global information and early warning system on food and agriculture

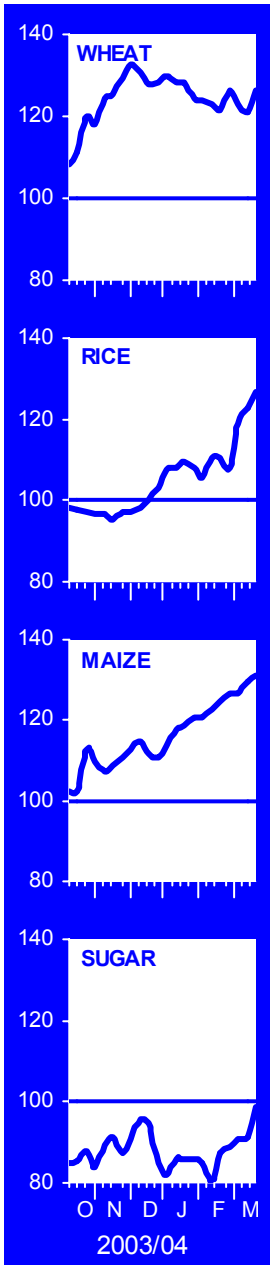
food outlook

No. 1 **April 2004**

highlights

EXPORT PRICES

(July 2003=100)



The Global Information and Early Warning System on Food and Agriculture is undertaking a review of the *food outlook* publication with the aim of improving the quality and timeliness of the reporting. Four issues of the report will be published in 2004, of which this is the first. Subsequent issues will be in June, September and November.

While some changes to the structure of the cereal section have already been introduced in this issue, work will continue throughout the year to enhance the content and improve the structure and presentation of the publication.

World cereal production is forecast to increase in 2004 to 2 131 million tonnes, which would be some 2 percent up from last year and 3 percent above the average of the past five years. The bulk of the increase is expected in wheat, although rice output is also seen to rise significantly. By contrast, production of coarse grains is forecast to decrease marginally.

Global cereal utilization is anticipated to rise further in 2003/04 to 1 971 million tonnes, up 1 percent from the previous year but still slightly below the 10-year trend.

Global cereal stocks will fall sharply by the end of seasons in 2004. Despite an upward adjustment since the previous report in November, aggregate closing inventories are still forecast to be down by 18 percent from their opening levels.

International cereal prices have strengthened since the previous report in November, reflecting tight market conditions.

Food aid costs per unit are expected to increase due to generally tighter world cereal supplies, strong international prices and higher freight rates for 2003/2004.

The world cereal import bill in 2003/04 is expected to rise by 2 percent from the previous year to about US$38 billion. Although a smaller volume of trade is forecast, this will be offset by higher international prices and a steep increase in ocean freight rates.

FOOD AND AGRICULTURE ORGANIZATION OF THE UNITED NATIONS

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Cereal Utilization – extended report	●			
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Meat and Meat Products		●		●
Milk and Milk Products		●		●
Oilseeds, Oils and Oilmeals		●		●
Pulses		●		
Sugar		●		●

1/ These dates are tentative and refer to the release of the English version. Food Outlook in Arabic, Chinese, French and Spanish language is available shortly after the release of the English version.

BASIC FACTS OF THE WORLD CEREAL SITUATION

	1999/2000	2000/2001	2001/2002	2002/2003	2003/2004 estimate	Change 2003/04 over 2002/2003
WORLD PRODUCTION 1/	(. . . million tonnes . . .)					(percentage)
Wheat	592.0	585.9	588.4	569.6	559.0	-1.9
Coarse grains	887.4	876.7	918.5	883.8	931.1	5.4
Rice, milled	409.1	400.7	400.2	381.8	394.2	3.3
(paddy)	(611.2)	(599.2)	(598.7)	(571.4)	(590.5)	3.3
All cereals (incl. milled rice)	**1 888.5**	**1 863.2**	**1 907.1**	**1 835.2**	**1 884.3**	**2.7**
Developing countries	1 040.5	1 008.8	1 027.6	1 000.1	1 046.5	4.6
Developed countries	848.0	854.4	879.5	835.0	837.8	0.3
WORLD TRADE 2/						
Wheat	110.3	100.9	107.9	108.6	99.5	-8.4
Coarse grains	102.0	108.3	105.3	105.3	105.0	-0.3
Rice (milled)	23.1	24.2	28.1	28.0	25.5	-9.0
All cereals	**235.4**	**233.4**	**241.3**	**241.9**	**230.0**	**-4.9**
of which: Food aid shipments 3/	10.6	8.9	7.4	8.6		
WORLD UTILIZATION						
Wheat	592.5	596.7	607.0	614.8	606.5	-1.3
Coarse grains	897.3	909.4	929.5	923.4	950.3	2.9
Rice (milled)	400.4	405.3	410.8	411.6	414.4	0.7
All cereals	**1 890.2**	**1 911.4**	**1 947.3**	**1 949.7**	**1 971.2**	**1.1**
Developing countries	1 153.1	1 160.6	1 181.2	1 184.7	1 212.7	2.4
Developed countries	737.1	750.8	766.2	765.0	758.5	-0.8
Per Caput Food Use	(. . . kg/year . . .)					
Developing countries	165.8	164.6	165.0	164.0	164.6	0.4
Developed countries	131.5	132.0	131.7	131.0	130.9	0.0
WORLD STOCKS 4/	(. . . million tonnes . . .)					
Wheat	259.5	248.3	232.0	186.9	139.4	-25.4
Coarse grains	261.1	229.1	213.3	175.5	152.1	-13.3
Rice (milled)	168.3	163.6	150.4	120.1	101.7	-15.3
All cereals	**688.9**	**640.9**	**595.8**	**482.4**	**393.3**	**-18.5**
Developing countries	523.4	479.5	428.3	341.4	269.2	-21.1
Developed countries	165.5	161.4	167.4	141.0	124.0	-12.1
EXPORT PRICES 3/	(. . . US$/tonne . . .)					
Rice (Thai, 100%, 2nd grade) 1/	253	207	177	197	201	2.0
Wheat (U.S. No.2 HRW)	112	128	127	161	158 5/	-6.9 6/
Maize (U.S. No.2 Yellow)	91	86	90	107	108 5/	0.1 6/
OCEAN FREIGHT RATES 3/						
From U.S. Gulf to Egypt	13.7	15.0	15.0	16.7	29.6 5/	97.5 6/
LOW-INCOME FOOD-DEFICIT COUNTRIES 7/	(. . . million tonnes . . .)					
Roots & tubers production 1/	438.3	449.9	445.8	447.1	386.5	-13.6
Cereal production (milled rice) 1/	819.6	779.8	786.4	768.9	786.7	2.3
Per caput production (kg.) 8/	239.3	224.5	223.4	215.7	217.9	1.0
Cereal imports 2/	89.0	80.4	86.9	80.3	78.4	-2.3
of which: Food aid deliveries 3/	7.1	7.6	6.4	6.7		
Proportion of cereal import covered by food aid	(. . . percentage . . .)					
	8.0	9.5	7.4	8.3		

Source: FAO **Note**: Totals and percentages computed from unrounded data.

1/ Data refer to the calendar year of the first year shown. **2/** For wheat and coarse grains, trade refers to exports based on the July/June marketing season. For rice, trade refers to exports based on the calendar year of the second year shown. **3/** July/June. **4/** Stock data are based on an aggregate of individual country carryovers at the end of national crop years and, therefore, do not represent world stock levels at any point in time. **5/** Average of quotations for July 2003-February 2004. **6/** Change from the corresponding period of the previous year, for which figures are not shown. **7/** Food deficit countries with per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. US$1 435 in 2001). **8/** Including milled rice.

Cereal Supply/Demand Roundup

Global cereal output to increase in 2004

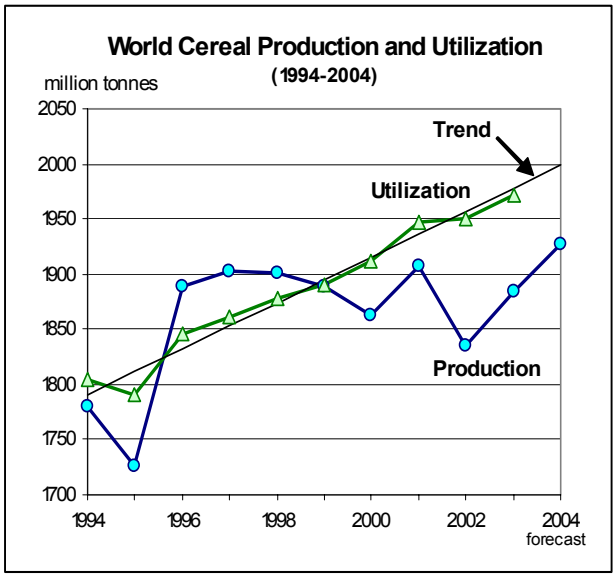
FAO's first forecast of global **cereal** output in 2004 is 2 131 million tonnes (including rice in paddy terms), which would be 2.4 percent up from the previous year and almost 3 percent above the average of the past 5 years. The bulk of the increase is expected in **wheat**, production of which is forecast to reach 596 million tonnes, 6.6 percent up from 2003 and well above the average of the past five years. This increase mostly reflects a sharp recovery in Europe's output after drought in the preceding year, which would more than offset reductions expected in China, the United States and Australia. By contrast, the early outlook for **coarse grains** points to a slight reduction in global output in 2004, by 1 percent to about 922 million tonnes.

Reductions forecast in Africa and North America would more than offset an increase expected in Europe. This first forecast for coarse grains is very tentative, however, as the bulk of the world's crops have yet to be planted in the main producing northern hemisphere countries, where the current forecasts assume normal weather and take into account latest indications of planting intentions. As for coarse grains, the main season in the major **paddy** producing countries, mostly located in the northern hemisphere, has yet to begin later in the year. However, given the good results from the crops already being harvested in the southern hemisphere and early expectations of increases in the rest of the world, the global paddy output in 2004 is expected to increase by about 3.8 percent to almost 613 million tonnes.

World Cereal Production

	Wheat		Coarse grains		Rice (paddy)		Total	
	2003	2004 forecast	2003	2004 forecast	2003	2004 forecast	2003	2004 forecast
	(. . . . . million tonnes . . . . .)							
Asia	244.9	251.6	213.2	214.6	538.1	556.8	996.1	1 023.1
Africa	21.5	20.1	92.7	84.2	17.8	17.9	132.0	122.1
Central America	2.9	2.0	32.1	31.0	2.3	2.4	37.3	35.4
South America	22.9	21.8	79.3	76.5	19.7	21.9	121.9	120.2
North America	87.1	81.5	302.6	287.7	9.0	9.8	398.7	379.1
Europe	154.5	196.7	197.8	215.4	3.2	3.3	355.5	415.3
Oceania	25.3	22.3	13.3	12.9	0.4	0.6	39.0	35.7
WORLD	**559.0**	**595.9**	**931.1**	**922.2**	**590.5 (394)1/**	**612.8 (409)1/**	**2 080.6 (1 884)2/**	**2 130.9 (1 927)2/**
Developing countries	266.3	267.5	402.3	393.0	567.4	587.5	1 236.0	1 248.0
Developed countries	292.7	328.4	528.8	529.2	23.1	25.3	844.6	882.9

Source: FAO 1/ Milled rice. 2/ including milled rice. **Note**: Totals computed from unrounded data.



The increase in global cereal output forecast for 2004 would come as a very welcome development for global food supply and could likely reduce a little further the shortfall in production compared to utilization, which has existed since 2000 and was especially large in 2002. The continued tightening of global cereal supplies for four successive years since 1999/2000 has brought international cereal prices under significant upward pressure in the past months.

Total cereal utilization expands

World cereal utilization in 2003/04 is forecast at 1 971 million tonnes, up 1 percent from 2002/03 but still slightly below the 10-year trend. In spite of a significant increase in international cereal prices and major animal disease outbreaks in the second half of the season, global cereal utilization is expected to rise above the previous season because of strong demand for feed and industrial use, especially in the United States.

GLOBAL OUTLOOK[1/]

Wheat	2002/03	2003/04
Production	▼	▼
Trade	▼	▼
Stocks	▼	▼
Prices	▲	▲
Coarse Grains		
Production	▼	▲
Trade	▼	▼
Stocks	▼	▼
Prices	▲	▲
Rice		
Production	▼	▲
Trade	▼	▼
Stocks	▼	▼
Prices	▲	▲

● stable ▲ up ▼ down - - not available

These signs refer only to the direction of change from the previous season.

1/ Production refers to the first year; stocks refer to crop seasons ending in the second year; trade and prices for wheat and coarse grains refer to July/June and for rice refer to the second year.

World Cereal Production, Supplies Trade and Stocks

	2001/02	2002/03	2003/04 estimate
	(. . . . . million tonnes . . . . . .)		
Production 1/	**1 907**	**1 835**	**1 884**
Wheat	588	570	559
Coarse grains	918	884	931
Rice (milled)	400	382	394
Supply 2/	**2 548**	**2 431**	**2 367**
Utilization	**1 947**	**1 950**	**1 971**
Trade 3/	**241**	**242**	**230**
Ending Stocks 4/	**596**	**482**	**393**

Source: FAO

1/ Data refer to calendar year of the first year shown. Rice in milled equivalent.

2/ Production plus opening stocks.

3/ July/June basis for wheat and coarse grains and calendar year (second year shown) for rice.

4/ May not equal the difference between supply and utilization due to differences in individual country marketing years.

Global cereal stocks fall sharply

Since the previous report in November, the FAO forecast for global end-of-season cereal stocks in 2004 has been raised by 11 million tonnes to 393 million tonnes, but is still down 89 million tonnes, or 18 percent, from their opening levels. Upward adjustments to forecasts for wheat inventories in several countries in Africa, Asia and a number of major exporting countries are the main reasons for this month's higher estimates. The anticipated sharp decline in cereal stocks from the previous season would be mainly due to China although substantial cutbacks are also anticipated in India, the Russian Federation, Ukraine, and the EU, mostly driven by reductions in their 2003 cereal production.

Cereal prices on the increase

International prices of most cereals have strengthened since the previous report in November. Export prices for wheat, maize and rice all registered strong gains, reflecting tight market conditions. While early prospects for wheat crops are favourable and hence some easing of wheat prices could be anticipated as the harvest approaches in the northern hemisphere in the coming months, export prices for coarse grains and rice are unlikely to recede any time soon based on current supply and demand prospects.

Trade in cereals contracts

The FAO forecast for world cereal trade in 2003/04 has been raised by 3 million tonnes since November to 230 million tonnes, still 12 million tonnes, or 5 percent, below the previous year's level. This large contraction is mostly accounted for by reduced wheat and rice trade, while coarse grain trade is forecast to remain largely unchanged from the previous season. For wheat, sharply reduced imports are forecast by the EU, Brazil and several countries in North Africa as well as in Asia. Regarding rice, the most significant cutbacks are expected in imports by Bangladesh, Indonesia, and Brazil.

Cereal Export Prices *

	2004	2003	
	Mar.	Oct.	Mar.
	(. . . . . US$/tonne . . . . . .)		
United States			
Wheat	168	150	146
Maize	128	104	105
Sorghum	132	111	104
Argentina			
Wheat	151	148	149
Maize	109	101	95
Thailand			
Rice white	253	199	198
Rice, broken	213	158	144

* Prices refer to the monthly average. For sources see Appendix Tables A.6 and A.8.

Wheat

Wheat production

	2003 estimate	2004 forecast	2004 cf 2003
	(…million tonnes…)		%
ASIA	**244.9**	**251.6**	**2.8**
China 1/	86.0	83.1	-3.4
India	65.1	75.0	15.2
Iran, Islamic Rep. of	13.5	12.3	-8.7
Kazakhstan	12.0	13.2	9.6
Pakistan	19.3	20.0	3.9
Turkey	19.5	20.0	2.6
AFRICA	**21.5**	**20.1**	**-6.6**
North Africa	**17.0**	**15.4**	**-9.9**
Egypt	6.8	6.9	0.8
Morocco	5.1	4.6	-10.6
Sub-Saharan Africa	**4.4**	**4.7**	**6.1**
Western Africa	**0.1**	**0.1**	**-6.8**
Eastern Africa	**2.6**	**2.2**	**-15.2**
Ethiopia	1.9	1.5	-19.5
Southern Africa	**1.7**	**2.4**	**38.7**
South Africa	1.4	2.1	47.2
CENTRAL AMERICA	**2.9**	**2.0**	**-30.6**
Mexico	2.9	2.0	-30.7
SOUTH AMERICA	**22.9**	**21.8**	**-4.8**
Argentina	14.0	14.5	3.6
Brazil	5.9	4.5	-23.7
NORTH AMERICA	**87.1**	**81.5**	**-6.4**
Canada	23.6	23.5	-0.1
United States	63.6	58.0	-8.8
EUROPE	**154.5**	**196.7**	**27.3**
EU	91.5	102.8	12.4
Hungary	2.9	4.2	43.9
Poland	7.9	9.0	13.3
Romania	2.5	6.1	145.3
Russian Fed.	34.0	43.4	27.6
Ukraine	4.3	15.7	268.7
OCEANIA	**25.3**	**22.3**	**-11.9**
Australia	24.9	21.9	-12.1
WORLD	**559.0**	**595.9**	**6.6**
Developing countries	266.3	267.5	0.4
Developed countries	292.7	328.4	12.2

Source: FAO. **Note:** Totals computed from unrounded data.
1/ Including Taiwan Province.

FAO's first forecast for **world** wheat production in 2004 is 596 million tonnes, 37 million tonnes more than in 2003. Compared with last year, output is expected to increase significantly in Europe and slightly in Asia, more than offsetting likely reductions in all other regions, the most noteworthy being in North America and in Oceania.

In **Far East Asia**, harvesting of the 2004 wheat crop has just started. Aggregate output is forecast to increase, returning to about the average of the past five years after a relatively small crop in 2003.

Production is anticipated to recover in **India**, reflecting increased plantings and favourable weather. A larger crop is also foreseen in **Pakistan.** These increases should more than offset a reduction in **China's** output for the fifth year in succession, following a further decline in plantings.

In the **Asian CIS** countries, the area planted with winter wheat is estimated to have risen slightly to about 4.4 million hectares in response to good weather conditions and input availability at planting time. Weather since planting has also been favourable, with significant snow-cover protecting crops from winterkill and providing ample moisture for spring growth. Assuming favourable weather conditions prevail and based on the condition of the winter crop, which accounts for about one-quarter of the aggregate winter and spring wheat area, the aggregate wheat harvest in the subregion could be above average.

