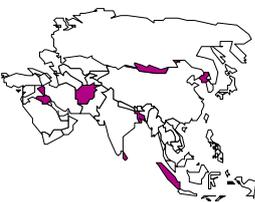


FOODCROPS AND SHORTAGES

No. 2

June 2005

	<p>AFRICA: In eastern Africa, heavy rains and floods have caused loss of life and destroyed crops and infrastructure in several countries. However, prospects for current crops have improved. In southern Africa, cereal import requirements in 2005/06 (excluding South Africa) are estimated about 30 percent higher than last year due to substantially reduced harvests in Malawi, Zambia and Zimbabwe. South Africa, on the other hand, is estimated to have more than enough exportable surplus of maize to meet the import needs of the subregion. In western Africa, the food situation has been deteriorating in countries of the Sahel affected by desert locusts and drought, notably in Mali, Mauritania and Niger. Funds and food aid are urgently needed to arrest the worsening situation.</p>
	<p>ASIA/NEAR EAST: Almost five months after the tsunami, most of the displaced people are still depending on food aid, while recovery and reconstruction activities continue. In Korea DPR, millions of vulnerable people will cease receiving food assistance soon unless substantial food donations are received. The food supply situation in Mongolia remains precarious after another harsh winter in the wake of last summer's drought. Elsewhere in Asia, severe droughts have seriously affected crops in several countries, especially in Thailand, Vietnam, Cambodia, China, and Laos. In the Asian CIS countries and Afghanistan, prospects are for a good harvest this year, owing mainly to favourable weather conditions.</p>
	<p>LATIN AMERICA AND THE CARIBBEAN: The recent start of the rainy season, notwithstanding, Cuba and Haiti have been seriously affected by a prolonged dry period and production of main staple food crops is expected to decline. In Central America, food assistance continues to be provided to vulnerable communities in El Salvador, Guatemala, Honduras and Nicaragua mainly due to past disasters. In Brazil, the maize crop has been affected by drought, especially in the main producing southern states. In Ecuador, heavy rains at the end of April affected the 2005 winter paddy crop that was about to be harvested.</p>
	<p>EUROPE: A reduction in cereal production is forecast in the EU in 2005 after the bumper crop last year, reflecting an area reduction and lower yields than last year's high levels. However, while yields and outputs remain somewhat above average in most member countries, the outlook is poor in Spain and Portugal because of persisting drought. Some reduction in output is also in prospect in the Balkan countries, despite generally favourable conditions, because also in these parts, yields are not expected to match last year's exceptionally good levels. In the European CIS, spring cereal planting was delayed owing to unfavourable weather while winterkill was low given above average snowfall providing protective cover.</p>
	<p>NORTH AMERICA: Prospects remain generally favourable for the wheat crops at different stages of growth throughout the region. In the United States, wheat output is forecast to decrease marginally, and production of coarse grains is also expected to decline reflecting a return to normal yields after last year's records. In Canada, the bulk of the 2005 cereal crops have just been planted and an above-average output is expected, although not as good as that in 2004.</p>
	<p>OCEANIA: A below-average cereal output is expected in Australia in 2005 because of persisting drought in eastern parts of the country during what should have been the main planting period.</p>



COUNTRIES FACING FOOD EMERGENCIES^{1/} (total: 34 countries)

<u>Region/Country</u>	<u>Reason for emergency</u>	<u>Region/Country</u>	<u>Reason for emergency</u>
AFRICA (23 countries)		ASIA/NEAR EAST (8 countries)	
Angola*	Returnees	Afghanistan*	Civil strife, IDPs and returnees
Burundi*	Civil strife, IDPs and returnees	Bangladesh*	Floods
Chad	Refugees, lack of rainfall	Indonesia	
Central Afr. Rep.	Recent civil strife	(Aceh Province)	Tsunami
Congo, Dem.Rep.*	Civil strife, IDPs and refugees	Iraq*	Conflict and insecurity
Congo Rep. of	IDPs, Refugees	Korea, DPR*	Economic constraints
Côte d'Ivoire	Civil strife, IDPs	Maldives	Tsunami
Eritrea*	Drought, IDPs, returnees	Mongolia*	Summer drought and harsh winter
Ethiopia*	Drought, IDPs	Sri Lanka*	Tsunami
Guinea*	IDPs and refugees		
Kenya*	Drought	LATIN AMERICA (2 countries)	
Liberia*	Recent civil strife, IDPs	Bolivia	Drought, civil unrest
Malawi*	Drought in parts	Haiti*	Civil strife and drought
Mali	Drought, locusts in parts		
Mauritania*	Drought, locusts	EUROPE (1 country)	
Niger	Drought, locusts in parts	Russian Federation	
Sierra Leone*	Returnees, refugees	(Chechnya)	Civil strife
Somalia*	Civil strife, drought in parts		
Sudan*	Civil strife, drought in parts		
Swaziland*	Drought in parts		
Tanzania, U.R.	Drought in parts, refugees		
Uganda*	Civil strife, IDPs		
Zimbabwe*	Economic crisis, drought		

COUNTRIES WITH UNFAVOURABLE PROSPECTS FOR CURRENT CROPS

<u>Country</u>	<u>Main contributing factor</u>	<u>Country</u>	<u>Main contributing factor</u>
Botswana	Drought	Maldives	Tsunami
Cuba*	Drought	Mozambique	Drought in parts
Ecuador*	Floods	Swaziland*	Drought
Kenya*	Drought in parts	Zambia	Drought in parts
Malawi*	Drought in parts	Zimbabwe*	Economic crisis, drought

PURCHASE AND DISTRIBUTION OF LOCALIZED OR EXPORTABLE SURPLUSES REQUIRING EXTERNAL ASSISTANCE

None.

^{1/} Both here and in the text, countries with unfavourable prospects for current crop and/or uncovered shortfalls are marked in **boldface**, and those affected or threatened by successive poor crops or food shortages are marked with an asterisk [*].

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

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

Purchase and distribution of localized or exportable surpluses, requiring external assistance: Refers to a situation of exceptional surplus in a particular area of a country, which needs to be transported to deficit areas in the same country or the neighbouring countries, and for which purpose external assistance is required.

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

Please note that the country reports – as updated between publications of the print version – are available from the GIEWS website: <http://www.fao.org/giews/> in the GIEWS Workstation.

CROP AND FOOD SUPPLY SITUATION

OVERVIEW

As of June 2005, the number of countries facing serious food shortages throughout the world stands at 34 with 23 in Africa, 8 in Asia/Near East, 2 in Latin America and 1 in Europe. The causes are varied but civil strife and drought predominate. A recent outbreak of desert locusts in western Africa and the tsunami disaster in south Asia have had serious though localized food security consequences. In many countries, the HIV/AIDS pandemic is a major contributing factor to food insecurity. Recently published assessment reports highlighting these factors in greater detail can be found at:

<http://www.fao.org/giews/english/alertes/sptoc.htm>

In **eastern Africa**, the March through May rains this year have been significantly below normal in eastern Kenya, southern Somalia, and northeastern Tanzania. However, recent rainfall along the Kenya-Somalia coastline and in central Kenya has eased the dry conditions. Recent heavy rains and floods particularly in Ethiopia, Somalia and Kenya, resulted in loss of life and destruction of crops and property.

The effects of earlier droughts and past or ongoing civil strife and conflicts continue to undermine the food security of large numbers of people. In Sudan, last year's poor harvest coupled with conflict and population displacements have resulted in a precarious food situation in several parts. Food supplies for millions of families across Sudan are running critically low, and many will face severe shortages unless more funds for food and agricultural inputs are forthcoming. In Eritrea, prospects for the 2005 agricultural season, which has just started, improved with recent good rains. However, serious food shortages remain following consecutive years of drought and poor crop production. An estimated 2.3 million people, about two-thirds of the whole population - including in urban and peri-urban areas - need humanitarian assistance. The slow response to the humanitarian appeal of 2005 is a major concern. In Somalia, despite improved crop and pasture prospects, there are serious humanitarian concerns due to cumulative effects of successive droughts and insecurity. Recent flare-ups in conflict in several areas have also displaced a large number of people and disrupted economic and livelihood activities. In Ethiopia and Kenya, recent good rains have improved crop prospects. However, a large number of people depend on food assistance and an adequate response to recent humanitarian appeals is urgently needed.

In **southern Africa**, harvesting of 2004/05 main agricultural season crops is nearly completed. The sub-region has been affected by erratic rainfall and prolonged dry spells especially during the critical maize grain development stage in several countries, reducing yields significantly. FAO/WFP Crop and Food Supply Assessment Missions visited Malawi, Mozambique, Zambia, Lesotho and Swaziland in April-May this year to assess the outcome of the season. Estimates indicate that the 2005 cereal crops were hardest hit by drought in Zambia, Malawi, and Zimbabwe. Some reduction in total production is also forecast for Angola, Mozambique and Botswana compared to 2004. On a brighter note, an increase in cereal harvests is forecast in South Africa, Madagascar and Namibia. Although some increase in cereal harvest in Swaziland and Lesotho was estimated compared to the previous year, production in these countries is alarmingly on a long-term downward trend. Full information on vulnerable groups in the sub-region is not yet available, as the national Vulnerability Assessment Committees (VACs) are still preparing their assessment reports. However, early indications point to large numbers of people in Zimbabwe, Malawi and southern Mozambique as being at risk of food insecurity due to reduced harvests and lack of purchasing power. The devastating impact of HIV/AIDS is a compounding factor in all the countries of the sub-region. WFP launched a regional Protracted Relief and Recovery Operation (PRRO) earlier in the year requiring some 704 000 tonnes of food commodities over a three-year period (2005-2007) to assist the food insecure and AIDS affected populations in the region.

In **the Great Lakes region**, harvesting of 2005B season crops will begin soon (June-July) with expectation of a near-normal cereal harvest. However, production of roots and tubers, important staples, is expected to be hard hit by the continuing effects of the cassava mosaic virus and unfavourable weather. In the Democratic Republic of Congo, food insecurity and malnutrition remain serious problems due to persistent instability, particularly in the east and northeast.

In **northern Africa**, harvesting of the 2005 winter cereal crops has only started. Early forecasts point to below-average output in Morocco, principally as a result of reduced plantings and low yields caused by a dry spell in main producing areas. By contrast, above-average output is anticipated in Algeria, Egypt and Tunisia, following generally favourable weather conditions. The subregion's 2005 aggregate cereal output is tentatively forecast at

about 31.8 million tonnes, some 13 percent below last year's record level, but about 4 percent above the average of the past five years.

In **western Africa**, the rainy season has started in the south of the Sahel, allowing land preparation and planting of coarse grains. Desert locusts remain a serious threat in the subregion, although FAO is not expecting a large-scale invasion this year. In the coastal countries along the Gulf of Guinea, where the rainy season is now well established, the first maize crop is developing satisfactorily in the south and the centre, while millet and sorghum are emerging in the north.

The food situation has been worsening in the parts of the Sahel affected by locusts and drought last year, in spite of actions taken by governments. In Burkina Faso, Chad, Mali, Mauritania, Niger and Senegal, millet prices continue to rise, while livestock prices have been falling. This reduces access to main food staples for vulnerable households, notably pastoral and agro-pastoral groups, which were hit especially hard. Severe malnutrition is reported to be on the increase in Mali, Mauritania and Niger. Several UN agencies have appealed for funds to assist affected populations, including FAO, UNICEF, WFP, but pledges are reportedly still short of requirements. Adequate funding and food aid are urgently needed to respond to the worsening situation.

In **central Africa**, reports of desert locusts in the extreme north of Cameroon have raised concerns over the food outlook for that part of the country, which is already facing a difficult lean season following a significant decline in food production last year due to drought.

In **Asia**, the impact of the 26 December 2004 tsunami is still being felt in the affected countries of South Asia. Although the overall food supply situation in those countries is satisfactory, many farmers in affected areas have lost two consecutive paddy seasons and face severe food security problems. Most of the IDPs, especially in Indonesia, Sri Lanka and Maldives, are still depending on food aid.

The main rice season is well advanced in countries around the Equatorial belt, whilst in many other countries land preparation and planting, of both rice and coarse grains have or are about to start with the arrival of monsoon rains.

In DPR Korea, over 60 percent of rice transplanting has been completed in the major producing regions with the assistance of civil society at large and the military. The country gathered a good crop last year. However, the public distribution system ration may be reduced to an alarming 200 grams per person per day from July due to inadequate food donations. WFP has been forced to curtail distributions to many vulnerable beneficiaries for the same reason. Mongolia has experienced another harsh winter after a drought last summer. As a result, substantial livestock losses have been forecast for the 2004/05 and the food supply situation remains precarious.

Severe droughts have also affected crops in several other countries, particularly in Thailand, Vietnam, Cambodia, China, and Laos. In Bangladesh, the government grain stock has been depleted to a dangerous level with soaring grain prices, mainly due to the severe floods last summer. The 2005 forecast bumper Boro crop is expected to help the country recover from the serious shortfalls.

In China, larger crops for wheat, rice, and maize in 2005 are expected due to the continued government support, but China will still face a grain deficit and will continue to be a net grain importer. In addition, China is expected to import in 2005 more than 22 million tonnes of soybeans.

In Afghanistan, prospects are for a significantly high cereal harvest following heavy snowfall and rains in winter and spring. The forecast cereal harvest at about 5.3 million tonnes is second only to the historic record harvest in 2003, estimated at 5.4 million tonnes.

In the **Asian CIS** region, favourable weather conditions and adequate water availability for irrigation have improved prospects for a good harvest. Aggregate cereal harvest in the region is forecast at about 28.2 million tonnes compared with 26.5 million tonnes last year. This aggregate includes some 23 million tonnes of wheat and 4.56 million tonnes of coarse grains (barley and maize).

In the **Near East**, the outlook for winter cereal crops, being harvested, is generally favourable. However, in Turkey the outlook has somewhat been dampened by the intermittent drought conditions that prevailed in central and south-eastern parts during last winter. In the major winter wheat and barley production areas of the country, the cold inland weather affected developing crops. In Iraq, the overall food security situation is adversely affected by conflict and security problems.

In **Central America and the Caribbean**, planting of the 2005/06 first (main) season coarse grain and bean crops has started with the arrival of first rains in May. In Mexico, harvesting of winter wheat is well advanced and production is expected at 2.8 million tonnes, showing a substantial recovery from last year's drought affected output. Planting of the spring/summer maize crop is underway and area planted is forecast to increase about 10-12 percent. In the Dominican Republic, planting of the 2005/06 first season maize is underway, while harvesting of the 2005 main paddy crop has started and an above-average output is anticipated. In Cuba and Haiti, a prolonged dry spell has severely affected the production of main food and cash crops.

In **South America**, planting of the 2005 wheat crop has started in the southern areas of the sub-region, while harvesting of the 2005 maize crop is well advanced. In Argentina, a record maize crop of about 19.5 million tonnes is anticipated, while in Brazil maize production has been affected by dry weather conditions in southern main producing states of Parana and Rio Grande do Sul with a reduction of about 13 percent compared to previous year. In Chile, production of maize is estimated at record level; while in Uruguay maize production is estimated to be far below the initial forecast of 290 000 tonnes due to reduced yields as a consequence of dry weather conditions at the beginning of the year. In Ecuador, heavy rains at the end of April caused some losses to the winter paddy crop that was about to be harvested in coastal provinces of Guayas and Manabi.

In **Europe**, prospects for the cereal crops throughout the region remain generally favourable with the exception of southern Spain and Portugal, where drought has devastated crops this year and output will be sharply reduced. However, apart from the losses in these two countries, output in the European Union was already expected to decline in 2005 on the basis of reduced plantings and a return to average yields after bumper levels in 2004. The aggregate cereal output for the EU is currently forecast to fall by about 10 percent from last year's record level. In the Balkan countries, another very good wheat crop is in prospect in Romania, but otherwise outputs are forecast to fall somewhat in 2005 on the assumption that yields in these countries will also return to normal after bumper levels last year.

In the **European CIS**, heavy rains and unusually cold weather during early spring delayed planting, which may affect yields. Earlier it was hoped that the region would collect a bumper crop given high moisture levels and low winterkill following above average snowfall in winter. Aggregate cereal harvest in the region is tentatively forecast at about 117 million tonnes, some 3 million tonnes down on last year's harvest. The forecast harvest in the region includes some 63.5 million tonnes of wheat, 27.4 million tonnes of barley and 10.5 million tonnes of maize.

In **North America**, prospects remain generally favourable for the wheat crops at different stages of growth throughout the region. The United States aggregate wheat output in 2005 is forecast to fall marginally. Prospects for the coarse grain crops that have been sown this spring are generally good after a favourable planting season. While little change is forecast in the final area for harvest, lower yields expected after very high levels in 2004 are expected to result in a reduction of about 3 percent in the output this year. In Canada, conditions for wheat planting this spring have been generally favourable. A slightly smaller planted area is estimated but expectations for less abandonment this year could result in little change in the final area harvested. However, a reduction in yields could result in a smaller wheat output, currently forecast at 23.5 million tonnes, 9 percent down from 2004.

In **Oceania**, a significant reduction is expected in Australia's 2005 cereal production because of persisting drought in eastern parts of the country during what should have been the main planting period. Despite excellent conditions in the west of the country, the aggregate cereal output in 2005 is now forecast to fall by about 8 percent from the 2004 crop and about 12 percent compared to the five-year average.

COUNTRY REPORTS

AFRICA

NORTHERN AFRICA

ALGERIA (17 May)

Harvesting of winter cereal crops is about to start and output of wheat, the main cereal, is provisionally forecast at 2.5 million tonnes, similar to 2004 good crop and far above the average of the past five years. An above average barley output of some 1 million tonnes is also tentatively forecast.

