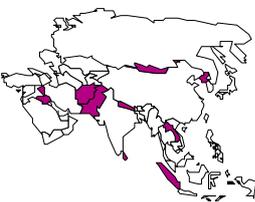


# FOODCROPS AND SHORTAGES

No. 3

October 2005

	<p><b>AFRICA:</b> In eastern Africa, despite improved outlook for current season crops in several countries, more than 18 million people are in need of food assistance. In western Africa, notwithstanding improved harvest prospects generally in the Sahel, the food security situation is still of concern notably in Niger, Mali and Burkina Faso. In Southern Africa, food insecurity is worsening for an estimated 12 million people due to reduced harvests in 2005, escalating food prices and rising energy costs. Prospects for 2006 main season crops are unfavourable in Zimbabwe, whatever the rainfall situation, due to the looming serious shortages of agricultural inputs. In Malawi, a “state of disaster” was declared by the Government due to the worsening food shortages.</p>
	<p><b>ASIA/NEAR EAST:</b> The recent earthquake in South Asia caused more than 50 000 deaths and destroyed homes and livelihoods of millions of people in Pakistan and India. In areas hit by the tsunami nine months ago, most of the displaced people are still depending on food aid. Recovery and reconstruction activities continue. In DPR Korea, an expected good harvest will ease the country’s need for food aid. Crop and food security prospects are poor in Laos, Nepal, and Timor-Leste due to bad weather. Cereal harvesting in Asian CIS countries is complete and production is slightly up on last year’s average level, owing mainly to favourable weather conditions. In Afghanistan, a bumper crop has been harvested.</p>
	<p><b>LATIN AMERICA AND THE CARIBBEAN:</b> In Guatemala, preliminary assessment of the damage caused by Hurricane Stan indicates that most families in the departments of San Marcos, Sololá, Huehuetenango and Quetzaltenango have not only lost most of their crops but also 40-60 percent of their land due to mudslides. In Haiti and Cuba, crop production has been seriously affected by dry weather followed by excessive rains due to hurricanes. In Ecuador and parts of Bolivia, dry weather conditions have adversely affected food crop and livestock production.</p>
	<p><b>EUROPE:</b> The 2005 cereal output in the EU is estimated to be sharply down from last year’s bumper harvest and below the average of the past 5 years. Winter cereals for harvest in 2006 have already been planted in northern parts of the EU and planting is ongoing in the centre under generally satisfactory conditions. Good precipitation is urgently needed for planting in the drought-affected Iberian Peninsula if another reduced crop is to be avoided there. In the European CIS cereal harvesting is nearly complete and output is estimated similar to last year’s average level.</p>
	<p><b>NORTH AMERICA:</b> Planting of the 2006 winter wheat crop is progressing on schedule in the United States and plants are emerging well under generally favourable conditions. The maize harvest is well underway and a good output of 276 million tonnes is forecast. In Canada, the 2005 cereal harvest is progressing somewhat slower than normal due to cool temperatures and rainfall, but yields have generally been good and another above-average output is expected.</p>
	<p><b>OCEANIA:</b> The harvest of the 2005 winter grains is just starting in some northern parts of Australia. Although production forecasts still vary somewhat reflecting very varied rainfall patterns in different parts of the country, the impact of which has been difficult to assess in parts, output of wheat, the major winter grain, is expected to be at least 20 million tonnes, close to last year’s level. Prospects for the summer coarse grain crops (mostly sorghum and maize) planted in September and October for harvest in 2006 are somewhat uncertain following predominantly dry weather continuing throughout September in Queensland, where a large share of the summer crops is produced.</p>



**COUNTRIES FACING FOOD EMERGENCIES<sup>1/</sup> (total: 39 countries)**

<u>Region/Country</u>	<u>Reason for emergency</u>	<u>Region/Country</u>	<u>Reason for emergency</u>
<b>AFRICA (25 countries)</b>		<b>ASIA/NEAR EAST (11 countries)</b>	
Angola*	Returnees	Afghanistan	Civil strife, IDPs and returnees
Burkina Faso	Drought, locusts in parts	Indonesia	
Burundi*	Civil strife, IDPs and returnees	(Aceh Province)	Tsunami
Chad	Refugees, poor rainfall	Iraq*	Conflict and insecurity
Central Afr. Rep.	Recent civil strife	Korea, DPR*	Economic constraints
Congo, Dem.Rep.	Civil strife, IDPs and refugees	Lao People's Dem. Rep.	Floods and drought
Congo Rep. of	IDPs, Refugees	Maldives	Tsunami
Côte d'Ivoire*	Civil strife, IDPs	Mongolia*	Summer drought and harsh winter
Eritrea*	Drought, IDPs, returnees	Nepal	Drought and civil strife
Ethiopia*	Drought, IDPs	Pakistan	Earthquake
Guinea*	IDPs and refugees	Sri Lanka*	Tsunami
Kenya*	Drought	Timor-Leste	Drought
Lesotho*	Drought in parts		
Liberia*	Recent civil strife, IDPs	<b>LATIN AMERICA (2 countries)</b>	
Malawi*	Drought in parts	Guatemala	Hurricanes
Mali	Drought, locusts in parts	Haiti	Civil strife and drought
Mauritania*	Drought, locusts		
Niger	Drought, locusts in parts	<b>EUROPE (1 country)</b>	
Sierra Leone*	Returnees, refugees	Russian Federation	
Somalia*	Civil strife, drought in parts	(Chechnya)	Civil strife
Sudan*	Civil strife, returnees, 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>
Cuba*	Drought and hurricanes	Mozambique	Drought in parts
El Salvador	Hurricane	Namibia	Dry weather
Laos	Floods and drought	Nepal	Drought
Lesotho*	Dry weather	Timor-Leste	Drought
Malawi*	Drought in parts	Zimbabwe*	Economic crisis, drought

**PURCHASE AND DISTRIBUTION OF LOCALIZED OR EXPORTABLE SURPLUSES  
REQUIRING EXTERNAL ASSISTANCE**

None.

<sup>1/</sup> 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 October 2005, the number of countries facing serious food shortages throughout the world stands at 39, with 25 in Africa, 11 in Asia/Near East, 2 in Latin America and 1 in Europe. The causes are varied but civil strife and drought predominate. A recent severe earthquake in South Asia has left tens of thousands dead and millions homeless and vulnerable in Pakistan. In many countries, particularly in sub-Saharan Africa, the HIV/AIDS pandemic is a major contributing factor to food insecurity. This report and similar others are available on the internet at the following URL address:

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

In **eastern Africa**, harvesting of the 2005 main season cereal crops has concluded or is about to conclude in southern parts of the sub-region while in northern parts harvesting of the crops has just begun. Prospects are favourable in Ethiopia and Eritrea while average to above average crops are estimated for Kenya, Tanzania and Uganda. In Somalia, however, a below-average 2005 main "gu" season harvest is estimated. Meanwhile in Sudan, despite good rains, prospects are uncertain.

The overall food situation in the subregion remains precarious with high malnutrition rates reported in several countries due to the effects of war, displacement and earlier droughts. Currently, more than 18 million people in the subregion depend on humanitarian assistance. The situation in Sudan is particularly alarming due to continued conflict that has resulted in serious food insecurity, especially in Darfur and southern Sudan. In Somalia, recent assessments indicate severe food insecurity in several parts of the country. The below average "gu" harvest coupled with an upsurge in civil strife have worsened the food situation. Nearly one million people are in need of humanitarian assistance.

In **southern Africa**, rainfall prospects for 2005/06 season in the subregion in general are normal to above normal. Land preparation and input deliveries are underway in most countries for planting of the main season crops starting in October-November. Problems with input supplies such as seeds, fertilizer, draught power and fuel, as well as hyperinflation are seen as severe constraints primarily in Zimbabwe. About 12 million people, two-thirds of them in Zimbabwe and Malawi, require emergency food assistance until the next harvest in April 2006. A bumper maize harvest in 2005 in South Africa is more than enough to cover the subregion's total import requirements of 2.8 million tonnes, of which two-thirds are anticipated to be imported commercially. WFP's regional Protracted Relief and Recovery Operation has so far received 36 percent of the US\$622 million appeal over a three-year period (2005-07).

In **the Great Lakes region**, although overall food production is improving in the Democratic Republic of Congo (DRC), security related problems are responsible for the food insecurity of local populations especially in the eastern part of the country. The food supply situation in general has improved following the favourable main season cereal harvests of 2005 and declining food prices in Burundi and Rwanda. However, problems with main root and tuber crops caused by cassava virus and pests persist, resulting in rising prices of these crops.

In **northern Africa**, harvesting of the 2005 winter crops has been completed, coarse grains (maize and sorghum) are presently being harvested in Egypt and harvesting of paddy is about to start. The 2005 aggregate wheat output is estimated to drop by 17 percent from last year's record level, to about 14 million tonnes, despite a record crop in Egypt. Delayed plantings in Algeria due to a late start of the rainy season, and extensive dry spells in Morocco resulted in sharply reduced output in these countries. Morocco's output is estimated to be less than half of last year's level at about 2.5 million tonnes. Wheat production in Tunisia was also smaller this year but remained above the average of the past five years. By contrast, wheat output in Egypt increased further this year to a new record level at almost 8.2 million tonnes, mainly as a result of an increase in the area planted.

In **western Africa**, development of current crops in the Sahel has been satisfactory so far in most producing zones, due to favourable weather conditions, and a good harvest is in prospect. In the southern parts of the coastal countries along the Gulf of Guinea, an average maize crop has been harvested while the secondary maize crop is developing satisfactorily. In the northern parts, harvesting of coarse grains is underway. However, many areas of the Sahel and northern parts of coastal countries continue to face a difficult food situation, due to depleted household food stocks and unusually high food prices, notably in Niger, Mali and

Burkina Faso. An improvement is likely following widespread harvesting from late October. In Côte d'Ivoire, insecurity, labour shortages and the de facto partition of the country continue to disrupt agricultural production and marketing activities, while food assistance continues to be needed for internally displaced people and refugees in Guinea, Liberia and Sierra Leone.

In **central Africa**, civil strife and insecurity continue to undermine food security in several countries. The food security situation remains precarious in the Central African Republic, and a strong agricultural recovery is not expected this year. In Cameroon, a tight food situation is still reported in the north, following the poor 2004 cereal production.

In **Asia**, the recent earthquake in South Asia killed over 50 000 people, injured more than 74 000 and left millions homeless in Pakistan and India. Numbers are still rising. Latest estimates indicate that over 2 million people require life-saving assistance, mainly winterised tents in view of the fast-approaching winter. The UN has appealed for some US\$ 550 million to meet these urgent needs for the next six months.

Over nine months after the 26 December 2004 tsunami disaster, most of the IDPs are still depending on food aid, while recovery and reconstruction activities continue. Although the overall food supply situation in Indonesia and Sri Lanka is satisfactory, many farmers in affected areas have lost two consecutive paddy seasons and face severe food security problems. In Maldives, tourist numbers in the last nine months have reportedly dropped by about 30 percent compared to before tsunami.

In DPR Korea, a record crop since 1995 is expected due to favourable weather conditions and strong government support. But country's per capita food consumption is still low and nutrition is well below minimum requirement by international standards. Mongolia has experienced another harsh winter and a drought summer and the food supply situation remains precarious. Severe droughts or floods have affected crops in several other countries, particularly in Laos, Timor-Leste, and Nepal.

Despite another good crop, China is still expected to face a grain deficit and to continue to be a net grain importer in 2005/06, which may have significant impact on grain prices in the region and world market. In addition, China is expected to import more than 22 million tonnes of soybeans and more than 3 million tonnes of cotton.

In Afghanistan, a bumper harvest has been gathered and aggregate cereal output is estimated at almost double the drought-reduced harvest last year.

In the **Asian CIS** region, cereal harvesting is complete and production is estimated at about 27.9 million tonnes, some 1.8 million tonnes up on last year's harvest. The aggregate harvest in the region includes some 23 million tonnes of wheat, 2.4 million tonnes of barley and about 1.5 million tonnes of maize. Kazakhstan is the largest producer in the region accounting for about 47 percent of the total cereal harvest.

Most countries in the **Near East** harvested average to above average cereal crops last summer due to favourable growing conditions. Jordan has strongly recovered from the 2004 drought affected poor crop. However, in Saudi Arabia, cereal production, mainly wheat, is estimated well below average due to reduced planted area.