In the **Near East**, prospects for the 2004 wheat crop to be harvested from May are also generally good, reflecting favourable weather conditions. Production should remain close to last year's average to above-average levels in **Afghanistan**, **Syria** and **Turkey**. By contrast, in **Iraq** production is likely to decline due to shortages of agricultural inputs.

In **North Africa,** the winter wheat crop (which accounts for three-quarters of the African region's production on average), is about to be harvested. Reflecting above-average plantings and generally favourable weather for the season, the aggregate output of the three Maghreb countries - **Algeria**, **Morocco** and **Tunisia** – is forecast at the good level of 8.3 million tonnes, although 10 percent short of last year's record. In **Egypt**, where the wheat crop is largely irrigated, the area sown is officially estimated to have increased somewhat from the already high level of 2003 and correspondingly output is forecast to increase slightly to 6.9 million tonnes.

In **Eastern Africa** the 2004/05 season is yet to begin, except in Sudan where a normal wheat crop is being harvested. After a bumper crop in the 2003/04 season in the subregion, the coming crop is assumed, at this stage, to decrease to the average level. The 2003/04 aggregate wheat output is estimated at nearly 2.6 million tonnes, about 35 percent above the previous year's average level. Ethiopia accounted for over 70 percent of the total with an output estimated at 1.9 million tonnes.

In **Southern Africa**, the 2004 wheat crop, to be planted from May, is expected to recover from last year's poor level of 1.7 million tonnes, some 30 percent below average. Production in 2003 was adversely affected by a sharp decline in planting and drought. In **South Africa**, the largest producer in the subregion, a

survey of farmers' 2004 planting intentions suggests that the area sown will recover to the average level.

In **Central America and the Caribbean**, harvesting of 2004 irrigated wheat crop in **Mexico**, virtually the sole producer in the subregion, has just started. The aggregate output is tentatively forecast at some 2 million tonnes, a sharp decline from last year and well below average. This mainly reflects reduced plantings in the north-west of the country because of water shortage.

In **South America**, land is being prepared in **Argentina**, **Chile**, **Paraguay** and **Uruguay** for planting of the 2004 wheat crop from May/June, while planting has just started in **Brazil**. At this very early stage, output in the subregion is expected to remain above the average of the past five years but somewhat down from the 2003 bumper crop.

In the **United States**, a decline in wheat output is in prospect: the total area sown to winter wheat decreased by 3 percent and the rate of abandonment could be above average because of limited snow cover during the winter. Assuming an about-average spring crop, which is still to be sown, the aggregate wheat output in 2004 is forecast at 58 million tonnes (2003: 63.6). In **Canada**, the wheat crop is mostly spring sown in May/June. Early tentative forecasts point to a virtually unchanged wheat crop of about 23.5 million tonnes.

In **Europe**, a strong recovery in wheat production is expected in the **EU** after drought sharply reduced output last year. The winter wheat area is estimated to have increased largely in response to improved price prospects for the 2004/05 marketing season and coming out of the winter the crops are reported to be in generally good condition, with limited frost damage reported so far. Aggregate output of the EU is forecast at 102.8 million tonnes (2003: 91.5) Among the major producing member states, output is forecast to increase by 23 percent in France, and about 11 percent in both Germany and the United Kingdom. By contrast, output may decrease slightly in Spain because of delayed planting reducing yield potential.

Among the **central and eastern European countries (CEECs)**, prospects for the winter cereal crops are also generally favourable and planted areas are reported to have increased throughout the region, reflecting favourable autumn weather and the incentive of good price prospects. Furthermore, winter weather conditions have been favourable, with ample snow cover protecting plants from winterkill and providing ample moisture for spring development. In the three major producing CEECs - **Hungary**, **Poland** and **Romania** – aggregate wheat output is forecast to increase by about 6 million tonnes, to over 19 million tonnes, representing a 45 percent increase from last year's poor crops.

In the **European CIS** subregion, the area planted with winter wheat rose from the previous year's poor level to an estimated 14.5 million hectares. After last year's reduced crops the governments in the region had planned to cultivate a larger area but plantings were hampered by inadequate access to seeds and other inputs. However, prospects for the harvest remain much better than last year as weather conditions have been generally favourable since planting with adequate snow-cover pointing to a lower-than-normal level of winterkill and providing good moisture for spring development. Based on the condition of the winter crops, which account for about 50 percent of the aggregate (winter and spring) output, and assuming normal conditions for the spring crops, the aggregate wheat output in the region is forecast to more than double from the reduced 2003 level to some 61 million tonnes but would remain below the bumper crops recorded in 2001 and 2002. The **Russian Federation** and **Ukraine** account for the bulk of the total.

Planting for the 2004 wheat crop in **Australia** will begin in April/May so the outlook, at this stage, is very tentative. An early official forecast puts output at about 22 million tonnes, 3 million tonnes down from last year's record level but much will depend on weather conditions and market prospects come planting time.

Global wheat trade will drop sharply this season

The FAO forecast for world trade in wheat[1/] in the season ending 2003/04 (July/June) has been raised by 3 million tonnes since November to 99.5 million tonnes. The revision mainly reflects higher forecasts for wheat imports by China, the EU, Romania, and Ukraine, which more than offset lower forecasts for imports by Algeria, Brazil, Ethiopia, the Islamic Republic of Iran (IRI), and Nigeria. Nonetheless, the FAO forecast for trade in 2003/04 still points to a substantial decline of about 6.2 million tonnes from 2002/03. While a sharp drop in imports by the EU would be responsible for most of the decrease in world trade this season, above-average and record wheat harvests would also reduce import demand by several traditional wheat importing countries, mostly in Afghanistan, Algeria, Brazil, the Islamic Republic of Iran and Tunisia.

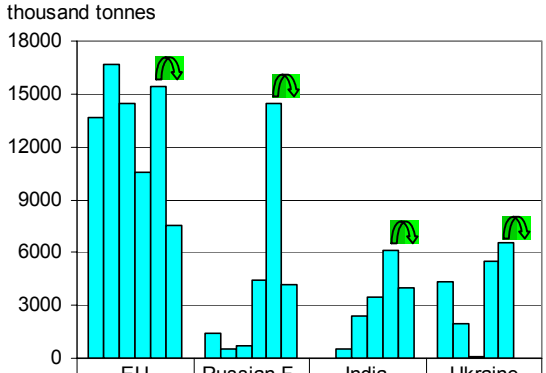
On a regional basis, imports in Africa are forecast to decline by 4.8 million tonnes to 22 million tonnes as a result of a strong rebound in wheat production in Ethiopia and several countries in northern Africa. However, wheat purchases by the region's largest wheat importer, Egypt, are expected to remain steady at around 6.4 million tonnes in spite of the rise in its domestic production in 2003. The main reason is the Government's recent decision to increase wheat imports for subsidized domestic pasta production, in view of rising domestic prices and reductions in private sector wheat imports due to lack of hard currency.

1/ Including wheat flour in grain equivalent.

In Asia, wheat imports are forecast at 41 million tonnes, similar to the previous season, even though wheat purchases by several countries are forecast to decrease significantly. The largest decline is forecast for the IRI, a leading wheat importer until a few years ago. After two consecutive years of bumper crops, wheat purchases by the IRI are expected to be halved this season to only 1 million tonnes, the smallest volume in more than two decades. By contrast, China has been increasing its wheat purchases steadily since December in response to smaller domestic production and declining stocks. Based on recent agreements to import large quantities of wheat from Australia, Canada and the United States, the FAO forecast for wheat imports by China (Mainland) has been raised to 2.5 million tonnes, up sharply from about 400 000 tonnes in 2002/03 and the highest since 1996/97.

In Europe, aggregate wheat imports are put at 16.4 million tonnes, the same as the previous season's peak even though purchases by the EU alone are forecast to fall by 7 million tonnes as a result of such reduced seed wheat supplies from the Black Sea. Higher wheat requirements are expected in most CEECs as well as the Russian Federation and Ukraine, all because of drought-reduced production in 2003. Among countries in Latin America and the Caribbean, Brazil, the region's largest importer is forecast to cut its imports by almost 20 percent this season, following a doubling of its production. By contrast, wheat purchases by Mexico are expected to increase by 6 percent as a result of a drop in domestic production and strong demand.

Wheat exports down in the EU and some of the emerging exporters



	EU	Russian F.	India	Ukraine
1998/99	13661	1452	12	4361
1999/00	16697	565	500	1939
2000/01	14494	726	2357	110
2001/02	10555	4453	3500	5512
2002/03	15447	14482	6100	6584
2003/04	7500	4200	4000	5

Turning to exports, the fundamental picture is that of major exporters regaining their market share after two consecutive seasons of declining sales. All major wheat exporters, with exception of the EU, are likely to increase sharply their exports this season. In the EU, exports could be halved as a result of smaller production coupled with high internal prices and a strong Euro. By contrast, larger exports are expected from Argentina, Australia, Canada and the United States, driven by a rebound in their production and much smaller sales by the EU, India, and nearly all emerging wheat-exporting countries in the CIS, as shown in the chart.

Wheat Utilization to fall below trend

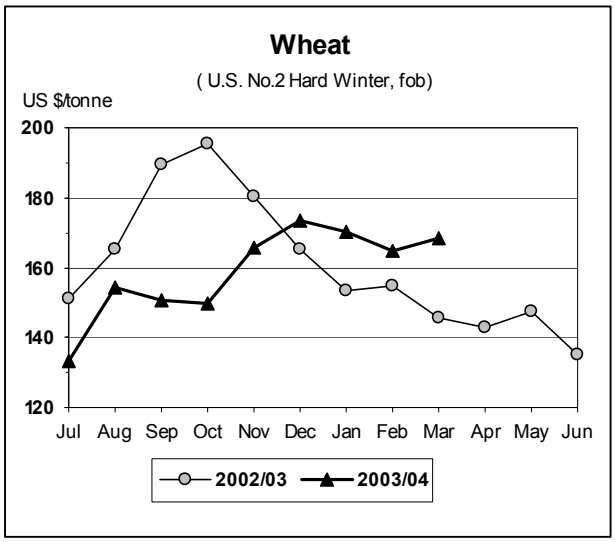
Global wheat utilization is forecast to drop to 606 million tonnes in 2003/04, down 8 million tonnes from the previous year and 2 percent below the long-term trend. This decline is driven by sharp reductions in wheat use for animal feed, principally in the EU and several countries in the CIS. By contrast, in the United States, a recovery in domestic wheat production and high maize prices are expected to result in a rebound in wheat feed use to levels approaching the more normal pre-2002/03 levels. Global usage of wheat for human consumption is forecast at 439 million tonnes, pointing to an increase in line with world population growth. As a result, per caput food consumptions of wheat for the world as a whole and the LIFDCs, as a group, are expected to remain steady at around 70 kg and 62 kg, respectively in 2003/04.

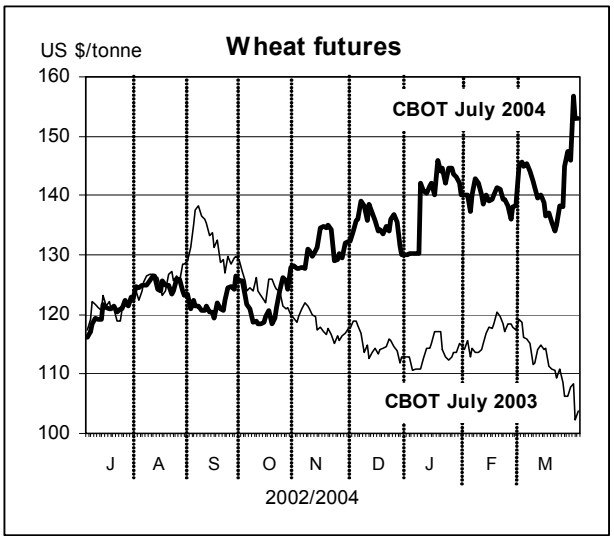
Stocks down sharply

World wheat stocks for crop years ending in 2004 are put at 139 million tonnes, down 48 million tonnes, or 25 percent, from the previous season. The biggest decline is expected once again in China, but wheat stocks in India are also forecast to drop sharply this season after a reduction in production and three consecutives seasons of exceptionally large exports. Much smaller carryovers are also anticipated in the EU, evidenced by a much tighter situation compared to the previous season due to a combined impact of lower production and smaller imports. Significant draw-downs are also forecast for the Russian Federation and Ukraine as a result of exceptionally poor harvests in 2003.

Prices strengthen further

International wheat prices rose during the first half of the 2003/04 marketing season, supported by reductions in exportable supplies in the EU and in a number of CEECs and the CIS. The price of US wheat No. 2 HRW surged to US$180 per tonne during the fourth week in March, raising the average price for the month to US$168 per tonne, up US$18 per tonne from October and US$22 per tonne, or 15 percent, more than in the corresponding month last year. In Chicago, wheat futures also extended their gains, underpinned by brisk export activities as well as strength in maize and soybean futures. By late March, the CBOT US Wheat futures price for July 2004 delivery was quoted at US$153 per tonne, up US$49 per tonne, or 47 percent, from the corresponding period last year.





However, favourable planting conditions and forecasts for a rebound in world wheat production in 2004, coupled with generally weaker import demand prospects, are expected to restrain price increases in the coming months. While demand for US wheat continues to remain strong, rising competition mostly from Australia, which this season has large exportable supplies and enjoys transportation advantage in some important Asian markets, could also put some downward pressure on US prices.

Coarse Grains

Coarse Grains Production

	2003 estimate	2004 forecast	2004 cf 2003
	(…million tonnes…)		%
ASIA	**213.2**	**214.6**	**0.7**
China 1/	125.1	126.0	0.7
India	33.7	34.0	0.9
Indonesia	10.8	11.3	4.0
Iran, Islamic Rep. of	4.9	4.6	-6.1
Kazakhstan	2.6	3.1	19.2
Pakistan	2.1	2.2	3.0
Philippines	4.6	5.3	14.7
Thailand	4.5	4.5	1.1
Turkey	10.4	10.7	2.3
Viet Nam	2.4	2.2	-9.9
AFRICA	**92.7**	**84.2**	**-9.2**
North Africa	**12.7**	**11.4**	**-10.7**
Egypt	7.6	7.6	-1.0
Morocco	2.8	2.4	-15.5
Sub-Saharan Africa	**80.0**	**72.1**	**-9.9**
Western Africa	**37.7**	**34.3**	**-8.9**
Nigeria	20.9	20.1	-3.7
Central Africa	**2.7**	**2.6**	**-1.6**
Eastern Africa	**22.7**	**20.9**	**-7.8**
Ethiopia	8.1	7.4	-7.8
Sudan	5.9	4.5	-25.0
Southern Africa	**17.0**	**15.0**	**-11.8**
South Africa	10.2	8.1	-20.2
CENTRAL AMERICA	**32.1**	**31.0**	**-3.5**
Mexico	28.3	27.3	-3.4
SOUTH AMERICA	**79.3**	**76.5**	**-3.6**
Argentina	19.1	17.0	-11.3
Brazil	50.2	49.7	-0.9
NORTH AMERICA	**302.6**	**287.7**	**-4.9**
Canada	26.5	27.0	1.5
United States	276.0	260.8	-5.5
EUROPE	**197.8**	**215.4**	**8.9**
EU	95.0	106.0	11.6
Hungary	5.8	8.0	37.0
Poland	15.7	17.0	8.0
Romania	10.7	9.8	-8.6
Russian Fed.	30.9	31.2	0.9
Ukraine	15.5	17.7	13.8
OCEANIA	**13.3**	**12.9**	**-3.7**
Australia	12.8	12.3	-3.7
WORLD	**931.1**	**922.2**	**-1.0**
Developing countries	402.3	398.1	-2.3
Developed countries	528.8	529.2	0.1

Source: FAO. **Note:** Totals computed from unrounded data.
1/ Including Taiwan Province.

Global coarse grains output in 2004 is forecast at 922.2 million tonnes, 1 percent down from last year but well above the five-year average. Reductions forecast in Africa and North America, would more than offset increases expected in Asia and Europe. This first forecast is very tentative, however, as the bulk of the world's crops have yet to be planted in the main producing northern hemisphere countries.

Most of the main 2004 coarse grains are about to be planted in **Asia**. The region's aggregate output in 2003 was about average at 213 million tonnes and early indications for 2004 suggest output will remain close to last year's level. In **China**, maize output is forecast to increase reflecting the Government's higher production target. However, this increase may not materialize because of strong prices for competing crops. In **India**, the bulk of coarse grains are produced during the monsoon season from June/July to November. In the **Philippines,** the secondary maize crop is in the ground and after generally favourable conditions, a good output above last year and the average is expected.

In the **Asian CIS** countries, winter coarse grains are reported to be in good condition and, with favourable input and moisture prospects for the spring crops, the aggregate output in the subregion is tentatively forecast to increase in 2004.

In **North Africa,** the bulk of the coarse grains crop is grown in **Egypt** and planting will begin from April. Production in 2004 is tentatively expected to remain above average but will likely be somewhat less than the previous year's bumper level. Prospects for the winter barley crop in the ground in **Morocco** are satisfactory.

In **Western Africa**, seasonably dry conditions prevail in the **Sahelian** zone where the 2004 coarse grain season will start in May/June. The aggregate output of coarse grains in the nine Sahelian countries in 2003 was a record 12.5 million tonnes. Record crops were harvested in all countries with the exception of **Cape Verde** and **Guinea Bissau**. In the **coastal countries** from **Guinea** to **Nigeria** rains have started in early March allowing planting of the first 2004 maize crop to begin, particularly in southern areas. Record cereal crops were harvested in 2003 in **Benin**, **Togo** and **Nigeria** while output was below-average in **Côte d'Ivoire**, **Ghana** and **Liberia**. The aggregate 2003 coarse grains production in the eight coastal countries along the Gulf of Guinea is estimated at some 25 million tonnes, virtually unchanged from previous year's above average crop.

In **Central Africa**, sowing of the main 2004 maize crop, to be harvested from July, is underway in **Cameroon** and in the **Central African Republic**. Production of cereals in 2003 in the subregion was average at about 2.7 million tonnes.