Imports of cereals in marketing year 2005/06 (July/June) are forecast at about 6.0 million tonnes, some 771 000 tonnes more than the previous year. Wheat imports are expected to increase from the previous year by some 19 percent to 4.0 million tonnes.

EGYPT (17 May)

Harvesting of the 2005 wheat crop has started while that of maize will start later in June. The outlook is good as the crops benefited from favourable climatic conditions at planting and during growth. About 8.3 million tonnes of wheat are forecast, far above the past five-year average of 6.7 million tonnes. This reflects an estimated 15 percent increase in wheat plantings. An above-average paddy production is also anticipated, but the recent appreciation of the Egyptian Pound may affect the country's rice exports.

Reflecting the anticipated good wheat output, wheat imports in marketing year 2005/06 (July/June) are expected to decrease from 7.3 million tonnes last year to about 6.29 million tonnes. Imports of maize, mostly used as animal feed, are forecast at about 4.5 million tonnes, about 100 000 tonnes less than the previous year.

MOROCCO (3 June)

Following abundant rains that improved crop conditions in main producing areas in late February/early March, a dry spell through May resulted in losses of over a third of area planted to wheat and barley, with another third seriously affected, according to official sources. Cumulative rainfall as of late April was below average in almost all regions of the country, with an estimated shortfall of about 32 percent compared to the average. As a consequence, production is expected to be sharply reduced. Initial indications point to wheat output in 2005 at some 2.52 million tonnes, about 45 percent of the bumper crop harvested last year, while barley production is estimated at 1.05 million tonnes, about 38 percent of last year's output.

Cereal imports in 2005/06 (July/June) are forecast to increase substantially, to 3 million tonnes of wheat and 1.6 million tonnes of coarse grains, mainly barley and maize.

TUNISIA (20 May)

Harvesting of the 2005 winter crops is underway. Despite overall favourable weather conditions in the North, which is the main cereal producing area, initial indications point to a significant drop in output, due to a decrease in area planted combined with poorly distributed rainfall in the South and the Centre. Total cereal production is tentatively put at 1.9 million tonnes, compared to 2.347 million tonnes in 2004. Wheat output at about 1.397 million tonnes is almost 19 percent below last year while the barley crop is estimated at 500 000 tonnes, a 19 percent reduction.

Imports of cereals in 2005/06 (July/June), mostly wheat and maize, are forecast at 2.23 million tonnes, about 458 000 tonnes more than in the previous year.

WESTERN AFRICA

BENIN (15 June)

The first rains came in April in the south, allowing planting of the main maize crop due for harvest from July. In spite of above average cereal production in 2004, estimated at about 1.1 million tonnes, the overall food situation is tight. This is due to several factors including Nigeria's protectionist policy and the tightening of controls against re-export trade, as well as increased food prices driven by high oil prices. Economic growth slowed down in 2004 and households' income and access to food are negatively affected.

As of mid-June, the estimated number of Togolese refugees in Benin was 20 599.

BURKINA FASO (20 May)

Seasonal rains commenced in late April/ May in the southern part of the country, allowing land preparation to start. Availability of seeds may be limited in the northern regions hard hit last year by desert locust invasion and poor rainfall.

Following release of the final 2004 cereal production figures, the aggregate cereal production is estimated at 2.9 million tonnes, which is close to the average of the previous five years but 19 percent below the record crop harvested in 2003. Millet prices continue to rise, while livestock prices have been falling, reducing access to main food staples for vulnerable households, notably pastoral and agro-pastoral groups, which were hit especially hard. The Government took emergency measures including free distribution and subsidized sales in affected communities. Although the operation helped improve somewhat the food situation in affected communities, the impact on cereal prices remains limited, and the food situation of an estimated 1.6 million people at risk of food shortages needs to be closely monitored.

Commercial imports of cereals in the marketing year ending in October 2005 are forecast at about 197 300 tonnes.

CAPE VERDE (20 May)

Seasonably dry conditions prevail. Planting of maize normally starts in July with the onset of the rains on the main islands. Seed shortages are likely following the 2004 poor harvest.

The revised 2004 production estimates released by the statistical services indicate an aggregate maize production of about 4 000 tonnes. This level is only one-third of previous year's output and even below the poor crops of 1997 and 1998. Production of beans and potatoes will also decline significantly. This is due to poor precipitation combined with desert locust infestations during the 2004 growing season. Although the country imports the bulk of its consumption requirement even in good years, the rural population particularly in the semi-arid zones could be severely affected by the production shortfall. About 27 percent of the populations of S. Antao, S. Nicolau, Fogo and Santiago islands is estimated to be at risk of food shortage, according to official sources.

In response to this the Government has launched its FAIMO labour-intensive infrastructural programmes funded from food aid counterpart funds. The FAIMO programmes improve access of poor people to food through the creation of thousands of jobs. However, these programmes are under-funded as a result of poor donor response to the Government's appeal.

Total imports of cereal in the marketing year ending in October 2005 are forecast to be around 100 000 tonnes. Taking into account an anticipated commercial cereal import of 42 000 tonnes and 40 000 tonnes of food aid pledges, the total uncovered deficit for the year is about 18 000 tonnes.

CHAD (21 May)

Significant rains fell in the extreme south, where land preparation and planting of coarse grains have started.

Following release of the final 2004 cereal production figures, the aggregate cereal production is estimated at 1.2 million tonnes, which is about one-fourth lower than the previous year's good output. The reduction in production was mainly due to poor rainfall during the 2004 growing season, mainly in the Sahelian zone. Losses due to Desert Locusts infestation were not significant. A joint CILSS/FEWS-Net Mission that visited the country in March observed a precarious food situation characterised by low food supply and high prices. As recommended by the "Comité directeur du comité d'action pour la sécurité alimentaire et la gestion des crises (CASAGC)", the National Early Warning System, subsidized sales of cereals began in May.

As of late May, the estimated number of Sudanese refugees in eastern Chad was 193 300. More accurate estimates will be available on completion of the joint WFP/UNHCR verification exercise currently underway. WFP has finalized the new phase of EMOP 10327.1 for the period July 2005-December 2006 requiring 92 000 tonnes of food at an estimated cost of about US\$82 million. WFP has started food prepositioning in refugee camps before the rainy season starts. Food prepositioning has been completed in southern camps and should be completed for other camps by July.

CÔTE D'IVOIRE (21 May)

Planting of the first maize crop is nearly complete in the South. Conflict-induced problems, notably labour shortages due to populations displacements, the lack of agricultural support services in parts of the country, market segmentation, disruptions by insecurity, and excessive transport costs due to hefty levies at roadblocks, continue to disrupt agricultural production and marketing activities in the country. In addition, crops were affected in 2004 by poor rainfall in northern regions, preventing a significant agricultural recovery in spite of improved agricultural inputs distribution. The results of a crop assessment organized by the Government jointly with FAO and WFP in February 2005 indicate cereal production (rice paddy, maize, millet and sorghum) in 2004 at about 1.57 million tonnes, slightly higher than in 2003, but still 7 percent below the average for the five years preceding the crisis. This is mainly due to shortages of inputs and the dry weather that affected cereal crops in the north. By contrast, aggregate production of roots/tubers and banana/plantain, produced mainly in the centre and south, has been estimated at about 5.9 million tonnes, close to the average for the five years preceding the crisis. Food production has been satisfactory in the south but remains below average in the north and the west.

In spite of reduced agricultural production since 2002, the overall food supply position remains adequate and inflation moderate, mainly due to sustained food imports in the government-held south and cross-border trade with Burkina Faso and Mali in the rebel-controlled north. However, food security for many households continues to be hampered by disruption of livelihoods especially in the west. In addition, due to the continuing unfavourable market situation, smallholder cash crop producers are experiencing a significant loss of income. Although cotton production in 2004/05 is estimated to have increased to some 400 000 tonnes, compared to 180 000 tonnes in the previous year, due mainly to improved input distribution to cotton farmers, there is still uncertainty regarding the marketing of the crop.

GAMBIA, REPUBLIC OF (21 May)

The rains have not yet started and farmers are currently preparing their fields. Planting is expected to start in the weeks ahead with the onset of the rains. Seed availability is expected to be adequate following the 2004 good harvest.

The overall food supply situation remains satisfactory and markets are well supplied. This is the result of the good crop harvested last year and a stable exchange rate of the Dalassi, the Gambian currency, since mid-2004.

GHANA (21 May)

Planting of the first maize crop is nearly complete. Following an average cereal production in 2004, estimated at 1 930 000 tonnes, the overall food supply situation is expected to be satisfactory in 2005. However, inflation is on the rise, driven by a 50 percent increase in oil price in January, which may affect access to food in the country. Cocoa production in 2004/05 is not expected to reach the record level of 2003/04, due to less favourable weather conditions. However, the relatively high cocoa price on the international market should benefit the estimated 1.6 million peasant farmers who produce most of the country's cocoa.

In addition to the large number of Ivorian and Liberian refugees who are living in the country, the crisis in Togo has prompted a new influx of an estimated 15 144 Togolese as of mid-June, according to the UNHCR. Most of the Togolese refugees are living with host families. WFP has launched an immediate Response Emergency Operation.

GUINEA* (23 May)

Planting of the 2005 crops has started in most areas of the country, after significant rains were received in April. Access to food continues to be negatively affected by high inflation and high prices for rice which is the main staple.

The repatriation of Sierra Leonean refugees in Guinea was completed in July 2004, while that of Liberian refugees is underway. About 9 000 Liberian refugees have been repatriated since the beginning of the operation in November 2004. Although the restoration of peace in Sierra Leone and the improved situation in Liberia have resulted in a decrease of the number of refugees in Guinea, the country still hosts a large number of refugees. In June 2005, according to UNHCR statistics, there are around 69 000 refugees living in different camps, in addition to some 80 000 IDPs and over 100 000 returnees from Côte D'Ivoire in 2002 in Guinea Forestière and Upper and Middle Guinea.

GUINEA-BISSAU (23 May)

Land preparation is underway. Planting is expected to start in the weeks ahead with the onset of the rains. Seed availability is expected to be adequate following the 2004 good harvest.

Following release of the final 2004 cereal production figures, the aggregate cereal production is estimated at 171 375 tonnes, 41 percent above last year's level. Rice paddy, the main crop, increased by 34 percent to about 89 000 tonnes. Commercial imports in 2004/05 (November/October) are forecast at 50 000 tonnes of rice and 15 000 tonnes of wheat. Although per caput cereal consumption is forecast to recover somewhat in 2004/05 from its previous low level, the bulk of the population is facing chronic food insecurity, with 65 percent of the population living below the poverty line, and a stagnant economy. In late April, the Government appealed for international assistance, following an outbreak of anthrax epidemic in the northern region of Oio.

LIBERIA* (24 May)

Planting of the 2005 paddy crop, virtually the only cereal grown in the country, has started. Although insecurity prevented many farmers from cultivating in 2004, agricultural production has recovered somewhat from the previous year's very low level reflecting the return of many displaced people following the end of the civil war. Paddy production in 2004 is estimated at 159 600 tonnes compared to 110 000 tonnes in 2003. Rice production should further increase this year reflecting improved security, increased plantings by returning refugees and farmers previously displaced, as well as comparatively improved conditions for the distribution of agricultural inputs. During this farming season, 149 245 beneficiaries in all 15 countries of Liberia received 2 863 tonnes of seed rice, including those in the southeast not reached in 2003/04.

The repatriation of refugees and resettlement of IDPs started in October-November 2004 and to date, 178 010 persons have been repatriated and resettled. UNHCR reports that in December 2003, over 340 000 Liberian refugees were in neighbouring countries, while an estimated 500 000 were internally displaced. With the improvement of the security situation, WFP continues to extend its operation across the country, and is shifting progressively from emergency to recovery.

Following a steep rise in rice prices in the country, due mainly to an increase in the world price, the Government set up a special committee to recommend solutions to bring rice prices down and stabilize the market.

MALI (24 May)

Land preparation is underway and first planting has started in the extreme south, following first rains in May. Planting will progress northwards following the onset of the rains. Availability of seeds may be limited in the regions hard hit last year by desert locust invasion and poor rainfall.

The food situation has been worsening in drought- and desert locust-affected regions of the country, in spite of steps taken by the Government. Millet prices continue to climb, while livestock prices have been falling. This reduces access to main food staples by vulnerable households, notably pastoral and agro-pastoral groups, which were hit especially hard. A nutritional survey carried out by "Acción Contra el Hambre" in parts of Mali's Kidal region showed that among children under five years, nearly one-third was suffering from global malnutrition

Emergency measures taken by Governments include subsidized sales of 15 000 tonnes of animal feed and the authorization granted to traders to import 60 000 tonnes of rice exempted from levies.

WFP has prepared an EMOP to feed an estimated 444 500 people from March through November, but as of 21 May only 11 percent of the requirements have been received. FAO also appealed for funds to provide agricultural inputs and assist pastoralists in the affected Sahelian countries, including Mali. So far, less than 20 percent of the \$11.4 million required has been received. More funds are urgently needed to respond to the worsening situation.

MAURITANIA* (24 May)

Seasonably dry conditions prevail. Plantings of coarse grains will start following the onset of rains, which normally begins in July. Availability of seeds is limited, following last year's widespread desert locust invasion and poor rainfall.

The food situation remains critical in Mauritania. Following release of the final 2004 cereal production figures, the aggregate cereal production is estimated at 116 064 tonnes, about 40 percent below 2003 and 26 percent below the previous five years average. Widespread and increasing malnutrition is reported. In response to the deteriorating situation, WFP has started Food-For-Work programme in Brakna, Gorgol, Assaba, Tagant and Hodh El Gharbi regions. European Union-funded food distribution, to be implemented by the Commissariat à la Sécurité Alimentaire (CSA), has started in Trarza, Gudimakha and Hodl El Chargui. FAO appealed for US\$11.4 million to provide agricultural inputs and assist pastoralists in the affected Sahelian countries, including Mauritania. These funds are urgently needed to respond to the worsening situation.

NIGER (24 May)

Land preparation is underway and first planting has started in the extreme south, following first rains in May. Planting will progress northwards with the onset of the rains. Availability of seeds may be limited in the regions hard hit last year by desert locust invasion and poor rainfall. Desert locusts remain a serious threat, although FAO is not expecting a large-scale invasion this year.

The food situation has been worsening in drought- and desert locust-affected regions of the country, in spite of steps taken by the Government. Millet prices continue to climb, while livestock prices have been falling. This reduces access to main food staples by vulnerable households, notably pastoral and agro-pastoral groups, which were hit especially hard by drought and desert locusts.

The Government has been selling cereals at subsidised prices in affected communities. Although the resources of the national crisis mitigation mechanism have already been completely depleted, the impact of the operation on the overall food situation is very limited. In early April, "Médecins sans frontières" warned that severe child malnutrition was increasing rapidly in the Maradi and Tahoua districts, with rising admissions at supplementary feeding centres. In response to the crisis, several actions have been taken at international level: FAO launched an appeal for funds to provide agricultural inputs and to assist pastoralists, while UNICEF and WFP appealed for funds to feed some 2.5 million people officially estimated to be at risk of food shortage, including about 800 000 children. Pledges are reportedly still short of requirements. Additional food aid pledges and deliveries are urgently needed to arrest to the worsening situation.

NIGERIA (24 May)

Planting of the first maize crop is underway in the South, following the start of rains in April. In spite of the good crop harvested in 2004, soaring food prices across the country reportedly prompted the Government to start the sale of 66 000 tonnes of grain at subsidized rates in mid-May. The hike in staple food prices is caused probably by increased cross-border trade to neighbouring countries, including Niger, Chad and Cameroon, whose agricultural sector has been hit by desert locusts and poor rainfall last year.

Cereal imports have trended upwards in recent years, due mainly to high urban population growth, changing consumption pattern and inadequate agricultural performance. Consequently, the Government has taken a series of measures to improve agricultural production, including the Special Programme for Food Security, jointly implemented with FAO, 25 percent subsidy on fertilizers and zero tariffs on imported agro-chemicals, the selection of key sub-sectors for rehabilitation or expansion, and tightening of controls against illegal imports. Moreover, the Government, is planning to ban the importation of rice by 2006. The import ban on pasta, spaghetti and biscuits, introduced in 2004, contributed to the expansion of the country's milling capacity and of the domestic pasta sector. Imports of cereals in 2005, mainly rice and wheat, are forecast at about 4.2 million tonnes.

SENEGAL (25 May)

Seasonably dry conditions prevail in most parts of the country. Rains are expected to start and progress towards the centre and north in June. Availability of seeds may be limited in the regions hard hit last year by desert locust invasion and poor rainfall.

Following release of the final 2004 cereal production figures, aggregate cereal production is estimated at 1 053 583 tonnes, which is 27 percent lower than last year's record crop of about 1.4 million tonnes, and 2 percent below the five-year average. The price of the important millet crop has been increasing steeply since September in affected regions, reducing access to this main food staple by vulnerable households, notably pastoral and agro-pastoral groups, which were hit especially hard. Although the total cereal import requirement is anticipated to be covered on commercial basis, the country is going to face a difficult lean season, since millet prices are likely to remain high. With scarce pasture and water, livestock condition is reported to be deteriorating in spite of increased movement of herds.

FAO appealed for funds to provide agricultural inputs and assist pastoralists in the Sahelian affected countries, including Senegal. So far, less than 20 percent of the \$11.4 million required have been provided. More funds are urgently needed to respond to the worsening situation.