In **Central America and the Caribbean**, the abundant rains typical of the hurricane season were reported over most of the subregion during the past few weeks, with some damages to rural housing and infrastructure. Harvesting of the 2005 main season cereal crops is well advanced in Central America and average to above average outputs of maize (the main cereal) are provisionally forecast. However, in Guatemala, Hurricane Stan has caused serious crop losses. In Mexico, harvesting of the 2005 spring/summer maize and sorghum crops is about to start and production is expected to decline in comparison to last year's record output as a consequence of reduced plantings and yields. In Haiti and Cuba, production of food and cash crops has been seriously affected first by a prolonged period of dry weather conditions and then by the torrential precipitations due to the close passage of seasonal hurricanes.

In **South America**, planting of the 2005 winter wheat crop has been completed in the southern countries. Due to inadequate levels of soil moisture at planting and unattractive price prospects, the aggregate planted area of the subregion is estimated to be down by about 12 percent from last year's record. Harvesting of 2005 coarse grains has been virtually completed and the subregion's aggregate output is expected to be about 72.2 million tonnes, some 3 percent below last year's harvest and far from the 2003 record crop of

80.4 million tonnes. This is essentially due to the pronounced reduction in Brazilian maize crop output that offset the good results obtained in almost all other South American countries. Planting of the important 2005/06 summer season coarse grains has started and planting intentions point to a reduction in Argentina, Brazil, Bolivia and Chile, while average plantings are expected in the other countries. In Ecuador and parts of Bolivia, dry weather conditions have affected food crops and livestock production.

In **Europe**, the bulk of the 2005 cereal crops have been gathered, apart from maize in the major southern and central producing countries. Cereal output has fallen quite sharply throughout the region from the record level last year, but remained about the average of the past five years. Yields of the winter grain crops generally returned to about average levels but the grain quality was compromised in many central and eastern parts of the region by heavy rains and flooding during the summer. By contrast, in the Iberian Peninsula, drought plagued the 2004/05 season causing sharp crop losses. Regarding the region's main summer crop of maize, after a promising start to the season with ample soil moisture in most producing areas, apart from Spain and Portugal, a period of dry weather reduced yield potential in France and Italy. However, heavy summer rainfall continued to benefit crops in the big producers in eastern parts of the region such as Hungary and Romania. Winter cereals for harvest in 2006 have already been planted in many northern parts and planting is ongoing in central parts under generally satisfactory conditions. Rainfall in eastern parts has somewhat hampered fieldwork for autumn planting although not yet sufficiently to have a serious impact on the area sown. Good precipitation is urgently needed for the planting in the drought-affected Iberian Peninsula if another reduced winter crop is to be avoided.

In the **European CIS (The Russian Federation, The Ukraine, Belarus and Moldova)**, cereal harvesting is nearly complete and aggregate harvest in the region is tentatively estimated at about 119 million tonnes, nearly 5.6 million tonnes down on last year's good harvest. This aggregate includes some 67.4 million tonnes of wheat and 51.5 million tonnes of coarse grains. Harvest in the Russian Federation accounts for about 47 million tonnes of wheat and nearly 29 million tonnes of the coarse grains, while the figures for Ukraine are 18.2 and 16.4 million tonnes respectively.

In **North America**, planting of the 2006 winter wheat crop is progressing on schedule in the United States and plants are emerging well under generally favourable conditions. The aggregate output of wheat in 2005 was officially estimated in October at 57.1 million tonnes, about 3 percent down from 2004. Coarse grains output is also forecast to fall, after last year's record harvest. Maize output is forecast at 270 million tonnes, 10 percent down from last year but still the second largest crop on record as, despite the likelihood of below average yields, a very large area has been sown this year. In Canada, the 2005 cereal harvest has been progressing slowly due to rainfall and cool temperatures, but the good rainfall throughout the season was generally favourable for crop yields. Another above-average output is expected, with latest official forecasts putting the 2005 wheat output at almost 25.6 million tonnes.

In **Oceania**, the 2005 cereal output in Australia is set to fall slightly from last year's level, which nevertheless would be a much better outcome than was envisaged at the start of the season when planting rains failed to arrive on time in most of the eastern producing regions. An about-average winter grain area was sown when late rains eventually arrived. With the harvest of the 2005 winter grains just starting in some northern parts of the country, production forecasts continue to vary quite greatly, but it now seems likely that the wheat crop in 2005 will at least be as large as last year's 20 million tonnes. Prospects for the summer coarse grain crops (mostly sorghum and maize) planted in September and October for harvest in 2006 are somewhat uncertain following predominantly dry weather continuing throughout September in Queensland, where a large share of the summer crops are produced.

## COUNTRY REPORTS

### AFRICA

#### **NORTHERN AFRICA**

##### ALGERIA (7 October)

The harvesting of the winter grain crops, mainly wheat and barley, is virtually over. Delayed plantings due to a late start of the rainy season resulted in sharply reduced output. Aggregate 2005 cereal production is estimated at about 2.5 million tonnes, some 36 percent lower than the bumper 2004 output and slightly below the average for the previous five years. Production of wheat is currently estimated at 1.8 million tonnes, about 800 000 tonnes less than last year while barley output, estimated at some 0.7 million tonnes, was only half of last year's above-average outturn.

Wheat imports for the marketing year 2005/06 (July/June) are expected to increase over last year's volume of 4.5 million tonnes to some 5 million tonnes, reflecting the decrease in production.

##### EGYPT (7 October)

Harvesting of the 2005 irrigated wheat crop was completed in July, and output has provisionally been estimated at 8.18 million tonnes, well above the past five-year average of 6.7 million tonnes. The increase is due to the combination of an estimated 15 percent increase in wheat plantings and the favourable climatic conditions that benefited crops at planting and during growth.

Harvesting of the maize crop is well advanced, while that of paddy is due to start soon. Maize production is officially forecast to decline to 6.25 million tonnes, due to a decrease in area planted. By contrast, early forecasts of irrigated paddy point to an above-average crop of 6.4 million tonnes.

Reflecting the anticipated good wheat output, wheat imports in marketing year 2005/06 (July/June) are expected to decrease from 7.8 million tonnes last year to about 6.6 million tonnes. Imports of maize, mostly used as animal feed, are forecast at about 5 million tonnes, about 100 000 tonnes more than the previous year.

##### MOROCCO (7 October)

Land preparation is underway for the planting of the 2005/06 winter grain crops. Extensive dry spells throughout the last growing season resulted in sharply reduced output this year. The aggregate 2005 cereal production, mostly wheat and barley, is estimated at about 4.3 million tonnes, nearly one-half of last year's crop. Output of wheat, by far the most important crop, decreased to 3 million tonnes compared to 5.5 million tonnes in 2004 and the five-year average of 3.75 million tonnes.

Cereal imports in 2005/06 (July/June) are forecast to increase substantially to 2.5 million tonnes of wheat and 1.9 million tonnes of coarse grains, mainly barley and maize.

##### TUNISIA (7 October)

Harvesting of the 2005 winter crops has been completed. Output is estimated to drop significantly despite overall favourable weather conditions in the North, which is the main cereal producing area, due to a decrease in area planted combined with poorly distributed rainfall in the South and the Centre. Total cereal production is estimated at 2.09 million tonnes, compared to 2.347 million tonnes in 2004. Wheat output at about 1.627 million tonnes is about 5 percent below last year while the barley crop is estimated at 465 000 tonnes, a 24 percent reduction.

Imports of cereals in 2005/06 (July/June), mostly wheat and maize, are forecast at 2 million tonnes, about 58 000 tonnes less than in the last marketing year.

## **WESTERN AFRICA**

### **BENIN (8 October)**

Harvesting of the first maize crop is nearly complete in the South, while later cereal crops are generally developing satisfactorily in the North. In spite of above average cereal production in 2004, estimated at about 1.1 million tonnes, very high food prices have been reported across the country. This is due to higher-than-normal exports to neighbouring countries, caused by a drop in production in Sahelian countries, and lower food supplies and high food prices in several other coastal countries. The situation is expected to improve, as food supply increases with the new harvests.

### **BURKINA FASO (8 October)**

**Rains and soil moisture have been generally adequate to allow satisfactory development of crops since the beginning of the growing season, although localised crop failures due to inadequate rainfall were reported in the south-east and the Boucle du Mouhoun region. Millet and sorghum crops are in the heading and maturation stages. Pastures have regenerated countrywide, improving livestock conditions. The desert locust situation remains calm in the country.**

**Food prices have started decreasing, mainly due to increased cereal imports from neighbouring coastal countries and the arrival of new harvests on the markets, notably in the south. However, the food security situation is still of concern in parts of the country, especially in the north, where vulnerable groups need to be continuously monitored and assisted as necessary until the end of the lean season.**

### **CAPE VERDE (8 October)**

After the first rains in late July on Fogo, Santo Antao, Brava and Santiago islands, the weather became mostly dry on all islands except Brava until the last dekad of August, when precipitation resumed. The dry weather conditions affected recently planted maize which failed in parts. The desert locust situation is calm, but infestations of grasshoppers are reported in Santiago and Brava islands.

Total imports of cereals in the marketing year ending in October 2005 are estimated at 100 000 tonnes. Taking into account an anticipated commercial cereal import of 42 000 tonnes and 42 200 tonnes of food aid pledges, the total uncovered deficit for the year is about 16 000 tonnes.

### **CHAD (8 October)**

**Rainfall has been adequate since the start of the growing season in May, allowing satisfactory development of crops countrywide. Millet and sorghum are maturing in the Sudanian zone while they are still developing in the Sahelian zone. Harvesting of maize, cassava and groundnuts has started in some regions. Pastures are regenerating, improving livestock conditions. The food situation is expected to improve as new harvests arrive on the markets.**

**Insecurity in neighbouring Central African Republic has led to an influx of about 15 000 refugees since June, bringing the number of Central African refugees to over 35 000. Chad is also home to more than 200 000 refugees from Sudan's Darfur region.**

#### **COTE D'IVOIRE (8 October)**

Harvesting of the first maize crop is nearly complete in the South. Satellite imagery shows that output may be affected by dry spells which occurred in the south-east in July. Moreover, 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. Food security for many households also 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.

#### **GAMBIA, REPUBLIC OF (8 October)**

Precipitation has been regular and widespread since the beginning of the growing season with reports of floods in several regions. Reflecting the abundant rains, millet, sorghum and upland rice crops are developing satisfactorily, while transplanting of swamp rice is underway. Groundnut crops are flowering/pegging countrywide. Harvesting of maize has started, improving food supply and lowering food prices.

#### **GHANA (8 October)**

Harvesting of the first maize crop is nearly complete. Overall crop prospects are mixed, due to delayed plantings following a late start of the rainy season and subsequent dry spells, notably in the south. The start of rains was delayed by between 4-6 weeks in the south and about 2-3 weeks in some locations in the north. About 80 percent of fields were planted later than usual according to estimates of the Ministry of Food and Agriculture (MoFA).

Like other countries in the region, Ghana experienced very high prices of basic food items this year. Compared to 2004, maize price more than doubled, while rice price was four times higher. Local sources attribute the maize price hike to a combination of factors including poor weather in 2004, 50 percent increase in fuel prices in February 2005, increased exports to Burkina Faso and Niger, and stoppage of re-exports from Burkina Faso to Ghana.

The cereal import requirement for 2005, mainly wheat and rice, is estimated at 755 000 tonnes, of which about 680 000 tonnes are anticipated to be covered by commercial imports.

#### **GUINEA\* (8 October)**

Harvesting of rice, by far the most important crop, started at the end of September. Satellite imagery analysis indicated that crops benefited from favourable climatic conditions in most areas of the country at planting and during growth. However, access to food continues to be negatively affected by high inflation and high prices for rice, the main staple, coupled with low household power.

Although the restoration of peace in Sierra Leone and the improved situation in Liberia have resulted in a relative decrease of the number of refugees in Guinea, the country still hosts a large refugee population (repatriation is slower than foreseen). In June 2005, according to UNHCR statistics, there were around 60 000 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 (8 October)**

Rains and soil moisture were generally adequate during the growing season, allowing satisfactory development of crops. Harvesting of early maturity varieties of maize has started. Millet, sorghum and rainfed rice are heading. Transplanting of swamp rice is underway after desalinisation of swamp rice

fields. The desert locust situation is calm. However, grasshopper infestations are reported in Bafata, Gabu and Quirina regions.