In the **Eastern African** subregion, harvesting of the 2003 main season, and most of the 2003/04 secondary season, coarse grain crops is complete. The subregion's 2003 aggregate production is estimated at a bumper level of some 23 million tonnes, 21 percent higher than the 2002 crop. In **Ethiopia**, although the secondary crop has yet to be sown, the outcome of this will not impact significantly on the aggregate estimate

for 2003, which now stands at 8.1 million tonnes, well above the average for the preceding five years. This mainly reflects higher yields as a result of favourable rains and absence of major outbreaks of pests or diseases. A bumper coarse grains production was also recorded in **Sudan** following favourable weather. By contrast, in **Tanzania**, the 2003 coarse grains output is estimated at 3.3 million tonnes, 10 percent below last year's crop and below average due to poor rains. In **Somalia**, the recently harvested secondary "deyr" season sorghum and maize crops and the main 2003 "Gu" season coarse grains output, harvested last August/September, were reduced and in aggregate the 2003/04 production declined by 28 percent from the bumper crop of the previous year, although it remained about average. In **Kenya**, the 2004 main "long-rains" cropping season has began and the early outlook is favourable. Harvesting of the 2003/04 secondary "short rains" cereal crop which accounts for some 15 percent of annual production is complete and a slightly below average 360 000 tonnes of maize is estimated. In aggregate the 2003/04 maize output is estimated close to 2.4 million tonnes, around the average of the previous five years.

In **Southern Africa**, the outlook for the 2004 coarse grain crops, about to be harvested, has improved with abundant rains in February and March. However, following the delayed arrival of the rainy season and dry weather in northeastern parts of **South Africa,** FAO forecasts the subregion's aggregate coarse grains output at 15.0 million tonnes, about 12 percent below last year's average production. The forecast of aggregate maize output is 14.0 million tonnes. In South Africa, the subregion's largest producer, the official forecast of maize production has been revised upward to 7.7 million tonnes, which is still a 21 percent reduction from the previous year. Maize production in **Zimbabwe** is expected at about 1 million tonnes indicating a slight recovery over the sharply reduced levels of the previous two years, mainly due to improved weather conditions. Prospects for coarse grains are overall favourable in **Zambia** and **Mozambique** but unfavourable in drought-affected **Lesotho** and **Swaziland**.

In **South America**, harvesting of the 2004 coarse grains is underway in the main southern producing countries. The aggregate output of the subregion is forecast at 76 million tonnes (comprising 68 millions of maize), lower than last year's record harvest but still above average. In **Brazil**, where the 2004 main season maize crop is being harvested in the centre-south states, an official forecast points to an output of 34.2 million tonnes, almost unchanged from the main season output in 2003. By contrast, in **Argentina**, the official forecast points to a decline of 18 percent in the 2004 maize crop to 12.4 million tonnes, partly because of dry weather causing plantings to be reduced and partly because of a lower average yield being obtained.

In the **United States** planting of the bulk of the 2004 maize crop will begin from April. At this early stage, assuming generally normal weather conditions for the season, the aggregate 2004 coarse grain crop (mostly maize) is tentatively forecast to be about average. The final estimate of the 2003 coarse grains crop is 276 million tonnes, almost 13 percent up from the previous year's poor crop and above the average of the past five years. In **Canada**, the early outlook for 2004 suggests coarse grains production will remain close to the previous year's level and just above the five-year average.

In **Europe**, although it is still too early to accurately forecast the main spring and summer coarse grain crops, as for wheat, a strong recovery in production is expected after last year's low drought-affected level. A sharp increase is expected especially among the **EU** countries, where the spring barley and maize areas are expected to rise following the EC decision late last year to reduce the compulsory set-aside requirement from 10 to 5 percent. Among the **CEECs**, early indications mostly assume a return to about-average production levels, meaning a significant increase from 2003 in several countries. In the **European CIS,** the area planted with winter coarse grains is estimated to be up from last year and similar to 2002 when a bumper harvest was collected. However, the bulk of the coarse grains are planted in the spring (April/May). Assuming normal weather, the harvest should recover from the sharply reduced level last year.

In **Australia**, early prospects for the 2004 summer coarse grain crop (mostly sorghum) are very favourable reflecting good rains in the main producing areas.

World trade to remain flat for the third consecutive season

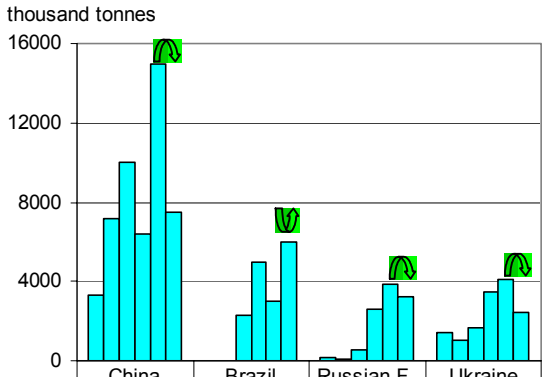
World trade in coarse grains in 2003/04 (July/June) is forecast at 105 million tonnes. This is slightly higher than the forecast in November and virtually unchanged from the previous two seasons, in spite of a sudden surge in imports by several countries in Europe. International trade in maize is forecast to remain steady at about 79 million tonnes, but trade in barley is forecast to decline slightly, to 15.5 million tonnes and sorghum to increase slightly to 7.5 million tonnes. Trade in oats, rye and millet are also forecast to remain largely unchanged at 1.8 million tonnes, 1.2 million tonnes and 160 000 tonnes, respectively.

While on an aggregate basis, this year's variation in trade seems minimal, important changes are taking place at regional and country levels. Imports are likely to decrease in almost all regions except in Europe and Latin America. In Europe, total imports are forecast at 11 million tonnes, up 50 percent from the previous season. In the EU, imports (mostly maize and sorghum) are forecast to increase by 50 percent to the highest level in 15 years, mainly in response to an 12 percent reduction in 2003 production and very tight supplies of feed wheat. Last year's drought-reduced production shortfalls have also raised import needs in

several countries outside the EU, especially the Russian Federation, Poland, and Hungary. Among the Latin America and the Caribbean countries, imports of sorghum by Mexico are forecast to increase due to strong feed demand.

In North America, a strong rebound in production in Canada is expected to result in a cut of over 2.6 million tonnes, or nearly 60 percent, in imports. In Asia, total imports are forecast down by about 1 million tonnes, to 57 million tonnes. The decrease is driven, in part, by dampened import demand for maize, reflecting a contraction in poultry production in countries affected by this year's outbreaks of avian influenza. Nonetheless, a number of Asian countries are expected to increase their imports this season: in particular, purchases of barley by the IRI and Saudi Arabia are forecast to increase sharply as a result of a growing feed demand. Aggregate imports in Africa are put at roughly 14 million tonnes, at least 2 million tonnes below the previous season. Bumper barley crops in several countries in North Africa would result in a sharp decline in barley imports. In the Sub-Saharan region, maize imports by South Africa are likely to fall below the previous season, based on smaller pace of purchases so far this season and the fact that the price of local maize is below international levels, making large imports before the start of the next season unlikely.

Coarse grain exports down in most emerging exporting countries



	China	Brazil	Russian F.	Ukraine
1998/99	3326	7	167	1405
1999/00	7181	8	95	1047
2000/01	10002	2296	531	1628
2001/02	6386	5000	2562	3505
2002/03	14964	3000	3825	4074
2003/04	7520	6000	3232	2447

Regarding exports, the situation is very similar to wheat in that a recovery in production among major exporters with the exception of EU, is expected to result in larger sales and hence a recapturing of their global market shares. The biggest increase is expected from the United States with its total shipments rising by over 6 million tonnes from the previous year's reduced level to almost 54 million tonnes. By contrast, as shown in the chart, among the emerging exporters, only Brazil is forecast to increase its exports, to a peak volume of over 6.0 million tonnes, supported by a record maize production. By contrast, tighter supplies in China are likely to lead to the halving of its maize exports this season, while exports by Ukraine could also decline sharply as a result of high domestic prices.

Higher feed and industrial usage

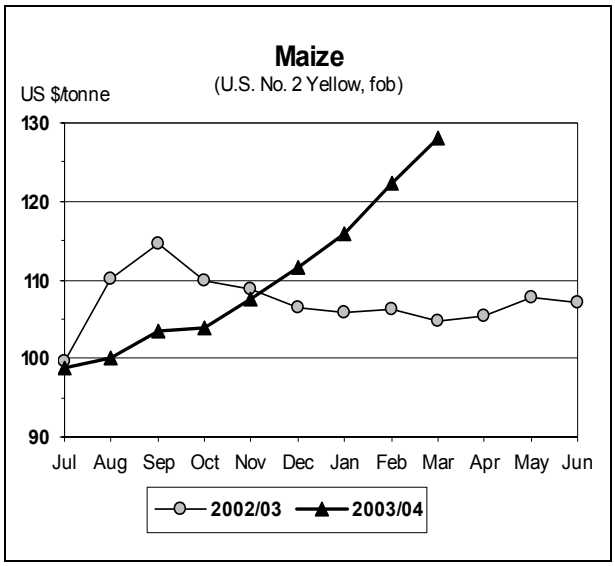
Global coarse grain utilization is expected to expand by 3 percent in 2003/04, to 950 million tonnes. Higher demand for animal feed coupled with record use for ethanol production in the United States are among the main factors for this increase. While a strong recovery in the combined coarse grain production in Australia, Canada and the United States is expected to enable those countries to meet the expected growth in their feed demand, the tight wheat supply situation in Europe has given rise to higher feed use of coarse grains in some markets, in particular in the EU.

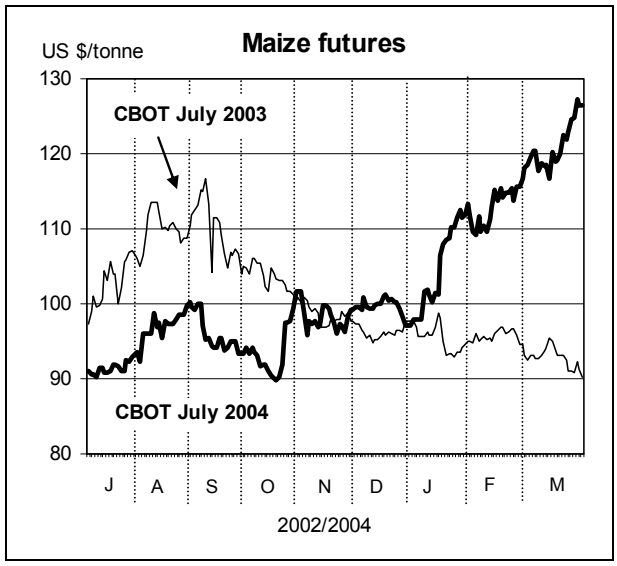
Falling inventories also among major exporters

Global coarse grain inventories for crop years ending in 2004 are put at 152 million tonnes, down 23 million tonnes from their opening levels. Total coarse grain stocks held by the five major exporters are forecast at 46 million tonnes, down 8 million tonnes from the previous season. In spite of a recovery in production in the United States, ending stocks in that country are still likely to show a decline as a result of a rebound in domestic use and a surge in exports. Also, stocks in the EU are forecast to drop sharply, following poor harvests in 2003 and strong domestic demand. Nonetheless, the bulk of the anticipated sharp reduction in global inventories would again be on account of China where stocks are forecast to decline by a further 18 million tonnes as a result of a drop in production, high domestic use and continuing exports.

Tight supplies lead to high prices

Export prices for most coarse grains have been rising steadily since the start of the current marketing season in June. International maize prices even began to surge above the previous season's levels from mid-October 2003, in response to tighter supplies and strong demand. While the outbreaks of animal diseases in North America and Asia (BSE and the avian influenza) have had some dampening impact on feed grain demand, prices continued to receive underlying support from reduced sales by China, near-record low stocks in the United States and persistent rallies in soybean prices. In March, US maize export price (US No.2 Yellow) averaged US$128 per tonne,





representing a gain of some US$24 per tonne since October and as much as US$23 per tonne, or 22 percent, above the corresponding month last year. Similarly, by late March, the CBOT July 2004 maize futures rose to US$36 per tonnes above the corresponding period in the previous season. While maize prices are likely to remain strong for a while, they could recede from the current high levels following larger than expected harvests in Argentina and also improved crops forecasts in South Africa.

Rice

Rice Production

	2003 estimate	2004 forecast	2004 cf 2003
	(…million tonnes…)		%
ASIA	**538.1**	**556.8**	**3.5**
Bangladesh	39.5	40.5	2.4
Cambodia	4.7	4.7	0.0
China 1/	167.5	178.8	6.7
India	131.9	136.0	3.1
Indonesia	52.1	53.1	2.0
Iran, Islamic Rep. of	3.3	3.4	2.0
Japan	9.7	10.7	9.6
Korea, Rep. of	6.0	6.7	11.4
Myanmar	24.6	23.0	-6.7
Pakistan	7.3	7.6	4.1
Philippines	14.0	14.6	4.1
Thailand	26.8	27.5	2.5
Viet Nam	34.5	34.2	-0.9
AFRICA	**17.8**	**17.9**	**0.3**
North Africa	**6.2**	**6.2**	**0.4**
Egypt	6.2	6.2	0.4
Sub-Saharan Africa	**11.6**	**11.6**	**0.2**
Western Africa	**7.1**	**7.2**	**1.6**
Nigeria	3.4	3.5	2.9
Central Africa	**0.4**	**0.4**	**-0.3**
Eastern Africa	**0.9**	**1.0**	**8.7**
Southern Africa	**3.1**	**3.0**	**-5.5**
Madagascar	2.8	2.7	-5.4
CENTRAL AMERICA	**2.3**	**2.4**	**6.3**
Mexico	0.3	0.3	10.7
SOUTH AMERICA	**19.7**	**21.9**	**11.6**
Argentina	0.7	0.9	30.9
Brazil	10.4	12.5	20.4
Colombia	2.5	2.6	2.0
NORTH AMERICA	**9.0**	**9.8**	**8.9**
United States	9.0	9.8	8.9
EUROPE	**3.2**	**3.3**	**2.8**
EU	2.7	2.7	1.7
OCEANIA	**0.4**	**0.6**	**51.2**
Australia	0.4	0.6	53.5
WORLD	**590.5**	**612.8**	**3.8**
Developing countries	567.4	587.5	3.5
Developed countries	23.1	25.3	9.5

Source: FAO. **Note**: Totals computed from unrounded data.
1/ Including Taiwan Province.

Paddy production in 2004 tentatively set to grow by 3 percent

FAO first forecast of paddy production in 2004 shows a 4 percent increase from the previous season, to 613 million tonnes, which would be the highest level on record. The forecast is still highly tentative, since the season in the major producing countries situated in the northern hemisphere will not commence until mid-year.

However, initial results from on-going harvests in countries in the southern hemisphere already point to a 3 million tonne increase from the previous season, to 81 million tonnes. Along and south of the equator, prospects are positive so far in Indonesia as well as Malaysia where some 400 000 hectares of new land have been opened for rice cultivation. By contrast, drought at planting time has limited the production potential in Sri Lanka. In Africa, the season is well advanced in Madagascar, Mozambique and Tanzania. In Madagascar, production might fall this year, reflecting a poor start of the season and the impact of two cyclones that hit the country at a critical stage of crop development. A recovery from last year's shortfall is anticipated in Tanzania.

High prices last year bolstered plantings in most of South America. Favourable growing conditions have further boosted the outlook for Argentina, Brazil and Uruguay. By contrast, drought conditions are expected to impair production in Ecuador and Peru. Low water allocations to producers in Australia constrained plantings again this year, but were sufficient to sustain a 54 percent increase in production from the dismal outcome of last season.

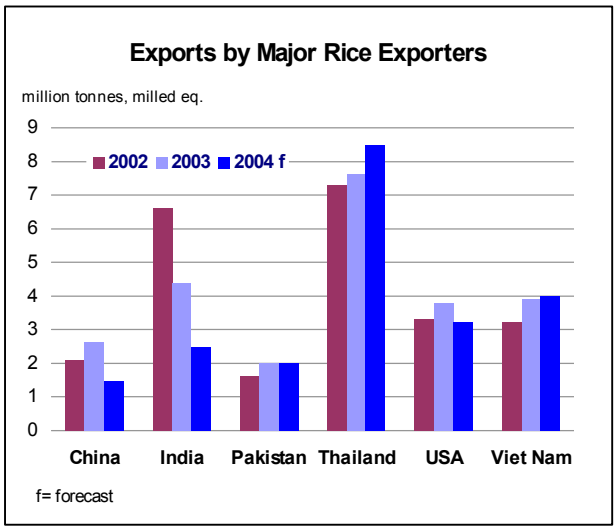
The early forecasts of 2004 paddy production in northern hemisphere countries are mainly based on the prevailing government policies, expectations of favourable producer prices and "normal" growing conditions. In Asia, China and India are expected to account for much of the anticipated increase in world output. In the first country, rising domestic prices have raised concern of an imminent tightness, which has prompted the government to launch several initiatives to boost production. Sizeable production gains are anticipated in Bangladesh, Indonesia, Philippines and the Islamic Republic of Iran, consistent with the expansionary policies pursued by those countries. Production should recover in Japan and the Republic of Korea where adverse weather conditions hampered crops last season. Strong price incentives should also boost the sector in Thailand and Pakistan. By contrast, Viet Nam has set a smaller production target this season, reflecting a 10 percent loss of its winter-spring crop because of drought. In Myanmar, the disruption caused by sudden changes in policies and the resulting slump in domestic prices are also anticipated to depress output. Production in Africa is set to grow modestly, although government efforts to promote the sector could give rise to some increases in Ghana, Mali and Nigeria. High prices should also sustain growth in Egypt. In Central America and the Caribbean, increases are anticipated in Mexico, supported by the introduction of new programmes to guarantee a minimum income to producers. High import prices should also boost output in Costa Rica, Nicaragua and Panama. In the rest of the world, the United States has forecast a record output in 2004, since producers are expected to respond to high prices by increasing plantings. Little change in production is currently foreseen for the EU, although the implementation of the new policy regime as of September, introduces some elements of uncertainty.

FAO Rice Conference

FAO held an international rice conference on 12-13 February 2004, to celebrate the International Year of Rice. The meeting was attended by representatives of governments, non-governmental organizations and the private sector.

The Conference discussed issues related to the commodity from a technical and economic perspective, highlighting efforts that are being made at the national and international levels to overcome major production constraints and opportunities for increased efficiency and sustainability within the rice-based system. The Conference also confronted issues related to the potential of science and new technologies, such as biotechnology, to improve the efficiency of rice production.