SIERRA LEONE* (25 May)

Planting of the rice crop is underway with the onset of rains in April. Agriculture has been recovering steadily since the end of the civil war in 2002, reflecting increasing plantings by returning refugees and farmers previously displaced, as well as improved conditions for the distribution of agricultural inputs. Further recovery is expected this year.

The security situation in the country remains calm. The repatriation of Sierra Leonean refugees in Guinea was completed in July 2004. About 12 170 people were repatriated in 2004, bringing the number of refugees repatriated since the beginning of the operation in October 2001 to about 56 000. An estimated 1 million internally displaced people have also been resettled. However, 65 000 Liberian refugees are still living in the country.

Imports of cereals in 2005 are forecast at about 288 000 tonnes, including 35 000 tonnes of food aid.

TOGO (15 June)

The first rains started in April in the south, allowing planting of the main maize crop due for harvest from July. The food supply situation should be satisfactorily this year, following the good crop harvested in 2004. However, the current political development may disrupt the growing season and affect the food situation of the country if population displacements continue. As of mid-June, about 35 743 people had fled the country, including 20 599 to Benin and 15 144 to Ghana.

CENTRAL AFRICA

CAMEROON (25 May)

Satellite imagery indicates that the rainy season started on time in the south, allowing land preparation and sowing of the first 2005 maize crop, due for harvest from July. Planting of coarse grains will progress northwards following the onset of the rains. However, swarms of desert locusts were reported in the extreme north, raising concerns over the food outlook for this part of the country, which is already facing a tight food situation.

National cereal production is estimated to have increased significantly in 2004, according to official sources. However, in the northern regions located in the Sudano-Sahelian zone, dry spells and the poor distribution of rainfall during the growing season resulted in a serious decline in production. High prices are reported in these regions due to low supply of grain.

In a bid to diversify the economy in view of declining oil production, the Government launched recently a five-year campaign to revamp the cocoa sector and boost output to 200 000 tonnes per year. 160 000 tonnes of cocoa were produced in 2003/04 in Cameroon, where between one million and two million people depend directly or indirectly on the cocoa sector.

CENTRAL AFRICAN REPUBLIC (CAR) (25 May)

Satellite imagery indicates that the rainy season started in April, allowing land preparation and sowing of the first 2005 maize crop, due for harvest from July. Agricultural production is expected to increase further this year, reflecting an improved security situation relative to the situation in previous years and increased plantings following agricultural inputs distribution with the assistance of FAO in the localities which were adversely affected by the 2003 rebellion.

The inflation rate estimated at 7 percent in 2003 due to increased food prices resulting from transport disruptions, slowed down in 2004 with an improved security situation. It is expected to remain stable in 2005, which should improve access to food in the country. Although most of the 230 000 IDPs have returned home, an estimated 41 000 refugees from CAR are still living in Chad.

CONGO, DEMOCRATIC REPUBLIC OF* (6 June)

Rains this season have been normal to above normal over much of the country. This is expected to result in favourable harvest of the secondary season crops such as maize and rice in southern provinces of Katanga, Kasai Oriental, and Bandundu. Relative improvement in the security situation since 2004 and assistance provided to the internally displaced persons (IDPs) and returning refugees has had some positive impact on agricultural activities in the affected areas. However, recent clashes and violent attacks in the eastern part of the country continue to displace large numbers of people, adding to the existing 3 million IDPs. Insecurity for producers and traders (who are forced to pay illegal levies on their farm produce), shortages of basic inputs (such as improved planting materials, hand tools, fishing equipment and veterinary supplies) and the decrepit rural infrastructure (notably feeder roads) are the main constraints to food production and distribution. Furthermore, staple crops, namely, cassava and banana, have been severely damaged by pests and diseases this season.

Food insecurity affects over 70 percent of the total population of 57 million in DRC. Hence, the Government and the donor community, at the Round Table conference held in March 2004, confirmed agriculture sector rehabilitation as the cornerstone of their strategy for poverty reduction. The focus will be on two main components, addressing emergency needs on one hand and achieving the medium to long term rehabilitation on the other. Under the Minimum Partnership Program for Transition and Recovery, the donor community has pledged US\$ 6.86 billion over the next 4 years, of which US\$ 285 million are intended for agriculture. The country has also received US\$ 39 million from the IMF under the Poverty Reduction and Growth Facility.

CONGO, REP OF (25 May)

Domestic cereal production covers about 3 percent of total cereal requirements; the balance is imported, mostly on commercial terms. In 2005 the import requirement of cereals, mainly wheat and rice, is estimated at some 288 000 tonnes, virtually unchanged from the previous year. An outbreak of Ebola in late April in the northern region of Cuvette-Ouest has prompted

the Government and the WHO to quarantine the districts of Etoumbi and Mbomo, where food assistance is needed.

Following the peace agreement between the Government and the rebels in March 2003, the Government and several international organizations have set up a Disarmament, Demobilization and Reintegration (DDR) programme for former militiamen; 42 000 former combatants are to benefit from the programme during 2004-2006. According to the UNHCR, the country hosts a large number of refugees, including DRC Congolese, Angolans and Rwandans. The security situation remains volatile and hampers humanitarian aid.

EQUATORIAL GUINEA (25 May)

The country does not produce a significant quantity of cereals. The staple foods are sweet potatoes, cassava and plantains. It imports on average 10 000 tonnes of wheat and 6 000 tonnes of rice.

In recent years inflation in Equatorial Guinea has been higher than in other countries of the Franc Zone, due to rapidly rising domestic demand since the oil boom began in the mid-1990s. However, annual inflation slowed down considerably in 2004, to 4 percent, from an estimated 7.3 percent in 2003.

GABON (25 May)

The main food crops are cassava and plantains. The only cereal crop grown is maize which is sown from July and harvested from November. In a normal year production reaches about 30 000 tonnes. Imports of cereals in 2005, mainly wheat and rice, are estimated at some 167 000 tonnes. Economic growth has trended downwards recently, due to declining oil production, which will continue to affect households' income and access to food.

SAO TOME AND PRINCIPE (25 May)

The staple food crops are roots, plantains and tubers. Annual imports of cereals are estimated at some 13 000 tonnes. Food aid needs for 2005 are estimated at about 7 600 tonnes. In 2003 agriculture accounted for 19 percent of GDP and about 86 percent of exports, but the structure of the economy will be significantly transformed by oil production which is expected to begin by 2010.

EASTERN AFRICA

BURUNDI* (15 June)

Harvesting of the main season (2005B) crops is currently underway with overall unfavourable prospect for legumes (beans), and roots and tubers due to irregularities and dry spells during April and first half of May. According to the country's Early Warning System prices in Bujumbura market in May 2005 were substantially higher for beans (26 percent), sweet potatoes (75 percent), and cassava flour (36 percent) compared to the same month a year ago. Production prospects for cereals (mainly sorghum and rice) are, however, considered good especially compared to last year's drought affected harvests. A joint FAO/WFP/UNICEF/Ministry of Agriculture assessment is planned shortly. Total cereal production for 2005 is forecast at 286 000 tonnes, about 2 percent higher than last year. However, a decline in production is forecast for legumes due to unfavourable weather and in roots and tubers due to the continuing attack of cassava mosaic virus.

Despite some improvements, food insecurity persists in northern, eastern and southern provinces due to the reduced harvests. According to UNHCR there are about 7 500 to 8 500 Rwandan asylum seekers in Burundi. These and the host families require assistance. Since March 2003 more than 150 000 Burundian refugees have returned from Tanzania but nearly as

many still remain. WFP distributed 4 500 tonnes of food to 521 000 beneficiaries in the month of May.

ERITREA* (1 June)

Planting of the 2005 cereal and pulse crops is about to start. Recent rains have helped land preparation and water replenishment in several areas of the country. The performance of the “bahri” rains (October-February), important for crops and pasture in the otherwise arid areas of the Northern Red Sea Zone and the escarpments, was generally unsatisfactory.

Widespread food shortages are reported in several areas of the country following consecutive years of drought and below average crop production. Cereal production in 2004 was estimated by an FAO/WFP Crop and Food Supply Assessment Mission at about 85 000 tonnes, less than half the average of the previous 12 years. An estimated 2.3 million people, about two-thirds of the whole population - including in urban and peri-urban areas - require humanitarian assistance. However, the Eritrean Relief and Refugee Commission (ERREC) has indicated that only 1.2 million people could be assisted so far due to shortages in available food aid stocks.

A revised Emergency Operation (EMOP) was jointly approved on 5 April 2005 by FAO and WFP for food assistance for a total of 840 000 people affected by crop failure for a period of five months (1 April 2005 to 31 August 2005). Overall, of the US\$157 million requested by Eritrea in the consolidated appeal (CAP) only 19.9 percent has been resourced by May. Further pledges are urgently needed ahead of the hungry season that has just started.

ETHIOPIA* (10 June)

During the first months of the year, a precarious food security situation with high malnutrition rates was reported in some areas following a combination of factors, including delays in the transfer of resources to beneficiaries under the Productive Safety Nets Program (PSNP) and partial and late response to the Humanitarian Appeal. In addition, heavy rains and floods in the southern and eastern lowlands resulted in loss of life, displacement of tens and thousands of people and severe damage to property and infrastructure.

The heavy rains in April and May have, however, improved prospects for the 2005 secondary “belg” grain crops in several parts of the country. The belg crop accounts for some 10 percent of national level grain production but in some areas it provides most of the annual grain production. Good rains in April and May have also helped the replenishment of pasture and water in the lowland areas of the south and south-east and in the pastoral Afar region, and encouraged farmers to plant and prepare land for the next main cropping season.

Despite improved conditions in some areas, the food security situation is still of concern in parts of country, particularly in eastern parts of Oromia and southern parts of Southern Nations, Nationalities and Peoples Region (SNNPR) where a number of districts are classified as hot-spot areas. Household food availability is reportedly poor and high malnutrition rates in some locations are of concern. A multi-agency mission, composed of Government, UN and other humanitarian agencies revised in April the total number of people in need of emergency food assistance in 2005 upwards from 3.1 million to 3.8 million with food requirement of about 464 000 tonnes. It is expected that contributions currently under discussion will cover the requirements for the remaining of the year. However, further adjustments of needs may follow the annual “belg/gu” assessment which begins in late June.

KENYA* (1 June)

Crop prospects for the 2005 “long rains” (March-June) season have generally improved following recent good rains. However, extended dry spells in the eastern marginal agricultural areas from March to early April have resulted in crop failure and reduced production in many areas. Pastoral areas in the south and northwest have also benefited

from recent heavy, well-distributed rainfall despite earlier dry conditions. Recent heavy rains and floods have resulted in loss of assets and displaced large number of people.

Food shortages in some of the drought-affected marginal agricultural districts of Eastern Province have eased following a relatively improved short-rains harvest. However, in the lowlands of Kitui and Makueni and most of the coastal districts significant food insecurity persists. Pastoralists and agro-pastoralists, in particular, face serious food shortages despite recent beneficial rains. The impact of successive poor seasons has left a large number of households highly vulnerable and unable to cope with continued losses of livestock and livelihood options. A revised Emergency Operation (EMOP) was jointly approved on 26 April 2005 by FAO and WFP worth about US\$42 million, for food assistance to about of 1.6 million people affected by drought for a period of 8 months (1 March 2005 to 31 October 2005). The Government of Kenya together with its humanitarian partners are currently organizing the long rains assessment, which will take place in July. Following this, food security conditions will be re-evaluated.

RWANDA (6 June)

Harvesting of 2005B main season crops (beans, cassava, sweet potatoes, potatoes and wheat) is underway and will continue until end of July. In spite of the rainfall being erratic and below normal in February-March, harvest of this season's cereal crops is forecast to be good. Consequently, the index of main food prices has been declining since late March 2005. However, prices in absolute terms, are reported to be higher for several important food commodities such as rice (20 percent), maize (30 percent), Irish potato (40 percent) and beans (41 percent) in April 2005 compared to April 2004. A joint FAO/WFP/UNICEF Ministry of Agriculture assessment is currently underway. Total cereal production for 2005 (sum of A, B and C seasons) is forecast at 271 000 tonnes, about 2 percent higher than last year's poor harvest but 2 percent below the average of previous five years.

As reported in recent FEWSNET Bulletin, livestock in six districts in four provinces have been quarantined due to an outbreak of black quarter disease.

The Rwandan economy grew by 6 percent in 2004 primarily due to a strong performance of the agriculture sector. However, according to the results of the recent joint assessment by FAO/WFP/UNICEF/the Government, a total of 30 000 tonnes of food aid would be required in 2005 for an estimated 110 000 vulnerable people, especially during the lean months of April and early May in the eastern part of the country. The continued influx of refugees from DRC and Burundi in recent months has resulted in over 50 000 refugees, putting strain on an already fragile food security situation there. WFP and its partners provide food aid to about 53 000 people. However, their rations reportedly have been cut by 30 percent due to pipeline problems.

SOMALIA* (1 June)

Following concerns over delayed "gu" rains in several major crop-producing areas in southern Somalia, good rains from mid-April have improved early prospects for the 2005 main season cereal crops, for harvest from August. However, recent heavy rains in both Somalia and the Ethiopian highlands have resulted in flooding that displaced hundreds of families and destroyed large tracts of farm land. Standing crops also face a high risk of flooding and spoilage due to the current heavy rains expected to continue through June. The *gu* is the main rainy season (April – June) and supports about 70 to 80 percent of the annual cereal production in normal years.

Elsewhere, in the mainly pastoral northwest, northeast and parts of the central regions, however, the *gu* rains started early and were significantly above normal, by as much as 120 to 300 percent of the long term average. This has improved pasture and water conditions but also caused flash floods, which resulted in loss of human lives, displacement of people and destruction of infrastructure. The floods also disrupted relief interventions in several parts.

Serious humanitarian concerns continue as a result of cumulative effects of successive droughts and insecurity. A recent malnutrition survey in Bosaso IDPs camps found an acute malnutrition rate of 20.3 percent with high child mortality rates. In addition, various indicators suggest that malnutrition levels continue to be significantly above the usual range in parts of Gedo, lower Juba Valley and northern Galgadud Region. Recent clan conflicts in several parts have also displaced a large number of people and disrupted overall economic and livelihood activities. Overall, an estimated one million vulnerable people require humanitarian assistance.

SUDAN* (1 June)

Harvesting of the 2005 wheat crop is complete and output is forecast to be about average. Total cereal production in 2004/05 is estimated at 3.4 million tonnes, about 43 percent below the previous year and about 22 percent below the average of the previous five years.

The poor harvest coupled with conflict and population displacements have resulted in a precarious food situation in several parts of the country. Humanitarian agencies in Sudan have warned that food supplies for millions of families across Sudan are running critically low, and many will face severe shortages unless more funds for food and agricultural assistance are forthcoming. The current planting season is also jeopardised.

The continued crisis in Greater Darfur remains the most pressing humanitarian crisis. In southern Sudan, the optimism that followed the peace deal signed in January 2005 to end the war has prompted large number of Sudanese refugees in neighbouring countries to trek back to their villages. The humanitarian challenges and rehabilitation and reconstruction needs of the shattered economy and infrastructure will be enormous. According to a joint UN agency assessment, access to sufficient food is worsening for the returnees and poor households in the south-western Sudanese region of Bahr el Ghazal and malnutrition levels are reportedly starting to rise in southern Sudan.

A revised Emergency Operation (EMOP) was jointly approved on 9 June 2005 by FAO and WFP for food assistance for 3.2 million people affected by war in Greater Darfur for a period of 12 months (1 January 2005 to 31 December 2005). The total revised budget now totals US\$561.5 million. In addition, FAO has appealed for nearly US\$62 million for emergency assistance to the country's agriculture sector for 2005. So far it has received only 17 percent of the funds requested. Additional pledges are urgently needed.

TANZANIA, UNITED REPUBLIC OF (1 June)

Harvesting of the main season maize crop has begun in uni-modal central and western regions, while in the grain-basket southern highlands, harvesting is expected to start in August. In bi-modal northern areas, rains were favourable for second-season Masika crops planted in March. The rains started early except in most of Mwanza and few other areas. Total maize output in 2005 is expected to be below the previous year's above average crop of about 2.9 million tonnes.

The overall food supply situation is generally favourable and with increased maize supply to most markets prices are expected to decline further. Lower prices are expected to encourage maize exports to neighbouring countries.

UGANDA* (1 June)

Prospects for the 2005 main season cereal crops have generally improved due to recent good rains. Earlier in April, a long dry spell, particularly in the main maize producing districts of central, eastern and mid-western parts, has negatively impacted on both crop and pasture development. Continued rains are needed through June to ensure a good harvest. Similarly, lower than normal rainfall in northern parts of the country has affected crop growth. By

contrast, in western and south-western parts of the country, where the current season is secondary, near normal rains have improved crop prospects.

The food situation in northern Uganda (Gulu, Kitgum, Pader and parts of Lira districts) remains precarious due to continued security concerns. Over 1.4 million displaced persons sheltering in over 100 congested camps depend mainly on WFP food assistance for survival. Overall, an estimated 2.69 million vulnerable people, including an estimated 570 000 drought-affected people in Karamoja, nearly 500 000 people on targeted programmes and about 192 000 refugees, rely on food assistance. WFP predicts a shortfall of over 88 000 tonnes, between July and December 2005, unless new pledges and deliveries are received. The total monthly requirement is at about 23 648 tonnes.