#### **LIBERIA\* (8 October)**

Harvesting of the 2005 paddy crop, virtually the only cereal grown in the country, is due to start soon. Production is anticipated (no survey has been done to assess the crop production to quantify) to show a slight increase in view of improved security. However, supplies of seeds and implements were limited and farmers were unable to procure seeds from their own resources due to the unaffordable prices. Secondly, the late return of IDPs and returnees has not given them the opportunity to prepare enough land for cultivation. Many of the agencies involved in the distribution of seeds and implements were unable to reach the remote farmers due to bad road conditions. The lack of agricultural agents in the rural areas has hindered the delivery of these inputs. In some areas farmers have not been able to cultivate due to lack of land and the seed they received has been consumed as food. Besides FAO and WFP, there are many NGOs which were involved in the distribution of seeds and implements. Most of the seeds were distributed in four primary counties, followed by nine counties as second and third priority. In total, 3 203 tonnes of rice seeds has been distributed in 2005. Due to input constraints, production levels remain insufficient to meet household food needs, unless supplemented with WFP food assistance, specially during the critical lean months. WFP will continue to provide assistance to households through various modalities, until the resettled population becomes self reliant. It is projected that about 171 096 farmers will need seeds and implements in 2006.

The repatriation of refugees and resettlement of IDPs started in October and November 2004 respectively. As of mid October 2005, 270 780 persons had been repatriated and resettled. This includes 42 108 Liberian returnees and 228 672 IDPs. 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 and the opening of roads, the resettlement programme can be accelerated to resettle the majority of the returnees before the next agricultural season. Their early resettlement supplemented with the timely distribution of seeds and implements can be expected to improve production levels in 2006. Until the completion of the resettlement programme, WFP will continue to target its operation to high resettlement counties with a progressive shift from emergency to recovery programmes.

#### **MALI (8 October)**

Rains were widespread from July through August, and soil moisture was generally adequate to allow satisfactory development of crops. Millet and sorghum are generally in the heading stages but harvesting of early millet has started in some regions. Transplanting of irrigated rice is still underway. There are reports of low use of fertilizer on rice in Office du Niger, San and Tombouctou, which may affect rice yield this year. Moreover, grain-eating birds and grasshoppers are reported in several regions. The desert locust situation is reported to be calm, with only scattered adults reported in the north. Pastures are generally good.

Although the overall food security situation has been improving, with the beginning of harvesting in the country and increased imports from neighbouring countries, there remain pockets of severe food insecurity in the North. Vulnerable groups need to be continuously monitored and assisted as necessary until the end of the lean season.

#### **MAURITANIA\* (8 October)**

Following the first showers in late May, good rains fell from June through September over most of southern and central Mauritania, with reports of heavy rains and floods in parts. As a result, crops are developing satisfactorily in most agricultural zones. They are already in the tillering or leafing stages. Pastures are adequate countrywide and the desert locust situation

remains calm. However, following last year's widespread desert locust invasion and poor rainfall, seed shortages have affected many farmers, in spite of distributions carried out by FAO and the Government.

Following last year's poor harvests, total imports of cereal in the marketing year ending in October 2005 are estimated at around 379 000 tonnes, including re-exports of wheat. Commercial cereal imports are estimated at about 280 000 tonnes.

#### **NIGER (8 October)**

Rainfall has been generally widespread and soil moisture adequate, allowing satisfactory development of crops, although localised rainfall deficits may have affected pasture regeneration in the pastoral zones of Tillabery and western Tahoua regions. Overall harvest prospects are favourable.

During the first round of general food distribution in August and early September, WFP, the Government and NGO partners coordinated their pipelines to reach 3 million people in urgent need of food aid.

A joint Government/FAO/CILSS Crop Assessment Mission is scheduled from 17 October to 5 November to estimate the 2005 cereal production and assess the livestock and food security situations in the country.

#### **NIGERIA (8 October)**

In the south, the first maize crop has been harvested while the second maize crop is cobbing. In the north, harvesting of millet and sorghum is underway. Reflecting generally favourable growing conditions during the rainy season, an average to above average harvest is anticipated.

Cereal imports have trended upwards in recent years, due mainly to high urban population growth, changing consumption pattern, increased feed use in the rapidly growing poultry sector and the continuous expansion of the country's milling capacity. In spite of the tightening of controls on illegal rice and wheat inflows, imports of cereals are forecast to increase to some 5.6 million tonnes in 2006.

The country is experiencing rising prices of basic foods. Compared to 2004, prices of maize, sorghum, millet, rice, gari and cowpea have more than doubled. Local sources attribute the price hike to a combination of factors including the Government's increasingly protectionist trade policy and the food crisis in neighbouring Niger. To mitigate the impact of high food prices on consumers, the Government has reportedly released grain from its strategic reserves.

#### **SENEGAL (8 October)**

Abundant rains caused flooding in several areas, notably in Dakar region. However, the impact on crops was limited. Millet and sorghum are generally at the heading stage in the south. Maize is maturing. In the north, coarse grains are tillering/leafing. Overall crop conditions are reported to be good and cereal production is expected to increase. Pastures are regenerating, improving livestock conditions.

Following last year's poor harvests, total imports of cereals in the marketing year ending in October 2005 are forecast to be around 970 000 tonnes. Although commercial imports and pledged food aid will largely cover the rice and wheat requirements, the shortfall in millet will be more difficult to offset given the low availability and trade of this cereal in the sub-region. This probably will result in millet being replaced by maize and rice.

#### **SIERRA LEONE\* (8 October)**

Heavy rains and flooding in the southern district of Pujehun destroyed many homes and acres of farmland and made thousands of people homeless in mid-August. In response, WFP provided 51 tonnes of emergency food aid to 6 934 families in targeted communities. However, agriculture, which has been recovering steadily since the end of the civil war in 2002, is expected to improve further this year, reflecting increasing plantings by returning refugees and farmers previously displaced, as well as improved conditions for the distribution of agricultural inputs. Harvesting of the rice crop is expected to start soon.

The security situation in the country remains calm. The repatriation of the estimated 65 000 Liberian refugees in Sierra Leone has been suspended after heavy rains made roads impassable. From October 2001 to July 2004, about 56 000 Sierra Leonean refugees have been repatriated and an estimated 1 million internally displaced people have been resettled either with assistance or spontaneously.

#### **TOGO (8 October)**

Harvesting of the major maize crop is nearly complete. Overall crop prospects are mixed, due to delayed plantings following a late start of the rainy season, and conflict-induced population displacements, which disrupted agricultural production and marketing activities in several regions. About 35 000 people fled the country and over 10 000 were internally displaced. This, in addition to the 2004 average harvest, higher-than-normal exports to neighbouring countries (caused by a drop in production in Sahelian countries), and lower food supplies in several other coastal countries, led to high food prices and a tight food situation this year.

### **CENTRAL AFRICA**

#### **CAMEROON (10 October)**

Rains have been adequate countrywide, and overall crop prospects are favourable. Harvesting of the first maize crop is nearly complete in the south, which should improve food supply and reduce prices in the northern part of the country, where a serious decline in the 2004 cereal production led to a tight food situation this year. For 1 month, WFP is providing an emergency ration of cereals to 237 700 people in the Far North province of Cameroon, the poorest part of the country.

In a bid to diversify the economy and reduce its dependency on 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 1 million and 2 million people depend directly or indirectly on the cocoa sector.

#### **CENTRAL AFRICAN REPUBLIC (CAR) (10 October)**

In the south the first maize crop has been harvested and planting of the second maize crop is completed. Although rainfall has been widespread in general since the beginning of the growing season in March, a strong agricultural recovery is not expected this year due to persistent insecurity.

Heavy rains throughout August caused flooding in western parts of the country, notably in Bangui where thousands of people were made homeless. Moreover, about 20 000 people have fled the country to southern Chad since June due to insecurity, bringing the number of Central African refugees in the latter country to over 35 000.

#### **CONGO, DEMOCRATIC REPUBLIC OF (14 October)**

Harvesting of maize, sorghum and millets in the northern part of Democratic Republic of Congo (DRC) is currently underway with expectations of a normal aggregate production. Judging from satellite imagery, above normal crop conditions in the centre and the north and normal to below normal in the south are expected. Staple crops, namely cassava and banana, have been severely damaged by pests and diseases this year. Insecurity for producers and traders (who are forced to pay illegal levies on their farm produce), still remains a primary concern. Since January this year the country has imported 190 000 tonnes of cereals (mostly wheat) on commercial basis and has received much of the pledged food aid of 52 000 tonnes. More aid would be needed during the lean period of October-December.

Repatriation of some 150 000 Congolese refugees has recently began by UNHCR. Re-establishment of agriculture for their livelihoods would require a coordinated effort and assistance. 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 a low-interest loan of US\$39 million from the IMF under the Poverty Reduction and Growth Facility and a promise of US\$150 million new grant from the World Bank for the health sector improvements.

To reinforce the resumption of agricultural activities, WFP is planning local food purchases in the surplus markets in the eastern areas for distribution throughout the country.

#### **CONGO, REP OF (10 October)**

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.

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 (10 October)**

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. Annual inflation slowed down in 2004, to 5.9 percent, from an estimated 7.3 percent in 2000, but it is forecast to rise again in 2005.

#### **GABON (10 October)**

Satellite imagery analysis revealed that rainfall has been below average this year, which may have affected yield of the main food crops which are cassava, plantains and maize.

Imports of cereals in 2005, mainly wheat and rice, are estimated at some 167 000 tonnes. Economic growth which has trended downwards recently, due to declining oil production, is expected to recover in 2005, helped by high international oil prices.

SAO TOME AND PRINCIPE (10 October)

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\* (14 October)**

Sowing of 2006A (secondary) season crops, maize, sorghum and beans in Burundi are nearly completed under near normal weather conditions. The 2005 annual cereal production has been estimated at 290 000 tonnes, about 4 percent better than the 2004 harvest. Production of banana and plantain is also forecast to improve by about 3 percent in 2005. With a decline in legumes, roots and tubers, total 2005 domestic food production in cereal equivalent is forecast to be about 1 percent less than last year. Total food import requirement in cereal equivalent is estimated at 444 000 tonnes. With anticipated commercial imports of 30 000 tonnes and food aid of 80 000 tonnes, there remains an uncovered food deficit of 334 000 tonnes, necessitating further international assistance. So far only 33 500 tonnes of food aid has been received.

According to the country's Early Warning System, prices in Bujumbura market in September 2005 were higher for sweet potatoes (81 percent) and cassava flour (33 percent) compared to the same month a year ago reflecting reduction in supplies. On the other hand maize prices were recorded to be 6 percent lower as result of better harvest this year. The cost of a "food basket" has increased by 18 percent compared to the same time last year. Despite some localized 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 and the trends in repatriation have been increasing steadily. These and the host families require assistance. WFP distributed on average 7 000 tonnes of food per month to about 609 000 beneficiaries from January to May 2005.

**ERITREA\* (24 October)**

Harvesting of the 2005 main season ("Kremti"), crops has just started and the outlook is generally favourable, following good distribution of rainfall. Preliminary estimates from the Ministry of Agriculture indicate a cereal production of about 106 000 tonnes compared to last year's 85 000 tonnes. However, even in good years, Eritrea produces only a fraction of its total food requirements and largely depends on imports.

In the last several years the food situation deteriorated sharply as a result of consecutive poor harvests and lingering effects of war with neighbouring Ethiopia, compounded by serious macro-economic imbalances. High cereal prices continue to impact on purchasing power and food security of large numbers of people. For instance, in July market prices for white sorghum, the main staple crop, doubled or more than doubled in Barentu and Keren compared to the same time last year. Currently, about 2 million people are facing varying degrees of food shortages with an estimated 1.3–1.4 million targeted for food assistance. Since September, however, general food distribution to drought/war affected beneficiaries has been suspended following government concerns about increased dependency and its proposal to shift to more food-for-work interventions. Consequently, only some 72 000 IDPs are currently receiving general rations compared with some 1.3 million in August 2005. Current in-country food aid stocks are expected to cover needs for the remainder of 2005 and well into 2006 unless earlier distribution levels are resumed. The government of Eritrea has declined to request the fielding of an FAO/WFP Crop and Food Supply Assessment Mission (CFSAM) in 2005.

#### **ETHIOPIA\* (24 October)**

Prospects for the 2005 main season “meher” crops are favourable in the main producing regions in western and central parts while the outlook is less favourable in the eastern and southern crop producing areas due to late and erratic rains. Furthermore, despite the general improvement in the secondary “belg” season compared to last year, some areas were adversely affected by either excessive or erratic and late rains. Normally, the belg season rains extend from February to May and the crop accounts for some 10 percent of total grain production but in some areas it provides the bulk of annual grain production.