Presentations from the Conference, and background documents can be accessed at the International Year of Rice website: http://www.fao.org/rice2004/en/e-001.htm



A sharp contraction in international trade in rice expected in 2004

FAO's forecast of world trade in rice in 2004, which is largely determined by the outcome of production in 2003, has been reduced by some 0.8 million tonnes from the previous report to some 25.5 million tonnes, which is 2.5 million tonnes lower than the estimate for 2003. The lowering of the 2004 forecast mainly reflects a worsening of export prospects for China and India, which more than offset some upward revisions for Thailand, Cambodia, Egypt, the United States and Uruguay.

According to the present outlook, China is anticipated to export 1.5 million tonnes during 2004, down from 2.6 million tonnes last year. In recent months the country has witnessed sharp increases in market prices that are likely to prompt the government, which holds a monopoly on rice exports, to restrict sales abroad. In India, steps have already been taken by the Food Corporation of India (FCI) to temporarily suspend sales for exports, pending an assessment of FCI buffer stocks, which were heavily depleted in the past two years. The ban coincided with the passing of new regulations, which will allow exporters to purchase rice directly from farmers rather than exclusively through the FCI. Sales from the country are currently prospected to hover around 2.5 million tonnes, down from 4.4 million tonnes in 2003. In January, Myanmar also prohibited exports for six months. As a result, the country's exports are forecast at 500 000 tonnes, little changed from last year but well below the country's potential. United States' shipments are expected to drop from 3.8 million tonnes to 3.2 million tonnes, constrained by high domestic prices and falling availabilities. Limited supply should also restrain sales from Australia to 200 000 tonnes, or about one-third of "normal" levels. Similarly, exports from Japan and the Republic of Korea, most of which are made in the form of food aid, are anticipated to be smaller following last season's production shortfalls and dwindling stocks. By contrast, shipments from Pakistan should remain of the order of 2 million tonnes, especially if the government maintains transportation subsidies, while sales by Thailand and Viet Nam, the two major rice exporters, are officially foreseen to increase to 8.5 million tonnes and 4.0 million tonnes, respectively. Viet Nam's export performance, however, will depend critically on the size of the winter/spring crop currently at the harvest stage. Scarcity of supplies already prompted the Government to advise exporters to refrain from signing new contracts requiring deliveries before the next harvest in June. In the rest of the world, favourable crops and higher international prices should boost shipments by Argentina, Uruguay and Egypt.

The reduction in the 2004 global import forecast reflects a number of adjustments that take into account the prospects of higher prices and freight rates and the reduced availabilities in China and India. For instance, the forecast of aggregate imports by African countries, part of which were sourced in those two countries, has been cut. At the same time, the forecast of imports by China was raised, following news of an intensification of trans-border movements of rice into the country.

Compared with 2003, imports by Asian countries are now anticipated to fall, mainly on account of weaker demand by Bangladesh and the Philippines following excellent harvests in 2003, and by Indonesia, where

imports have been banned from 20 January to 30 June. Despite the recent announcement of the liberalization of rice imports by the Islamic Republic of Iran, the imposition of high tariffs (100 percent ad-valorem tariff plus a discretionary duty of some US$190 per tonne this year) and improved domestic availability should also result in reduced shipments to the country. Smaller flows of food aid are likely to cut overall rice deliveries to the Democratic Republic of Korea. By contrast, Iraq, where the control over food grain procurement passed from the World Food Programme to the country's Ministry of Trade in April, is anticipated to import 1 million tonnes, up from 700 000 tonnes last year. China (mainland) is foreseen to purchase about 1.2 million tonnes, the highest level since 1995. In Africa, overall rice imports are likely to fall again this year, especially if world prices and freight rates keep rising, with the Cote d'Ivoire, Nigeria and Senegal accounting for much of the contraction. However, deliveries to Ghana and Madagascar are forecast to increase, to compensate for the latest season production shortfalls. In Latin America and the Caribbean, Brazil cut the official import forecast to 550 000 tonnes, down from over 1 million tonnes in 2003, in anticipation of a good 2004 paddy harvest. However, deliveries to both the Dominican Republic and Peru are foreseen to increase substantially, to compensate for smaller domestic supplies. Among the other major rice markets, deliveries to the United States are anticipated to be larger, attracted by high domestic prices. The Russian Federation is also foreseen to step up its purchases, especially since, unless extended, the 10 percent tariff would no longer be subject to a minimum value of €30 per tonne as of 20 March. Imports to the EU are provisionally forecast to remain of the order of 700 000 tonnes, although the halving of intervention prices as of September 2004 might result in much lower variable import duties.

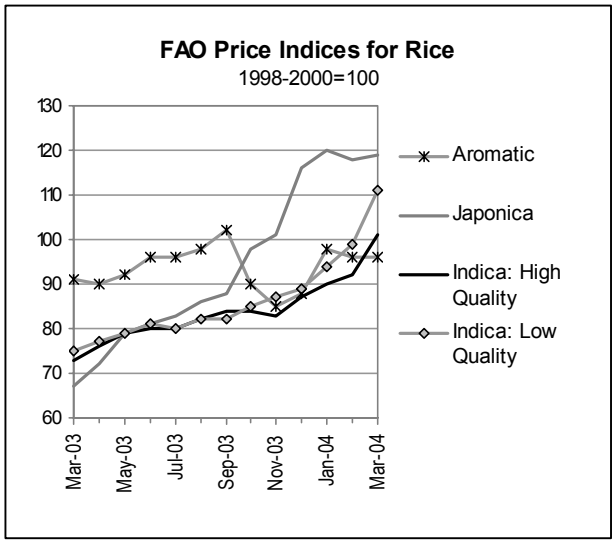
Overall rice consumption stable in 2004

World rice utilization is forecast to reach some 415 million tonnes, in milled equivalent, little changed from the previous year. Most will be used for human consumption, with food utilization estimated to fluctuate around 368 million tonnes. On a per capita basis, rice food consumption is forecast at 58.6 kg in 2004, down slightly from 58.7 kg last year. Consumers are likely to face price rises this year, which will be compounded in the major importing countries by sharp increases in freight rates.

Global carry over stocks to fall for the fourth consecutive year

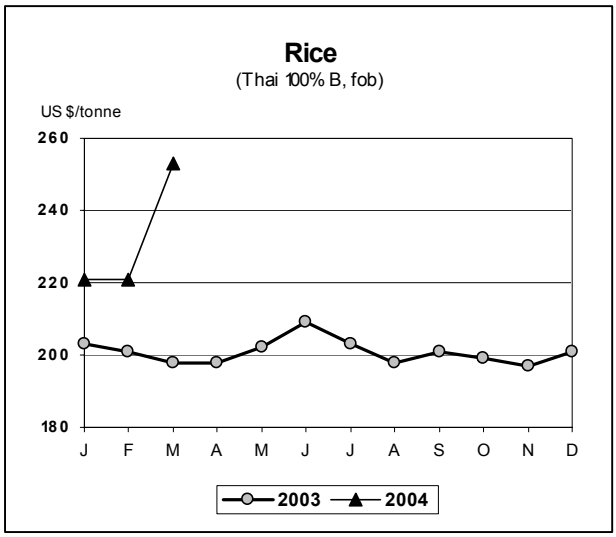
Since global rice utilization is again anticipated to outstrip production, global rice stocks are forecast to fall to 102 million tonnes at the close of the marketing season ending in 2004, down from 120 million tonnes a season earlier. As in the previous years, China is likely to account for much of the contraction, as the country end-of-season inventories could shrink from 78 million tonnes to 62 million tonnes. Among major exporters, a decline is anticipated in Australia, Egypt, Thailand and the United States. Rice reserves should also diminish in some major importing countries, including the Islamic Republic of Iran and the Philippines, in part due to reduced imports prospects, as well as in Japan, the Republic of Korea, following last season production shortfalls. By contrast, carry-over stocks might increase somewhat in India, though remaining well below historical levels, and in Myanmar, but would change little in Viet Nam.

International rice prices to keep rising



Rice prices recovered strongly over most of 2003, as reflected in the FAO all Rice Price Index (1998-2000=100) which averaged 82 for the whole year, up from 72 in 2002. The strength persisted in the first few months of 2004 as supplies tightened in major exporting countries. In March 2004, the index reached 109, the highest level since February 1999, and 20 points above the value in October.

Although the past five months coincided with the harvesting of the main paddy crops in major exporting countries, prices of all the various types and qualities of rice have followed a rising trend since October. For instance, within the high quality Indica rice segment, the price of Thai 100%B rice rose from US$199 per tonne last October to US$253 per tonne in March, with an even stronger increase reported for rice from Pakistan. As for the lower quality Indica, the Thai A1



Super quotations passed from US$158 to US$213 over the period, sustained by the withdrawal of Myanmar and Indian exporters from the market. Particularly strong price increases also affected medium grain rice, with the Japonica rice price sub- index surging 21 points between October and March. The rise was less pronounced for aromatic rice prices, the index of which rose by 6 points in the same period.

International rice prices are expected to increase further in the coming months, especially if China, which will not harvest its early rice crop before June, intensifies its purchases. However, the pressure would be mitigated, should Myanmar or India lift their restrictions on rice exports.

World Cereal Utilization

World Cereal Utilization

	2001/02	2002/03	2003/04 forecast
	(. . . . . million tonnes . . . . . .)		
Total utilization			
World	**1 947**	**1 950**	**1 971**
Developing countries	1 181	1 185	1 213
Developed countries	766	765	759
Food consumption 1/			
World	**969**	**975**	**990**
Developing countries	795	801	816
Developed countries	174	174	174
Feed use			
World	**714**	**710**	**711**
Developing countries	265	267	275
Developed countries	449	443	436
Other uses 2/			
World	**263**	**265**	**270**
Developing countries	121	116	121
Developed countries	143	149	148

Source: FAO. Note: Total computed from unrounded data.

1/ For direct human consumption. 2/ Other uses include seed, industrial uses and post harvest losses.

Cereal utilization rises in 2003/04 but remains below the long-term trend

Global cereal utilization in 2003/04 is forecast at 1 971 million tonnes, up 1 percent from 2002/03 but still slightly below the 10-year trend. In spite of a significant increase in international cereal prices so far during the 2003/04 marketing season, global cereal utilization is set to expand faster than in 2002/03, partly sustained by a strong rebound in domestic feed and industrial use in the United States.

Overall, the growth in world **food cereal consumption** in 2003/04 is expected to keep pace with the rise in population, with the total consumption rising to 990 million tonnes. Thus, per caput food use of cereals is forecast to remain stable at about 157 kg. Similarly, per caput food consumption in the LIFDCs, as a group, is likely to remain stable at 165 kg, helped by above-average harvests in several countries.

Total cereal **feed use** in 2003/04 is forecast at 711 million tonnes, roughly the same as the previous season's reduced level. A rebound in coarse grains production in the United States is helping to meet this season's feed demand, which is forecast to increase in spite of the discovery of BSE (Bovine Spongiform Encephalopath) in December. Feed use of cereals in Brazil is also forecast to increase significantly, especially for maize, on the back of large supplies and strong demand from the poultry sector. By contrast, increased grain prices in Europe and the CIS have resulted in a significant decline in cereal feed use in these regions. This is especially evident in the case of wheat, feed use of which is forecast to decline by 15 percent in Europe. Also in the CIS countries, Ukraine in particular, feed use is seen to drop significantly as farmers slaughter their cattle and pigs rather than feed them with expensive feed grains. In addition, a rapid spread of the lethal avian flu in Asia, where millions of birds have been eliminated since January, is depressing demand for feed grains for poultry production in the affected countries.

Other uses of cereals, which include post harvest losses, seeds and industrial uses, are estimated to have peaked in 2003/04, at 270 million tonnes. While the increase in rice and coarse grains production in 2003 would also give rise to higher post-harvest losses, the more remarkable feature is the increase in industrial use of cereals, mainly maize, which has been

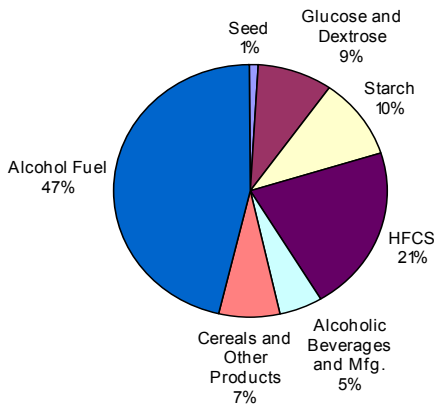
growing steadily in recent years. The increase in industrial use is mostly confined to China and the United States, mainly driven by a growing demand for maize-based ethanol production.

Per Caput Food Consumption of Cereals

	2001/02	2002/03	2003/04 forecast
	(. . . . . kg. per head . . . . .)		
Developing countries	165	164	165
Developed countries	132	131	131
TOTAL	**158**	**157**	**157**
Low-income food-deficit countries (excluding China and India)	166	165	165
	(158)	(158)	(159)
Wheat	70	70	70
Coarse grains	29	28	29
Rice (milled)	59	59	59

Source: FAO

Industrial Maize Utilization in the United States 2003/04



Source: USDA, ERS, Feed Outlook, Mar. '04

In the United States, the industrial use of maize continues to expand, mostly for production of ethanol. Based on the latest official figures, maize used to make ethanol-based fuel is forecast to hit a new record, at around 29 million tonnes, 4 million tonnes more than in 2002/03, an increase of 150 percent in 10 years. Among other industrial uses, maize use for high fructose maize syrup (known as HFCS) is expected to remain at around 13.6 million tonnes, while the use for starch is likely to increase slightly, to around 6.6 million tonnes.

Review of world cereal utilization in 2002/03

World **total utilization of cereals** in 2002/03 is estimated at 1 950 million tonnes, only 3 million tonnes more than in 2001/02 and 0.4 percent below the 10-year trend. For the most part, the slow growth in total cereal utilization in 2002/03 reflected a decline in the overall use of coarse grains in North America and Australia.

Aggregate food consumption of cereals (excluding indirect uses, such as for alcohol, starches and sweeteners) in 2002/03 is estimated at 975 million tonnes, up only 0.6 percent from the previous season (see the box on Dietary Patterns of Cereals). Growth in food consumption has been most subdued in countries with a strong economy and rising incomes. In those countries, the shares of cereals in dietary intakes continue to decline, mainly in favour of vegetable oils and animal products. This is particularly evident in China, the world's most populous country, where per caput cereal food consumption has fallen by as much as 10 kg over the past decade, to around 181 Kg in 2002/03.

World **feed use** of cereals, which represents more than one-third of total cereal utilization, contracted slightly in 2002/03 to about 710 million tonnes. A significant decline of around 11 million tonnes occurred in the United States alone, mainly because of reduced supplies and high prices. Nonetheless, the decline in the United States was partially offset by continuing expansions in several Asian countries, especially China, as well in the EU.

Other uses of cereals (seed and industrial purposes plus post-harvest losses) including seed and industrial use) moved up for the third consecutive season. The main factor behind the increase has been the rise in industrial use of maize, especially a continuation of strong demand in the United States for maize-based ethanol production.

Dietary Patterns of Cereals[1/]

Wheat is the primary staple food for almost one-third of the world's population (including most developed countries). Among the developing countries, wheat ranks first in dietary shares in countries in the Near East and North Africa, in many localities in Latin America, Pakistan, and the North of India. It is also the secondary staple for over 3.3 billion people in developing regions (or 70 percent of this population). Wheat is not a homogeneous grain. For instance, in the Near East and North Africa, and in parts of South Asia (India and Pakistan), wheat is processed into an unleavened bread; in East and South East Asia, it is eaten in the form of noodles; and in North Africa, as 'couscous'. Other wheat preparations featuring in many diets include bread, biscuits, and bakery products.

Rice is grown in many regions, under a wider variety of climatic and soil conditions than any other crop. It is nearly always eaten in boiled form, without further processing other than milling, which is in contrast with most other cereals. However, in some countries in the Far East, manufactured rice products appear in diets, mainly in the form of rice noodles, which compete to some extent with wheat noodles. Rice is the major cereal for roughly 3.4 billion people in developing countries.

Among the major **coarse grains**, **maize** represents either the major staple or main supplementary staple for 1 billion people in developing regions, mostly in Sub-Saharan Africa. In Latin America, white and yellow maize is extensively used to make unleavened bread ('tortilla'), and also eaten 'on the cob', while in Sub-Saharan Africa white maize is processed into various products, but popular forms include starchy pastes such as porridge. In the Near East, maize flour is commonly used to make bread, while in South and South East Asia (notably Indonesia and the Philippines) it is consumed in a number of diverse ways. **Millet** and **sorghum** are major foods for around 60 million people concentrated in the inland areas of tropical Africa, who consume them mostly in the form fermented or unfermented preparations. These grains also appear in diets in large parts of India and Pakistan, where they are consumed predominantly as unleavened bread. Among the other coarse grains, **barley** is popular in North Africa and the Near East, where it is used to make bread and as an ingredient added to soup dishes. It is also widely eaten in parts of East Asia (Republic of Korea and Japan particularly), where it is added to rice. **Rye** is commonly used to make bread in many developed countries, particularly those in Northern and Eastern Europe, but also in areas of North Africa and the Near East.