SOUTHERN AFRICA

ANGOLA* (6 June)

Harvesting of the 2005 main season crops, maize, sorghum and millets, is nearly completed. Although the cumulative rainfall since the beginning of the season in September 2004 has been close to normal the maize growing central areas of the country experienced dry spells from mid-December to mid-January followed by early tapering off of rains from the end of March. At the national level, a negative effect of this is partly compensated by increased areas under cultivation, favourable weather in the northern areas, resettlement of many internally displaced people and refugees and substantial distribution of agricultural inputs. As a result, FAO's preliminary estimate puts the total cereal production this year at about 695 000 tonnes, or about 5 percent below last year's production but above the five-year average. Still the country would require cereal imports of about 810 000 tonnes for 2005/06, of which 730 000 tonnes are expected to be in the form of commercial imports and 80 000 tonnes as food aid. Similar to the past years, challenges to improving food production in the country include access to productive inputs such as draught animals, fertilizer and agriculture extension services.

Angola's economy, which produces over 1 million barrels a day of crude oil that fetched more than double the budgeted price in the international market in 2004, is expected to boom with a Government prediction of 16 percent growth in 2005. Ironically, a large number of food insecure people exist in the country. WFP with limited food distribution currently feeds about 850 000 vulnerable people, most of them internally displaced persons (IDPs). Recently the World Bank approved a grant of US\$ 21 million to Angola to help implement the HIV/AIDS, Malaria and Tuberculosis Control Project.

BOTSWANA (6 June)

Below normal rainfall during the 2004/05 agricultural season points to less than favourable harvest of sorghum, the country's main staple foodcrop. FAO estimates total cereal production at about 18 000 tonnes, some 1 000 tonnes below last year's near-normal output. Earlier a statement from the Ministry of Agriculture had indicated that cereal plantings were substantially reduced this season due to the erratic and insufficient rainfall. Domestic cereal production in Botswana typically amounts to 5-10 percent of the country's total needs. The remainder is covered by commercial imports.

The cattle industry is Botswana's second largest foreign currency earner after diamonds. Cattle have been affected by successive outbreaks of foot-and-mouth disease resulting in loss of access to European markets. Recently the Government unveiled a plan to battle and eventually eradicate this disease.

LESOTHO (6 June)

An FAO/WFP Crop and Food Supply Assessment Mission in May estimated the 2005 cereal output at 119 000 tonnes, consisting of 92 000 tonnes of maize, 17 000 tonnes of sorghum and 10 000 tonnes wheat. The total production is higher than last year by about 15 percent but is 84 percent of the five-year average. Lesotho's cereal production appears to be on a downward trend, especially in the main producing districts of Berea, Butha-Butha, Leribe and Maseru. This is cause for concern and should be fully investigated. Endemic soil erosion, weather-related disasters and the impact of HIV/AIDS pandemic are likely to be major underlying causes.

Cereal import requirements for 2005/06 marketing year (April/March) are estimated at about 293 000 tonnes, of which 213 000 tonnes are expected to be imported commercially. With food aid stocks of 61 000 tonnes on hand and in the pipeline (as of 1 April 2005) there remains an uncovered cereal deficit of 19 000 tonnes which needs to be covered by additional donor assistance.

It is estimated that 548 800 people will have a significant food deficit between June 2005 and March 2006 and will require food or cash assistance amounting to 20 200 tonnes of maize. Currently WFP feeds up to 400 000 most vulnerable people affected by crop failure and by HIV/AIDS, through general and targeted distributions.

MADAGASCAR (6 June)

The 2004/05 agricultural season began with normal rainfall in September-October, followed by above average precipitation tapering off earlier than usual in April. The area planted to paddy is reported to have increased in response to high rice prices at planting time. As a result a preliminary estimate of production points to a record paddy harvest of about 3.4 million tonnes in the country. In anticipation of this favourable harvest, according to some reports, rice prices have dropped from about \$1/kg from the peak of the rice crisis (around December-January) to about \$0.5 in early May. In the usually dry south, Toliary province received heavy rains in early January. This was followed by much reduced precipitation in February and March. Consequently, maize harvest is expected to be about normal.

Reportedly more than 75 percent of Madagascar's 16 million people live below the poverty line of US\$ 1 a day. A recently released report by the Early Warning System showed that about 3 000 tonnes of food will be needed to feed 105 000 people in the upcoming lean season (December 2005-April 2006). A four-year aid package of US \$110 million was officially signed on 18 April under the US program of Millennium Challenge Corporation to help boost the country's agricultural production.

MALAWI* (6 June)

An FAO/WFP Crop and Food Supply Assessment Mission in April-May 2005 estimated the 2005 production of maize, Malawi's most important staple crop, at 1.25 million tonnes, the lowest in a decade and some 26 percent below last year's relatively poor harvest. Aggregate harvest of the important root and tuber crops, estimated at 3.8 million tonnes, is also some 9 percent down on last year's poor harvest and 15 percent below the five-year average. Early and above average rains had led to optimism for a good crop, but hopes were dashed when rains failed at a critical time when the maize crop was at the stage of cob formation and pollination in late January and the whole of February.

Market prices for the main staple, maize, in May on average were higher than the same period in past two years, reflecting the current poor harvest, especially in the south. Better than average maize production in neighbouring northern Mozambique would imply more formal and informal imports into Malawi. This trade should be mutually beneficial and would stabilize prices in both countries. Total commercial maize import is forecast at about 300 000 tonnes, leaving an uncovered deficit of 434 000 tonnes.

The Malawi VAC estimates that a total of 4.22 million people, or over 34 percent of the national population have insufficient production or income to meet their minimum food requirements and will require assistance in food or cash amounting to about 270 000 tonnes in maize equivalent during the 2005/06 April/March marketing year. The number in need of assistance could increase to 4.61 million if maize prices rise sharply.

MAURITIUS (6 June)

Domestic production of cereals in Mauritius amounts to less than 1 percent of total cereal needs; consequently the country imports commercially virtually its entire cereal consumption requirements. Sugarcane is grown on about 90 percent of the cultivated land area and accounts for 25 percent of the country's export earnings.

The anticipated loss of preferential access to US and European markets by 2007 is expected to have negative consequences for sugar and textiles, the two important exports of the country. For the last three years Mauritius has been experiencing a relatively high unemployment rate (in excess of 10 percent) according to the Economist Intelligence Unit, nearly double the average of 5.9 percent for 2000.

MOZAMBIQUE (6 June)

An FAO/WFP Crop and Food Supply Assessment Mission in April-May estimated the 2005 Cereal production in Mozambique to be about 1.92 million tonnes, some 3 percent lower than last year's record harvest, but 10 percent above last five-year average. Regional performance, however, differed significantly with 43 and 4 percent reductions in the cereal harvest in the southern and central provinces respectively, and an estimated 12 percent increase in the three northern provinces. Surplus maize from the northern and central areas is expected to be exported to neighbouring food deficit Malawi.

Despite the overall satisfactory national production, there are specific areas such as the southern districts of Tete province, and many districts in southern provinces, where harvests were reduced. Total cereal import requirements, including rice and wheat, are forecast to be 10 percent higher than last year's. Maize imports, in the order of 175 000 tonnes, may be necessary, given the high costs of moving grain from north to south. Of these about 130 000 tonnes are expected to be through commercial channels, leaving about 45 000 tonnes to be covered by food aid imports.

The preliminary results indicate that some 587 500 people will need emergency food assistance of about 70 000 tonnes of cereals during July 2005 to March 2006 lean period primarily due to the impact of drought in the south and parts of centre. Total national food assistance needs including those required to cope with the HIV/AIDS problem (under the regional PRRO) are estimated at 83 000 tonnes. Part of these food needs (about 114 300 tonnes) could be procured locally in view of a maize surplus in northern and central areas. Revised cassava yield estimates place the quantities theoretically available for use at a higher level than in previous assessments; therefore, the Mission recommends that opportunities for local purchases of dried cassava and cassava flour for food aid requirements be investigated.

NAMIBIA (6 June)

The Namibia Early Warning and Food Information Unit (NEWFIU) puts an early estimate of the 2004/05 total coarse grain production, mainly millets, sorghum and maize, at 129 000 tonnes, 3 percent above last year and 27 percent above the five-year average. Favourable production is also expected for non-cereal crops such as bambaranuts, cowpeas, pumpkins, and melons. According to earlier Government reports, farmers in eastern Caprivi region were provided emergency assistance for procurement of seed, draft animal power and ploughing implements and accessories. Production of

winter wheat is forecast at 10 500 tonnes, down by 1 000 tonnes from the previous year. Consequently, a national cereal import requirement for 2005/06 marketing year (May/April) is estimated at 167 500 tonnes, or some 11.5 percent higher than the year before. Most of this is expected to be met by commercial imports.

SOUTH AFRICA (6 June)

Relatively well-distributed rainfall during the main growing season, December 2004 to April 2005, through much of the maize producing area in the north-east, has led the country's Crop Estimating Committee to revise upwards its third estimate of maize production for the 2004/05 season to 11.8 million tonnes. This would represent an increase of about 21 percent over the previous year's above average harvest. With closing stocks of 3.85 million tonnes of maize, as of 26 April 2005, the potential surplus during May 2005-April 2006 marketing year could reach about 4.5 million tonnes, more than enough to cover the region's import requirements.

The final official production estimate for the winter wheat crop harvested in October-November 2004, at 1.7 million tonnes, indicates an increase by about 10 percent over the previous year. This would translate into a wheat import requirement for the year in the magnitude of 1 million tonnes.

The SAFEX price of white maize has plummeted to US\$88/t at the end of May in response to substantial domestic stocks, improved crop production prospects locally and internationally, substantial drop in the international price, and recent appreciation of the Rand against the US dollar (currently at about R6.57/US\$). Maize prices had soared to US\$216/t in early February 2004 with the fear of a severe drought in the country in 2004. The current low prices should help ease the regional food shortages and improve regional food security.

SWAZILAND* (6 June)

According to the recent FAO/WFP Crop and Food Supply Assessment the 2004/05 production of Swaziland's staple food crop, maize, is likely to be about 82 000 tonnes, 10 percent higher than last year's official post-harvest estimate and 6 percent below the average of the previous five years. The improved performance was due to favourable rainfall and increased use of chemical fertilizers combined with farmyard manure in the Highveld and Middleveld. The Lowveld and parts of Lubombo suffered serious crop failure due to poor rainfall. The observed longer term decline in maize production in Swaziland needs to be investigated.

Cereal import requirements for 2005/06 marketing year (April/March) are estimated at 111 000 tonnes, of which 70 000 tonnes are expected to be imported commercially. With about 6 000 tonnes of food aid in stock and pipeline at the beginning of the marketing year, there remains an uncovered deficit of 35 000 tonnes which needs to be met by additional international assistance.

Access to food for poor households remains a serious problem in Swaziland. Available data indicate that per capita consumption of maize has been declining over time without significant cross-substitution with other foods. There is an urgent need to examine the country's existing pricing and marketing policies for maize. Currently the National Milling Corporation (NMC), a parastatal company, is the sole authorized importer of maize. Given the oligopolistic nature of the milling industry, maize meal prices tend to be too high for poor households limiting their access to adequate supplies. In early May the CFSAM observed that the average price paid by consumers was four times the price charged to millers by NMC for grain.

ZAMBIA (6 June)

An FAO/WFP Crop and Food Supply Assessment Mission in May 2005 estimated the 2005 cereal output at 992 000 tonnes, 28 percent down from last year's bumper harvest and 16 percent below average of the previous five years. Similarly, total maize production this year

is estimated at about 820 000 tonnes. A series of dry spells during the 2004/05 growing season and early cessation of rains, especially in Southern and Western provinces, sharply reduced yields and production of cereals. In addition, the mission estimated a decrease in production of roots and tubers (cassava and sweet potatoes) of about 7 percent from the previous year. The overall prospects for the next winter crops (mainly wheat to be planted in June-July and harvested in November-December) are not good due to low soil moisture conditions and lack of quality seeds.

The mission also found that the retail prices of white maize, in mid-May especially in Southern and Western provinces affected by the drought, are showing an upward trend. In most markets they are above the floor price of 12 000 ZMK/kg established by the Food Reserve Agency (FRA). Also, there is a great variation of prices between locations reflecting long distances between markets, coupled with poor state of roads in many areas and high fuel costs. In April 2005, maize grain prices went from a minimum of 667 ZMK/15kg in Mumbwa (Central province) to a maximum of 1 163 ZMK/kg in Mongu (Western province).

Cereal import requirements for marketing year 2005/06 (May/April) are estimated at 269 000 tonnes of maize. Commercial imports are projected at 222 000 tonnes, with a remaining deficit of 47 000 tonnes to be covered by international assistance for those at risk in 17 districts in the Western and Southern provinces. Vulnerability Assessment Committee (VAC) and WFP assessment results on the magnitude and depth of food insecurity in the country are expected later this month.

According to a recent report of the National Vulnerability Assessment committee, some 1 232 661 people will be in need of some form of food assistance between July 2005 and February 2006, with the household cereal gap estimated at 118 335 tonnes. The report also recommended inclusion of nutrition and health programmes, support for education (prevention of drop-outs) as well as provisions for social protection.

ZIMBABWE* (6 June)

As a result of the widespread drought, combined with late availability of seeds, shortages of fuel, fertilizer, credit, spare parts and draught power, high cost of spare parts and inadequate credit, the 2004/05 agricultural season is expected to yield one of the lowest harvests in recent years. USDA estimates production of maize, the main staple food crop, at 550 000 tonnes, compared to over 2 million tonnes in 2000. Meanwhile, other estimates from national and regional sources, range from 300 000 to 600 000 tonnes. With a national consumption requirement of about 1.45 million tonnes, the import requirement is substantial. The Government of Zimbabwe has recently announced its plans to import 1.2 million tonnes of maize, but commercial import capacity of the country is severely constrained by falling foreign exchange reserves. According to official sources, about 150 000 tonnes of grain were imported from South Africa in April.

According to FEWSNET, the parallel market prices of maize in March throughout the country were rising instead of declining as per the normal seasonal pattern. At mid-March 2005 maize prices varied from Z\$ 1 170/kg in surplus areas mostly in the north-central part of the country to Z\$ 2 945/kg in the south and peripheral deficit areas. These prices have risen from the respective average of Z\$ 280 to Z\$ 560 per kg during post-harvest period in April 2004. The continuing hyper inflation¹ combined with extremely high levels of unemployment, greatly limit access to food for the most vulnerable population groups.

¹ Annual rate of inflation in March 2005 was about 130 percent; this has steadily declined from about 600 percent at the beginning of 2004.

NEAR EAST

CYPRUS (1 June)

The 2005 aggregate output of wheat and barley is forecast at 103 000 tonnes, slightly below the previous year but about average. Cereal production normally covers less than one-third of total domestic requirements.

Imports of cereals in 2004/05 (May/April), mainly wheat and barley, are estimated at about 645 000 tonnes, similar to the previous year.

IRAN, ISLAMIC REPUBLIC OF (6 June)

Wheat and barley are the main crops cultivated during the winter period in the Islamic Republic of Iran. Agro-meteorological conditions during March-April continued to be favourable for winter crops and close to the previous year. Harvesting of barley was completed in March, while harvesting of wheat has just commenced. Tentatively, 2005 output is forecast at 14.5 million tonnes of wheat, 500 000 tonnes higher than last year's record production, and 2.8 million tonnes of barley, some 100 000 tonnes above last year's level.

The country achieved record production in 2004, after a bumper crop in 2003, and made the country close to self-sufficient in wheat for the first time in recent years. The production increases are mainly due to Government support (guaranteed procurement prices, supplying higher yielding seeds, improving machinery services, augmenting fertilizer usage and enhancing water systems and pest management practices) and favourable weather conditions. Based on the anticipated 2005 production, the 2005/06 wheat import requirement is forecast at 249 000 tonnes, slightly above last year's low level. Total cereal import is forecast at some 3.3 million tonnes.

A strong earthquake measuring 5.9 on the Richter scale struck south-eastern parts of Iran on 13 March 2005. Some 22 000 people were affected by the quake, but damage was insignificant.

The International Federation of the Red Cross together with the Iranian Red Crescent Society continue assistance with the reconstruction and rehabilitation following Bam Earthquake in December 2003, which killed over 26 000 people, injured over 30 000 and left 75 600 homeless.

IRAQ* (1 June)

Prospects for the 2005 winter cereals, being harvested, are uncertain. Satellite-based Normalised Difference Vegetation Index (NDVI) for the months of April and May indicate a decrease in vegetation cover compared to the average (1998-2004) in several main crop producing areas.

Iraqis continue to receive their monthly food ration from the Public Distribution System (PDS). Shortfalls in rice, sugar and milk and infant formula were reported in several parts of the country due mainly to disruptions in transport.

The Iraqi Central Office for Statistics and Information Technology (COSIT) and WFP are planning a follow-up report to last year's Baseline Food Security Analysis which is expected to shed more light in the overall food situation in the country.

ISRAEL (1 June)

Harvesting of the 2005 wheat crop is almost concluded and the output is forecast at about 190 000 tonnes. Domestic production of wheat in normal years covers less than one-fifth of the country's total requirement, the rest being commercially imported. In 2004 wheat production – estimated at 128 000

tonnes – was below average due to poor precipitation. Imports of cereals in 2004/05 (July/June) are forecast at about 3.1 million tonnes.

JORDAN (1 June)

Aggregate output of wheat and barley in 2005 is forecast to increase sharply compared to the previous year's well below-average crop due to improved precipitation. Domestic cereal production normally meets only a small proportion of consumption requirements, the rest being covered by imports. Imports of wheat in 2004/05 (July/June) are forecast at 860 000 tonnes, about 10 percent higher compared to the previous year. Coarse grain imports are forecast at 900 000 tonnes, similar to the previous year.

LEBANON (1 June)

The 2005 wheat and barley crops, now being harvested, are expected to be about 130 000 tonnes, about 4 percent above the previous year due to improved precipitation. The country depends heavily on imports (more than 80 percent) to meet demand for cereals.