Household food availability is poor and high malnutrition rates, particularly for children, are of serious concern in some areas. The situation is exacerbated by significantly higher than average food prices. A multi-agency mission, composed of Government, UN and other humanitarian agencies, last April revised the total number of people in need of emergency food assistance in 2005 upwards from 3.1 million to 3.8 million. A subsequent inter-agency assessment of belg-dependent and pastoral areas in July identified additional requirements for the months of August to December, although the monthly number of people in need of relief food did not exceed the peak of 3.8 million in June. The relief food requirement in 2005 increased from an initial estimate of 387 000 tonnes to of about 464 000 tonnes in April and 600 000 tonnes in July (not including supplementary food requirements). The Productive Safety Net Programme (PSNP) started in 2005 to address the needs of more than 5 million chronically food-insecure people with cash and food transfers. Implementation of the programme was delayed in the first half of 2005 causing some problems, but exceptional measures introduced in June accelerated the process and resulted in reaching the bulk of the intended beneficiaries. The PSNP has now supported about 4.8 million chronically food-insecure people through community “public” works and free “direct” transfers. Overall, the national level of food aid in the pipeline is expected to cover the estimated requirements for the remainder of the 2005 and early 2006.

An FAO/WFP Crop and Food Supply Assessment Mission is planned to visit the country in November to assess the main season production and estimate food assistance requirements in 2006.

#### **KENYA (2 October)**

Harvesting of the 2005 long-rains season maize is almost over in most parts of the country and prospects are generally favourable due to good rains in main agricultural areas. These rains counteracted somewhat the adverse impact on yields of delayed planting due to the late start of the season. The long rains cropping season (March-May) normally accounts for 80 percent of total annual food production. Most north-western pastoral areas also received above average rains in April and May.

Overall, serious food problems remain in the south-eastern lowlands and the north-eastern pastoral areas. In the marginal agricultural areas of Eastern Province, particularly in Kitui and Makeni districts, the household food security situation has deteriorated sharply due to the near-total crop failure during the current season. This followed the earlier failure of the critical October-December 2004 short-rains season. The next important harvest is not due until February 2006. In addition, the northeastern pastoral districts including Garissa, Wajir, Tana River and Isiolo, are faced with serious food shortages. Recent reports indicate high child malnutrition rates in several districts. Refugees fleeing from the Gedo region of Somalia into Mandera District, due to conflict, are expected to exacerbate the food security situation in the area. Simmering clan tensions have also resulted in vicious clashes in several pastoral areas. Ever dwindling resources like water and pasture are some of the underlying causes that continue to plague these communities.

**RWANDA (14 October)**

Sowing of 2006A (secondary) season crops, maize, sorghum and beans is nearly completed under near normal weather conditions. The 2005 aggregate cereal production (season A and season B, with roughly one-third, two-third proportions) is estimated at 373 000 tonnes (milled basis), showing significant increase of about 28 percent over last year. This is primarily due to a record cereal harvest of 287 855 tonnes, some 44 percent for 2005B season above 2004B harvest. Consequently, the main food prices index has been declining since late March 2005. In Kigali market July prices were higher by 36 percent for sweet potatoes and 21 percent for beans compared the average prices in June. Production of roots and tubers is estimated to be lower this year than last year. Due to good harvest sorghum prices were found to have decreased in July. In spite of this favourable production, the country is largely deficit in cereals and requires over 200 000 tonnes of imports, of which food aid has been estimated at some 30 000 tonnes for 110 000 vulnerable people during the lean months of April-May and October-November in the eastern part of the country. So far commercial imports of 18 000 tonnes (maize from Uganda) and food aid of 17 000 tonnes have been received.

**SOMALIA\* (2 October)**

The Somalia Food Security Assessment Unit (FSAU) estimated the 2005 "gu" season cereal crop in Somalia at about 115 000 tonnes, including off-season gu crop, nearly 37 percent less than average. The decline is due to the poor rainfall performance in the main crop producing areas of southern Somalia. By contrast, the gu rains in central and northern Somalia were generally good and the estimated cereal harvest in these parts is above average. The "gu" cereal crop normally accounts for some 70 to 80 percent of annual production.

The above average gu rains in central and northern Somalia have markedly improved pasture and livestock conditions. Although this signifies an end to the severe drought conditions of more than three years, a full recovery will be slow due to the cumulative effects of the drought on livelihoods, including large livestock losses and high levels of indebtedness.

The overall food security situation in Somalia continues to be alarming with more than 900 000 people in need of urgent assistance. The situation is further aggravated by the outbreak and upsurge in hostilities in parts of southern Somalia and the deterioration in security conditions that are hampering the distribution of relief assistance. Further information and analysis can be accessed from the Food Security Assessment Unit (FSAU) at: [www.fsasomali.org](http://www.fsasomali.org).

**SUDAN\* (2 October)**

Prospects for the 2005 food crops, to be harvested from October, are still uncertain. In southern Sudan, early indications suggest an average crop but remain to be verified through crop assessments. Overall, Sudan's estimated rainfall reached near to above-normal levels, with potentially excessive totals in the northeastern agricultural areas and possibly below-normal amounts in north-eastern Darfur. Heavy rainfall was recorded in late July-early August in areas of West Darfur which is expected to benefit crops and improve water and pasture conditions.

In southern Sudan, the optimism that followed the peace deal signed in January 2005 to end the war has given way to apprehension following the tragic death of the First Vice-President of Sudan, Dr. John Garang. The optimism had prompted large numbers 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 an inter-agency UN 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. The continued crisis in Greater Darfur remains the most pressing humanitarian problem.

An FAO/WFP Crop and Food Supply Assessment Mission is visiting southern Sudan in October and is planned to visit northern Sudan in November to assess the main season production and estimate food assistance requirements, if any, in 2006.

#### **TANZANIA, UNITED REPUBLIC OF (24 October)**

The preliminary forecast of the 2005 maize crop indicates a 2 percent increase compared to last year's good crop. However, poor rainfall patterns in Dodoma, Tabora, Shinyanga, Morogoro (in early January to February) as well as in Arusha, Manyara and Kilimanjaro areas (during March to June) have affected maize crop production and may result in some downward revision.

The overall national food supply situation remains stable. In most markets in the southern highlands grain basket regions of Tanzania, wholesale maize prices have been below the four-year average since January 2005 due to good local production in 2004. However, in early August wholesale maize prices in Dar-es-Salaam were still 18 percent higher compared to the same time last year. The high demand from neighbouring countries, particularly Zambia and Malawi where below average crops have been gathered, may also counteract the expected fall in prices in southern Tanzania.

A vulnerability assessment carried out by the Food Security Information Team (FSIT) identified 34 districts, in the above mentioned regions, that are going face food shortages during the lean season of November 2005 to January 2006. About 600 000 people were identified to be food insecure requiring some form of intervention (subsidized maize prices) and the Government plans to distribute 10 000 tonnes of maize from the Strategic Grain Reserve (SGR). The SGR has currently a stock balance of about 112 000 tonnes, the highest level in recent years.

#### **UGANDA (24 October)**

Harvesting of the 2005 main season crops is complete and the outlook is favourable. Already wholesale maize price have started to decline in most of the markets. However, increased demand in northern Uganda and the observed exports to Kenya are expected to firm-up these prices. In northern Uganda, poorly distributed rainfall has negatively affected crop development. However, an average sorghum crop is expected in Karamoja.

The national food situation is stable. However, insecurity remains a serious problem in northern Uganda (Gulu, Kigum, Lira and Pader districts) as the Lord's Resistance Army (LRA) continues to attack communities and lay ambushes on roads, maiming and killing people as well as destroying assets and property and denying displaced people from accessing their fields and crops. Food distributions continue to reach 1.4 million displaced persons and nearly 200 000 refugees and other vulnerable persons. WFP faces a shortfall of over 100 000 tonnes of food commodities, with a funding gap of about US\$50 million required to maintain the food pipeline through mid-2006.

### **SOUTHERN AFRICA**

#### **ANGOLA\* (13 October)**

The official estimate of 2005 cereal harvest at a record level of 881 000 tonnes is a 22 percent increase over the year before. Although maize production estimated at 734 000 tonnes represents near self-sufficiency, the country still needs to import about 739 000 tonnes of cereals for 2005/06, mainly wheat and rice. In spite of the favourable national harvest, pockets of food insecurity exist in the central highlands compounded by poor road conditions and underdeveloped marketing systems. Consequently, there are a large number of food insecure people in the country despite more than three years of peace. Resettlement is still continuing

as UNHCR is currently organizing the repatriation of about 35 000 Angolan refugees from the neighbouring Zambia just ahead of the start of the rainy season. So far the international donors have pledged a total food aid of 32 000 tonnes; half of that has been received and is being distributed by WFP to about 500 000 vulnerable people. By early October about 120 000 tonnes of cereals (mostly wheat) had been imported commercially since April.

Angola's economy, which produces over 1 million barrels of crude oil a day 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.

#### BOTSWANA (13 October)

The official estimate of 2005 cereal harvest in Botswana is 19 000 tonnes which represents more than 50 percent drop from last year. This is expected to raise the total cereal import requirements (mostly maize) to 337 000 tonnes or 90 percent of total utilization during 2005/06 marketing year as opposed to some 83 percent last year. Most of the needs are met through commercial imports. So far total imports have been about 122 000 tonnes, mainly maize from South Africa.

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 the disease.

#### LESOTHO\* (13 October)

Preparations are currently underway for planting of the main season crops within a month's time. Forecast for the secondary winter crop to be harvested in November is generally unfavourable due to the prolonged dry conditions. This has exacerbated the already tight food supply situation in the country following a below average 2005 main season cereal harvest estimated at a below-average level of 118 000 tonnes.

Total cereal imports to date since April amount to about 110 000 tonnes (including food aid of about 12 000 tonnes) versus the estimated cereal import requirement of about 300 000 tonnes for 2005/06 marketing year (April/March). As the lean season approaches, the problem of access to food for an estimated 548 800 people in the Kingdom is getting worse due to slow international response for assistance. Emergency food aid needs have been estimated at 20 200 tonnes of cereals.

#### MADAGASCAR (13 October)

Field preparations are currently underway for planting of rice and maize, the two main cereal crops in Madagascar. The 2005 paddy harvest is estimated at a record level of about 3.4 million tonnes. FAO estimates total cereal import requirement for 2005/06 marketing year (April/March) at 174 000 tonnes or about 7 percent of the country's total utilization requirement. So far very little quantity (about 3 500 tonnes) has been imported commercially. About 17 000 tonnes, or half of estimated quantity of food aid, has been received so far during this marketing year.

As a result of a bumper paddy harvest, the average price of local rice dropped from about 9 000 FMG/kg at the peak of the "rice crisis" around December-January to a post-harvest low of 3 750 FMG in late June 2005. Since then the price has recovered and stabilized around 5 000 FMG in early October but has remained consistently below the price of imported rice. It is likely to further increase through the lean season months of January to March, benefiting the farmers with surplus rice to sell, but adversely affecting the vulnerable groups with limited purchasing power.

The price of vanilla has fallen from about US\$ 180/kg in 2004 to US\$ 50 in early 2005 adversely affecting incomes of farmers in the northern part of the island. Reportedly, more than 70 percent of Madagascar's 17 million people live below the poverty line of US\$ 1/day. A four-year aid package of

US\$ 110 million was officially signed on 18 April under the US Millennium Challenge Corporation to help boost the country's agricultural production. Madagascar's entry into the Southern African Development Community (SADC) in August is expected to improve trade and boost economic prospects for the country.

#### **MALAWI\* (18 October)**

Prospects for the 2005/06 rainfall season to begin in October-November in Malawi are generally normal to above rainfall. Field preparation for planting of the main season crops is underway. However, there are reports of the planned distribution of subsidized fertilizer and seeds facing difficulties. The Government had planned to distribute 50 kg of urea fertilizer and 5 kg of improved maize seed to about 1 million smallholder farmers under the UN Millennium Project with funding from the World Bank.

Due to generally low residual soil moisture from the main season, the prospects for the secondary winter crop in 2005 are poor. The official forecast for the winter maize crop is 192 000 tonnes, some 20 percent below last year's output. Total maize import requirements for the 2005/06 marketing year (April/March) are estimated at 767 000 tonnes, of which about 300 000 tonnes were expected to be covered commercially. From April to September 2005 only 48 000 tonnes were imported mostly through cross-border trade. As of 9 September, WFP had received donor pledges for about 96 000 tonnes as food aid. In addition the Government is distributing, through NGOs, 100 000 tonnes of food from now until December 2005.