1/ For a comprehensive analysis of cereal dietary changes over time see, *Cereal and Other Starch-Based Staples: Are Consumption Patterns Changing?* FAO, 2004. Available at: http://www.fao.org/docrep/meeting/007/J1183e/J1183e00.htm

Food Aid

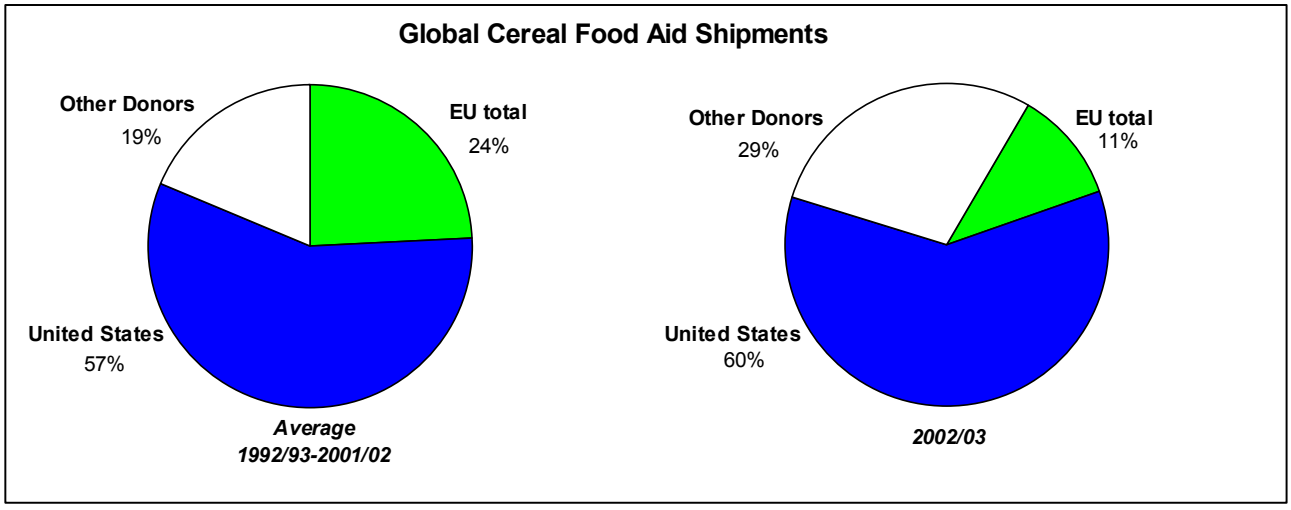
Cereal food aid anticipated to decline in 2003/04

Total cereal food aid shipments in 2003/04 (July/June) could decline in view of generally tighter world cereal supplies, strong international prices and soaring ocean freight rates. In the United States, the world's largest donor, the requested food assistance funding for the FY 2003 (fiscal year 2002/03) under the P.L. 480 Title II, its primary food aid programme, stood at US$1.185 billion, up from US$850 million appropriated in the FY 2002[1/]. However, the requested funding for the FY 2004 remains the same as in FY 2003[2/]. Based on the budget allocations alone it is difficult to determine the actual volume of food aid shipments by the United States in 2003/04, but without an increase in funding, the steep rise in prices coupled with higher transport costs could result in a reduction in cereal food aid shipments from the United States in 2003/04.

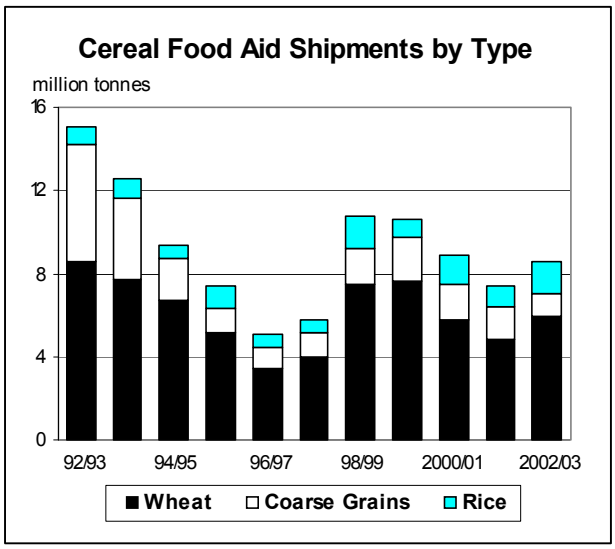
Among the other major donors, however, Canada has been noted to have expanded its food aid activities since 2002 and this trend is expected continue in 2003/04. Since the start of this marketing season, cereal shipments from the Republic of Korea have approached 577 000 tonnes, up 170 000 tonnes from 2002/03, primarily destined for the Democratic Republic of Korea. In December 2003, the Government of India announced additional donations of wheat, some 61 000 tonnes. India also pledged about 1 million tonnes of wheat to the United Nations World Food Programme (WFP) for distribution in the form of fortified biscuits for school children in Afghanistan.

1/ Title II of the Agricultural Trade Development and Assistance Act of 1954 (Public Law 480, also known as "Food for Peace") is administrated by USAID. Nearly half of the allocated value is usually designated for humanitarian emergency food assistance, the bulk of which in the form of cereals.

2/ The fiscal year 2004 in the United States begins on October 1, 2003.

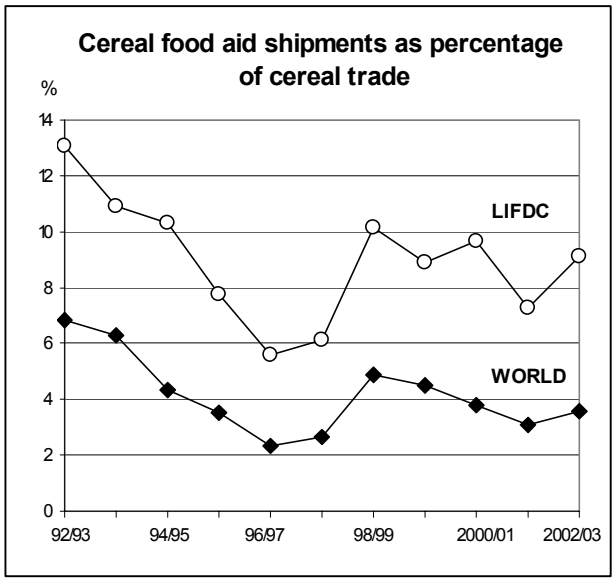


Cereal food aid shipment increased in 2002/03[1/]



Total cereal food aid shipment in 2002/03 reached 8.6 million tonnes, an increase of 16 percent from the reduced level in 2001/02 (Appendix Table 13)[2/]. Larger wheat shipments accounted for most this increase, which, at almost 6 million tonnes, were 1 million tonnes more than in 2001/02. Rice shipments also increased significantly, by 600 000 tonnes to 1.6 million tonnes. By contrast, total coarse grains shipments fell by 500 000 tonnes to 1.1 million tonnes, the lowest since 1996/97. Shipments from the United States increased by 6 percent to 5.2 million tonnes in 2002/03, which represented 60 percent of the total. Food aid by the Republic of Korea, a non-traditional donor country, reached 400 000 tonnes, consisting entirely of rice donations to the Democratic Republic of Korea.

Cereal food aid shipments to the LIFDCs reached 7.4 million tonnes in 2002/03, up 1.3 million tonnes from the previous season. At this level, the share of food aid shipments as a percentage of exports to the LIFDCs is around 9 percent, which is higher than in 2001/02 but still well below the 13 percent level in the early 1990s. The increase in shipments to LIFDCs in 2002/03 was mostly driven by larger donations to Africa and Asia. The top five recipients of cereal food aid were Iraq (1.3 million tonnes), Ethiopia (1.2 million tonnes), the Democratic Republic of Korea, (975 000 tonnes), Bangladesh (353 000 tonnes), Afghanistan (388 000 tonnes), and Angola (217 000 tonnes).



Non-cereal shipments in 2002 almost unchanged[3/]

Total food aid shipments in the form of non-cereals reached almost 1.4 million tonnes in 2002, slightly below the previous year (Appendix Table 15). For the second consecutive year, the leading destination for non-cereal food aid was Pakistan, which received 177 000 tonnes of mostly pulses and vegetable oils. Other major recipients included the Democratic Republic of Korea, Afghanistan, India, and Indonesia.

Food aid in pulses account for most of non-cereal food aid. In 2002, total shipment of pulses reached roughly 762 000 tonnes, the same as in 2001. Shipments of another major food aid commodity, vegetable oils, were reduced slightly. By contrast, a strong rebound in skim milk donations was recorded in 2002, mostly due to higher shipments by the United States.

1/ More detailed statistics on cereal and non-cereal food aid shipments (1970/71-2002/03) are available on the Internet as part of the FAO World Wide Web at the following URL address: http://www.fao.org , under *Statistical Database* select FAOSTAT and then *All Databases*

2/ Processed and blended cereals are converted into their grain equivalent to facilitate comparisons between deliveries of different commodities.

3/ While cereal shipments as food aid are reported on a July/June basis, non-cereals food aid is reported on a calendar year basis and as of March 2004, complete information is available only for 2002.

Non Cereals - Food Aid Shipments by type

	1998	1999	2000	2001	2002	Change from 2001
	(. . . . . thousand tonnes . . . . .)					
Butter oil	0.2	0.2	0.2	0.0	0.0	0.0
Dry fruit	0.2	2.4	3.1	2.6	2.8	0.2
Edible fats	8.1	2.2	5.1	8.4	11.6	3.2
Fish & products	9.7	15.7	7.8	9.5	10.9	1.4
Meat & products	9.7	234.5	56.6	18.0	23.2	5.3
Milk	25.2	56.8	95.8	45.2	66.7	21.6
Other dairy products	0.2	1.3	0.9	0.2	1.2	1.0
Pulses	445.9	1 162.9	606.5	762.5	761.8	-0.7
Sugar	26.4	29.6	48.2	77.0	34.2	-42.9
Vegetable oils	353.1	317.6	413.2	494.2	448.8	-45.4
Other foods	39.1	64.0	67.8	95.3	59.6	-35.7
Total	**891.4**	**1 857.6**	**1 257.0**	**1 435.8**	**1 386.6**	**-49.2**

Source: WFP **Note**: Totals computed from unrounded data.

Non-cereal food aid from the United States, the largest donor, fell to just over 1 million tonnes in 2002, still representing more than 70 percent of the total. Pulses account for more than one-half of all non-cereal shipments by the United States while vegetable oils account for more than one-third. However, donations from the United States in both commodities and sugar declined in 2002, while food aid in the form of meat and edible fats were reduced to nil.

Developments related to the Food Aid Convention

The Food Aid Committee (FAC) extended the Food Aid Convention by two years in June 2003. According to FAC, as of December 2003, total food aid shipped in 2002/03 was estimated at 9.2 million tonnes, in wheat equivalent, 1 million tonnes less than in 2001/02[1/].

1/ Under the FAC rules, all food aid contributions are evaluated and counted in terms of their commercial value relative to wheat, i.e. "in wheat equivalent".

However, total shipments were above the FAC Member countries' combined minimum annual commitments of about 5 million tonnes. Based on the FAC estimates, some 93 percent of aid provided under the Convention was in the form of grants.

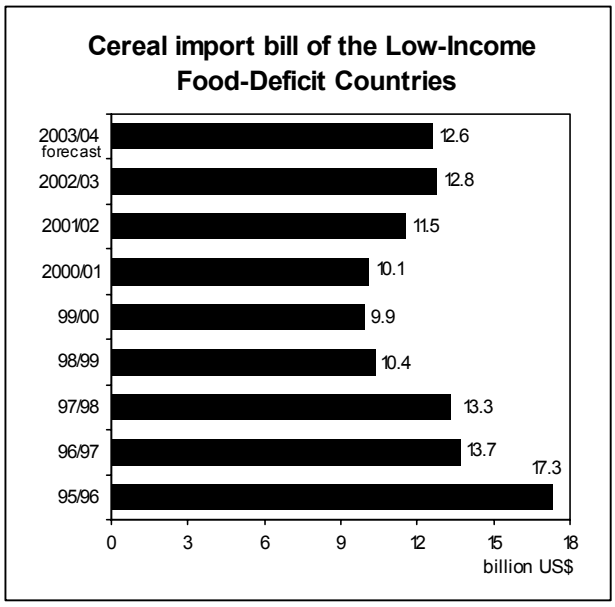
Developments related to the World Food Programme

Food aid shipments channeled multilaterally have grown in size in recent years, reaching an all time high of over 5 million tonnes in 2002/03, up 42 percent from 2001/02. The increase is mostly driven by the continuing growth in food aid channeled multilaterally through the WFP, which in 2002/03 surpassed 4 million tonnes. As of 1 March 2004, confirmed contribution by the donor community to WFP reached roughly US$3.6 billion, the highest on record. Of this total, contributions to Emergency Operations (EMOPS) reached US$2.4 billion. Support for Protracted Relief and Recovery Operations (PRROs) remained high, at more than US$1.1 billion.

Cereal Import Bill

Cereal import bill to rise in 2003/04

The value of the world cereal import bill in 2003/04 is expected to approach US$38 billion, up 2 percent from 2002/03 and the highest since 1996/97. Although world imports of cereals are forecast to decline by around 10 million tonnes in 2003/04, higher international prices and a steep increase in ocean freight rates are expected to keep up the overall cost of cereal imports. In addition, food aid in the form of cereals is expected to decline in 2003/04 which would also raise import costs for those food-aid recipient countries that need higher commercial purchases to meet their import requirements. At the same time, cereal export subsidies appear to be of no importance in 2003/04. The largest exporter, the United States, is not subsidizing cereal exports and the EU, a major wheat exporter, has sharply lowered its exports while not making any use of restitutions as a result of tight supplies and high internal prices.



In the LIFDCs[1/], the total cereal import bill could remain as high as in the previous season, at the aggregate level, and on a regional basis within this group. Similarly, costs of imports by type of cereals (i.e. wheat, coarse grains and rice) are also likely to remain unchanged from the previous season.

The combined cereal import bill of the Least-Developed Countries (LDCs) and the Net-Food Importing Developing Countries (NFIDCs) is forecast to decline by US$400 million to US$7.7 billion in 2003/04. The decrease is mostly driven by the anticipated smaller import requirements in several countries. The most significant declines, in value terms, are anticipated in Ethiopia, Malawi, Mozambique, Morocco, Tunisia, Zambia Afghanistan, Bangladesh and Peru. By contrast, the cost of cereal imports are expected to increase in many other countries, especially Egypt, Kenya, Tanzania, Jordan, Pakistan and Yemen.

1/ For definitions of the special country and economic grouping, see the Statistical Note on the last page of this report.

Changes in Cereal Import Bill of LIFDCs by Region and Commodity

	1995/96	1996/97	1997/98	1998/99	1999/00	2000/01	2001/02	2002/03 estimate	2003/04 forecast
	(.....US$ billion.....)								
LIFDCs	**17.3**	**13.7**	**13.3**	**10.4**	**9.9**	**10.1**	**11.5**	**12.8**	**12.6**
Africa	4.8	4.7	4.4	4.0	3.9	4.4	5.0	5.7	5.3
Asia	11.7	8.2	8.2	5.7	5.5	5.0	5.8	6.2	6.3
Latin Am. and Carib.	0.6	0.6	0.5	0.6	0.5	0.5	0.6	0.7	0.7
Oceania	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Europe	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.2	0.2
Wheat	11.1	8.9	7.1	5.4	5.4	5.6	6.0	7.0	7.0
Coarse grains	3.7	2.8	2.3	2.0	2.5	2.4	2.6	3.0	3.0
Rice	2.4	2.0	4.0	2.9	2.0	2.2	3.0	2.8	2.6

Trends in Cereal Import Bills[1/]

	1998/99	1999/00	2000/01	2001/02	2002/03 estimated	2003/04 forecast
Import Bill (US$ billion)						
Developing countries	21.8	21.6	22.3	23.7	26.5	26.3
LIFDCs	10.4	9.9	10.1	11.5	12.8	12.6
LDCs	2.3	1.9	1.9	2.3	2.9	2.5
NFIDCs	4.6	4.0	4.4	4.4	5.2	5.2
Total volume imported (million tonnes)						
Developing countries	161.5	173.3	172.0	175.5	169.6	160.1
LIFDCs	76.3	80.2	77.8	84.3	81.9	76.0
LDCs	16.8	16.5	15.7	17.1	19.9	15.8
NFIDCs	35.7	32.5	34.3	33.1	32.7	30.8
Food aid (million tonnes)						
Developing countries	7.5	7.6	7.9	7.0	7.8	7.8
% of total imports	4.7	4.4	4.6	4.0	4.6	4.8
LIFDCs	6.9	7.4	7.6	6.7	6.9	6.9
% of total imports	9.0	9.2	9.7	8.0	8.5	9.1
LDCs	3.5	3.6	3.9	2.9	3.7	3.7
% of total imports	21.1	22.1	24.9	17.2	18.7	23.6
NFIDCs	1.0	0.9	1.2	0.9	0.6	0.6
% of total imports	2.9	2.9	3.5	2.8	1.8	1.9
Commercial imports (million tonnes)						
Developing countries	154.0	165.7	164.2	168.5	161.9	152.4
LIFDCs	69.4	72.8	70.2	77.6	75.0	69.1
LDCs	13.3	12.8	11.8	14.2	16.2	12.1
NFIDCs	34.6	31.5	33.1	32.2	32.2	30.2
Per unit import cost (US$/tonne)[2/]						
Developing countries	135.1	124.8	129.8	135.1	156.0	164.2
LIFDCs	136.2	124.0	130.1	136.9	156.2	165.5
LDCs	134.7	116.0	122.4	134.6	147.0	158.4
NFIDCs	128.8	124.0	128.9	132.2	159.2	170.5

Note: Totals computed from unrounded data.

1/ The same countries may appear in more than one special country grouping. For definitions of country groupings see the Statistical Note on the last page of this report.
2/ Based on the per unit cost of total imports.

