs	-	-	70	70
<u>Current Aid Position</u>				
Food aid pledges	-	-	22	22
of which: delivered	-	-	22	22
Donor-financed purchases	-	-	3	3
of which: for local use	-	-	3	3
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	10	16	91	117
	[percentage]			
<u>Indexes</u>				
2003 Prod. compared to average (rice paddy terms)	86	84	100	97
2003/04 Import requirement compared to average	41	190	160	91
Cereal share of total calorie intake				51
<u>Additional Information</u>				
Major foodcrops	maize; roots; tubers; sorghum; pulses; plantains; rice			
Lean season	February-April			
Population (000s)	35 637			
GNP per capita in 2001 (US\$)	270			

Aggregate 2002 cereal production is estimated at 741 000 tonnes, slightly above last year's level but 7 percent above average. Cereal imports for domestic use and re-exports in the 2003 marketing year are estimated at 160 000 tonnes, to be covered commercially.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	-	61	651	712
Previous five years average production	-	70	620	690
Previous year imports	60	100	-	160 ^{1/}
Previous five years average imports	56	149	11	216
<u>2003 Domestic Availability</u>	-	42	678	721
2002 Production (rice in paddy terms)	-	62	678	741
2002 Production (rice in milled terms)	-	42	678	721
Possible stock drawdown	-	-	-	-
<u>2003 Utilization</u>	60	142	678	881
Food use	56	73	436	565
Non-food use	2	9	222	233
Exports or re-exports	2	60	20	82
Possible stock build up	-	-	-	-
<u>2003 Import Requirement</u>	60	100	-	160
Anticipated commercial imports	60	100	-	160 ^{1/}
of which: received or contracted	2	13	-	15
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	11	15	87	113
	[percentage]			
<u>Indexes</u>				
2002 Prod. compared to average (rice paddy terms)	-	89	109	107
2003 Import requirement compared to average	107	67	-	74
Cereal share of total calorie intake				47
<u>Additional Information</u>				
Major foodcrops	roots; tubers; coarse grains; fruit			
Lean season	April-July			
Population (000s)	4 999			
GNP per capita in 2001 (US\$)	270			

^{1/} Includes 60 000 tonnes of rice for re-export.

UGANDA

Domestic cereal availability in 2002/03 is estimated at 2 million tonnes against total utilization requirement of 2.18 million tonnes. The cereal import requirement is thus estimated at 145 000 tonnes. With commercial imports anticipated at 80 000 tonnes, there is a food aid requirement of 65 000 tonnes. As of end June, food aid pledges amounted to 73 000 tonnes, of which 66 000 tonnes had been delivered.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	14	114	2 181	2 309
Previous five years average production	11	98	1 953	2 062
Previous year imports	76	45	65	186
Previous five years average imports	77	48	49	174
<u>2003 Domestic Availability</u>	50	77	1 910	2 037
2002 Production (rice in paddy terms)	10	115	1 820	1 945
2002 Production (rice in milled terms)	10	77	1 820	1 907
Possible stock drawdown	40	-	90	130
<u>2003 Utilization</u>	80	127	1 975	2 182
Food use	79	127	1 658	1 864
Non-food use	1	-	217	218
Exports or re-exports	-	-	100	100
Possible stock build up	-	-	-	-
<u>2003 Import Requirement</u>	30	50	65	145
Anticipated commercial imports	30	50	-	80
of which: received or contracted	-	-	-	-
Food aid needs	-	-	65	65
<u>Current Aid Position</u>				
Food aid pledges	5	-	68	73
of which: delivered	5	-	61	66
Donor-financed purchases	-	-	25	25
of which: for local use	-	-	25	25
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	3	6	72	81
	[percentage]			
<u>Indexes</u>				
2002 Prod. compared to average (rice paddy terms)	91	117	93	94
2003 Import requirement compared to average	39	104	133	83
Cereal share of total calorie intake				21
<u>Additional Information</u>				
Major foodcrops	roots; tubers; plantains; pulses; maize; millet; sorghum			
Lean season	April-May			
Population (000s)	23 015			
GNP per capita in 2001 (US\$)	260			