On 16 October, a "state of disaster" was declared in Malawi by the President. Food insecurity, especially in the drought affected southern districts, is worsening as maize prices continue to rise. For example, the average price of maize in Liwonde market in the south in September was 22.25 kwacha/kg, about 35 percent higher than the same month last year. Prices are much higher this year compared to last year in all three regions of the country. The main reasons for higher prices in southern Malawi this year compared to last year, besides the fact that maize production was reduced by 26 percent nationally over last year's poor harvest, are that maize purchases are sourced deeper into northern Mozambique resulting in higher transport costs and fewer traders, and that the uncertainty of Government purchases and subsidized maize distributions has kept traders inactive.

WFP is now planning to feed up to 2.9 million people, while the government and other organizations have committed to feed additional 2.2 million. However, by early October donors had contributed/pledged about US\$ 28 million in response to the UN's US\$ 88 million appeal made earlier in August. ADMARC is distributing (rationing) limited quantities of maize (5 to 25 kg/person at a time) at a subsidised price of 17 kwacha/kg against the most common market prices of 25-30 kwacha in the south.

#### **MOZAMBIQUE (14 October)**

Under the forecast of normal to above normal rain pattern, land preparation for the 2005/06 main season crops is currently underway. Harvesting of the second season winter crop, mainly wheat, is completed with a poor output. The prospects are unfavourable due to the reduced rainfall in recent months and lower than usual water levels in the rivers and reservoirs. The 2005 production of cereals was estimated at 1.92 million tonnes, some 4 percent lower than last year's record harvest, but 10 percent above the last five-year average. Despite this overall satisfactory national production, certain areas such as the southern districts of Tete Province, and many districts in southern provinces, were affected by drought. Total cereal import requirements, including rice and wheat, are forecast to be 10 percent higher than last year. To date the country has received about 294 000 tonnes of commercial imports and 12 000 tonnes of food aid (but pledges of 37 000 tonnes).

Total national food assistance needs, including for the HIV/AIDS affected (under the regional PRRO), are estimated at 83 000 tonnes. In view of the maize surplus in northern and central

areas, part of these food needs could be procured locally. So far local procurement of maize by WFP has been minimal at 8 800 tonnes, in order to avoid undue price increases in local markets.

Reflecting the poor harvest in the south and large export demand in the north from neighbouring food deficit Malawi, maize prices have risen since April in most markets in the country and are higher than the prices last year especially in the food deficit south. An average price in early October was 6 810 Mts/kg in Maputo, up from about 4 490 Mts the same period last year. The average maize price at harvest time (April) in Maputo was 5 129 Mts/kg. Rising maize prices will exacerbate food insecurity for the estimated 587 500 people. Currently WFP is distributing food aid to only a quarter of these, mostly in drought-affected areas.

#### **NAMIBIA (14 October)**

Production of winter wheat is forecast at 10 500 tonnes, down by 1 000 tonnes from the previous year. The 2005 total coarse grain production, mainly millets, sorghum and maize, has been revised downwards by the Namibia Early Warning and Food Information Unit and is now put at 97 182 tonnes, 16 percent below last year and 3 percent below the five-year average. The national cereal import requirement for 2005/06 marketing year (May/April) is estimated at 145 000 tonnes, almost unchanged from last year probably due to stock drawdown. Most of the deficit is expected to be met through commercial imports. So far only 22 000 tonnes of cereal imports, mostly from neighbouring South Africa, have been recorded.

Recently a loan of US\$34 million from the African Development Bank has been approved to invest in irrigation schemes to boost the country's cereal production.

#### **SOUTH AFRICA (14 October)**

The final estimate of 2005 maize harvest by the country's Crop Estimating Committee revised the previous figure to a record 12.45 million tonnes. This represents an increase, due to favourable weather, of about 28 percent over the drought-affected harvests of the previous two years. The resulting anticipated closing stocks of about 5 million tonnes of maize are more than enough to cover the subregion's maize import requirements.

The first estimate of the area planted under winter wheat shows a 4 percent decline, to 800 500 hectares, over the 2004 level. However, yields are expected to improve over the 2003 and 2004 drought-affected levels resulting in a near normal production level of 2.03 million tonnes.

A farmer survey of maize planting intentions for the 2005/06 agricultural season shows an alarming decline of 42 percent to a new level of 1.7 million hectares. Farmers have complained about the low unprofitable level of maize prices. The survey also shows a switch from maize and sorghum crops to relatively more lucrative crops such as soybeans and groundnuts.

The SAFEX price of white maize plummeted from about R900/tonne in January 2005 to under R600/tonne beginning of March in response to substantial domestic stocks, improved crop production prospects locally and internationally, and substantial drop in the international price. The price was fairly stable at around R600 until early July; since then it has steadily risen to R850/tonne in early October as the lean season approaches and demand picks up in the subregion. This price is still well below the import parity price of maize of about R1200/tonne. The current low price of maize in the country should help ease the regional food shortages and improve regional food security.

#### **SWAZILAND\* (14 October)**

Preparations for the upcoming 2005/06 cropping season are currently underway in Swaziland. The 2005 cereal harvest estimated at 83 000 tonnes was 5 percent below the average of the previous five years. Farmers have cited low farm gate prices and high cost of fertilizer, tractor rental, fuel and transport as the key reasons for poor agricultural productivity. 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. So far commercial imports and food aid receipts have been recorded at 26 000 and 3 000 tonnes, respectively.

Food insecurity for vulnerable groups remains a critical issue, in view of declining income-earning opportunities and remittances, high levels of unemployment, and the impact of HIV/AIDS on the livelihoods of households.

#### ZAMBIA (14 October)

Land preparation is currently underway for the planting of the 2005/06 main season cereal crops. The 2005 winter wheat harvest is estimated at a five-year harvest level of 90 000 tonnes. The government has planned a program of 50 percent input subsidy during the 2005/06 agricultural season for targeted 125 000 small-scale farmers with 50 000 tonnes of fertilizer and 2 600 tonnes of maize seed. The 2005 cereal output was estimated at 980 000 tonnes, 33 percent down from last year's bumper harvest and 17 percent below average of the previous five years. Consequently, cereal import requirements for marketing year 2005/06 (May/April) were estimated at 271 000 tonnes, anticipated to be covered by 224 000 tonnes of commercial imports, and 47 000 tonnes of international food aid. Although the Government has lifted a ban on imports and plans to allow 200 000 tonnes of white maize, so far commercial imports have been only about 15 000 tonnes. The removal of the 15 percent duty is likely to encourage private trader import activities.

The average selling price for maize on 14 October, according to CHC Commodities Ltd., was 54 000 ZMK/50 kg bag, up from about 33 300 the same period last year. The average maize price at harvest time (April-May) in the Central Province was near the floor price of 36 000 ZMK/50 kg bag offered by the National Food Reserve Agency.

According to the Zambia VAC some 1.2 million people will be in need of some form of food assistance amounting to about 118 000 tonnes between July 2005 and February 2006, to be provided by the Government and/or international community. To date only 8 000 tonnes have been received as food aid.

#### ZIMBABWE\* (12 October)

Planting of the main season crops usually starts in October. However, prospects for the upcoming agricultural season at this time look bleak as serious problems with availability and delivery of key inputs such as seeds and fertilizer along with lack of sufficient fuel, transportation facilities and draught power are reported. With sharply declining numbers of draught animals, very few working tractors and continuing diesel shortages, much land cultivation is likely to be dependent on manual labour and hand hoes.

Normally Zimbabwe requires about 50 000 tonnes of maize seed. Current domestic production has been estimated at 30 000 tonnes, and the Government is reported to be in negotiations with seed companies to import another 20 000 tonnes. NGOs and other agencies are also expected to import small quantities of seed. However, timely seed distribution to individual farmers across the country would imply more extensive transport facilities than are available right now.

Domestic capacity for fertilizer production has sharply decreased. Normal production capacity is about 140 000 tonnes/year. However, due to the lack of foreign currency to import raw materials, domestic production will be very limited this coming season. The Government is reportedly issuing tenders to import 100 000 tonnes of CAN fertilizer at an estimated cost of US\$ 40 million, but even if these are imported, timely distribution to farmers at affordable prices will be a major challenge.

The 2005 production of maize, the main staple food crop, has been put at about 600 000 tonnes, compared to over 2 million tonnes in 2000. Import requirement is estimated at over 1 million tonnes of cereals but commercial import capacity of the country is severely constrained by falling foreign exchange reserves and reduced revenues from this year's tobacco sales. By early October 2005 about 510 000 tonnes of grain had been received/contracted, primarily from South Africa. Very little, only about 1 400 tonnes, have been recorded through informal cross border channels. Additional unrecorded food imports in the form of remittances from relatives from South Africa are said to have occurred.

Access to food in many areas is severely hampered by scarcity of grain either from farmers/traders or from the Grain Marketing Board (GMB), and problems of transport and fuel supplies in the country. This has resulted in sharp and continuous price increases in most markets. Between June and September this year maize prices increased from Z\$ 1 100 to Z\$ 2 200/kg in the north-central part of the country and from Z\$ 3 890 to Z\$5 560/kg in the south (FAO and FEWSNET). The annual inflation in September reached 360 percent, up from 124 percent in March due to rises in fuel and food prices, and depreciation of the Zimbabwe dollar. According to the Consumer Council of Zimbabwe (CCZ) basic cost for an urban family of six had shot up by 43 percent, in local currency, from September to October. The continuing hyper inflation combined with extremely high levels of unemployment, is greatly limiting access to food, putting up to 5 million people at risk of food insecurity. In a change in Government policy, on 29 September WFP received an official Government authorization to distribute food in 49 districts around the country. An estimated 3 million people will receive monthly rations of cereals and pulses. WFP has received US\$ 86 million, equivalent to over 165 000 tonnes (about 55 percent of needs).

## **NEAR EAST**

### **CYPRUS (2 October)**

Sowing of the 2006 wheat and barley crops is about start. Aggregate cereal output in 2005 is estimated at 120 000 tonnes, nearly 18 percent higher than the previous five year's average.

Imports of wheat in 2005/06 (May/April) are forecast at 100 000 tonnes, while aggregate imports of barley and maize are forecast at some 540 000 tonnes, unchanged from last year.

### **IRAN, ISLAMIC REPUBLIC OF (12 October)**

Output of 2005 wheat crop is estimated at 15 million tonnes, another record production after bumper crops in the previous two years, reflecting strong Government support (guaranteed procurement prices, supplying higher yielding seeds, improving machinery services, augmenting fertilizer usage and enhancing water systems and pest management practices). Based on this large production, the country can maintain wheat self-sufficiency with some imports for feed use. The 2005 maize production is estimated at 1.5 million tonnes and 2005/06 import requirement is forecast at 2.3 million tonnes to meet domestic demand from livestock sector.

### **IRAQ\* (2 October)**

Cereal production may be affected by serious shortages of fertilizers and other agricultural inputs. The 2005 total cereal production, harvested last June, has been tentatively estimated at 3.1 million tonnes, slightly higher than the previous year's.

The food security situation in the country remains extremely fragile. Recent events indicate a deterioration of security conditions which led to an increase in humanitarian needs in crisis areas. UN and other international agencies are monitoring the situation and providing assistance as needed.

ISRAEL (2 October)

Planting of the 2006 wheat and barley crops, to be harvested during April/May next year, has just begun. Production of wheat last May/June is estimated at 180 000 tonnes, more than 40 percent above last year's crop. Imports of cereals in 2005/06 (July/June) are forecast at some 3.2 million tonnes.

JORDAN (2 October)

Sowing of the 2006 wheat and barley crops, for harvest in May/June next year, is about to start. In 2005, aggregate output of wheat and barley, estimated at 75 000 tonnes, was more than double the drought reduced crop in 2004. Imports of cereals in 2005/06 (July/June) are forecast at some 1.9 million tonnes, about 7 percent higher than last year.

LEBANON (2 October)

The sowing of the wheat and barley crops is about to start. Generally, domestic cereal production usually covers only about 10 percent of the consumption requirements. Aggregate production of wheat and barley in 2005 is estimated at 140 000 tonnes, slightly higher than the average for the previous five years. Imports of wheat in 2005/06 (July/June) are forecast at some 550 000 tonnes, similar to last year.