APPENDIX TABLES

A.1 a) **- WORLD CEREAL PRODUCTION**

	Wheat			Coarse Grains		
	2001	2002	2003 estim.	2001	2002	2003 estim.
	(. . . . . million tonnes . . . . .)					
ASIA	**246.2**	**251.7**	**244.9**	**209.9**	**212.9**	**213.2**
Bangladesh	1.6	1.5	1.5	0.1	0.1	0.1
China 1/	93.9	90.3	86.0	125.1	133.8	125.1
India	69.7	71.8	65.1	34.0	25.7	33.7
Indonesia	-	-	-	9.3	9.7	10.8
Iran, Islamic Rep. of	9.5	12.5	13.5	3.5	4.7	4.9
Japan	0.7	0.8	0.8	0.2	0.2	0.3
Kazakhstan	12.7	12.7	12.0	3.0	3.0	2.6
Korea, D. P. R.	0.1	0.1	0.2	1.6	1.8	1.9
Korea, Rep. of	-	-	-	0.5	0.4	0.4
Myanmar	0.1	0.1	0.1	0.7	0.8	0.9
Pakistan	19.0	18.2	19.3	2.2	2.2	2.1
Philippines	-	-	-	4.5	4.3	4.6
Saudi Arabia	2.0	1.8	1.8	0.3	0.3	0.3
Thailand	-	-	-	4.7	4.5	4.5
Turkey	19.0	19.5	19.5	10.2	11.0	10.4
Viet Nam	-	-	-	2.1	2.3	2.4
AFRICA	**18.0**	**16.3**	**21.5**	**82.6**	**81.8**	**92.7**
North Africa	**12.9**	**11.7**	**17.0**	**10.0**	**9.9**	**12.7**
Egypt	6.3	6.6	6.8	7.8	7.4	7.6
Morocco	3.3	3.4	5.1	1.3	1.9	2.8
Sub-Saharan Africa	**5.1**	**4.6**	**4.4**	**72.6**	**72.0**	**80.0**
Western Africa	**0.1**	**0.1**	**0.1**	**33.4**	**34.8**	**37.7**
Nigeria	0.1	0.1	0.1	19.6	20.2	20.9
Central Africa	**-**	**-**	**-**	**2.6**	**2.6**	**2.7**
Eastern Africa	**2.1**	**1.9**	**2.6**	**22.0**	**18.8**	**22.7**
Ethiopia	1.5	1.2	1.9	7.5	6.2	8.1
Sudan	0.2	0.4	0.4	5.1	3.5	5.9
Southern Africa	**2.9**	**2.6**	**1.7**	**14.6**	**15.8**	**17.0**
Madagascar	-	-	-	0.2	0.2	0.2
South Africa	2.5	2.3	1.4	7.9	10.5	10.2
Zimbabwe	0.3	0.2	0.1	1.6	0.6	0.9
CENTRAL AMERICA	**3.3**	**3.2**	**2.9**	**30.5**	**30.1**	**32.1**
Mexico	3.3	3.2	2.9	26.9	26.6	28.3
SOUTH AMERICA	**21.4**	**18.2**	**22.9**	**71.9**	**65.0**	**79.3**
Argentina	15.3	12.3	14.0	19.6	18.7	19.1
Brazil	3.3	2.9	5.9	43.0	37.0	50.2
Colombia	-	-	-	1.4	1.4	1.4
NORTH AMERICA	**73.8**	**60.3**	**87.1**	**285.1**	**265.2**	**302.6**
Canada	20.6	16.2	23.6	22.7	20.1	26.5
United States	53.3	44.1	63.6	262.4	245.2	276.0
EUROPE	**201.0**	**209.6**	**154.5**	**225.0**	**220.7**	**197.8**
Bulgaria	4.1	3.6	2.0	2.0	2.5	1.9
EU	91.6	104.0	91.5	107.8	107.5	95.0
Hungary	5.2	3.9	2.9	9.8	7.8	5.8
Poland	9.3	9.3	7.9	17.7	17.6	15.7
Romania	7.7	4.4	2.5	11.1	9.9	10.7
Russian Fed.	47.0	50.6	34.0	35.7	33.7	30.9
Ukraine	21.3	19.8	4.3	17.1	16.4	15.5
OCEANIA	**24.7**	**10.4**	**25.3**	**13.5**	**8.1**	**13.3**
Australia	24.3	10.1	24.9	12.9	7.5	12.8
WORLD	**588.4**	**569.6**	**559.0**	**918.5**	**883.8**	**931.1**
Developing countries	264.0	262.3	266.3	382.0	374.1	402.3
Developed countries	324.4	307.4	292.7	536.5	509.6	528.8

Source: FAO **Note:** Totals computed from unrounded data.
1/ Including Taiwan Province.

Table A.1 b) **- WORLD CEREAL PRODUCTION**

	Rice (paddy)			Total Cereals 1/		
	2001	2002	2003 estim.	2001	2002	2003 estim.
	(. . . . . million tonnes . . . . .)					
ASIA	**544.5**	**517.7**	**538.1**	**1 000.6**	**982.2**	**996.1**
Bangladesh	36.4	38.2	39.5	38.1	39.8	41.1
China 2/	179.3	176.3	167.5	398.3	400.4	378.5
India	139.6	109.0	131.9	243.3	206.5	230.7
Indonesia	50.5	51.5	52.1	59.8	61.1	62.9
Iran, Islamic Rep. of	2.0	3.1	3.3	14.9	20.2	21.7
Japan	11.3	11.1	9.7	12.3	12.2	10.8
Kazakhstan	0.2	0.2	0.2	15.9	15.9	14.8
Korea, D. P. R.	2.1	2.2	2.3	3.8	4.1	4.4
Korea, Rep. of	7.4	6.7	6.0	7.9	7.0	6.4
Myanmar	21.9	22.8	24.6	22.7	23.7	25.7
Pakistan	5.8	6.7	7.3	27.0	27.2	28.7
Philippines	13.1	13.0	14.0	17.6	17.3	18.7
Saudi Arabia	-	-	-	2.3	2.1	2.1
Thailand	26.5	25.6	26.8	31.2	30.1	31.3
Turkey	0.4	0.4	0.4	29.6	30.8	30.3
Viet Nam	32.1	34.4	34.5	34.2	36.8	36.9
AFRICA	**17.3**	**17.5**	**17.8**	**117.9**	**115.6**	**132.0**
North Africa	**5.3**	**6.0**	**6.2**	**28.2**	**27.6**	**35.9**
Egypt	5.2	6.0	6.2	19.3	20.0	20.7
Morocco	-	-	-	4.6	5.3	8.0
Sub-Saharan Africa	**12.0**	**11.5**	**11.6**	**89.8**	**88.0**	**96.0**
Western Africa	**7.6**	**7.1**	**7.1**	**41.1**	**41.9**	**44.9**
Nigeria	3.3	3.4	3.4	23.0	23.6	24.4
Central Africa	**0.4**	**0.4**	**0.4**	**3.0**	**3.0**	**3.1**
Eastern Africa	**1.1**	**1.1**	**0.9**	**25.2**	**21.8**	**26.2**
Ethiopia	-	-	-	9.0	7.3	10.0
Sudan	-	-	-	5.3	3.9	6.3
Southern Africa	**3.0**	**2.9**	**3.1**	**20.5**	**21.3**	**21.9**
Madagascar	2.7	2.6	2.8	2.9	2.8	3.0
South Africa	-	-	-	10.4	12.8	11.6
Zimbabwe	-	-	-	1.9	0.7	1.0
CENTRAL AMERICA	**2.2**	**2.3**	**2.3**	**36.0**	**35.7**	**37.3**
Mexico	0.2	0.2	0.3	30.4	30.0	31.5
SOUTH AMERICA	**19.9**	**19.9**	**19.7**	**113.2**	**103.0**	**121.9**
Argentina	0.9	0.7	0.7	35.7	31.8	33.8
Brazil	10.4	10.6	10.4	56.7	50.5	66.4
Colombia	2.3	2.3	2.5	3.8	3.8	4.0
NORTH AMERICA	**9.8**	**9.6**	**9.0**	**368.7**	**335.1**	**398.7**
Canada	-	-	-	43.3	36.3	50.1
United States	9.8	9.6	9.0	325.4	298.8	348.6
EUROPE	**3.2**	**3.2**	**3.2**	**429.2**	**433.5**	**355.5**
Bulgaria	-	-	-	6.1	6.2	3.9
EU	2.6	2.6	2.7	202.0	214.1	189.1
Hungary	-	-	-	15.0	11.7	8.8
Poland	-	-	-	27.0	26.9	23.6
Romania	-	-	-	18.9	14.3	13.2
Russian Fed.	0.5	0.5	0.4	83.2	84.8	65.4
Ukraine	0.1	0.1	0.1	38.5	36.3	19.9
OCEANIA	**1.8**	**1.3**	**0.4**	**39.9**	**19.8**	**39.0**
Australia	1.8	1.3	0.4	39.0	18.8	38.1
WORLD	**598.7**	**571.4**	**590.5**	**2 105.5**	**2 024.8**	**2 080.6**
Developing countries	572.2	545.8	567.4	1 218.2	1 182.1	1 236.0
Developed countries	26.4	25.7	23.1	887.4	842.7	844.6

Source: FAO **Note**: Totals computed from unrounded data.

1/ Rice is included in the cereal total in paddy terms. **2/** Including Taiwan Province

Table A.2 a) - **WORLD IMPORTS OF CEREALS**

	Wheat (July/June) 1/			Coarse Grains (July/June)		
	2001/02	2002/03 estim.	2003/04 f'cast	2001/02	2002/03 estim.	2003/04 f'cast
	(. . . . . million tonnes . . . . .)					
ASIA	**47.4**	**41.0**	**40.6**	**57.8**	**57.6**	**56.8**
Bangladesh	1.9	1.7	1.8	0.2	0.2	0.1
China	2.1	1.5	3.6	8.0	7.3	7.3
Taiwan Province	1.0	1.1	1.1	5.3	5.0	4.8
Georgia	0.5	0.5	0.5	-	-	-
India	0.1	0.1	0.1	0.2	0.1	0.2
Indonesia	4.0	4.1	4.2	1.1	1.7	1.1
Iran, Islamic Rep. of	5.7	2.0	1.0	1.8	1.4	1.7
Iraq	3.0	1.7	1.9	0.1	0.1	0.2
Israel	1.5	1.6	1.2	1.5	1.3	1.3
Japan	5.7	5.4	5.8	19.9	20.4	20.0
Korea, D. P. R.	0.3	0.4	0.4	0.5	0.3	0.2
Korea, Rep. of	4.0	3.7	3.0	8.6	8.9	9.1
Malaysia	1.3	1.4	1.4	2.4	2.4	2.5
Pakistan	0.3	0.3	0.5	0.1	0.1	0.2
Philippines	3.1	3.2	3.1	0.4	0.4	0.3
Saudi Arabia	0.1	0.1	0.1	7.1	6.7	7.2
Singapore	0.3	0.3	0.3	0.2	0.2	0.2
Sri Lanka	0.9	0.9	1.0	0.2	0.1	0.1
Syria	0.3	0.6	0.1	1.0	1.2	0.6
Thailand	1.1	0.9	1.0	-	0.1	-
Yemen	2.0	2.0	2.2	0.3	0.2	0.3
AFRICA	**24.9**	**27.0**	**22.2**	**14.7**	**16.5**	**14.3**
North Africa	**15.6**	**16.4**	**12.8**	**11.0**	**10.6**	**9.6**
Algeria	4.0	4.4	3.2	2.0	1.8	1.5
Egypt	6.6	6.4	6.4	5.5	5.3	5.4
Morocco	2.9	2.7	1.1	1.7	1.5	1.2
Tunisia	0.7	1.4	0.6	1.1	1.2	0.8
Sub-Saharan Africa	**9.3**	**10.6**	**9.4**	**3.7**	**5.9**	**4.7**
Côte d'Ivoire	0.3	0.4	0.3	-	-	-
Ethiopia	0.2	1.6	0.2	-	0.1	-
Kenya	0.6	0.4	0.6	0.5	0.3	0.8
Nigeria	2.5	2.5	2.2	0.1	0.1	0.1
Senegal	0.3	0.3	0.3	0.1	0.1	-
Sudan	1.2	1.0	1.2	0.1	0.1	0.1
South Africa	0.5	0.9	1.2	0.7	1.0	0.4
CENTRAL AMERICA	**6.9**	**7.0**	**7.3**	**14.4**	**11.9**	**13.2**
Cuba	1.0	1.0	1.0	0.2	0.3	0.3
Dominican Rep.	0.3	0.3	0.3	0.7	0.7	0.7
Mexico	3.3	3.3	3.5	11.2	8.5	9.7
SOUTH AMERICA	**12.2**	**11.6**	**10.5**	**5.8**	**5.9**	**5.5**
Brazil	7.2	6.7	5.4	0.4	0.6	0.3
Chile	0.3	0.4	0.4	1.2	1.1	1.1
Colombia	1.2	1.2	1.2	2.3	2.3	2.4
Peru	1.3	1.3	1.3	0.8	0.7	0.6
Venezuela	1.3	1.1	1.2	0.7	0.7	0.7
NORTH AMERICA	**3.1**	**2.2**	**2.0**	**6.3**	**6.5**	**4.0**
Canada	0.1	0.2	-	3.9	4.5	1.9
United States	3.0	2.0	2.0	2.5	1.9	2.1
EUROPE	**13.4**	**16.4**	**16.4**	**7.5**	**7.4**	**11.1**
Belarus	0.5	0.4	0.3	0.3	0.2	0.1
EU 2/	10.0	12.0	4.8	4.2	4.6	6.9
Poland	0.2	0.2	0.8	0.1	0.4	0.9
Romania	0.1	0.6	2.0	-	-	0.1
Russian Fed.	0.5	0.5	0.7	0.8	0.3	0.7
Ukraine	0.1	0.5	3.6	0.1	0.1	0.2
OCEANIA	**0.6**	**0.4**	**0.5**	**0.1**	**0.1**	**0.1**
New Zealand	0.3	0.1	0.2	0.1	0.1	0.1
WORLD	**108.4**	**105.7**	**99.5**	**106.6**	**105.9**	**105.0**
Developing countries	81.1	76.8	70.8	70.4	69.1	68.0
Developed countries	27.3	28.8	28.7	36.2	36.8	37.0

Source: FAO **Note:** Totals computed from unrounded data.

1/ Including wheat flour in wheat grain equivalent, but excluding semolina.
2/ Excluding trade between the EU member countries.

Table A.2 b) - **WORLD IMPORTS OF CEREALS**

	Rice (milled)			Total Cereals 1/		
	2002	2003 estim.	2004 f'cast	2001/02	2002/03 estim.	2003/04 f'cast
	(. . . . . million tonnes . . . . .)					
ASIA	**14.2**	**13.8**	**12.1**	**119.4**	**112.4**	**109.5**
Bangladesh	0.5	1.6	0.6	2.6	3.5	2.5
China	0.3	0.4	1.4	10.4	9.2	12.3
Taiwan Province	0.1	0.1	0.2	6.5	6.3	6.1
Georgia	-	-	-	0.5	0.5	0.5
India	-	-	0.1	0.2	0.2	0.3
Indonesia	3.5	3.0	2.0	8.6	8.8	7.3
Iran, Islamic Rep. of	1.0	0.7	0.5	8.5	4.2	3.2
Iraq	1.1	0.7	1.0	4.3	2.5	3.1
Israel	0.1	0.1	0.1	3.1	3.0	2.6
Japan	0.7	0.7	0.7	26.2	26.5	26.4
Korea, D. P. R.	0.7	0.7	0.5	1.6	1.4	1.0
Korea, Rep. of	0.2	0.2	0.2	12.8	12.8	12.4
Malaysia	0.6	0.6	0.5	4.3	4.3	4.4
Pakistan	-	-	-	0.4	0.4	0.7
Philippines	1.3	0.9	0.6	4.8	4.5	3.9
Saudi Arabia	0.8	0.8	0.8	7.9	7.7	8.1
Singapore	0.5	0.5	0.5	1.0	0.9	0.9
Sri Lanka	0.1	0.1	0.1	1.2	1.1	1.2
Syria	0.2	0.2	0.2	1.5	1.9	0.8
Thailand	-	-	-	1.1	1.0	1.1
Yemen	0.3	0.3	0.3	2.5	2.5	2.7
AFRICA	**8.5**	**8.1**	**7.6**	**48.0**	**51.7**	**44.0**
North Africa	**0.2**	**0.2**	**0.3**	**26.8**	**27.2**	**22.6**
Algeria	0.1	0.1	0.1	6.1	6.3	4.8
Egypt	-	-	-	12.1	11.7	11.8
Morocco	-	-	-	4.6	4.2	2.3
Tunisia	-	-	-	1.8	2.6	1.4
Sub-Saharan Africa	**8.3**	**7.9**	**7.3**	**21.3**	**24.4**	**21.4**
Côte d'Ivoire	1.0	1.1	0.8	1.3	1.5	1.1
Ethiopia	-	-	-	0.3	1.7	0.2
Kenya	0.2	0.2	0.2	1.3	1.0	1.6
Nigeria	1.8	1.5	1.3	4.4	4.1	3.6
Senegal	0.8	0.6	0.6	1.1	1.0	0.9
Sudan	-	-	-	1.3	1.1	1.3
South Africa	0.6	0.8	0.8	1.8	2.6	2.4
CENTRAL AMERICA	**1.8**	**1.8**	**1.9**	**23.1**	**20.8**	**22.4**
Cuba	0.6	0.5	0.5	1.7	1.7	1.8
Dominican Rep.	-	-	0.1	1.0	1.0	1.2
Mexico	0.5	0.5	0.5	14.9	12.3	13.7
SOUTH AMERICA	**0.8**	**1.4**	**1.0**	**18.9**	**18.9**	**17.0**
Brazil	0.6	1.1	0.6	8.2	8.3	6.2
Chile	0.1	0.1	0.1	1.5	1.6	1.6
Colombia	0.1	0.1	0.1	3.6	3.6	3.7
Peru	-	-	0.1	2.1	2.0	1.9
Venezuela	-	0.1	0.1	2.0	1.9	2.0
NORTH AMERICA	**0.7**	**0.7**	**0.7**	**10.1**	**9.4**	**6.8**
Canada	0.3	0.3	0.3	4.2	5.0	2.2
United States	0.4	0.5	0.5	5.8	4.4	4.6
EUROPE	**1.8**	**1.7**	**1.8**	**22.7**	**25.5**	**29.3**
Belarus	-	-	-	0.8	0.6	0.5
EU 2/	0.7	0.7	0.7	14.9	17.3	12.4
Poland	0.1	0.1	0.1	0.4	0.7	1.8
Romania	0.1	0.1	0.1	0.3	0.7	2.2
Russian Fed.	0.5	0.4	0.5	1.7	1.2	1.8
Ukraine	0.1	0.1	0.1	0.3	0.7	3.9
OCEANIA	**0.3**	**0.4**	**0.4**	**1.0**	**0.9**	**1.0**
New Zealand	-	-	-	0.5	0.2	0.3
WORLD	**28.1**	**28.0**	**25.5** 3/	**243.1**	**239.6**	**230.0**
Developing countries	24.0	23.7	21.3	175.5	169.6	160.1
Developed countries	4.1	4.3	4.3	67.6	69.9	70.0

Source: FAO **Note:** Totals computed from unrounded data.

1/ Trade in rice refers to the calendar year of the second year shown.
2/ Excluding trade between the EU member countries.
3/ Highly tentative.