ZAMBIA

An FAO/WFP Crop and Food Supply Assessment Mission in May estimated the 2003 cereal production at 1.33 million tonnes, 80 percent higher than the reduced level of 2002 and above average. As a result no imports of maize, the country's main staple, will be necessary in marketing year 2003/04. Cereal import requirements are limited to reduced quantities of wheat and rice in which the country has a structural deficit.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003/04 MARKETING YEAR (May/April)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	75	10	657	742
Previous five years average production	80	16	915	1 011
Previous year imports	46	11	378	435
Previous five years average imports	45	21	256	322
<u>2003/04 Domestic Availability</u>	100	10	1 264	1 374
2003 Production (rice in paddy terms)	100	15	1 216	1 331
2003 Production (rice in milled terms)	100	10	1 216	1 326
Possible stock drawdown	-	-	48	48
<u>2003/04 Utilization</u>	143	33	1 264	1 440
Food use	139	32	1 024	1 195
Non-food use	4	1	230	235
Exports or re-exports	-	-	10	10
Possible stock build up	-	-	-	-
<u>2003/04 Import Requirement</u>	43	23	-	66
Anticipated commercial imports	43	23	-	66
of which: received or contracted	-	1	11	12
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	7	7
of which: for local use	-	-	7	7
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	13	3	96	112
<u>Indexes</u>	[percentage]			
2003 Prod. compared to average (rice paddy terms)	125	94	133	132
2003/04 Import requirement compared to average	96	110	-	20
Cereal share of total calorie intake				65
<u>Additional Information</u>				
Major foodcrops	maize; roots; tubers			
Lean season	March-May			
Population (000s)	10 660			
GNP per capita in 2001 (US\$)	320			

An FAO/WFP Crop and Food Supply Assessment Mission in May estimated the 2003 cereal production at 1 million tonnes, including forecast for the winter wheat and barley crops. At this level, production is 41 percent higher than the poor level of last year but still well below average. Cereal import requirement for 2003/04 are estimated at 1.287 million tonnes, of which maize accounts for 980 000 tonnes. Given the acute shortage of foreign exchange, 610 000 tonnes need to be met through food aid.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2003/04 MARKETING YEAR (April/March)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	160	2	552	714
Previous five years average production	272	-	1 532	1 804
Previous year imports	36	12	1 198	1 246
Previous five years average imports	119	22	382	523
<u>2003/04 Domestic Availability</u>	90	3	917	1 010
2003 Production (rice in paddy terms)	90	5	917	1 011
2003 Production (rice in milled terms)	90	3	917	1 010
Possible stock drawdown	-	-	-	-
<u>2003/04 Utilization</u>	388	12	1 897	2 297
Food use	341	12	1 567	1 920
Non-food use	12	-	300	312
Exports or re-exports	-	-	-	-
Possible stock build up	35	-	30	65
<u>2003/04 Import Requirement</u>	298	9	980	1 287
Anticipated commercial imports	298	9	370	677
of which: received or contracted	-	-	182	182
Food aid needs	-	-	610	610
<u>Current Aid Position</u>				
Food aid pledges	-	17	120	137
of which: delivered	-	-	2	2
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	29	1	133	163
	[percentage]			
<u>Indexes</u>				
2003 Prod. compared to average (rice paddy terms)	33	-	60	56
2003/04 Import requirement compared to average	250	41	257	246
Cereal share of total calorie intake				58
<u>Additional Information</u>				
Major foodcrops	maize; wheat; millet; sorghum			
Lean season	February-April			
Population (000s)	11 770			
GNP per capita in 2001 (US\$)	480			

TERMINOLOGY

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

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

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