Imports of cereals - mainly wheat - in 2004/05 (July/June) are forecast at some 790 000 tonnes, slightly above the previous year.

SAUDI ARABIA (1 June)

The 2005 wheat crop which is just harvested is forecast at about 1.2 million tonnes compared to the previous year's 1.6 million tonnes. Local barley production has virtually ceased since 2003 as farmers did not find the Government Purchase Price (GPP) of US\$267.67/tonne attractive enough.

Imports of coarse grains (mainly barley and maize) in 2004/05 (July/June) are forecast at 7.7 million tonnes, about 4 percent below the previous year due to improved pasture.

SYRIA (1 June)

The output of wheat in 2005, now being harvested, is forecast at 4.7 million tonnes, about 9 percent above the average for the previous five years. The barley crop is also forecast at an above average 1.1 million tonnes.

Imports of wheat and rice in 2004/05 (July/June) are forecast at a total of 405 000 tonnes whilst barley and maize imports are forecast at 1.7 million tonnes.

TURKEY (1 June)

The outlook for the 2005 wheat crop, for harvest from July, has somewhat been dampened by the intermittent drought conditions that prevailed in central and south-eastern parts of the country during last winter. In the major winter wheat and barley production areas of the country, the cold inland climate had affected developing crops.

The 2005 wheat crop is provisionally forecast at 19.7 million tonnes, about 5 percent below the previous year. Production of wheat in 2004, estimated at 20.7 million tonnes, was slightly above the average of the previous five years. Output of coarse grains (mostly barley and maize) in 2005, forecast at 11.5 million tonnes, is slightly above the previous year and about 7 percent above average. Paddy production in 2004 is estimated at 400 000 tonnes about 7 percent above the previous year and 12 percent above average.

Wheat imports in 2004/05 (July/June) are forecast at 600 000 tonnes compared with 1.2 million tonnes for the previous year. Maize imports are forecast at about 800 000 tonnes compared to 1 million tonnes the previous year.

YEMEN (1 June)

Planting of the main sorghum and millet crops, to be harvested towards the end of the year, has started under favourable weather conditions. The output from the 2004 sorghum crop is estimated at some 263 000 tonnes, about 23 percent higher than the previous year but nearly 21 percent below the average of the previous five years. Output from the wheat crop, estimated at 105 000 tonnes, is similar to the previous year's below-average crop. Maize production in 2004 estimated at 31 000 tonnes, was almost similar to 2003 but 29 percent below the average. Imports of cereals in 2005, mainly wheat, are forecast at about 2.3 million tonnes, compared to 2.4 million tonnes in 2004.

ASIA

AFGHANISTAN* (6 June)

Above-average precipitation and water availability in various rivers in Afghanistan are seen to result in another bumper crop this year. However, air temperatures in the past few weeks have been significantly above average, which may cause flooding compromising crops and infrastructure. Aggregate cereal harvest is tentatively forecast at about 5.3 million tonnes, some 2 million tonnes up on the five-year average harvest. The forecast cereal harvest includes some 4.27 million tonnes of wheat, 315 000 tonnes of maize, 337 000 tonnes of barley and 325 000 tonnes of paddy rice. Aggregate cereal import requirement for the 2005/06 marketing year is forecast at about 386 000 tonnes, including 280 000 tonnes of wheat and 106 000 tonnes of rice. The wheat import requirement includes some 120 000 tonnes of targeted food assistance requirement for the same period.

WFP under the current Protracted Relief and Recovery Operation (PRRO) is targeting a total of 4.8 million vulnerable beneficiaries. Main recovery activities include food for education -- school feeding, de-worming, support to teacher training, literacy training, -- vocational skill training and food-for-work activities focusing on forestation, environmental protection, watershed management, irrigation and construction of schools. Relief activities, one-third of the planned assistance, support returning refugees, internally-displaced persons, the malnourished, TB patients and their families, vulnerable households and social institutions, as well as isolated populations affected by natural disasters, such as snow, floods and earthquakes. The Government, with support of WFP and other stakeholders, launched the 2005 National Risk and Vulnerability Assessment end-May 2005. The assessment covers both rural and urban areas. The findings, expected to be released in September 2005, will support programming intervention modalities for identified populations at risk.

ARMENIA (3 June)

Spring crops, mainly barley, some upland wheat and maize, have been planted on about 81 000 hectares, a similar to last year. Both, winter and spring crops are in good conditions following favourable weather and adequate input availability. Aggregate cereal production is forecast at about 479 000 tonnes, some 35 000 tonnes up on last year's good harvest. This year's forecast harvest includes some 380 000 tonnes of wheat and 87 000 tonnes of barley. Aggregate cereal requirement per annum is estimated at 648 000 tonnes. Total cereal import requirement for the 2005/06 marketing year is estimated at 169 000 tonnes, including 110 000 tonnes of food quality wheat, 25 000 tonnes of rice and 28 000 tonnes of maize.

AZERBAIJAN (3 June)

Latest reports point to favourable growing conditions both for winter and spring crops. Aggregate cereal harvest, highly dependent on weather, is tentatively forecast at a recorded 2.2 million tonnes, some 415 000 tonnes up on the average of the last five years. This aggregate includes some 1.8 million tonnes of wheat, 232 000 tonnes of barley and some 150 000 tonnes of maize. Aggregate import requirement for the 2005/06 marketing year is forecast at about 1.15 million tonnes of mainly food quality wheat.

BANGLADESH* (6 June)

Harvesting of the 2005 wheat crop, a small contributor to the country's food supply, has been completed. Provisionally, the output is estimated at 1.48 million tonnes, 1.2 percent above last year but 1.4 below the five-year average. Harvesting of the 2005 Boro (spring) rice, accounting for more than 50 percent of total annual rice production was completed in May. A bumper Boro paddy harvest is estimated, reflecting favourable weather condition, timely supply of seeds, fertilizers and other agricultural inputs.

Bangladesh lost about 700 000 tonnes of Aman rice last year due to the worst floods in 15 years, which made ten million people homeless. The government stock was depleted to a dangerous level this Spring. The shortfall in Aman production led to soaring foodgrain prices which has affected not only rice consumption, but also seed procurement for the current Aman season. The 2005 bumper Boro crop is expected to help the country recover from the serious shortfalls in domestic food supply and to stabilise food prices.

A tornado on Sunday 20 March 2005 killed at least 56 people, injured more than 1 000 and made at least 10 000 people lose their homes. Also, a number of severe storms accompanied by strong winds, heavy rain and hail, have hit Bangladesh in the past several weeks.

The floods in the late summer of last year had devastating effects on the agriculture sector. WFP provided assistance to 1.5 million flood-affected households through general food distribution immediately after the flood and assisted 420 000 mother and children through the Supplementary Feeding Programme. Over 600 000 children in flood-affected areas are still receiving food assistance under the school-feeding programme which will continue until November 2005. Also, WFP provides food assistance through various micro-level livelihood activities to some 23 500 unskilled participants (over 90 percent women) in four districts.

CAMBODIA (2 June)

There are two seasons of paddy production in the country: wet season and dry season, with the wet season production accounting for some 80 percent of the total. The main current agricultural activities include the completion of the harvesting of dry season paddy crops, estimated at 0.8 million tonnes, and planting/transplanting of main wet season rice due for harvest from November. Cambodia had a bad season in 2004/05 due to a bad drought that affected certain areas for the third year in a row. According to the Ministry of Agriculture, the country produced only 3.1 million tonnes of wet-season rice, 700 000 tonnes less than the previous year (which was a record harvest). Kompong Cham, Kompong Speu and Mondolkiri provinces had the highest percentages of crop loss. WFP began distributing 1 500 tonnes of rice aid to 150 000 rural Cambodians. There are some 500 000 people who face food shortage in the country.

CHINA (6 June)

In China (mainland), harvesting of 2005 early rice crop will start soon and production is expected to increase by 3 million tonnes on last year to reach 34 million tonnes, reflecting larger area sown and favourable weather, except for spring drought which affected Yunnan and Hainan provinces. Aggregate 2005 paddy production is tentatively forecast at 182 million tonnes.

Harvesting of the 2005 winter wheat crop has commenced. The weather during the season has been favourable in the major producing areas. Yield is forecast at 4.055 tonnes per hectare, below last year's record yield of 4.2 tonnes per hectare but above the average of the previous five years. The 2005 wheat output is tentatively forecast at 91.7 million tonnes, about 400 000 tonnes above last year, reflecting the increased wheat area as a result of higher prices and Government policy, especially increased wheat seed subsidies.

The sowing of 2005 coarse grain crops, mainly maize, is complete in the major producing regions in China and soil moisture remained favourable for germinating maize in the northeast. A large maize yield is expected, but is forecast smaller than last year when there was near perfect weather.

Despite the forecast of larger crops for wheat, rice and maize in 2005, China is expected still to face a grain deficit and would continue to be a net grain importer in 2005/06. In addition, China is expected to import more than 22 million tonnes of soybeans in 2005/06 to meet growing domestic demand. Soybeans are defined as a grain in China.

Taiwan Province is expected to import some 6 million tonnes of cereals in 2005/06 (4.85 million tonnes of coarse grains for livestock and 1 million tonnes of wheat), more or less the same as last year.

GEORGIA (3 June)

Latest reports point to favourable prospects for a good harvest this year owing to improved weather conditions and above average precipitation. Provided favourable weather conditions persist over summer, aggregate cereal harvest this year is forecast at about 748 000 tonnes, some 80 000 tonnes up on last year's harvest. The forecast harvest includes some 287 000 tonnes of wheat, 385 000 tonnes of maize and 65 000 tonnes of barley. Total cereal import requirement for the 2005/06 marketing year is estimated at 811 000 tonnes of mainly food quality maize.

WFP, under a three year Protracted Relief and Recovery Operation (PRRO), has distributed a total of 7 500 tonnes of food to some 220 000 beneficiaries since the start of the PRRO in July 2003. The current PRRO, which is scheduled to come to an end by June 2006, comprises of relief and recovery components, mainly food distribution to vulnerable groups and Food for Work programmes.

INDIA (1 June)

Harvesting of the wheat crop is almost complete and sowing of the coarse grain and Kharif rice, oilseeds and groundnuts crops, for harvest from September, has begun. Reflecting favourable seasonal weather conditions, the 2005 wheat crop is officially estimated at 73 million tonnes, higher than both the 2004 harvest of some 72 million tonnes and the 2000-04 average of 71 million tonnes.

Assuming normal rainfall during the Kharif season, the output of coarse grains is expected to increase by one million tonne from last year, reflecting higher maize prices, strong feed demand, and increased application of hybrid seeds.

India was one of the world's largest exporters of wheat and rice. The cereal export level in 2004/05 is estimated at some 5 million tonnes, which is forecast down to 4.1 million tonnes in 2005/06, reflecting tight grain stocks.

INDONESIA (6 June)

Most of the areas normally under the secondary rice crop have been planted. Aggregate paddy production in 2005 is estimated to decline by 1.7 percent from last year to some 53.1 million tonnes, as a result of later plantings, some flooding, and the impact of the tsunami of 26 December 2004. But this level is still some 2 percent above the average of the previous five years. The output from the 2005 maize crop is provisionally estimated at some 11.5 million tonnes, some 3 percent higher than last year. The overall food supply situation in Indonesia is satisfactory. The rice import ban will remain in effect through June, 2005. Wheat (no domestic production) imports in 2005/06 are forecast to remain stable at around 4.4 million tonnes, while maize imports are expected slightly lower at 1 million tonnes.

The 26 December 2004 earthquake, tsunami and 29 March 2005 earthquake caused great loss of life, damage and disruption in Indonesia. An FAO/WFP Food Supply and Demand Assessment Mission which visited Aceh Province from 12 through 25 March 2005 found that rice production in 2005/06 would show a surplus of about 200 000 tonnes 400 000 tonnes in a

normal year. However, in spite of the overall surplus of rice, many farmers in the most affected coastal areas in Aceh have lost two consecutive paddy seasons (2004/05 main season and 2005 secondary season) completely. In the fisheries sector, 2005 output is estimated to decline by 50 percent for marine fishing and 41 percent for brackish water culture and per capita fish output will be reduced from some 38 kg in a normal year to 20 kg. The livelihoods of some 331 360 working people have been directly affected by the disaster; they are in need of food and other financial assistance in 2005.

Based on the Mission report, almost 30 percent of the population in Aceh Province lived below the poverty line before the tsunami, which is much higher than 17 percent of the national average. Over 35 percent of children under age of 5 were underweight, compared to 25 percent for Indonesia. The disaster has aggravated the livelihoods and nutritional status of the poor. Households most affected by casualties, loss of assets and livelihoods include: inhabitants of the islands/archipelagos of Nias, Simeulue, Nanyak; landless families who previously worked on tambaks and severely damaged lands; full-time or near full-time fishermen; part-time fishermen with paddy fields close to the coastlines; farming families involved in paddy production with major secondary incomes from tambaks, and traditional salt producers.

Almost five months after the disaster, most of Aceh's 600 000 IDPs still rely on food aid from WFP. In May, some 11 700 tonnes of food, including rice, vegetable oil and canned fish were distributed to some 772 000 beneficiaries throughout Aceh and North Sumatra. For the month of June, the planned beneficiaries figure in Indonesia stands at some 770 000. The school feeding programme is currently being implemented in 9 districts, covering some 156 000 primary school children.

FAO recently distributed 174 tonnes of rice seeds, 1 305 tonnes of fertilizer and 545 hand tractors to help 8 700 families start to plant an initial 5 000 hectares of affected farmland.

JAPAN (2 June)

Planting of the main rice crop for harvest in October-November is underway. Paddy production in 2005 is expected to decline by 2.5 percent from last year to 10.6 million tonnes due to anticipated area reduction reflecting the government rice policy changes. The government has decided to phase out government controls on production by 2008 as part of its rice policy reforms. In the interim period, the production control scheme, is replaced by a production volume target which is set for each prefecture based on market demand forecast. The 2005 target is set at 8 510 000 tonnes. The minimum access commitment of rice for 2005 is set at 682 000 tonnes (7.2 percent of total domestic consumption).

The import of wheat and coarse grain in 2005/06 (July/June) is forecast to remain steady at 5.6 million tonnes for wheat and 19.5 million tonnes for coarse grains.

KAZAKHSTAN (3 June)

Spring cereal planting is complete and nearly 13.8 million hectares has been planted, some 200 000 hectares up on the record area planted last year. Soil moisture and weather conditions have been favourable for crops throughout winter and Spring. The 2005 aggregate cereal harvest is tentatively forecast at about 14 million tonnes, more than a million ton up on last year's harvest. This year's forecast harvest, assuming weather conditions do not deteriorate, includes some 10.8 million tonnes of wheat, 1.9 million tonnes of barley and 420 000 tonnes of maize. Aggregate cereal export during the 2005/06 marketing year is forecast at about 4.4 million tonnes, some 1.3 million tonnes up on last year. This aggregate includes some 4 million tonnes of wheat and about 250 000 tonnes of barley.

KOREA, DEMOCRATIC PEOPLE'S REPUBLIC OF* (6 June)

Transplanting of rice, the most important current farming activity in the country, is in full swing. Farmers, government officials, workers, and soldiers have been participating in rice

transplanting. As of the end of May, over 65 percent of rice transplanting had been completed in North and South Hwanghae and South Phyongan Provinces, the major rice producing areas. Despite sharp temperature differences between daytime and nighttime and continuing gales, seeds were sown on time and seedlings are healthy. The Government has concentrated all efforts on boosting agricultural production this year. Rural communities across the country have made material and technical preparations for farming such as securing high-yielding seeds, making various kinds of big and small farm implements, preparing farm machinery and fertilizing fields. The government budget for agriculture this year has reportedly been raised by 29 percent.

The country harvested a good crop last year and paddy production in 2004 is estimated at 2.37 million tonnes, 5.6 percent up on the previous year, as a result of favourable weather, improved irrigation facilities in the main Cereal Bowl region and increased application of fertilizer provided through international assistance. However, domestic supply is still expected to fall well below the minimum food needs and the country will again have to depend on external assistance as its capacity to import commercially remains highly constrained. Due to lack of large donations since October, WFP has been forced to halt food assistance to large numbers of the beneficiaries. Unless new donations are received, 3.6 million elderly people, Food for Work participants, primary school children and the poorest urban households will not be receiving assistance from WFP.

KOREA, REPUBLIC OF (2 June)

Planting of the 2005 paddy crop, the most important cereal crop grown in the country, is underway. In 2004, the country produced some 5 million tonnes of milled rice. On 30 December 2004, Korea submitted a proposal to the WTO to extend special treatment for rice through an enlarged minimum market access agreement for the 2005-2014. Total rice imports will increase from 4 percent of domestic consumption in 2004 to 8 percent in 2014. In order to reduce price support to comply with Korea's WTO domestic support limits while increasing non-trade distorting support to rice farmers, the Korean National Assembly revised the Food Grain Management Act and Rice Income Compensation Act in early March 2005. The planted area for 2005 crop is expected to decline to 990 000 ha, down 11 000 ha from last year, reflecting the Direct Payment for Adjustment of Rice Production to provide a direct payment to farmers who do not cultivate any commercial crop on previously existing rice acreage.

Cereal import in 2004/05 is estimated at about 13.1 million tonnes (of which nearly 3.9 million tonnes of wheat, 8.8 million tonnes of maize and 226 000 tonnes of rice).

KYRGYZ REPUBLIC (2 June)

The Kyrgyz Republic is set to repeat last year's good harvest estimated at 1.7 million tonnes of cereals. This aggregate includes some 1.2 million tonnes of wheat, 170 000 tonnes of barley and some 320 000 tonnes of maize. Aggregate cereal import requirement for the 2005/06 marketing year is forecast at 158 000 tonnes, including 140 000 tonnes of milling wheat, mainly from Kazakhstan, 10 000 tonnes of rice and 8 000 tonnes of maize.