Table A.3 a) - **WORLD EXPORTS OF CEREALS**

	Wheat (July/June) 1/			Coarse Grains (July/June)		
	2001/02	2002/03 estim.	2003/04 f'cast	2001/02	2002/03 estim.	2003/04 f'cast
	(. . . . . million tonnes . . . . .)					
ASIA	**11.9**	**17.2**	**14.5**	**8.3**	**17.4**	**10.0**
China 2/	1.2	1.0	1.3	6.4	15.0	7.5
India	3.5	6.1	4.0	-	0.1	0.3
Indonesia	-	-	-	0.1	0.1	0.1
Japan	0.4	0.4	0.4	-	-	-
Kazakhstan	3.8	5.7	5.8	0.4	0.5	0.4
Myanmar	-	-	-	0.1	0.1	0.1
Pakistan	0.7	1.1	0.1	-	-	-
Syria	0.5	0.6	0.6	-	-	0.3
Thailand	-	-	-	0.3	-	0.1
Turkey	0.4	1.0	1.0	0.5	0.7	0.5
Viet Nam	-	-	-	-	-	-
AFRICA	**0.5**	**0.5**	**0.4**	**2.2**	**1.9**	**2.2**
Egypt	-	-	-	-	-	-
Ethiopia	-	-	-	0.1	-	-
Nigeria	-	-	-	0.1	0.1	0.1
South Africa	0.2	0.3	0.2	1.4	1.1	1.2
Sudan	-	-	-	0.1	0.1	0.4
Uganda	-	-	-	0.3	0.1	0.1
CENTRAL AMERICA	**0.6**	**0.7**	**0.6**	**0.2**	**0.2**	**0.3**
SOUTH AMERICA	**11.0**	**5.8**	**9.5**	**15.0**	**15.7**	**16.8**
Argentina	11.0	5.6	8.5	9.6	12.2	10.3
Brazil	-	-	0.8	5.0	3.0	6.0
Paraguay	0.1	0.2	0.2	0.2	0.3	0.3
Uruguay	-	-	0.1	0.1	0.1	0.1
NORTH AMERICA	**42.8**	**32.0**	**48.0**	**58.8**	**49.2**	**58.1**
Canada	16.6	9.0	16.0	2.6	1.7	4.2
United States	26.2	23.0	32.0	56.2	47.5	53.9
EUROPE	**24.7**	**41.6**	**12.5**	**15.6**	**17.7**	**12.0**
Bulgaria	0.6	1.1	0.2	0.3	0.5	0.1
Czech Rep.	0.1	0.5	-	-	0.1	0.3
EU 3/	10.6	15.4	7.5	5.0	6.6	4.5
Hungary	1.9	1.3	0.5	3.0	1.3	0.6
Romania	0.5	0.2	-	0.5	0.4	0.4
Russian Fed.	4.5	14.5	4.2	2.6	3.8	3.2
Ukraine	5.5	6.6	-	3.5	4.1	2.4
OCEANIA	**16.4**	**10.8**	**14.0**	**5.2**	**3.3**	**5.7**
Australia	16.4	10.8	14.0	5.2	3.2	5.7
WORLD	**107.9**	**108.6**	**99.5**	**105.3**	**105.3**	**105.0**
Developing countries	19.5	17.7	18.5	23.9	33.6	27.7
Developed countries	88.4	90.9	81.0	81.4	71.8	77.3

Source: FAO

Note: Totals computed from unrounded data.

1/ Including wheat flour in wheat grain equivalent, but excluding semolina.
2/ Including Taiwan Province.
3/ Excluding trade between the EU member countries.

Table A.3 b) - **WORLD EXPORTS OF CEREALS**

	Rice (milled)			Total Cereals 1/		
	2002	2003 estim.	2004 f'cast	2001/02	2002/03 estim.	2003/04 f'cast
	(. . . . . million tonnes . . . . .)					
ASIA	**22.4**	**22.0**	**19.6**	**42.6**	**56.6**	**44.1**
China 2/	2.1	2.6	1.5	9.7	18.6	10.3
India	6.6	4.4	2.5	10.1	10.6	6.8
Indonesia	-	-	-	0.1	0.1	0.1
Japan	0.2	0.6	0.3	0.7	1.0	0.7
Kazakhstan	-	-	-	4.2	6.2	6.2
Myanmar	0.9	0.4	0.5	1.0	0.5	0.6
Pakistan	1.6	2.0	2.0	2.4	3.1	2.1
Syria	-	-	-	0.5	0.6	0.9
Thailand	7.3	7.6	8.5	7.6	7.6	8.6
Turkey	-	-	-	0.8	1.7	1.5
Viet Nam	3.2	3.9	4.0	3.3	3.9	4.0
AFRICA	**0.5**	**0.6**	**0.7**	**3.2**	**3.0**	**3.3**
Egypt	0.5	0.6	0.7	0.5	0.6	0.7
Ethiopia	-	-	-	0.1	-	-
Nigeria	-	-	-	0.1	0.1	0.1
South Africa	-	-	-	1.5	1.4	1.4
Sudan	-	-	-	0.1	0.1	0.4
Uganda	-	-	-	0.3	0.1	0.1
CENTRAL AMERICA	**-**	**0.1**	**0.1**	**0.7**	**0.9**	**0.9**
SOUTH AMERICA	**1.2**	**1.1**	**1.5**	**27.2**	**22.6**	**27.8**
Argentina	0.2	0.2	0.4	20.8	18.0	19.1
Brazil	-	-	-	5.0	3.0	6.8
Paraguay	-	-	-	0.3	0.5	0.5
Uruguay	0.7	0.6	0.7	0.7	0.7	0.9
NORTH AMERICA	**3.3**	**3.8**	**3.2**	**104.9**	**85.0**	**109.3**
Canada	-	-	-	19.1	10.7	20.2
United States	3.3	3.8	3.2	85.8	74.4	89.1
EUROPE	**0.3**	**0.2**	**0.2**	**40.6**	**59.5**	**24.8**
Bulgaria	-	-	-	1.0	1.6	0.3
Czech Rep.	-	-	-	0.1	0.6	0.3
EU 3/	0.3	0.2	0.2	15.8	22.3	12.2
Hungary	-	-	-	4.9	2.6	1.1
Romania	-	-	-	1.1	0.6	0.4
Russian Fed.	-	-	-	7.0	18.3	7.4
Ukraine	-	-	-	9.0	10.7	2.5
OCEANIA	**0.4**	**0.2**	**0.2**	**22.0**	**14.3**	**19.9**
Australia	0.4	0.2	0.2	22.0	14.3	19.9
WORLD	**28.1**	**28.0**	**25.5** 4/	**241.3**	**241.9**	**230.0**
Developing countries	24.0	23.1	21.5	67.3	74.4	67.7
Developed countries	4.2	4.9	4.0	174.0	167.6	162.3

Source: FAO

Note: Totals computed from unrounded data.

1/ Trade in rice refers to the calendar year of the second year shown.
2/ Including Taiwan Province.
3/ Excluding trade between the EU member countries.
4/ Highly tentative.

Table A.4 – **CEREALS: Supply and Utilization in Main Exporting Countries (National Crop Years)**

	Wheat 1/			Coarse Grains 2/			Rice (milled basis)		
	2001/02	2002/03 estim.	2003/04 f'cast	2001/02	2002/03 estim.	2003/04 f'cast	2001/02	2002/03 estim.	2003/04 f'cast
	(. . . . . million tonnes . . . . .)								
	UNITED STATES (June/May)			**UNITED STATES**			**UNITED STATES** (Aug./July)		
Opening stocks	23.8	21.1	13.4	52.7	45.1	31.0	0.9	1.2	0.8
Production	53.3	44.1	63.6	262.4	245.2	276.0	6.7	6.5	6.3
Imports	2.9	2.1	2.0	2.3	2.2	2.0	0.4	0.5	0.5
Total Supply	**80.0**	**67.3**	**79.0**	**317.3**	**292.4**	**309.0**	**8.0**	**8.2**	**7.6**
Domestic use	32.7	30.7	32.9	217.1	215.6	224.7	3.8	3.5	3.9
Exports	26.2	23.2	31.3	55.2	45.9	56.7	3.0	3.9	3.0
Closing stocks	21.1	13.4	14.8	45.1	31.0	27.5	1.2	0.8	0.7
	CANADA (August/July)			**CANADA**			**THAILAND** (Nov./Oct.) 3/		
Opening stocks	9.7	6.7	5.7	4.4	3.5	3.2	1.8	2.4	2.1
Production	20.6	16.2	23.6	22.7	20.1	26.5	17.6	16.9	17.8
Imports	0.1	0.2	0.0	4.0	4.2	2.1	0.0	0.0	0.0
Total Supply	**30.3**	**23.1**	**29.2**	**31.1**	**27.8**	**31.8**	**19.4**	**19.3**	**19.9**
Domestic use	7.4	8.3	7.4	24.0	22.0	23.5	9.6	9.7	9.7
Exports	16.2	9.2	15.8	3.6	2.7	4.2	7.3	7.6	8.5
Closing stocks	6.7	5.7	6.0	3.5	3.2	4.1	2.4	2.1	1.6
	ARGENTINA (Dec./Nov.)			**ARGENTINA**			**CHINA** (Jan./Dec.) 3/ 4/		
Opening stocks	0.3	1.0	2.1	1.2	1.3	0.7	106.5	92.9	78.1
Production	15.3	12.3	14.0	19.6	18.7	19.1	122.9	120.9	114.8
Imports	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.4	1.4
Total Supply	**15.6**	**13.3**	**16.1**	**20.8**	**20.0**	**19.8**	**229.7**	**214.2**	**194.3**
Domestic use	5.1	5.3	5.6	9.4	8.2	8.3	134.7	133.4	131.1
Exports	9.5	6.0	8.6	10.2	11.1	10.5	2.1	2.6	1.5
Closing stocks	1.0	2.1	1.9	1.3	0.7	1.0	92.9	78.1	61.6
	AUSTRALIA (Oct./Sept.)			**AUSTRALIA**			**PAKISTAN** (Nov./Oct.) 3/		
Opening stocks	4.0	7.1	2.1	1.2	1.4	0.7	1.0	0.6	0.3
Production	24.3	10.1	24.9	12.9	7.5	12.8	3.9	4.5	4.9
Imports	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total Supply	**28.3**	**17.2**	**27.0**	**14.2**	**8.8**	**13.5**	**4.9**	**5.0**	**5.2**
Domestic use	4.9	6.0	5.3	6.7	4.9	6.3	2.7	2.8	2.8
Exports	16.3	9.1	15.2	6.1	3.2	6.0	1.6	2.0	2.0
Closing stocks	7.1	2.1	6.5	1.4	0.7	1.2	0.6	0.3	0.4
	EU (July/June) 5/			**EU** 5/			**VIET NAM** (Nov./Oct.) 3/		
Opening stocks	14.5	12.5	15.0	17.0	18.0	18.0	4.0	4.5	4.9
Production	91.6	104.0	91.5	107.7	106.8	94.9	21.4	23.0	23.0
Imports	10.0	12.0	4.8	4.2	4.6	6.9	0.0	0.0	0.0
Total Supply	**116.1**	**128.5**	**111.3**	**128.8**	**129.4**	**119.8**	**25.4**	**27.5**	**27.9**
Domestic use	92.8	98.2	92.3	105.8	104.7	103.0	17.7	18.7	19.0
Exports	10.8	15.3	8.0	5.0	6.6	4.5	3.2	3.9	4.0
Closing stocks	12.5	15.0	11.0	18.0	18.0	12.3	4.5	4.9	4.9
TOTAL ABOVE									
Opening stocks	52.3	48.5	38.1	76.5	69.2	53.6	114.1	101.5	86.3
Production	205.0	186.6	217.6	425.3	398.2	429.3	172.5	171.8	166.8
Imports	13.0	14.3	6.9	10.5	11.1	11.0	0.8	0.9	1.8
Total Supply	**270.3**	**249.4**	**262.6**	**512.3**	**478.5**	**493.9**	**287.4**	**274.2**	**254.9**
Domestic use	142.8	148.5	143.5	363.2	355.4	365.8	168.6	168.1	166.6
Exports	79.0	62.8	78.9	79.9	69.5	81.9	17.2	19.9	19.0
Closing stocks	48.5	38.1	40.2	69.2	53.6	46.2	101.5	86.3	69.2

Source: FAO **Note:** Totals computed from unrounded data.

1/ Trade data include wheat flour in wheat grain equivalent. For the EU semolina is also included.

2/ Argentina (Dec./Nov.) for rye, barley and oats, (March/February) for maize and sorghum; **Australia** (November/October) for rye, barley and oats, (March/February) for maize and sorghum; **Canada** (August/July); **EU** (July/June); **United States** (June/May) for rye, barley and oats, (September/August) for maize and sorghum.

3/ Rice trade data refer to the calendar year of the second year shown.

4/ Including Taiwan province.

5/ Excluding trade between the EU member countries.

Table A.5 - **WORLD CEREAL STOCKS: Estimated Total Carryovers of Cereals 1/**

	Crop Years ending in:						
	1998	1999	2000	2001	2002	2003 estim.	2004 f'cast
	(. . . . . million tonnes . . . . .)						
TOTAL CEREALS	**666.5**	**687.7**	**688.9**	**640.9**	**595.8**	**482.4**	**393.3**
Wheat	**257.8**	**263.0**	**259.5**	**248.3**	**232.0**	**186.9**	**139.4**
held by:							
- main exporters 2/	39.3	50.4	50.2	52.3	48.5	38.1	40.2
- others	218.5	212.6	209.3	195.9	183.5	148.7	99.2
Coarse Grains	**256.1**	**267.6**	**261.1**	**229.1**	**213.3**	**175.5**	**152.1**
held by:							
- main exporters 2/	69.3	80.0	77.4	76.5	69.2	53.6	46.2
- others	186.7	187.6	183.8	152.6	144.1	121.9	105.9
Rice (milled basis)	**152.6**	**157.2**	**168.3**	**163.6**	**150.4**	**120.1**	**101.7**
held by:							
- main exporters 2/	115.7	117.2	119.7	114.1	101.5	86.3	69.2
excl. China 3/	4.5	4.1	6.7	7.7	8.7	8.1	7.6
- others	36.9	40.0	48.5	49.4	48.9	33.8	32.5
BY REGIONS							
Developed Countries	**169.6**	**171.5**	**165.5**	**161.4**	**167.4**	**141.0**	**124.0**
Australia	3.8	3.0	4.5	5.3	8.7	3.0	7.8
EU	35.1	36.6	34.2	31.9	31.1	33.7	24.0
Canada	10.4	12.5	13.5	14.1	10.3	8.9	10.2
Hungary	3.1	2.9	2.2	1.5	1.6	1.3	0.9
Japan	6.7	6.0	5.8	5.5	5.2	4.6	3.8
Poland	4.0	4.3	3.9	2.1	3.0	2.9	2.3
Romania	5.0	3.5	3.6	0.9	3.0	2.2	1.9
Russian Fed.	18.0	5.8	4.9	6.5	13.4	12.5	7.0
South Africa	3.8	2.5	1.9	3.0	1.5	3.1	3.1
Ukraine	4.5	2.2	2.2	2.3	5.2	5.1	2.9
United States	58.7	77.8	75.6	77.4	67.4	45.2	43.1
Developing Countries	**496.9**	**516.2**	**523.4**	**479.5**	**428.3**	**341.4**	**269.2**
Asia	**459.6**	**476.3**	**484.1**	**442.6**	**388.1**	**307.5**	**231.1**
China 3/	367.3	375.5	369.9	323.6	274.2	218.7	155.8
India	42.9	47.3	57.4	62.2	60.0	39.4	30.0
Indonesia	5.5	5.6	5.9	5.7	3.6	4.1	3.9
Iran, Islamic Rep. of	4.9	4.9	5.8	5.0	4.9	3.9	2.5
Korea, Rep. of	2.8	2.8	3.3	3.2	3.4	2.9	2.7
Pakistan	7.1	8.6	7.9	7.4	4.6	1.4	0.9
Philippines	2.0	2.6	1.9	2.0	1.8	2.2	2.0
Syria	4.0	4.1	3.9	3.3	4.7	5.5	4.9
Turkey	7.4	9.4	8.3	8.7	7.5	7.0	6.2
Africa	**22.4**	**27.4**	**25.1**	**23.9**	**23.8**	**20.6**	**21.8**
Algeria	2.8	2.8	1.7	1.6	1.9	1.5	1.9
Egypt	3.7	4.6	4.2	4.1	3.8	3.2	2.8
Ethiopia	1.4	1.4	1.5	2.2	1.7	0.8	0.5
Morocco	2.9	5.2	3.7	2.1	2.0	2.1	2.5
Nigeria	1.9	1.9	1.6	2.2	2.5	2.3	1.8
Tunisia	1.9	1.9	2.1	2.1	1.8	1.5	2.1
Central America	**5.2**	**6.2**	**6.5**	**5.5**	**5.6**	**4.8**	**4.9**
Mexico	4.0	5.0	5.0	4.0	4.3	3.5	3.8
South America	**9.6**	**6.2**	**7.5**	**7.4**	**10.6**	**8.4**	**11.3**
Argentina	2.1	1.7	1.4	1.6	2.3	2.8	3.0
Brazil	4.9	1.5	2.7	1.9	4.5	2.6	5.7

Source: FAO **Note:** Based on official and unofficial estimates. Totals computed from unrounded data.

1/ Stock data are based on an aggregate of carryovers at the end of national crop years and do not represent world stock levels at any point in time.

2/ The major wheat and coarse grains exporters are Argentina, Australia, Canada, the EU and the United States. The major rice exporters are China (including Taiwan Province), Pakistan, Thailand, the United States and Viet Nam. See Table A.4 for country details.

3/ Including Taiwan Province.

Table A.6 – **SELECTED EXPORT PRICES OF CEREALS AND SOYBEANS**

	Wheat			Maize		Sorghum	Soybeans
	U.S. No.2 Hard Red Winter Ord. Prot. 1/	U.S. Soft Red Winter No.2 1/	Argentina Trigo Pan 2/	U.S. No.2 Yellow 1/	Argentina 2/	U.S. No.2 Yellow 1/	U.S. No.2 Yellow 1/
	(. . . . . US$/tonne . . . . .)						
July/June							
1999/2000	112	97	112	91	90	89	190
2000/2001	128	101	124	86	84	93	184
2001/2002	127	113	119	90	89	95	182
2002/2003	161	138	145	107	102	112	222
2003 - March	146	129	149	105	95	104	224
September	151	139	152	103	101	110	245
October	150	139	148	104	101	111	284
November	165	159	165	107	110	120	294
December	174	159	162	112	116	121	297
2004 - January	170	157	160	116	114	124	316
February	165	157	150	122	113	126	328
March I	164	156	147	125	109	131	353
II	161	154	146	128	108	131	358
III	168	152	148	129	108	132	376
IV	180	164	161	131	111	135	396

Sources: International Grain Council and USDA.

1/ Delivered U.S. Gulf ports. **2/** Up River f.o.b.