SAUDI ARABIA (2 October)

Sowing of the wheat crop for harvest in April/May next year is about to start. Production of wheat in 2005 is estimated at 1.2 million tonnes, well below last year's crop and the average. Total import of cereals in 2005/06 (July/June) is currently estimated at about 9.3 million tonnes, including about 6.4 million tonnes of barley.

SYRIA (2 October)

Sowing of the 2006 wheat and barley crops is underway and is expected to continue until mid-January next year. The 2005 wheat crop, harvested last summer, is estimated at 4.7 million tonnes. At this level, the production is about 9 percent above last year's crop and the average. Barley production, which is almost entirely rainfed, is estimated at average 1.1 million tonnes.

TURKEY (2 October)

Sowing of the 2006 wheat crop is underway. The 2005 wheat crop, harvested from last July, is estimated at 20.2 million tonnes, compared to last year's 20.7 million tonnes. The barley crop estimated at about 7.9 million tonnes, compares with last year's crop of about 8.1 million tonnes.

Wheat import in the current 2005/06 (July/June) marketing year is expected to be around 1 million tonnes.

YEMEN (2 October)

The output of the sorghum crop, now being harvested, is forecast at about 312 000 tonnes, nearly 19 percent higher than last year's crop and some 3 percent above the average for the previous five years. Cereal imports in 2005 are estimated at nearly 2.4 million tonnes.

**ASIA**

**AFGHANISTAN (6 October)**

**Cereal harvesting in Afghanistan is complete and aggregate harvest is estimated at 5.3 million tonnes, a bumper harvest second only to the record harvest in 2003 but nearly 2.2**

million tonnes up on last year's drought reduced harvest. This year's cereal harvest includes some 4.26 million tonnes of wheat, 325 000 tonnes of rice, 337 000 tonnes of barley and 315 000 tonnes of maize. Above average precipitation and irrigation water availability throughout the country were the main factors contributing to such a high level of output this year. Aggregate cereal import requirement for the 2005/06 marketing year is forecast at 356 000 tonnes including 110 000 tonnes in food aid. This aggregate is a record low and includes some 250 000 tonnes of wheat (imported mainly as wheat flour) and 140 000 tonnes of rice.

Under the current PRRO, WFP is implementing a winterization programme, which will have pre-positioned nearly 23 000 tonnes of food in remote and food insecure areas where access is difficult during winter. The food pre-positioning should be completed by 7 November. WFP will be presenting a new PRRO for Executive Board approval in November. The proposed PRRO shall focus on late recovery and early development and aims to support some 6.6 million Afghans in food-insecure areas through various activities, including food for work, food for training and food for education in partnership with the Government, non-government partners and communities. Target groups shall include poor and food-insecure households, internally displaced people, tuberculosis patients and their families, victims of natural disasters, schoolchildren, teachers and illiterate people. Capacity building of government counterparts will be an important element. The proposed PRRO shall continue to encourage joint programmes among partner United Nations agencies under the leadership of the Government.

#### ARMENIA (4 October)

Armenia has recently gathered some 474 000 tonnes of cereals compared with 444 000 tonnes harvested in 2004. This aggregate includes some 375 000 tonnes of wheat, 87 000 tonnes of barley and 6 000 tonnes of maize. Aggregate annual cereal requirement is estimated at about 597 000 tonnes. Cereal import requirement for the 2005/06 marketing year is forecast at about 163 000 tonnes including 110 000 tonnes of wheat, 38 000 tonnes of maize and 10 000 tonnes of rice. Food aid requirement for the current marketing year is estimated at about 25 000 tonnes of wheat.

#### AZERBAIJAN (4 October)

Aggregate cereal harvest, which has recently been completed, is estimated at a record 2.2 million tonnes, some 100 000 tonnes up on last year's good harvest. This aggregate includes some 1.8 million tonnes of wheat, 232 000 tonnes of barley and 150 000 tonnes of maize. Azerbaijan requires some 3 million tonnes of cereals for its annual utilisation. Aggregate cereal import requirement for the 2005/06 marketing year is forecast at about 852 000 tonnes of mainly food quality wheat. Last marketing year aggregate cereal imports amounted to 1.14 million tonnes.

#### BANGLADESH (10 October)

Output of the 2005 Boro (spring) rice crop, accounting for more than 50 percent of total annual rice production is estimated at 14.6 million tonnes, some 1 million tonnes higher compared to the previous year, reflecting favourable weather condition, timely supply of seeds, fertilizers and other agricultural inputs.

Output of 2005 wheat, a small contributor to the country's food supply, is officially estimated at 1.3 million tonnes, against 1.4 million tonnes target and 1.40 million tonnes average of the last five years; reflecting the smaller area due to relative low profitability.

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. Rice prices have risen more than 40 percent in the past year and it is feared that prices will rise further during the month of fasting. 2004/05 total cereal import is estimated to increase to 3.64 million tonnes from 2.95 million tonnes a year earlier. The Bangladesh Ministry of Food is carrying out the largest countrywide food distribution through Open

Market Sales (OMS) at subsidised prices, Vulnerable Group Feeding, and village rationing in the wake of rising prices. The Primary School Feeding activity by WFP is ongoing and will continue until the end of the November 2005 to provide High Energy Biscuits to over 600 000 primary school students each day.

#### CAMBODIA (12 October)

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. Harvesting of the wet season rice will start from December. Weather conditions this year are reportedly close to normal without serious natural disasters reported. The rainfall condition since September has been improving and a better harvest this season, particularly of the rice crop, is expected. The 2005 aggregate paddy production is forecast at 4.3 million tonnes, 3.1 percent up from last year and 3.2 percent above the average of the previous five years.

#### CHINA (12 October)

In China (mainland), harvesting of 2005 rice crop is complete for early rice and is underway for single crop rice and late double crop rice. Aggregate 2005 paddy production is tentatively forecast at 180 million tonnes, 1 million tonnes higher than last year, reflecting estimated larger area.

Harvesting of the 2005 winter wheat crop was completed in June and in August for spring wheat. Aggregate 2005 wheat crop is estimated at 96 million tonnes, about 4 million tonnes above last year, reflecting the increased wheat area as a result of higher prices and Government policy, especially increased wheat seed subsidies. Harvesting of 2005 coarse grain crops, mainly maize, is complete in the South and will be completed in October in the North. Despite a larger area, a smaller maize output in 2005 is expected due to unfavourable weather during planting and early crop development in the major producing regions. The 2005 maize output is tentatively estimated at 128 million tonnes, some 2.3 million tonnes below last year, but more than 10 million tonnes about the average of the previous five years.

Despite the forecast of larger crops, China in 2005/06 is expected still to face a grain deficit and would continue to be a net grain importer, which may have significant impact on the grain prices in the region and world market. In addition, China is expected to import more than 22 million tonnes of soybeans and more than 3 million tonnes of cotton in 2005/06.

**Floods since late September have forced the evacuation of around 286 000 people in north-western China, where steady rainfall has strained the banks of the Hanjiang and Weihe rivers. Floods have always been the major natural disaster in China, but this year has been reportedly more devastating than usual. Up to 8 October, floods in China have reportedly affected more than 211 million people, killed some 1 300 and destroyed more than 8 million hectares of crops.**

#### GEORGIA (5 October)

Latest reports point to an aggregate cereal harvest of 748 000 tonnes, some 80 000 tonnes up on last year. This year's harvest includes some 287 000 tonnes of wheat, 385 000 tonnes of maize and 65 000 tonnes of barley. Aggregate cereal utilisation is estimated at about 1.4 million tonnes per annum. Aggregate import requirement for the 2005/06 marketing year is forecast at about 680 000 tonnes including 100 000 tonnes of wheat in food aid requirement. Georgia imported some 961 000 tonnes of cereals during the 2004/05 marketing year, the highest level over the past decade. Wheat accounts for nearly 95 percent of the total cereal imports.

**WFP, under a three-year Protracted Relief and Recovery Operation (PRRO), has distributed a total of 27 500 tonnes of food to some 350 000 beneficiaries since the start of the PRRO in July 2003. The operation is scheduled to come to an end by June 2006. WFP assistance contributes to the sustainable recovery and transition process in Georgia by (i) providing**

**relief to vulnerable groups, inclusive disaster-affected persons and Chechen refugees; and (ii) promoting recovery through asset maintenance/creation in rural poor communities as well as support to primary school children and TB patients.**

#### INDIA (10 October)

Sowing for the Kharif crop for harvesting in 2006 is complete. The late arrival of monsoon negatively affected planting, but subsequent rains helped crop survival in most regions. Acreage of rice, sugarcane, and sunflower is estimated to be larger than last year, while that of coarse grains and soybean is smaller.

The latest estimates of the 2005 wheat crop, harvested in May, indicate an output of 72 million tonnes, virtually unchanged from the previous year. Output of 2005 paddy is tentatively estimated at 129 million tonnes, some 1 percent above that of last year; while output of 2005 maize is forecast at 14.5 million tonnes, 6.6 percent up from the previous year, as a result of larger sown area and increased use of hybrid seeds.

India is one of the world's largest exporters of wheat and rice. The cereal export level in 2004/05 is estimated at some 6 million tonnes, which is forecast down to 3.6 million tonnes in 2005/06, reflecting tight grain stocks.

**The severe floods in July killed more than 1 000 people, especially in the commercial city of Mumbai (Bombay), affected up to 20 million people. An earthquake with a magnitude of 7.6 on the Richter scale, occurred on 8 October 2005 and severely affected Pakistan and India. The death toll in India has been estimated at more than 1 600 people. Up to 50 000 people have been left homeless by the earthquake.**

#### INDONESIA (3 October)

Most of the areas normally under the secondary rice crop have been planted. Aggregate paddy production in 2005 is estimated at some 53 million tonnes, down by 2 percent from last year, as a result of late plantings, some flooding, and the impact of the tsunami of 26 December 2004. But this level is still 1.9 percent above the average of the previous five years. The output from the 2005 maize crop is provisionally estimated at some 11.7 million tonnes, 4.6 percent higher than last year. The overall food supply situation in Indonesia is satisfactory. Wheat (no domestic production) imports in 2005/06 are forecast to remain stable at around 4.3 million tonnes, while maize imports are expected slightly lower at 0.6 million tonnes.

**The food aid distributions are ongoing in tsunami-hit areas. The estimated beneficiary number in September stood at 600 000 for General Food Distribution in Aceh and North Sumatra, at 332 438 for School Feeding Programme (SFP), and at 33 302 for Maternal and Child Nutritional Programme. FAO is working closely with the Government in providing technical and policy assistance to plan and coordinate rehabilitation efforts in the agriculture, fisheries and forestry sectors. An FAO/WFP Food Supply and Demand Assessment Mission will visit Aceh Province in early November.**

**Five cases of the deadly H5N1 strain of avian influenza virus have been confirmed in Indonesia, with three deaths and two people being treated. Bird flu has killed more than 60 people in four Asian countries since late 2003.**

#### JAPAN (12 October)

Japan produces only about one-quarter of its domestic cereal requirement. Rice accounts for 90 percent of cereal production. Harvesting of the 2005 paddy crop started in late September and will extend into November. The 2005 paddy production is forecast at some 10.6 million tonnes, 2.5 percent below last year's production and 3.2 percent below the average of the previous five years,

reflecting rice policy changes. It has been decided to phase out government controls on production by 2008 as part of its rice policy reforms.

The import of cereals in 2005/06 (July/June) is forecast at 26 million tonnes (coarse grains some 19.8 million tonnes, wheat 5.6 million tonnes, and rice 0.7 million tonnes).

#### KAZAKHSTAN (4 October)

Latest reports indicate that cereal harvesting is nearly complete throughout Kazakhstan and the harvest is estimated at about 13.3 million tonnes, more than 700 000 tonnes up on last year but nearly 860 000 tonnes down on the average of the past five years. The aggregate cereal harvest this year includes some 10.7 million tonnes of wheat, 1.6 million tonnes of barley and 420 000 tonnes of maize. This year Western Kazakhstan suffered significantly reduced precipitation and some crops have been compromised. Kazakhstan is set to export some 4.4 million tonnes of wheat, 246 000 tonnes of barley and some 22 000 tonnes of maize during the 2005/06 marketing year. Cereal exports during the 2004/05 marketing year totalled some 4.2 million tonnes.