LAO PEOPLE'S DEMOCRATIC REPUBLIC (2 June)

Rice, the country's main crop, is grown during two seasons. The wet season rice is planted in June-July and harvested in October-November. The dry season irrigated crop, which is planted in December-January and harvested in April, is entirely under high yielding varieties and is becoming increasingly important. The country harvested a larger wet-season rice crop and achieved a good paddy production (2.5 million tonnes) in 2004. However, the 2005 dry season crop was affected by drought and a sharp production reduction is expected due to lower planted area. With 2004 paddy production, the country can virtually maintain its food sufficiency in 2005. However, Laos is one of the poorest and least developed countries in the world. Some 30 percent of population is estimated

to live below the national poverty line. One third of the Lao population, predominantly in upland areas, experiences rice deficit for four months in a normal year and need food assistance.

Livestock is still very under-developed with 95 percent of national livestock herd and over 85 percent of production produced by smallholders. However, the poultry sector is beginning to develop and production has expanded from 13 million birds in 2000 to 19.5 million birds in 2004. The sector suffered from an outbreak of HPAI (H5N1) Avian Influenza in 2004 that impacted most heavily on the small commercial broiler industry.

MALAYSIA (2 June)

Planting of the irrigated secondary paddy crop, which normally accounts for more than 40 percent of total production, has been completed. Harvesting of the main paddy crop, planted in August to November last year, finished in April. An aggregated 2004 paddy production is estimated at 2.18 million tonnes, 74 000 tonnes below the previous year, as a result of some heavy flooding. The 2005 paddy output is provisionally estimated at 2.2 million tonnes. Rice import in 2005/06 is forecast at some 600 000 tonnes, representing some 29 percent of domestic consumption. Wheat is not produced in Malaysia and maize production is insignificant. The 2005/06 import requirement is forecast at some 1.39 million tonnes for wheat and 2.5 million tonnes for maize.

MALDIVES (6 June)

Since the advent of the tsunami on 26 December 2004, up to 42 000 people have received food assistance through WFP, while some 24 000 school children have received fortified biscuits through a school feeding programme. WFP has agreed to extend its assistance through the end of 2005.

The tsunami caused severe damage to the fishing sector, which is the second leading sector in the economy with about 20 percent of the total population dependent on it as the major income earning activity. FAO has assisted with the construction of 89 small fishing boats and has provided US\$ 190 000 worth of fishing gear to the country. Additional US\$ 1.1 million worth of fishing gear will be procured and delivered in June.

The Government has announced that work is underway to ensure that all displaced and homeless people would be provided with permanent housing within the next two years. Currently, outside assistance has been secured to rebuild 2 455 homes. Approximately 13 000 people were left homeless by the tsunami.

MONGOLIA* (2 June)

Livestock in Mongolia play a fundamental role in the nutritional status of the majority of the population. Substantial losses have been forecast for the 2004/05 winter as a result of a dry summer in 2004 and heavy snows and much below-normal temperature from January to March. In Khentii aimag, the ground was covered by 30-40 cm on average and 70-80 in some areas which rendered access to pasture for livestock impossible. Snow depth in Bayan-Ulgii aimag was 15-20 cm in steppe and reached 40-50 cm in mountainous areas with temperature reaching minus 34-38° C in daytime and minus 38-40° C at night.

Wheat is virtually the only cereal grown in the country. Production in 2004 declined by some 20 percent compared to the previous year to 135 400 tonnes, reflecting the dry summer weather in the major wheat growing regions. Planting of the 2005 wheat crop is about to start and harvesting will take place in September. The output of this crop is critically dependent on the rainfall situation in the coming several months and is, provisionally, forecast at 140 000 tonnes. This covers only about 35 percent of domestic wheat utilization, leaving an estimated import requirement for 2005/06 of 255 000 tonnes. Imports of 13 000 tonnes of rice are also foreseen. Given that the country has a serious balance of payment problem, commercial imports will only cover part of this requirement and food aid will be necessary to meet the deficit.

MYANMAR (6 June)

Harvesting of 2005 secondary crop, normally accounting for 15 percent of aggregate product, has been completed. Planting of the main season rice crop will start with the arrival of the southwest monsoon rains. The outcome of this crop, which is harvested from October, will crucially depend on the performance of the monsoon, which normally arrives in the country in early May. This year's monsoon was delayed. Up to 20 May, the rainfall was 51 percent below normal on a national average.

The aggregate 2004 paddy production is estimated at a record high of 23 million tonnes. The wheat and coarse grains harvested in November 2004 yielded 107 000 tonnes and 753 000 tonnes, respectively. The 2005 paddy output is expected to be higher to that in the previous year. Reflecting steady increases in paddy production in the last several years, the overall cereal supply situation is satisfactory in the country with a net export of cereals projected at some 240 000 tonnes in 2005/06.

Some 200 villages in the southern coast relying on fishing were hard hit by the tsunami of 26 December 2004. Since March 2005, WFP tsunami response activities have been focusing on the construction of water ponds, access roads, bridges, houses and dykes, among other infrastructure. Some 709 tonnes of food have been distributed in the Delta area and 358 tonnes in Thai border area, including Food-For-Work activities which are nearing completion by end of June 2005.

NEPAL (2 June)

Planting of the main season paddy crop is underway and will continue until August. The output of 2005 paddy is provisionally forecast at 4.4 million tonnes, 2.3 percent above the previous year. The output of wheat harvested in April 2005 is estimated at 1.2 million tonnes, while coarse grain production, mostly maize, is forecast at 1.75 million tonnes. Consequently, the total cereal import requirement in 2005/06 is expected at 120 000 tonnes, almost unchanged from last year.

Nepal is one of the most disaster-prone countries in the world. Widespread flooding and landslides in the summer of 2004 affected 800 000 people in 25 of Nepal's 75 districts. The armed conflict and the unstable political situation in the country continue to disrupt the security and livelihood of thousands of families.

PAKISTAN (2 June)

Harvesting of the winter wheat is complete in the main wheat-growing provinces. A record wheat crop in 2005 is expected (21.4 million tonnes), as a result of the increased government minimum support prices (from PKR350 per 40 kg to PKR400 per 40 kg), favourable climatic conditions, and availability of fertilizers and loans. Despite the larger wheat crop, the country is expected to import some one million tonnes of wheat to maintain strategic reserves and meet demand of the growing population.

The planting of the paddy crop just started and 2005 paddy production is tentatively forecast at some 7.8 million tonnes, 5 percent above last year's. The output of coarse grains in 2005, mostly maize, is forecast at 2.18 million tonnes, similar to last year's production. Pakistan is a major exporter of rice and the 2005/06 export is forecast at 2.2 million tonnes. Some 200 000 tonnes import of coarse grains is expected for 2005/06.

PHILIPPINES (2 June)

Harvesting of the secondary rice and maize crops is underway. Total paddy rice production in 2005 is forecast at 14.6 million tonnes, slightly above last year's record-level harvest. The rice import requirement in 2005/06 is forecast at some one million tonnes. Department of Agriculture in Philippines has lowered the 2005 maize production target to 5.5 million tonnes from 5.7 million tonnes reflecting the first quarter drop from 1.534 million tonnes to 1.253 million tonnes year-on-year

and expected drop in the second quarter resulting from a series of typhoons which damaged crops late last year, and El Nina-induced drought which has severely damaged the maize crops in major producing regions in the country.

Since wheat is not produced in the country, the estimated requirements of some 3 million tonnes are all imported. An import of about 1.1 million tonnes of rice will also be needed.

SRI LANKA* (6 June)

The main 2005 Maha rice crop, planted in October-November 2004, has been harvested. The paddy production is estimated at some 2 million tonnes, 330 000 tonnes above last year's drought- affected production. The tsunami impact on national paddy production is estimated to be minimal. Assuming normal growing conditions for the Yala crop to be harvested in August-September, total national paddy production in 2005 is provisionally forecast at 3 million tonnes , some 14 percent above last year's harvest. Based on this optimistic production forecast, the Government of Sri Lanka imposed a ban on imported rice (including food aid) in February so as to prevent market distortions.

Since the advent of the tsunami, WFP has provided relief food to some 910 000 people and will soon start to give 120 000 children a nutritious snack at school as well as supplying corn-soya blended food to 312 000 vulnerable people including mothers and infants. In addition, the government has issued coupons for general food distribution for the months of June and July to 11 tsunami-affected districts. For its emergency and regular operations in Sri Lanka, WFP is finalizing arrangements to procure some 20 000 tonnes of rice locally so as to support the local rice market and farmers in areas hit by the tsunami.

FAO has initiated the delivery of some US\$ 1.74 million worth of seeds and fertilizer to farmers in southern Sri Lanka.

TAJIKISTAN (2 June)

Tajikistan is set to gather another record crop forecast at 911 000 tonnes of cereals, compared with the previous record harvest of 840 000 tonnes produced last year. Above average precipitation over the mountains throughout winter and the subsequent availability of water in the rivers feeding the extensive irrigation systems in the country, enabled farmers to match the high areas planted last year but increase yields. The forecast aggregate cereal harvest includes some 780 000 tonnes of wheat, 63 000 tonnes of barley, 35 000 tonnes of maize and 32 000 tonnes of paddy rice. Aggregate cereal import requirement for the 2005/06 marketing year is forecast at 381 000 tonnes of mainly wheat.

THAILAND (25 May)

Total paddy output in 2004 is at 23.9 million tonnes, the lowest record since 1998, reflecting the dry weather conditions at the critical stage of the main crops. Planting of the 2005 main season crops and harvesting of the second season paddy crop are underway. This year's second season rice crop is likely to be down 17 percent from last year due to the continued dry weather conditions which limited crop cultivation in the north and northeast areas. However, the 2005 main season paddy production is expected to recover based on anticipated normal weather conditions. The 2005 maize crop, now being sown, is forecast at 4.18 million tonnes, close to last year's production.

Thailand is expected still to be the world largest rice exporter in 2005, with a government-targeted export of some 8.5 million tonnes, some 1.5 million tonnes lower than the record 10 million tonnes in 2004. Thailand exported 1.91 million tonnes rice in the first quarter, down 7.8 percent from last year.

TIMOR-LESTE, DEMOCRATIC REPUBLIC OF (1 June)

Harvesting of the maize crop, one of the main staples of the country, has been completed while that of rice has just started. Output of cereals is estimated to be nearly unchanged from last year at 166 000 tonnes. Some 40 000 tonnes food import requirement is forecast. Inadequate agricultural infrastructures and poor soil quality in most parts of Timor-Leste continue to hinder development of the agricultural sector.

The country is one of the poorest countries with more than 40 percent of the population living below the poverty line. Every year the country faces food shortage in rural areas which is at its greatest during the period between November to February. This year's situation is worse due to the delay in rains and crop failures. The worst affected area is Hato Bauilico where the main cash crop - potato - has suffered massive failure.

TURKMENISTAN (6 June)

Cereal harvesting has begun and official forecasts point an aggregate cereal harvest of about 3 million tonnes, some 200 000 tonnes up on last year's hitherto record harvest and more than 870 000 tonnes up on the five-year average harvest. The forecast harvest includes some 2.8 million tonnes of wheat, 110 000 tonnes of paddy rice and some 60 000 tonnes of barley. The government intends to export some 150 000 tonnes of wheat and import 40 000 tonnes of hard wheat and some 4 000 tonnes of rice.

UZBEKISTAN (2 June)

Uzbekistan is set to harvest about 5.4 million tonnes of cereals, nearly 731 000 tonnes up on the five year average harvest. Favourable weather conditions and adequate water availability in the rivers feeding the extensive irrigation systems of the country as well as improved access to agricultural inputs are the main causes of the improved harvest. The forecast cereal harvest includes some 4.9 million tonnes of wheat, 100 000 tonnes of barley, 140 000 tonnes of maize and 220 000 tonnes of paddy rice. Exports of mainly wheat during the 2005/06 marketing year is forecast at 500 000 tonnes. Imports of cereals in the same period is forecast at 408 000 tonnes comprising of 253 000 tonnes high quality wheat and 130 000 tonnes of rice.

VIET NAM (24 May)

Harvesting of the winter/spring paddy crop in the Mekong River Delta is due for completion at the end of June. Rice cultivated areas for the early summer-autumn crops in the Mekong Delta region decreased by approximately 130 000 hectares due to drought. Production is expected to fall sharply.

Vietnam, the world's second largest rice exporter after Thailand, is likely to ship around 4.1 million tonnes of rice this year, same level as in 2004, due to prolonged drought. The country exported some 1.55 million tonnes of rice in the first four months of this year, representing a slight fall of 9.9 percent compared to the same period of last year.

Central Khanh Hoa province has provided a total of 1 000 tonnes of rice in relief aid to 66 635 people in areas badly hit by droughts.

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

COSTA RICA (31 May)

In Central Valley and Pacific provinces, scattered rains are characterizing the transition period from the dry to the rainy season, while the Caribbean provinces are receiving some abundant precipitation. Planting of the 2005/06 first season cereal and bean crop has just started and intended areas planted to paddy and white maize are anticipated to be similar to the previous year at 68 000 and 8 000 hectares, respectively. The country relies on imports for maize and wheat, and requirements in marketing year 2005/06 (July/June) are forecast at about 560 000 tonnes of maize, 210 000 tonnes of wheat and 140 000 of rice.

CUBA* (2 June)

Moderate to heavy rains have increased soil moisture favouring planting operations of spring/summer maize and paddy crops, especially in the drought-affected eastern provinces of Las Tunas, Camaguey and Holguin. The harvest of 2004/05 sugar cane crop is virtually completed and raw sugar output is expected to be about 1.3 million tonnes, representing the smallest production in almost a century. This result is essentially due to the prolonged drought that affected the whole country. The harvest of 2004/05 coffee crop was completed in April and output is estimated at low 180 000 60-kg bags, the lowest production in the last 50 years, also as a consequence of the drought that hit the main growing eastern provinces of Guantanamo and Santiago. About one million tonnes of wheat, 600 000 tonnes of rice and 280 000 tonnes of maize will be required as imports in marketing year 2005/06.

DOMINICAN REPUBLIC (2 June)

Heavy rains have caused flooding and landslides in the North of the country. Harvesting of 2005 main paddy crop just started in main producing north-eastern and north-western departments and early forecasts indicate an output of about 636 000 tonnes, about 10 per cent above previous year's output when heavy rains affected planting activities in key producing province of Bajo Yuna. Planting of 2005 main maize crop is well advanced and the area planted is estimated below average. Import requirements for marketing year 2005/06 (July/June) are forecast at 900 000 tonnes of maize and 330 000 tonnes of wheat.

EL SALVADOR (3 June)

Abundant rainfall associated with the tropical storm "Adrian" increased soil moisture in coastal, central and eastern departments and plantings operations started as usual at the end of May. Early forecast indicates that the area planted with grain crops will be similar to previous year and, thanks to the distribution of high yield seeds, 2005 aggregate grain crops production is officially forecast to increase by about 4 percent. Import requirements for marketing year 2005/06 (July/June) are early forecast at 350 000 tonnes of maize and 250 000 tonnes of wheat. Food assistance continues to be delivered by the international community to the most food insecure communities and, in particular, in the eastern department of Morazan where cases of malnutrition have been on the rise as the communities are at the peak of the lean period before the next maize harvest in August.

GUATEMALA (6 June)

Heavy rains in the provinces of Guatemala, Quetzaltenango, Totonicapan, Quiche, Zacapa and Jalapa caused damages to urban infrastructures as well as some localized losses of early planted maize crop. Planting of the 2005/06 coarse grain crops, principally maize, has started with the arrival of the first rains and average plantings of 615 000 hectares are forecast. Wheat and maize import

requirements in marketing year 2005/06 (July/June) are forecast at about 400 000 tonnes and 550 000 tonnes respectively, similar to the previous year. With the support of the National Anti-Hunger Front, food assistance continues to be provided by the international community to the most food insecure rural families suffering from acute malnutrition in the provinces of Jutiapa, Zacapa and Huehuetenango.

HAITI* (31 May)

Late arrival of first seasonal rains caused a substantial delay in planting operations of the main 2005 season to be harvested by June-July. The departments of South, South East and Central Plateau have registered a delay of about two months. In the departments of North, North-East and the Artibonite valley and the coastal areas of South, maize, sorghum, rice and bean crops of 2004/05 second season have been affected by a severe dry spell that lasted from November 2004 to March 2005. Aggregate maize production for marketing year 2004/05 (July/June) is estimated at 220 000 tonnes, 11 percent more than the previous year. Tubers production should however witness a slight increase. Paddy production continues its declining trend due to the reduction in planted areas and yields as a consequence of the increasing problems in the Artibonite Department with the drainage and the insufficient maintenance of the irrigation infrastructures. Paddy production in 2004 is estimated at low 96 000 tonnes. Import requirements for marketing year 2005/06 (July/June) are about 250 000 tonnes of wheat and 260 000 tonnes of rice. Despite the problems due to the uncertainty of the security environment, the international community continues to deliver food aid to vulnerable groups, health centres and schools in several western, northern and central departments.