Table A.7 – **SELECTED WHEAT AND MAIZE PRICE INDICES**

	Wheat	Maize
	(1997/98-1999/00=100)	(1997/98-1999/00=100)
1999/2000	93	92
2000/2001	97	87
2001/2002	99	91
2002/2003	121	108
2003 - March	111	106
September	111	104
October	113	105
November	123	108
December	123	113
2004 – January	124	117
February	124	123
March	122	129

Sources: FAO, International Grain Council

1/ The wheat price index has been constructed based on the IGC wheat price index, rebased to July/June 1997/98-1999/00 = 100. The IGC wheat price index is composed of a simple average of following price quotations, converted to an index, with base July/December 1986 = 1000:

1. Australian Standard White, fob Eastern States - second position quoted
2. Canadian No.1 CWRS 13.5%, fob St. Lawrence
3. Canadian No.1 CWRS 12.5%, fob Vancouver
4. United States No.2 HRW (Ordinary), fob Gulf
5. United States No.2 SRW, fob Gulf
6. United States No.2 DNS 14%, fob Lakes
7. United States No.2 Western White, fob Pacific

2/ U.S. Maize No. 2 Yellow (delivered U.S. Gulf ports) with base July/June, 1997/98-1999/00 = 100

Table A.8 **- PRICE INDICES AND SELECTED EXPORT PRICES FOR RICE**

Calendar years	Export Prices				FAO Indices				
	Thai 100% B	Thai broken	U.S. Long grain	Pakistani Basmati	Total	Indica		Japonica	Aromatic
	1/	2/	3/	4/		High quality	Low quality		
January/December	(. . . . . U.S.$/tonne . . . . .)				(. . . . . 1998-2000=100 . . . . .)				
2000	207	143	271	418	84	84	83	83	89
2001	177	135	264	332	74	74	74	76	69
2002	197	151	207	366	72	73	75	67	74
2003	201	151	284	358	82	79	81	84	91
2003 - March	198	144	212	369	73	73	75	67	91
November	197	159	337	n.a.	90	83	87	101	85
December	201	164	354	n.a.	96	87	89	116	88
2004 - January	221	176	357	449	101	90	94	120	98
February	221	184	355	449	102	92	99	118	96
March I	242	194	368	449	)				
II	250	207	407	449	)				
III	258	224	407	449	) 109	101	111	119	96
IV	260	225	407	n.a.	)				

Sources: FAO for indices. Rice prices: Jackson Son & Co. (London) Ltd. and other public sources.

Note: The FAO Rice Price Index is based on 16 rice export quotations. 'Quality' is defined by the precentage of broken kernels, with high (low) quality referring to rice with less (equal to or more) than 20 percent brokens. The Sub-Index for Aromatic Rice follows movements in prices of Basmati and Fragrant rice.

1/ White rice, 100% second grade, f.o.b. Bangkok, indicative traded prices. 2/ A1 super, f.o.b. Bangkok, indicative traded prices. 3/ U.S. No.2, 4% brokens f.o.b. 4/ Basmati: ordinary, f.o.b. Karachi.

Table A.9 – **PRICE INDICES AND SELECTED INTERNATIONAL PRICES FOR OILCROP PRODUCTS**

Marketing years	FAO Indices			International Prices				
	Oilseeds	Edible/Soap Fats/Oils	Oilcakes/ Meals	Soybeans 1/	Soybean Oil 2/	Palm Oil 3/	Soybean Cake 4/	Rapeseed Meal 5/
October/September	(. . . . . 1990-92=100 . . . . .)			(. . . . . U.S.$/tonne . . . . .)				
1997/98	109	154	116	256	634	641	197	138
1998/99	89	125	82	209	483	514	149	104
1999/00	83	91	89	209	355	337	180	124
2000/01 Oct.-Mar.	82	76	98	206	314	254	198	146
Apr.-Sept.	82	86	94	197	356	289	178	135
2001/02 Oct.-Mar.	83	95	100	188	378	323	175	135
Apr.-Sept.	90	107	104	213	445	392	174	122
2002/03 Oct.-Mar.	103	124	106	241	543	442	186	133
Apr.-Sept.	104	123	110	246	535	414	197	149
2003/04 Oct.-Mar.	139	144	138	351	653	512	273	199

Sources: FAO and Oil World.

Note: The FAO indices are calculated using the Laspeyres formula; the weights used are the average export values of each commodity for the 1990-92 period. The indices are based on the international prices of five selected seeds, ten selected oils and fats and seven selected cakes and meals.

1/ Soybeans (US, No.2 yellow, c.i.f. Rotterdam). 2/ Soybean oil (Dutch, fob ex-mill). 3/ Palm oil (Crude, c.i.f. North West Europe). 4/ Soybean cake (Pellets, 44/45%, Argentina, c.i.f. Rotterdam). 5/ Rapeseed meal (34%, Hamburg, f.o.b. ex-mill).

Table A.10 - **WHEAT AND MAIZE FUTURES PRICES**

		May		July		September		December	
		this year	last year	this year	last year	this year	last year	this year	last year
		(. . . . . US$/tonne . . . . . .)							
WHEAT									
February	17	140	122	138	118	139	119	142	123
	24	146	119	146	116	146	118	149	122
March	2	140	116	141	114	143	116	146	119
	9	136	112	137	111	139	113	142	116
	16	137	108	138	106	140	108	143	112
	23	152	103	153	104	154	106	156	109
MAIZE									
February	17	114	95	115	96	113	96	111	96
	24	117	92	118	93	116	93	115	93
March	2	116	92	118	93	116	93	115	94
	9	119	93	120	94	117	94	116	94
	16	120	90	122	91	119	92	118	92
	23	124	90	126	90	125	91	124	91

Source: Chicago Board of Trade

Table A.11 - **OCEAN FREIGHT RATES FOR WHEAT**

	From U.S. Gulf ports to:				From North Pacific ports to:	
	Rotterdam 1/	CIS Black Sea 1/ 2/	Egypt (Alexandria) 1/	Bangladesh 1/	China 1/	Japan 1/
	(. . . . . US$/tonne. . . . .)					
July/June						
1999/2000	12.60	40.97	13.65	18.50	27.00	32.83
2000/2001	13.10	40.97	15.00	18.31	27.00	36.31
2001/2002	10.99	40.97	15.00	18.50	26.90	34.19
2002/2003	12.50	40.97	16.67	22.50	27.23	31.50
2003 - March	12.00	40.97	17.00	26.00	27.00	29.00
September	20.00	40.97	23.00	36.00	27.00	35.00
October	20.00	40.97	23.00	36.00	27.00	42.00
November	26.00	40.97	34.00	47.00	27.00	42.00
December	28.00	40.97	36.00	47.00	27.00	42.00
2004 - January	28.00	40.97	36.00	47.00	27.00	42.00
February	35.00	40.00	43.00	55.00	…	…
March						

Source: International Grains Council

Note: Estimated mid-month rates based on current chartering practices for vessels ready to load three to four weeks ahead.
1/ Size of vessels: Rotterdam over 40 000 tonnes; CIS 20-40 000 tonnes; Egypt over 30 000 tonnes; Bangladesh over 40 000 tonnes; China 20-35 000 tonnes; Japan 15-24 999 tonnes. 2/ Excludes CIS and United States flag vessels.

Table A.12 - **SELECTED INTERNATIONAL COMMODITY PRICES**

	Currency and Unit	Effective Date	Latest Quotation	1 month ago	1 year ago	Average 1989-91
Sugar (I.S.A. daily price)	US cents per lb	16.03.04	6.74	5.83	8.15	11.4
Coffee (I.C.O. daily price)	US cents per lb	19.03.04	61.76	58.12	49.03	76.7
Cocoa (I.C.C.O. daily price)	US cents per lb	19.03.04	67.37	68.70	91.69	56.0
Tea (total tea, Mombasa)	US$ per kg.	16.03.04	1.58	1.66	1.53	1.5
Bananas (Central America, f.o.b., Hamburg)	€ per tonne	05.03.04	1 049 1/ 737 2/	987 1/ 728 2/	1 054 1/ 846 2/	566
Cotton (COTLOOK, index "A" 1-3/32")	US cents per lb	26.03.04	71.20	73.70	61.45	78.5
Jute "BWD" f.o.b. Mongla at sight	US cents per lb	19.03.04	245	245	245	391.2
Wool (64's, London)	Pence per kg	26.03.04	447	458	572	466

Source: FAO 1/ EU duty paid, estimated. 2/ Estimated price for EFTA markets.

Table A.13 - **SHIPMENTS OF FOOD AID IN CEREALS, July/June**

Donors	1997/98	1998/99	1999/00	2000/01	2001/02	2002/03 1/ estim.
	(. . . . . thousand tonnes, grain equivalent 2/ . . . . .)					
Australia	261	249	236	197	155	191
Canada	382	324	402	150	225	245
China	122	170	214	433	414	265
EU	1 491	2 214	1 935	1 532	1 042	998
of which:						
Community	778	1 403	1 219	868	402	477
National Action	713	811	716	664	640	521
Austria	*9*	*1*	*9*	*4*	*0*	*2*
Belgium	*21*	*48*	*20*	*13*	*9*	*12*
Denmark	*59*	*78*	*63*	*58*	*26*	*3*
Finland	*0*	*4*	*6*	*5*	*7*	*6*
France	*198*	*86*	*170*	*230*	*202*	*76*
Germany	*144*	*122*	*103*	*88*	*74*	*133*
Greece	*15*	*4*	*12*	*0*	*0*	*0*
Ireland	*5*	*2*	*5*	*9*	*4*	*15*
Italy	*66*	*135*	*166*	*73*	*155*	*48*
Luxembourg	*8*	*4*	*4*	*4*	*9*	*13*
Netherlands	*61*	*35*	*71*	*75*	*100*	*38*
Spain	*3*	*36*	*16*	*11*	*3*	*5*
Sweden	*37*	*65*	*30*	*32*	*19*	*36*
United Kingdom	*87*	*191*	*41*	*64*	*32*	*137*
India	11	25	4	0	1	12
Japan	366	1 133	311	807	515	188
Norway	20	21	28	29	13	63
Switzerland	37	26	29	18	10	22
United States	2 745	6 395	7 167	5 024	4 853	5 159
WFP purchases	3	1	31	70	13	62
Others donors	329	214	267	619	172	1 404
Total shipments	**5 768**	**10 783**	**10 628**	**8 885**	**7 417**	**8 610**
of which:						
Wheat	3 984	7 469	7 649	5 774	4 821	5 908
Rice	646	1 612	907	1 375	1 005	1 606
Coarse grains	1 138	1 702	2 072	1 737	1 592	1 096
of which to:						
Africa	1 990	2 245	2 605	3 419	2 070	3 204
Asia	3 010	5 251	4 193	4 283	4 108	4 549
Latin America	509	950	787	599	757	704
Others	258	2 338	3 043	585	483	153
Channelled multilaterally	2 200	3 369	3 217	3 922	3 592	5 108
of which through:						
WFP	2188	3348	3208	3877	3558	4 138

SOURCE: World Food Programme.

1/ As of January 2004.

2/ To express cereal food aid in grain equivalent, wheat, rice and coarse grains are counted on a one to one basis; for grain products, appropriate conversion factors are used to determine the grain equivalent.

Table A.14 – **FOOD AID IN CEREAL SHIPMENTS BY RECIPIENTS, July/June**

Recipient countries	1997/98	1998/99	1999/00	2000/01	2001/02	2002/03 1/ estim.
	(. . . . . thousand tonnes, grain equivalent 2/ . . . . .)					
WORLD	**5 768**	**10 783**	**10 628**	**8 885**	**7 417**	**8 610**
LIFDC (83 countries)	**5 020**	**7 749**	**7 133**	**7 493**	**6 119**	**7 431**
of which:						
Asia	**2 802**	**5 056**	**3 845**	**3 776**	**3 684**	**4 138**
Afghanistan	85	75	192	240	272	388
Armenia	158	11	20	89	36	16
Azerbaijan	63	15	36	21	15	5
Bangladesh	531	1 293	908	486	564	353
China	90	260	192	40	81	107
Georgia	143	95	101	104	83	18
India	224	253	307	169	159	128
Indonesia	9	1 374	484	242	232	204
Iraq	35	17	11	4	4	1 333
Korea, D.P.R.	831	1 036	895	1 542	1 070	975
Pakistan	162	300	148	7	240	1
Sri Lanka	134	25	68	97	72	81
Tajikistan	141	39	88	177	173	121
Africa	**1 966**	**2 136**	**2 573**	**3 375**	**1 979**	**2 924**
Angola	132	145	174	205	181	217
Burkina Faso	21	38	35	10	31	21
Egypt	59	13	64	21	34	11
Eritrea	63	103	94	236	252	184
Ethiopia	548	463	1 031	1 211	299	1 218
Liberia	45	93	75	30	20	37
Malawi	21	74	28	16	45	156
Morocco	10	10	19	278	9	4
Mozambique	178	167	115	140	181	95
Rwanda	180	163	206	43	49	20
Sudan	50	227	115	177	86	126
Latin America	**206**	**426**	**443**	**278**	**280**	**289**
Haiti	123	133	165	107	94	144
Honduras	20	94	110	54	34	27
Nicaragua	26	151	97	37	56	55
Others	**47**	**131**	**272**	**64**	**177**	**79**
to Special Country Groupings 3/:						
DEVELOPED COUNTRIES	**837**	**2 490**	**3 378**	**1 078**	**942**	**454**
DEVELOPING COUNTRIES	**4 931**	**8 293**	**7 250**	**7 807**	**6 476**	**8 156**
LDC (49 countries)	**2 504**	**3 614**	**3 721**	**3 676**	**2 873**	**3 827**
NFIDC (22 countries)	**733**	**879**	**974**	**1 190**	**905**	**550**

SOURCE: World Food Programme.

1/ As of January 2004.

2/ To express cereal food aid in grain equivalent, wheat, rice and coarse grains are counted on a one to one basis; for grain products, appropriate conversion factors are used to determine the grain equivalent.

3/ Same countries may appear in more than one special country groupings. For definitions see Statistical Note on the last page of this report.

Table A.15 – **FOOD AID IN NON CEREAL SHIPMENTS BY RECIPIENTS**

Recipient countries	1997	1998	1999	2000	2001	2002 1/ estim.
	(. . . . . thousand tonnes . . . . .)					
WORLD	**826**	**891**	**1 858**	**1 257**	**1 436**	**1 387**
LIFDC (83 countries)	**564**	**638**	**646**	**826**	**1 051**	**1 082**
of which:						
Asia	**235**	**301**	**292**	**310**	**613**	**727**
Afghanistan	10	5	7	9	24	96
Armenia	4	8	5	4	17	8
Bangladesh	4	4	5	6	6	3
Georgia	10	16	13	5	7	4
India	40	27	33	31	36	60
Indonesia	0	52	21	91	6	39
Iraq	18	11	12	6	8	13
Korea, D.P.R.	58	55	47	61	63	111
Pakistan	44	5	9	5	253	177
Philippines	0	61	78	54	68	79
Tajikistan	16	7	6	8	25	17
Africa	**279**	**272**	**260**	**398**	**314**	**321**
Angola	23	26	22	47	26	44
Congo, Dem. Rep.	0	4	3	5	5	4
Egypt	8	2	7	3	3	1
Ethiopia	18	21	19	49	18	9
Kenya	15	21	8	54	39	11
Liberia	11	17	25	13	5	5
Madagascar	2	6	12	20	17	6
Mozambique	12	10	11	11	7	13
Rwanda	105	63	48	44	28	25
Sierra Leone	10	14	6	7	18	18
Sudan	21	30	38	22	21	12
Uganda	7	15	10	12	9	7
Zambia	2	1	5	6	7	17
Latin America	**35**	**47**	**77**	**89**	**108**	**31**
Haiti	10	16	21	11	23	12
Honduras	1	7	19	15	28	12
Nicaragua	14	15	34	24	24	6
Ecuador	2	2	1	38	30	0
Others	**15**	**18**	**17**	**29**	**16**	**2**
to Special Country Groupings 2/:						
DEVELOPED COUNTRIES	**171**	**128**	**1 190**	**269**	**313**	**188**
DEVELOPING COUNTRIES	**655**	**763**	**668**	**988**	**1 122**	**1 198**
LDC (49 countries)	**282**	**271**	**275**	**376**	**333**	**443**
NFIDC (22 countries)	**170**	**163**	**110**	**156**	**441**	**286**

SOURCE: World Food Programme.

1/ As of January 2004.

2/ Same countries may appear in more than one special country groupings. For definitions see Statistical Note on the last page of this report.

STATISTICAL NOTE: Data are obtained from official and unofficial sources. For cereals, production data refer to the calendar year in which the whole harvest or bulk of harvest takes place. For sugar, production data relate to the October/September season. For vegetable oils and oil meals derived from oilseeds, production data refer to the year in which the bulk of the seeds concerned are crushed. For trade in wheat and coarse grains, the time reference period is normally the July/June marketing year unless otherwise stated. Trade data for rice and other commodities refer to the calendar year. Coarse grains refer to all other cereals except wheat and rice. Quantities are in metric tonnes unless otherwise stated. '-' means nil or negligible.

In the presentation and analysis of statistical material, countries are sub-divided, where appropriate, into the following two main economic groupings: "Developed countries" (including the developed market economies and the transition markets) and "Developing countries" (including the developing market economies and the Asia centrally planned countries). The designation "Developed and "Developing" economies is intended for statistical convenience and does not necessarily express a judgement about the stage reached by a particular country or area in the development process.

References are also made to special country groupings: Low Income Food Deficit Countries (LIFDCs), Least Developed Countries (LDCs) and Net Food-Importing Developing Countries (NFIDCs). The LIFDCs currently includes 83 countries that are net importers of cereals with per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. US$1 435 in 2001). The LDCs and NIFDCs groups include a list of countries agreed by the World Trade Organization (WTO) to qualify as beneficiaries under the Marrakech Decision on the Possible Negative Effects of the Reform Programme on Least-Developed and Net-Food Importing Developing Countries. The LDCs group currently includes 49 countries with low income as well as weak human resources and low level of economic diversification. The list is reviewed every three years by the Economic and Social Council of the United Nations. The NIFDCs group includes 22 developing country WTO Members which notified their request to be listed as NFIDCs and have submitted relevant statistical data concerning their status as net-importers of basic foodstuffs during a representative period. This list is reviewed annually by the WTO Committee on Agriculture.

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

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Meat and Meat Products		●		●
Milk and Milk Products		●		●
Oilseeds, Oils and Oilmeals		●		●
Pulses		●		
Sugar		●		●

1/ These dates are tentative and refer to the release of the English version. Food Outlook in Arabic, Chinese, French and Spanish language is available shortly after the release of the English version.

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