#### KOREA, DEMOCRATIC PEOPLE'S REPUBLIC OF\* (10 October)

**Harvesting of main season crops (rice, maize, millet, sorghum, and sweet potatoes) is underway and will be complete in the middle of October. The other agricultural activities currently include preparing for the planting of winter crops (wheat and barley). The 2005 total cereal production (milled basis and not including potatoes in cereal equivalent) is expected to reach some 3.9 million tonnes (compared to 3.6 million tonnes last year), a record high since 1995, reflecting favourable weather condition and strong government support by providing agricultural labour, farm machinery, high-yielding seeds, and fertilizer.**

**Based on the estimated production this year, the cereal deficit in 2005/06 marketing year is estimated to decline to 890 000 tonnes. With some commercial imports and anticipated concessional imports at 500 000 tonnes from the Republic of Korea (also some from China), the country is likely to maintain national food consumption level as before. However, this level is low, at some 160 kg per capita (some 180 kg including potatoes), and well below the nutritional requirement based on international standards.**

**The above scenario of favourable national food availability masks the sub-national level chronic problem of food insecurity. Last year's CFSAM estimated as many as 6.44 million people, or 27 percent of the whole population, being at risk of facing food shortages during the year. Many of them were children, pregnant women, old people, and those who were underemployed due to factory closings or work reduction programs. It is likely that their situation is by and large unchanged.**

**The Government of the Democratic People's Republic of Korea (DPRK) has requested the United Nations to end all humanitarian aid by the end of the year, although development aid is still sought.**

#### KOREA, REPUBLIC OF (10 October)

Harvesting of the paddy crop just started and will continue into November. The 2005 output of paddy is forecast at 6.5 million tonnes, 3.5 percent down from last year and 4.9 percent below the average of the previous 5 years, reflecting the small areas. The government provides a direct payment to farmers who do not cultivate any commercial crop on previously existing rice acreage.

The country produces less than 30 percent of its cereal consumption requirement. Cereal import in 2005/06 is estimated at about 12.9 million tonnes (of which nearly 3.8 million tonnes of wheat, 8.6 million tonnes of maize and 250 000 tonnes of rice).

**KYRGYZ REPUBLIC (5 October)**

Latest reports indicate that the Kyrgyz Republic has harvested some 1.7 million tonnes of cereals similar to the harvest last year. 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 115 000 tonnes, including 105 000 tonnes of milling wheat, mainly from Kazakhstan, and 10 000 tonnes of rice.

**LAO PEOPLE'S DEMOCRATIC REPUBLIC (10 October)**

**Floods in August have seriously affected livelihoods in several provinces, especially in Savannakhet and Bolikhamxay provinces. More than 30 000 hectares of paddy were badly damaged.**

**Harvesting of the wet season paddy, accounting for about 85 percent of annual cereal production, is underway and will continue to December. Wet paddy is predominantly grown in the lowland of the Mekong River basin while a smaller low performing monsoon crop is cultivated in the uplands. The 2005 paddy production is estimated at 2.35 million tonnes, some 7 percent down from last year and 3 percent compared to the average of the previous five years, reflecting the smaller area and low productivity as a result of both drought and floods.**

**In 2006, the country can virtually maintain food self-sufficiency at national level with total cereal import requirement of 37 000 tonnes. However, one-third of the Lao population, predominantly in upland areas, experiences rice deficit for four months in a normal year and need food assistance, especially in the districts affected by floods in the summer.**

**MALAYSIA (12 October)**

Malaysia has been relatively wet with most places recording above-normal rainfall. The national rainfall was above normal at 10 percent in June, 13 percent in July, and 22 percent in August. Planting of the main paddy crop is underway for harvesting from December. Paddy production in 2005 is forecast at 2.2 million tonnes, some 1 percent above the five years' average. Nearly 30 percent of domestic rice consumption is imported. Practically all wheat and maize requirements are imported. Import in 2005/06 is expected at 1.39 million tonnes for wheat and 2.5 million tonnes for maize.

**MALDIVES (12 October)**

**Maldives was the smallest country hit by the tsunami on 26 December 2004, but it suffered the sharpest blow in relative terms. After more than nine months, the country is facing severe budget and economic problems, as a result of both tsunami and rising oil prices.**

**The tourism industry accounts for a large percentage of the country's GDP. Despite a number of resorts damaged by the tsunami having been repaired, tourism numbers in the nine months have reportedly dropped by about 30 percent from the same period of the previous year.**

**Fisheries and agriculture were also damaged by the tsunami. FAO has been providing assistance in the building of boats and fishing gear. FAO has also been providing farmers with the required agricultural inputs and tools (fertilizer, vegetable seeds, cuttings and seedlings, and hand tools).**

**WFP provided rice, sugar, vegetable oil and pulses to some 41 000 food insecure, tsunami affected, people from February to May. In June, due to economic recovery, regaining of livelihoods and financial schemes being in place, WFP and the Government of Maldives reduced the numbers of beneficiaries to some 13 000. Among these are the Internally**

Displaced Persons (IDPs) and their host families who are still considered to be food insecure. The selected beneficiaries will receive rice, wheat flour, vegetable oil, pulses and sugar till the end of 2005. In addition, WFP provided a "one off" food ration for the month of Ramadan for some 63 000 tsunami affected people.

#### **MONGOLIA\* (10 October)**

Livestock in Mongolia play a fundamental role in the nutritional status of the majority of the population. Total number of livestock in 2004 is officially estimated at 28 million, 3.5 million above the previous year. However, 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 during the winter. To protect against the consequences of natural disasters such as disease and severe winter weather (zud), a livestock insurance system was introduced in July 2005, with a no-interest loan of US\$ 7.54 millions from the International Development Association.

Wheat is virtually the only cereal grown in the country. Production in 2004 is officially estimated at 135.6 thousand tonnes, some 15.5 percent below the previous year, reflecting the dry summer weather in the major wheat growing regions. Harvesting of 2005 wheat crop is underway and the output of this crop is provisionally forecast at 110 000 tonnes, below the level of last year, reflecting the drought weather in most part of the country this summer. This output covers only about 28 percent of domestic wheat utilization, leaving an estimated import requirement for 2005/06 of 285 000 tonnes. 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. The United States Department of Agriculture (USDA) has committed to donate 20 000 tonnes of wheat to Mongolia under the Food for Progress programme. Besides, the private US charity, Mercy Corps, will sell the wheat in Mongolia for an estimated US\$ 2.9 million to help rural development projects.

#### **MYANMAR (10 October)**

Harvesting of the 2005 main season rice crop, accounting for some 85 percent of annual production, is underway. The 2005 paddy production is forecast at 24.5 million tonnes, some 4.7 percent above the production last year. Reflecting a steady increase in paddy production in the last several years, the overall cereal supply situation is satisfactory at national level in 2005/06.

Myanmar is a least-developed country ranking 131<sup>st</sup> out of 175 countries in the Human Development Index. WFP continues to provide food to 347 600 beneficiaries under EMOP 'Emergency Food Assistance to Vulnerable Families in Shan State', with total 20 000 tonnes aid from June 2005 to May 2006 and also continues to provide food to 416 000 beneficiaries under Protracted Relief and Recovery Operation (PRRO).

#### **NEPAL (11 October)**

Flooding and landslides, triggered by days of torrential rains in the late September, reportedly killed at least 32 people with 39 people missing in Dadeldhura district in far-western Nepal.

Harvesting of maize is complete while harvesting for millet and rice has just started and will be complete by the middle of December. Scattered rainfall in June, July and August delayed paddy transplantation and reduced the paddy area (some 5 percent down) and production in most of Nepal, particularly eastern Nepal. The output of 2005 paddy is provisionally forecast at 4.08 million tonnes, some 5 percent below the previous year, while coarse grain production, mostly maize, is forecast at 1.92 million tonnes, almost unchanged from last year. Consequently, the total cereal import requirement in 2005/06 is expected at 140 000 tonnes.

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 (26 October)**

An earthquake with a magnitude of 7.6 on the Richter scale occurred on 8 October 2005 and killed more than 50 000 people, injured some 74 000 and made millions homeless (numbers still rising). Latest estimates indicate that over 2 million people need life-saving assistance, mainly winterised tents before winter sets in within the next 2-3 weeks. The UN has revised its earlier appeal and now requires nearly US\$ 550 million for emergency assistance for six months.

Output of the 2005 wheat crop, harvested in June, is estimated at a record 21.1 million tonnes, reflecting the increased government minimum support prices, favourable weather, and availability of fertilizers and loans. Accordingly, the wheat import in 2005/06 is estimated to decline to 500 000 tonnes from last year's 1.4 million tonnes.

Harvestings of Kharif rice is underway. The 2005 rice output is estimated at 5 million tonnes, slightly above last year's record production, resulting from timely sowing, favourable weather, and availability of fertilizer and pesticides. Pakistan is a major exporter of rice and the 2005/06 export volume is forecast at 2.2 million tonnes.

#### **PHILIPPINES (12 October)**

Harvesting of main rice has started from the middle of September and will continue to December. Plantings of maize and second rice for harvesting in 2006 just started. The output of 2005 paddy crop is expected to reach a record high at 14.8 million tonnes, reflecting an increase in area cultivated to hybrid rice, which offset the negative impact of dry weather conditions. 2005/06 rice import requirement is estimated at 1.2 million tonnes, down from 1.8 million tonnes in the previous year.

The 2005 maize output is estimated at 5.4 million tonnes. With this production, the Philippines will be self-sufficient in maize. Wheat is not produced in the country and imports are estimated at 3.05 million tonnes in 2005/06.

#### **SRI LANKA\* (12 October)**

The output of main 2005 Maha rice crop is officially estimated at 2.01 million tonnes, 330 000 above last year's drought-affected production. Harvesting of the Yala crop is underway and the output is expected to be higher compared to last year. Wheat imports are forecast at 1 million tonnes for 2006. In addition, the country imports some 130 000 tonnes of maize to meet domestic feed and food consumption requirement each year.

WFP is currently purchasing 13 000 tonnes of rice from local cooperatives through the Sri Lanka Ministry of Agriculture for its tsunami programmes and a further 5 000 tonnes for its longer-term recovery programme (PRRO).

In September, WFP provided enough relief food to feed 750 000 people through its General Food Distribution to the areas affected by tsunami. As from October, WFP will target its assistance to 350 000 people under its vulnerable Group Feeding intervention. In addition, WFP is providing assistance to around 855 000 people in tsunami affected and conflict affected food insecure areas through School Feeding, MCN and FFW activities.

**FAO, as the UN's coordinating agency for the rehabilitation of the fisheries and agriculture sectors in Sri Lanka, continues to distribute fishing nets and engines to tsunami-affected fishers and to provide seeds and fertilizers to crop sector.**

**TAJIKISTAN (5 October)**

Latest reports indicate that Tajikistan has just harvested a record 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 and increase yields. The 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 rice. Aggregate cereal import requirement for the 2005/06 marketing year is forecast at 242 000 tonnes, mainly wheat.

**THAILAND (12 October)**

Harvesting of the main rice crop is about to start. This crop accounts for about 75 percent of annual rice production. The remainder is produced mainly under irrigation with planting season from January to March and harvesting season from May to July. The 2005 main season paddy output is officially estimated at 21.3 million tonnes and the 2005 total output of paddy is estimated at 27 million tonnes, nearly a record performance, reflecting favourable weather and the support of the Government, which has announced plans to buy up to 9 million tonnes of paddy at raised floor prices. Harvesting of maize is just completed and an output of 4.2 million tonnes is estimated.

Thailand is expected still to be the world's largest rice exporter in 2005, with the export estimated at 7.8 million tonnes, down from last year's 10.1 million, reflecting last year's and this spring's droughts.

**TIMOR-LESTE, DEMOCRATIC REPUBLIC OF (10 October)**

**Harvesting of the rice crop is just complete in northern areas, while it is still underway in southern areas and will continue to the end of November. The country has experienced a serious drought in most parts this season, with nine districts out of 13 reportedly affected. Plantings of maize and cassava will start from November. If the drought situation continues, next year's crop and food security will be affected substantially.**

**The country is one of the poorest in the world with more than 40 percent of the population living below the poverty line. Over 350 000 people or 42 percent of the population are considered as chronically food insecure. Every year the country faces a food shortage in rural areas which is at its greatest during the period from November to February. This year's situation is expected to be worse due to lack of rain. Rainfall in the next couple of months is particularly important for the next cropping season starting from November-December.**

**TURKMENISTAN (4 October)**

Cereal harvesting is complete and official estimates point to an aggregate cereal harvest of slightly over 3 million tonnes, some 290 000 tonnes up on last year's record harvest and more than 963 000 tonnes up on the five-year. The forecast harvest includes some 2.9 million tonnes of wheat, 110 000 tonnes of rice and some 50 000 tonnes of barley. The government intends to export some 120 000 tonnes of wheat and import 40 000 tonnes of hard wheat and some 4 000 tonnes of rice.