HONDURAS (3 June)

Planting of 2005 first season cereal and bean crops just started with the arrival of seasonal rains and will continue until July. Official early forecast points to an increase of 10-12 percent in area planted under maize as a consequence of new credit programs for small farmers. Assuming normal weather conditions, 2005 maize production is tentatively forecast at 500 000 tonnes, slightly above last five years average. During the months of February and March 2005, the Government financed plantings of about 1 400 hectares of irrigated red beans in order to face the shortage caused by the dry spells that affected 2004 bean crop production. It is estimated that this emergency production will provide some 900 quintals of red beans. 2005 paddy production is expected to remain at the same level of 27 000 tonnes as the previous year. Wheat and maize import requirements in marketing year 2005/06 (July/June) are forecast at about 250 000 tonnes and 240 000 tonnes respectively. Food assistance continues to be provided by the international community, especially to families in municipalities with over 50 percent of chronic malnutrition.

JAMAICA (3 June)

Planting of 2005 first season cereal crops is start at the end of May with the arrival of seasonal rains. The only cereal grown in the country is maize (with a marginal production of paddy) and 95 percent of the area is under rain-fed conditions. Production for 2005 maize crop is forecast to be average at about 2 000 tonnes, but the final outcome will be largely determined by rainfall during the growing season. At the beginning of May, exports of bananas resumed after the devastation caused to national production by Hurricane "Ivan" in September 2004. In order to cover domestic demand for cereals, import requirement for marketing year 2005/06 (July/June) are forecast at 235 000 tonnes of wheat, 250 000 tonnes of maize and 70 000 tonnes of rice.

MEXICO (1 June)

Under hot and dry weather conditions, harvesting of the 2005 important irrigated winter wheat crop is well advanced in the northwest main growing areas. This season's production is provisionally estimated at 2.8 million tonnes, well above the 2.2 million tonnes obtained the previous year that was affected by a severe drought in the main producing northern state of Sonora. Harvesting of the

winter maize crop planted at the end of 2004 is also underway and output is estimated at 5.7 million tonnes, very similar to previous year's good result. Dryness accelerated maturation of and drydown of winter sorghum crop which is mainly cultivated in north-eastern state of Tamaulipas. Winter sorghum production is estimated at 2.4 million tonnes, about 25 per cent below the same season's output in 2004 as a consequence of reduced plantings in February-March. Dry weather conditions dominated major grain areas from the central plateau to the northeast during the months of April and May and the later-than-usual arrival of the summer rainy season caused some delay in planting operations of spring/summer maize and sorghum crops. Due to an expected increase of 10-12 percent in planted area, early official forecasts point to an aggregate 2005 maize production (fall 2004/05 and summer 2005) of 23.5 million tonnes. Sorghum output is instead forecast to remain stable to 2003 level of about 7 million tonnes. Imports in marketing year 2005/06 (July/June) are expected to be about 5.0 million tonnes of maize, 3.6 million tonnes of wheat and 3.3 million tonnes of sorghum. Rice imports in 2005 are estimated at more than 500 000 tonnes.

NICARAGUA (1 June)

Moderate to heavy rainfall have characterized the start of the 2005 rainy season. During the third week of May, the tropical storm "Adrian" caused heavy rains in some northern and north-eastern departments. Planting of 2005 first season cereal and bean crops is underway and official sources forecast an increase of about 12 percent in planted area. Harvesting of the small 2004/05 third "apante" season maize crop has been recently completed and the aggregate 2004 maize crop output is expected at about 440 000 tonnes. This result is well below the 2003 record production of 580 000 tonnes as a consequence of the prolonged dry period that caused about 25 per cent loss of planted area during the important first season maize crop. Unfavourable dry weather conditions during the first season crop and reduced plantings in the important third 'apante' season crop affected also the production of beans, an important staple food, and aggregate 2004 production is estimated at low 173 000 tonnes. Import requirements in marketing year 2005/06 (July/June) are forecast at 125 000 tonnes of wheat, 90 000 tonnes of maize and 125 000 tonnes of rice. Food assistance continues to be provided by the international community to the most vulnerable groups and school children in Central and Northern Atlantic Regions.

SOUTH AMERICA

ARGENTINA (31 May)

Harvesting of the 2004/05 maize crop is currently underway with normal weather conditions. More than 80 percent of plantings had been harvested as of May 26 and early official forecast point to a record output of 19.5 million tonnes. This result is mainly due to the increased plantings in Buenos Aires, Santa Fe and Córdoba provinces and to the adequate rainfall that determined very good yields, in some cases above 9 tonnes per hectare. Harvesting of 2004/05 sorghum crop is virtually completed and official early forecast points to an above-average output of 2.9 million tonnes. It is the consequence of good yields as well as the increase in planted area of about 15 percent due to the need to introduce sorghum in the annual rotation and to the increasing demand of the feed industry. Planting of the 2005 winter wheat crop, to be harvested by the end of the year, started in mid-May but its progress has been delayed because of reduced soil moisture in key producing areas of La Pampa and southern Buenos Aires. Planting intentions point to 6.2 million hectares, up slightly from last season's 6.07 million hectares. Harvest of 2005 paddy crop is about to be completed and output is expected to be similar to previous year's result, slightly above 1 million tonnes.

BOLIVIA (6 June)

Harvesting of summer cereal crops that were planted between October and December is well advanced in the main producing Departments of Santa Cruz and Chuquisaca in the Valle and Llano regions, while planting of winter cereal crops to be harvested from September just started. Food assistance continues to be provided by the international community to families of El Chaco region whose production crops were affected by a prolonged dry period at the

end of 2004. Wheat imports in marketing year 2005/06 (July/June) are forecast to be lower than the level of 400 000 tonnes imported in the previous year.

BRAZIL (31 May)

Harvesting of 2005 first maize crop is virtually completed in Centre-South states and output is officially forecast at 28 million tonnes, 10 percent below the 31.1 million tonnes obtained the previous year. This result is essentially due to dry weather conditions during the first months of this year that affected the maize crop yields, especially in the main producing states of Parana and Rio Grande do Sul where 2005 first season maize crop output is expected to decline about 7 and 38 percent respectively compared to 2004. Reduced rainfall in west Parana and south Mato Grosso do Sul has also affected area planted and yields of the second "safrinha" maize crop that is being harvested and production is estimated at 8.3 million tonnes, about 18 percent below last year output. Official forecast for the 2005 aggregate maize crop production have been recently downward revised pointing slightly above 36 million tonnes, about 13 percent less than the 2004 crop. Planting of winter wheat crop has been virtually completed in the central and southern states where recent heavy showers have improved soil moisture for proper germination, while it is still underway in Rio Grande do Sul where wheat crop planting takes place after the harvest of soybean crop. Wheat planted area is early forecast at 2.6 million hectares, about 6 percent below previous year. Harvesting of paddy crop has been virtually completed and paddy production is expected to be record, slightly above 13 million tonnes, as a consequence of the increased area in South-East and Centre-West areas that counterbalanced the reduced yields in the main producing state of Rio Grande do Sul that was significantly affected by drought.

CHILE (31 May)

Harvesting of 2004/05 maize crop is well advanced in regions VI, VII and VIII and early forecast point to a record output of 1.4 million tonnes. This result is essentially due to the increase in plantings that balanced the decrease in yields that was caused by unfavourable weather condition, characterized in particular by atypical temperatures, at the beginning of the season. Harvesting of 2005 paddy crop has been recently completed and production is officially estimated at 120 000 tonnes, 12 percent less than last five years average due to the impact of low temperatures during the heading phase of early plantings. Planting of 2005/06 winter wheat crop to be harvested by the December is underway and early forecasts point to a reduction in planted area from 420 000 to 360 000 hectares as a consequence of the low domestic wheat prices in 2005 and expectations for better prices for alternative crops such as oats and barley. Import requirements for the marketing year 2005/06 (July/June) are forecast at 725 000 tonnes of maize (mostly yellow), 450 000 tonnes of wheat and 135 000 tonnes of rice.

COLOMBIA (6 June)

Heavy rains have caused flooding and landslides in several provinces along the Caribbean and Pacific Coasts as well as in the Andean zone. Planting of the 2005 first (main) maize crop has been completed in the Departments of Cordoba, Cesar and Bolivar and area planted is tentatively forecast to increase slightly from the good level reached in 2004. Harvesting of the 2005 irrigated paddy crops in the central department of Tolima and north-western department of Cordoba has been recently completed. The rainfed important paddy crop which grown in the eastern plains of Los Llanos is harvested between August and October. Aggregate paddy output in 2005 is tentatively forecast at 2.7 million tonnes, slightly above last year's record production. Food assistance from the international community continues in various parts of the country to the internally displaced population, the victims of the civil strife which for long is affecting the country. While the country is expected to be self-sufficient for rice, wheat and maize imports in marketing year 2005 are forecast at average levels of 1.2 million tonnes and 2 million tonnes respectively.

ECUADOR* (3 June)

Heavy rains at the end of April have caused flooding and landslides in coastal provinces of Esmeraldas, Guayas, Manabi and Los Rios. Although an official assessment is not yet available, 2005 winter paddy crop which was about to be harvested at the time of flooding has been severely affected, especially in key producing provinces of Guayas and Manabi. At the same time, abundant rainfalls have damaged early plantings of paddy in the lowlands, while they were beneficial in the northern uplands of Los Rios province. Harvesting of the main 2005 winter (yellow) maize crop started at the beginning of April and the bulk of the production is currently being harvested. Improved soil moisture is favouring planting of 2005 summer maize crop in inter-Andean provinces of Cotopaxi, Bolivar, Tungurahua and Chimborazo. While the country is expected to be self-sufficient in rice, import requirements for 2005/06 marketing year (January/December) are forecast at 380 000 tonnes of maize and 500 000 tonnes of wheat.

GUYANA (6 June)

Harvesting of 2005 spring rice crop is well advanced in the main growing areas on the Atlantic coast. Early forecasts point to an aggregate paddy output for 2005 of 440 000 tonnes, with a reduction of about 12 percent from last year good crop. This is mainly due to the negative impact of exceptional heavy rains in January that particularly affected paddy yields in Regions Four (Demerara/Mahaica) and Five (Mahaica/Berbice). Import requirements of wheat in marketing year 2005/06 are forecast at average level of 40 000 tonnes.

PERU (6 June)

In March and April, the water level of reservoirs in northern Coast has increased favouring planting of 2005 paddy crop. In the first three months of 2005, the area planted with paddy crop increased about 22 percent compared to the same period of the previous year that was severely affected by a drought in the highlands that reduced water availability in the main reservoirs. Under favourable weather conditions, harvesting of paddy crop has just started in northern departments of Piura, Lambayeque and St. Martin. 2005 paddy crop production is early forecast at about 2.2 million tonnes, approximately 21 percent above last year's output. Harvesting of white maize crop is underway in the departments of Cajamarca, Apurimac and Cusco, while the bulk of the plantings of yellow maize has been completed in the departments of La Libertad and Lambayeque. Despite some areas in northern highlands with reduced soil moisture, 2005 maize production (white and yellow) is early forecast at 1.3 million tonnes, 8 percent above last year's output and similar to last five years' average. Import requirements for marketing year 2005 (January/December) are forecast at average levels of about 1.5 million tonnes of wheat and over 1 million tonnes of maize.

URUGUAY (6 June)

Harvesting of 2004/05 maize crop has been recently completed and production is tentatively estimated at 200 000 tonnes, well below the production of 290 000 tonnes that was expected at the beginning of the season. In fact, despite a 30 percent increase in the area planted in response to high domestic prices in 2004, maize crop production declined about 10 percent from last year's good output as a consequence of the negative effects on yields caused by the dry weather conditions that prevailed in producing areas from December to February. Harvesting of 2005 paddy crop is about to be completed and production is estimated at 1.2 million tonnes, slightly below last year's record output due water shortages that affected planting operation at the end of 2004. Plantings of 2005 winter wheat and barley crops have just started. Area planted under wheat is expected to be similar to the 180 000 hectares planted in 2004, while plantings of barley are expected to decrease some 20 percent from 2004 record acreage of 137 000 hectares.

VENEZUELA (7 June)

Normal to abundant rains have favoured plantings of summer maize crop in key producing areas of Portuguesa, Guarico and Barinas. Although maize (mainly white) is planted all year round, the bulk of 2005/06 marketing year plantings is underway. Planting intentions point to 560 000 hectares with a production of about 1.9 million tonnes, slightly below last year's good result of 2 million tonnes. Harvest of winter paddy crop is underway and production is provisionally estimated at a high 1.2 million tonnes as a consequence of increased planted area in the main growing states of Portuguesa and Guarico. Wheat and maize (mostly yellow for feed industry) imports in marketing year 2005/06 (July/June) are expected to be average at 1.5 million tonnes and 650 000 tonnes respectively.

EUROPE

EU (9 June)

The EU's aggregate cereal output in 2005 is now forecast at 260 million tonnes, 30 million tonnes down from the record crop last year, reflecting an expected decline in yields after 2004's exceptional high levels. Nevertheless, apart from Spain and Portugal where drought has devastated this year's crop prospects, yields and outputs are forecast to remain above the five-year average in most countries. In the Iberian Peninsula, where dry weather has prevailed throughout the season so far, output of cereals in Spain, one of the EU's main producers of wheat, barley and maize is now forecast to drop by 33 percent from last year's good crop and 25 percent compared to the average of the past five years. Similarly large losses are expected in Portugal.

ALBANIA (9 June)

Prospects remain satisfactory for the 2005 cereal crops. The aggregate area planted to cereal crops is expected to have remained similar to 2004 as the area has changed little during the past few years and there have been no weather anomalies or other factors that might have strongly influenced plantings for this year. However, conditions are reported to have been a bit drier than normal during April and May while temperatures have been high so yields may be somewhat reduced.

BELARUS (3 June)

Spring cereal planting is complete although planting was delayed by about 20 days owing to unusually cold March and heavy rains in April. Farmers have not been able to fully take advantage of the high soil moisture following above average snowfall during winter. Winter and early planted spring crops are in satisfactory conditions and winterkill was significantly low. Provided good weather conditions persist, aggregate cereal harvest this year is tentatively forecast at about 6.2 million tonnes, slightly up on the harvest in 2004/05 marketing year. This aggregate includes just over a million tonnes of wheat, about 1.9 million tonnes of barley and 625 000 tonnes of maize. Cereal import requirement for the 2005/06 marketing year is forecast at 567 000 tonnes, including 232 000 tonnes of wheat and 260 000 tonnes of maize. Exports of rye is forecast at 100 000 tonnes during the 2005/06 marketing year.

BOSNIA-HERZEGOVINA (6 June)

Favourable weather conditions and adequate soil moisture for summer cereals, mainly maize, has increased prospects for another good harvest this year. Aggregate cereal harvest this year is forecast at about 1.2 million tonnes, slightly down on last year's above average harvest. The forecast harvest includes some 220 000 tonnes of wheat, 55 000 tonnes of barley and 850 000 tonnes of maize. Aggregate cereal import requirement for the 2005/06 marketing year is forecast at about 529 000 tonnes, including 350 000 tonnes of wheat, 150 000 tonnes of maize and 29 000

tonnes of barley. In view of improving poultry and livestock sectors, the demand for coarse grains, maize and barley, has recently been rising.

BULGARIA (9 June)

Recent rainfall in Bulgaria was timely for this year's cereal crops after a period of dry hot weather and production prospects remain satisfactory. However, yields are expected to return closer to the five-year average, after the bumper levels in 2004, and aggregate cereal output is forecast at just about 6 million tonnes, compared to the exceptional crop of 7.2 million tonnes last year.

CROATIA (6 June)

Heavy rains in early spring delayed spring planting, which may affect yields. Aggregate cereal harvest this year is forecast at about 3.2 million tonnes, some 128 000 tonnes down on last year's harvest. The forecast harvest includes some 879 000 tonnes of wheat, about 2.1 million tonnes of maize and 173 000 tonnes of barley. Exports for the 2005/06 marketing year is tentatively forecast at 100 000 tonnes of wheat and 40 000 tonnes of maize, similar to last year.

ESTONIA (3 June)

Prospects are for a similar cereal harvest to last year, which is estimated at about 600 000 tonnes. Spring cereals account for about 88 percent of the total cereal areas. This year's forecast cereal harvest includes some 180 000 tonnes of wheat, 290 000 tonnes of barley and some 40 000 tonnes of rye. The total cereal import requirement for the 2005/06 marketing year is forecast at about 258 000 tonnes, including 136 000 tonnes of wheat, 60 000 tonnes of maize and 42 000 tonnes of barley.

LATVIA (2 June)

Latest reports indicate that Latvia may harvest just over one million tonnes of cereals, slightly up on last year's harvest and more than 100 000 tonnes up on the five-year average harvest. This year's forecast harvest includes some 470 000 tonnes of wheat, 295 000 tonnes of barley and 150 000 tonnes of rye. Aggregate cereal import requirement for the 2004/05 marketing year is estimated at 156 000 tonnes of mainly wheat and exports during the same period are estimated at 52 000 tonnes.

LITHUANIA (3 June)

Aggregate cereal harvest is forecast at about 2.75 million tonnes, slightly down on the harvest in 2004. This year's forecast harvest includes some 1.38 million tonnes of wheat, 814 000 tonnes of barley and 420 000 tonnes of rye. Aggregate cereal exports (mainly wheat) for the 2004/05 marketing year is estimated at 250 000 tonnes and imports for the same period is estimated at 264 000 tonnes.

MOLDOVA (3 June)

Favourable weather conditions and improved access to purchased inputs have resulted in good prospects for winter and summer crops. Aggregate cereal harvest this year is forecast at more than 2.8 million tonnes, some 120 000 tonnes up on the record harvest in 2004/05 marketing year. The aggregate harvest this year includes just over a million tonnes of wheat, 1.5 million tonnes of maize and some 250 000 tonnes of barley. During the 2004/05 marketing year Moldova exported some 320 000 tonnes of cereals, including 100 000 tonnes of wheat and barley each and 120 000 tonnes of maize. Cereal exports this year will at least match last year's.

ROMANIA (9 June)

Prospects remain very favourable for the 2005 wheat crop. The winter wheat area is estimated to have increased by about 13 percent above the area harvested last year, to 2.2 million hectares, and

weather conditions have been generally ideal since planting last autumn. Wheat output has been officially forecast in early June at 7.6 million, virtually unchanged from last year's good crop. Planting of the spring/summer grain crops was carried out under favourable conditions. However, even if planted areas have changed little from last year, output of these grains is expected to fall because of an expected decline in yields from 2004's bumper levels.

THE FORMER YUGOSLAV REPUBLIC OF MACEDONIA (9 June)

As in other parts of the region, prospects for the 2005 cereal crops are generally satisfactory but yields will likely fall from last year's good levels and thus with little change reported in cereal area, the output for the year is forecast to decline compared to 2004.

RUSSIAN FEDERATION (3 June)

Spring cereal planting was delayed owing to unusually cold weather conditions in March and heavy rains during the first half of April. However, favourable weather conditions in the past few weeks encouraged farmers to speed their planting campaign. It is feared that an early winter may not allow ripening of the late planted cereals and yields may be low. Assuming favourable weather persists and winter does not arrive earlier than usual, aggregate cereal harvest is tentatively forecast at just over 73 million tonnes, some 2 million tonnes down on last year's harvest. This aggregate includes some 44 million tonnes of wheat, 16.5 million tonnes of barley and 3 million tonnes of maize. Total cereal exports during the 2005/06 marketing year is forecast at about 7.6 million tonnes, slightly up on last year. Cereal exports include some 6.8 million tonnes of wheat and 800 000 tonnes of barley. Cereal imports during the same period are forecast at about 2.6 million tonnes of mainly food quality wheat, similar to last year.

Civil strife in Chechnya continues to disrupt social and economic activities. The conflict has displaced more than 300 000 people, 187 000 of whom are internally displaced in Chechnya, 30 000 live in the neighbouring Ingushetia and 9 000 live in Dagestan. Under the current 18-month Emergency Operation Programme (EMOP), which began in January 2004 and has been extended until December 2005, WFP will assist some 259 000 most vulnerable population in Chechnya and Ingushetia with 47 882 tonnes of food.

SERBIA AND MONTENEGRO (6 June)

Latest reports indicate that cereal harvest this year may be significantly down on last year's good harvest due to a delay in Spring planting following heavy rains in early Spring. Aggregate cereal harvest is tentatively forecast at about 8.3 million tonnes, some 1.3 million tonnes down on last year's harvest. This aggregate includes some 1.9 million tonnes of wheat, 5.8 million tonnes of maize and 400 000 tonnes of barley. Aggregate cereal exports for the 2005/06 marketing year is estimated at about 825 000 tonnes and imports for the same period is estimated at 153 000 tonnes. The high exports are mainly due to higher stocks from last year's good harvest.

UKRAINE (3 June)

Spring cereal planting is complete with just over 7 million hectares planted, similar to last year. Reduced/no precipitation over the past couple of weeks has been a cause for concern and some crops may have been damaged. Cereal crops are weather dependent and a continuation of the dry spell in June may significantly reduce this year's harvest. Provided weather conditions improve with more precipitation, aggregate cereal harvest is tentatively forecast at about 34.4 million tonnes, some 1.3 million tonnes down on last year. The forecast cereal harvest for 2005/06 marketing year includes some 17.4 million tonnes of wheat, 8.8 million tonnes of barley and 5.4 million tonnes of maize. Aggregate cereal exports during the 2005/06 marketing year are tentatively forecast at about 8.6 million tonnes, some 1.7 million tonnes down on last year. This aggregate includes 4 million tonnes of wheat, 3 million tonnes of barley and 1.5 million tonnes of maize.

NORTH AMERICA

CANADA (9 June)

In Canada, conditions for grain planting this spring have been generally favourable. Regarding wheat, a slightly smaller planted area is estimated but expectations for less abandonment this year could result in little change in the final area harvested. However, a reduction in yields could result in a smaller wheat output, currently forecast at 23.5 million tonnes, 9 percent down from 2004. Although the area of barley for harvest this year is forecast to increase, as for wheat, yields are expected to be down from exceptional high levels last year and output is forecast to drop to about 12.7 million tonnes from 13.2 million tonnes in 2004.

UNITED STATES (9 June)

Spring wheat planting was completed on an area estimated to be 4 percent up from last year and the crop is reported to be in mostly fair to good condition. The winter wheat harvest is already underway in the southern states while further to the north it is maturing. Winter wheat output is forecast at some 43 million tonnes, 6 percent up from last year as the area harvested should increase after much lower abandonment and in addition, higher yields are expected. Spring wheat output prospects are still uncertain but assuming trend yields and the recent average ratio of planted-to-harvested area, this year's crop could be down somewhat from 2004 despite the larger area planted. The country's aggregate wheat output in 2005 is forecast at 58.2 million tonnes, marginally down from 2004. The bulk of the main coarse grain crop in the United States was sown by late May, somewhat ahead of the average date after a very favourable planting season. However, despite the good start to the season and early indications that the area for harvest will be virtually unchanged this year, production of coarse grains is forecast to decrease somewhat because of lower yields expected after very high levels in 2004. Nevertheless, yields could still be above the average of the past five years. As of May, the aggregate output of coarse grains was forecast at 296.6 million tonnes, about 3 percent down from the previous year. Of the total, maize is expected to account for 279 million tonnes.

OCEANIA

AUSTRALIA (9 June)

Prospects for the 2005 winter wheat and coarse grain crops are poor in eastern states because of persisting drought during what should have been the main planting period. Although, winter grain planting can still be carried out up until the end of June, and forecasts early in the month pointed to an increased likelihood that some significant planting showers might yet arrive, it is certain that the area sown in the eastern producing states will be considerably less than last year and yield prospects are not as good because of the limited soil moisture reserves for crop growth during the season. By contrast, prospects in Western Australia are generally very favourable, reflecting timely planting rains and satisfactory precipitation for developing crops. Based on the good prospects in the west of the country and the renewed hopes in early June that some rainfall may arrive in time for planting in the east, FAO forecasts the country's wheat output at 18 million tonnes, above an official early-June forecast (based on May conditions and assuming drought to continue throughout the rest of 2005) but down by about 12 percent from the previous year's crop. Output of barley, the main winter coarse grain is also expected to decline significantly.

**ESTIMATED CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/
a) 2004/05 or 2005 estimates (in thousand tonnes)**

COUNTRY	Marketing year	2003/04 or 2004			2004/05 or 2005			
		Actual imports			Total import requirements (excluding re-exports)	Import position		
		Commercial purchases	Food aid	Total commercial and aid		Total commercial and aid	Food aid allocated committed or shipped	Commercial purchases
AFRICA		31 205.0	3 154.1	34 359.1	35 923.9	22 880.5	1 943.0	20 937.5
Northern Africa		14 443.9	20.1	14 464.0	15 567.0	12 948.0	4.2	12 943.8
Egypt	July/June	10 979.9	20.1	11 000.0	11 900.0	10 347.5	4.2	10 343.3
Morocco	July/June	3 464.0	0.0	3 464.0	3 667.0	2 600.5	0.0	2 600.5
Eastern Africa		3 603.0	1 505.2	5 108.2	5 568.0	2 877.3	1 125.9	1 751.4
Burundi	Jan./Dec.	40.1	55.9	96.0	82.0	25.6	25.6	0.0
Comoros	Jan./Dec.	34.3	0.0	34.3	33.0	5.1	0.0	5.1
Djibouti	Jan./Dec.	75.0	11.5	86.5	63.0	11.5	5.1	6.4
Eritrea	Jan./Dec.	134.8	269.7	404.5	422.0	103.7	103.7	0.0
Ethiopia	Jan./Dec.	44.7	549.1	593.8	265.0	240.3	240.3	0.0
Kenya	Oct./Sept.	1 204.2	66.3	1 270.5	1 950.0	787.5	149.0	638.5
Rwanda	Jan./Dec.	196.7	27.3	224.0	229.0	22.3	10.5	11.8
Somalia	Aug./July	243.9	23.1	267.0	304.0	89.4	45.5	43.9
Sudan	Nov./Oct.	1 068.6	226.4	1 295.0	1 328.0	951.7	417.6	534.1
Tanzania	June/May	483.2	134.3	617.5	632.0	524.8	38.8	486.0
Uganda	Jan./Dec.	77.5	141.6	219.1	260.0	115.4	89.8	25.6
Southern Africa		2 784.4	1 082.0	3 866.4	3 438.7	3 437.6	406.4	3 031.2
Angola	April/March	617.2	219.8	837.0	778.0	778.7	72.4	706.3
Lesotho	April/March	221.5	19.0	240.5	250.5	250.5	5.9	244.6
Madagascar	April/March	337.9	29.9	367.8	290.0	290.0	34.9	255.1
Malawi	April/March	86.5	14.5	101.0	262.0	260.1	32.1	228.0
Mozambique	April/March	595.9	276.3	872.2	771.0	771.1	55.0	716.1
Swaziland	May/April	113.7	15.5	129.2	138.8	138.8	5.8	133.0
Zambia	May/April	228.7	68.7	297.4	125.0	124.6	62.9	61.7
Zimbabwe	April/March	583.0	438.3	1 021.3	823.4	823.8	137.4	686.4
Western Africa		9 116.7	435.7	9 552.4	9 996.2	3 223.1	370.7	2 852.4
Coastal Countries		6 948.4	239.9	7 188.3	7 254.0	2 224.8	149.9	2 074.9
Benin	Jan./Dec.	154.7	13.3	168.0	143.0	14.0	14.0	0.0
Côte d'Ivoire	Jan./Dec.	1 100.0	35.0	1 135.0	1 155.0	167.3	5.6	161.7
Ghana	Jan./Dec.	713.4	60.7	774.1	751.0	161.1	50.9	110.2
Guinea	Jan./Dec.	343.9	17.2	361.1	372.0	27.7	6.1	21.6
Liberia	Jan./Dec.	156.7	71.7	228.4	210.0	81.5	57.4	24.1
Nigeria	Jan./Dec.	4 123.2	10.5	4 133.7	4 230.0	1 638.6	0.0	1 638.6
Sierra Leone	Jan./Dec.	245.5	31.5	277.0	288.0	57.2	15.9	41.3
Togo	Jan./Dec.	111.0	0.0	111.0	105.0	77.4	0.0	77.4
Sahelian Countries		2 168.3	195.8	2 364.1	2 742.2	998.3	220.8	777.5
Burkina faso	Nov./Oct.	147.4	24.0	171.4	229.3	37.6	28.3	9.3
Cape Verde	Nov./Oct.	38.6	35.5	74.1	100.0	43.9	40.0	3.9
Chad	Nov./Oct.	80.0	30.7	110.7	127.3	49.3	36.6	12.7
Gambia	Nov./Oct.	147.3	11.4	158.7	141.3	27.9	1.2	26.7
Guinea Bissau	Nov./Oct.	49.5	3.8	53.3	74.4	28.0	1.1	26.9
Mali	Nov./Oct.	222.8	0.9	223.7	265.2	14.1	1.8	12.3
Mauritania	Nov./Oct.	226.1	52.9	279.0	336.0	155.2	57.8	97.4
Niger	Nov./Oct.	338.3	23.2	361.5	517.5	64.0	28.6	35.4
Senegal	Nov./Oct.	918.3	13.4	931.7	951.2	578.3	25.4	552.9
Central Africa		1 257.0	111.1	1 368.1	1 354.0	394.5	35.8	358.7
Cameroon	Jan./Dec.	522.8	29.7	552.5	510.0	261.3	11.0	250.3
Cent.Afr.Rep.	Jan./Dec.	54.9	4.1	59.0	46.5	0.4	0.4	0.0
Congo, Dem.Rep.	Jan./Dec.	361.3	69.3	430.6	480.0	98.4	16.7	81.7
Congo, Rep.	Jan./Dec.	287.2	5.1	292.3	288.0	23.9	0.6	23.3
Eq. Guinea	Jan./Dec.	19.8	0.0	19.8	16.0	3.4	0.0	3.4
Sao Tome	Jan./Dec.	11.0	2.9	13.9	13.5	7.1	7.1	0.0

Foodcrops and Shortages, June 2005

ESTIMATED CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/
a) 2004/05 or 2005 estimates (in thousand tonnes)

COUNTRY	Marketing year	2003/04 or 2004			2004/05 or 2005			
		Actual imports			Total import requirements (excluding re-exports)	Import position		
		Commercial purchases	Food aid	Total commercial and aid		Total commercial and aid	Food aid allocated committed or shipped	Commercial purchases
ASIA/NEAR EAST		38 939.0	2 531.4	41 470.4	49 607.0	34 621.0	1 341.4	33 279.6
Afghanistan	July/June	381.3	124.9	506.2	1 733.0	241.7	184.4	57.3
Armenia	July/June	126.0	42.0	168.0	169.0	51.0	3.0	48.0
Azerbaijan	July/June	790.0	6.0	796.0	1 149.0	890.4	36.4	854.0
Bangladesh	July/June	2 692.1	256.9	2 949.0	3 473.0	2 739.2	329.8	2 409.4
Bhutan	July/June	56.5	3.5	60.0	66.0	0.3	0.3	0.0
Cambodia	Jan./Dec.	51.6	28.2	79.8	150.0	1.5	1.5	0.0
China	July/June	11 369.4	30.6	11 400.0	16 500.0	12 011.0	66.9	11 944.1
Georgia	July/June	518.0	84.0	602.0	811.0	791.2	65.7	725.5
India	April/March	168.0	36.5	204.5	250.0	63.5	45.5	18.0
Indonesia	April/March	8 129.1	212.1	8 341.2	6 291.0	5 645.1	47.1	5 598.0
Iraq	July/June	3 046.6	417.4	3 464.0	4 230.0	2 895.0	9.2	2 885.8
Korea, D.P.R.	Nov./Oct.	420.8	688.8	1 109.6	1 097.0	507.5	234.7	272.8
Kyrgyz Republic	July/June	78.0	1.0	79.0	158.0	61.4	0.7	60.7
Lao, P.D.R.	Jan./Dec.	7.0	25.1	32.1	17.0	5.5	5.5	0.0
Maldives	Jan./Dec.	32.5	7.5	40.0	40.0	10.7	10.3	0.4
Mongolia	Oct./Sept.	199.3	48.7	248.0	263.0	83.3	36.6	46.7
Nepal	July/June	112.5	8.8	121.3	120.0	36.3	17.3	19.0
Pakistan	May/April	386.9	14.0	400.9	1 600.0	1 417.9	7.7	1 410.2
Philippines	July/June	4 012.4	106.1	4 118.5	4 676.0	3 369.4	123.3	3 246.1
Sri Lanka	Jan./Dec.	1 318.0	35.3	1 353.3	1 274.0	518.2	56.6	461.6
Syria	July/June	2 181.1	8.9	2 190.0	2 405.0	1 996.2	10.5	1 985.7
Tajikistan	July/June	278.0	86.0	364.0	381.0	161.1	46.1	115.0
Timor-Leste	July/June	62.0	0.0	62.0	42.0	10.6	0.0	10.6
Turkmenistan	July/June	34.0	0.0	34.0	44.0	0.1	0.0	0.1
Uzbekistan	July/June	268.0	82.0	350.0	408.0	116.0	0.0	116.0
Yemen	Jan./Dec.	2 219.9	177.1	2 397.0	2 260.0	996.9	2.3	994.6
CENTRAL AMERICA		1 288.0	177.5	1 465.5	1 500.0	1 097.4	290.7	806.7
Haiti	July/June	499.0	77.9	576.9	578.0	427.8	163.8	264.0
Honduras	July/June	513.6	64.5	578.1	577.0	402.2	52.6	349.6
Nicaragua	July/June	275.4	35.1	310.5	345.0	267.4	74.3	193.1
SOUTH AMERICA		867.4	5.3	872.7	906.0	901.1	47.0	854.1
Ecuador	July/June	867.4	5.3	872.7	906.0	901.1	47.0	854.1
OCEANIA		415.2	0.0	415.2	420.2	55.9	0.0	55.9
Kiribati	Jan./Dec.	8.7	0.0	8.7	8.7	0.0	0.0	0.0
Papua New Guinea	Jan./Dec.	342.0	0.0	342.0	347.0	55.2	0.0	55.2
Samoa	Jan./Dec.	15.5	0.0	15.5	15.5	0.5	0.0	0.5
Solomon Isl.	Jan./Dec.	29.5	0.0	29.5	29.5	0.0	0.0	0.0
Tonga	Jan./Dec.	6.4	0.0	6.4	6.4	0.0	0.0	0.0
Tuvalu	Jan./Dec.	1.1	0.0	1.1	1.1	0.0	0.0	0.0
Vanuatu	Jan./Dec.	12.0	0.0	12.0	12.0	0.2	0.0	0.2
EUROPE		1 579.6	26.5	1 606.1	1 449.0	774.6	4.8	769.8
Albania	July/June	387.6	26.5	414.1	402.0	236.6	4.8	231.8
Belarus	July/June	612.0	0.0	612.0	567.0	375.4	0.0	375.4
Bosnia-Herzegovina	July/June	580.0	0.0	580.0	480.0	162.6	0.0	162.6
TOTAL		74 294.2	5 894.8	80 189.0	89 806.1	60 330.5	3 626.9	56 703.6

SOURCE: FAO

1/ Includes food deficit countries with per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. US\$1 415 in 2002), which is in accordance with the guidelines and criteria agreed to by the CFA should be given priority in the allocation of food aid.

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

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