**UZBEKISTAN (5 October)**

Latest reports indicate that Uzbekistan has just harvested nearly 5.4 million tonnes of cereals, about 798 000 tonnes up on the five year average. 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 contributing factors to 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 rice. Exports of mainly wheat during the 2005/06 marketing year are forecast at 500 000 tonnes. Imports of cereals in the same period are forecast at 283 000 tonnes comprising of 146 000 tonnes food quality wheat and 120 000 tonnes of rice.

#### VIET NAM (12 October)

Typhoon Damrey and flash floods in the late September struck northern Viet Nam, killing 69 people and destroying 318 000 hectares of crops, mainly rice. The northern regions are likely to lose between 300 000 and 400 000 tonnes of rice due to Damrey's destruction. Seafood and salt production were also reportedly hit by the disaster.

Harvesting of the 10<sup>th</sup> month rice started from the middle of September in northern parts of the country and will commence from late October in the south. Despite the recent floods, the 2005 output of paddy is forecast to reach a new record at 37 million tonnes, some 882 000 tonnes over last year's record production.

Viet Nam, the world's second largest rice exporter after Thailand, is likely to ship around 4.5 million tonnes of rice this year, compared to 4.1 last year. The country exported some 4.3 million tonnes of rice in the first nine months of this year, the highest volume compared to the same periods of the previous years. In terms of value, it has reported that the value of rice exports in the first nine months reached over US\$ 1 billion, US\$ 410 million over the same period last year.

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

#### COSTA RICA (28 September)

At the end of September, torrential rains caused rivers to overflow in Pacific coastal areas, especially in the Nicoya peninsula and in the southern part of San José province, resulting in several flash floods and mudslides. Some damages to food and cash crops have been reported. Harvesting of 2005 first season maize and bean crops is underway under normal weather conditions, while planting of the second season crops has started in some areas. Production of the main paddy crop is estimated at average 160 000 tonnes. Production of minor maize crop for 2005 is anticipated to be about 13 000 tonnes. The country has a structural deficit of wheat and maize and import requirements in marketing year 2005/06 (July/June) are forecast at 215 000 tonnes of wheat and 565 000 tonnes of maize, both reflecting the gradual increase of national demand.

#### CUBA\* (29 September)

At the beginning of July, category 2 hurricane "Dennis" hit the majority of Cuban territory, in particular Matanzas, Cienfuegos, Sancti Spiritus and Villa Clara. Damages to the rural infrastructures and losses of agricultural and livestock production are reported, especially to fruits (mango and citrus), banana, coffee and vegetables sectors. On 20 September, the passage of powerful hurricane "Rita" affected north-western provinces of Pinar del Rio and La Habana, with torrential rains and thunderstorms, accompanied by strong winds. However, despite the positive effect of these abundant precipitations in partially replenishing major dams, the drought situation persists in the eastern provinces of Camaguey, Holguin and Las Tunas. Harvesting of 2005 main paddy crop is underway and production is early estimated at about 580 000 tonnes. This is about 5 percent below previous year's low output as a consequence of reduced yields due to the limited availability of irrigation water. Low yields are also expected for the first season maize crop for which harvesting operations started recently. Tentative forecast for 2005 maize crop points to about 200 000 tonnes.

Rice import requirements for marketing year 2005 (January/December) are forecast at 750 000 tonnes, same as the volume imported during the previous year. The international community is providing food assistance to some communities in the Eastern provinces affected by the prolonged drought and by hurricane "Dennis".

**DOMINICAN REPUBLIC (29 September)**

Normal to abundant rains are reported, especially in the southern departments in mid-July due to the distant passage of hurricanes "Dennis" and "Emily". Both food and cash crops are reported to be in good condition. Harvesting of main season paddy crop is virtually completed and it is expected to be a significant recovery from last year's production which was affected by flooding, rising from 577 000 tonnes in 2004 to 636 000 tonnes in 2005. Harvesting of the 2005 first season maize crop is well advanced and a satisfactory output is anticipated.

Imports for wheat and maize (mostly yellow maize for the poultry sector) in marketing year 2005/06 are anticipated at 320 000 tonnes and 900 000 tonnes respectively, similar to those of the previous year.

**EL SALVADOR (28 September)**

Harvesting of the first season maize crop, which represents about 80 percent of annual production, is well advanced, while in some areas planting of the second season maize and bean crops has started. Aggregate maize crop production in 2005 was preliminarily forecast at record level of about 714 000 tonnes, as a consequence of abundant precipitation during the last two months. However, torrential rains due to Hurricane Stan in early October damaged late-planted crops and the production forecast is unlikely to materialize.

Maize import requirements for marketing year 2005/06 (July/June) are anticipated to decrease from previous year's 529 000 tonnes to 450 000 tonnes, as a result of the very good production. The country relies entirely on imports for wheat and they are forecast at the average level of 250 000 tonnes for the marketing year.

Food assistance continues to be delivered by the international community, targeting in particular the most food insecure areas of the country, such as the rural villages along the Honduran border in the Eastern department of Morazán where cases of malnutrition have increased during the lean period.

**GUATEMALA (26 October)**

From the beginning of July to the end of August, torrential rains have affected the capital and the departments of Izabal, Alta Verapaz, Huehuetenango and San Marcos, causing flooding and mudslides and damages to urban and rural infrastructures. Beginning 2 October, Hurricane Stan struck the country extensively damaging crops, housing, infrastructure and electrical and phone networks. On 6 October, the government of Guatemala declared a state of emergency for all of the country. Close to 300 000 people are estimated to have been affected, with more than 600 dead. WFP has launched an emergency operation (EMOP) worth US\$ 14,095,272 to provide food assistance for some 285 000 people for a period of six months (October 2005 – April 2006). Harvesting of 2005 first season coarse grains had recently been completed, while planting of second season cereal and bean crops was underway. Total planted area with maize crop in 2005 is forecast at an average level of 614 000 hectares with an estimated output of about 1 million tonnes. Rising oil prices are affecting prices of main staple food with serious food security consequences for the poorest and most vulnerable population groups. A similar concern exists about a possible increase in the prices of agricultural inputs which could cause a reduction in their use and lead to lower yields and production.

Wheat and maize import requirements for 2005/06 marketing year (July/June) had been forecast at about 400 000 tonnes and 580 000 tonnes respectively, volumes slightly more than those of the previous year. With the support of the “National Front against Hunger”, the international community continues providing food assistance to the most food insecure rural families, in particular to children less than five years old and pregnant and lactating women suffering acute malnutrition.

#### HAITI (29 September)

In mid-July, the passage of hurricanes “Dennis” and “Emily” caused damages to agriculture and livestock sectors in the southern departments, which produce the bulk of national food supply. The same southern departments were previously affected by a prolonged dry weather period, with about two-month delay in the arrival of the seasonal rains, which substantially delayed the start of planting operations of the main season cereal and bean crops. Harvesting of first season maize has been completed in July-August and planting of the second season crop, to be harvested by the end of the year, is well advanced. Maize crop production in 2005 is forecasts at low 180 000 tonnes. Harvest of the important irrigated paddy crop has been also completed, while the rainfed crop harvest is still underway. Paddy output for this year is anticipated slightly below 100 000 tonnes, similar to the volume obtained in 2004. To be noted in 2005, however, is an increase in production of roots and tubers (750 000 tonnes), fruits (500 000 tonnes), bananas (300 000 tonnes) and pulses (100 000 tonnes).

Wheat imports for marketing year 2005/06 (July/June) are provisionally forecast at about 270 000 tonnes. Imports of rice in 2005 (January/December) are forecast at about 260 000 tonnes.

The security situation continues to be tense and volatile and it is likely to worsen as the date for presidential elections comes closer. Despite some logistical problems due to local turmoil, the international community continues to deliver assistance to the most food insecure groups, targeting people at particular risk such as pregnant and lactating women and young children.

#### HONDURAS (30 September)

Harvesting of 2005/06 first maize crop is almost completed. First season maize output, which represents about 80 percent of annual production, is estimated at about 420 000 tonnes, with a 5 percent increase compared to previous year when several northern and central departments were seriously affected by dry weather conditions in July. Planting of 2005/06 second season maize crop is underway and reduced levels of soil moisture are reported in some areas in northern departments of Olancho and Colón.

Wheat and maize import requirements in marketing year 2005/06 (July/June) are forecast at about 250 000 tonnes and 265 000 tonnes respectively. Food assistance continues to be provided by the international community, especially to families in municipalities with over 50 percent of chronic malnutrition.

#### MEXICO (26 September)

Harvesting of 2005 important rainfed spring maize crop is about to start and production is tentatively estimated at 15.5 million tonnes, about 1 million tonnes less than last year’s output of the same season. Aggregate maize crop in 2005 (fall 2004/05 plus spring 2005) is forecast at about 21.5 million tonnes, slightly below 2004 record production. Land is already being prepared in the states of Baja California Sur and Sonora for planting the 2005/06 fall maize crop. Harvesting of 2005 summer sorghum crop is about to start in North-Western states and early forecast points out to a total sorghum production of 5.7 million tonnes, about 18 percent less than previous year’s output as a consequence of reduced plantings and yields. Harvesting of the main 2005 paddy crop (mainly

rained) is about to start in key producing states of Veracruz and Campeche and output is forecast at an average level of 300 000 tonnes. Imports in marketing year 2005/06 (July/June) are expected to be about 6.3 million tonnes of maize (with an increase of about 10 percent due to the expansion of the demand of the feed industry), 3.6 million tonnes of wheat and 3.5 million tonnes of sorghum.

#### NICARAGUA (28 September)

Harvesting of the 2005/06 first season maize and bean crops is virtually completed. Localized damages to maize and paddy crops are reported in the Atlantic departments, especially in the municipality of Waspam in the Northern Atlantic Autonomous Region (RAAN) where a state of emergency has been declared due to rat infestation, pests and flooding in July. However, crops have largely benefited from above average precipitations from May to September. Early forecasts point to a 2005 record production of maize and bean crops, with 550 000 tonnes and 250 000 tonnes respectively. Import requirements in marketing year 2005/06 (July/June) are forecast at average levels of 130 000 tonnes of wheat, 80 000 tonnes of maize and 125 000 tonnes of rice.

The International community continues to provide food assistance to pregnant and nursing women, children under two years old and to the most vulnerable rural families in some Central and Northern Atlantic departments.

### **SOUTH AMERICA**

#### ARGENTINA (27 September)

Planting of 2005/06 winter wheat has been recently completed. Official estimates point to an area planted slightly below 5 million hectares, a 20 percent decrease compared to the previous year. This considerable reduction is mainly due to limited soil moisture at planting in key growing areas of Buenos Aires, La Pampa and Cordoba. Part of the area not planted to wheat is expected to be planted to sunflower in October. Currently, despite some localized damages due to freezing temperatures, the wheat crop is in good conditions, but precipitations are needed in the upcoming weeks, especially in South-West growing areas. Early forecasts indicate an output of 12.5 million tonnes. With some delay due to low temperatures, planting of 2005/06 maize crop started at the beginning of September and planting intentions tentatively point at 3.15 million hectares, about 7 percent below the area planted the previous year. Early estimates indicate 2006 maize crop production between 17 and 18 million tonnes, well below the 19.5 million tonnes record production obtained in 2005. Planting of 2005/06 paddy crop is about to start and planting intentions point to 166 000 hectares, with a 1 percent increase on 2004/05.

#### BOLIVIA (26 September)

From the beginning of September, low temperatures and snowstorms are severely affecting livestock and pastures in South-West highlands. However, damages to major staple food such as maize and rice are likely to be limited because harvesting operations in this area are well advanced. Some losses of the quinoa crop have been reported in some communities of the Nor and Sud Lipez provinces in the department of Potosí. In August, the departments of Beni, Pando and the north of Santa Cruz have been affected by severe dry weather conditions that have caused the loss of about 15 000 head of cattle. Fed by the drought and high winds, a massive fire on 23 September destroyed about 150 000 hectares of tropical forest in the departments of Beni and Pando close to the border with Brazil.

Harvesting of 2005 second season (winter) cereal crops is virtually completed and land is being prepared for the planting of 2005/06 first season (summer) coarse grains, essentially maize, that will be harvested from next March. Planning of 2005/06 paddy crop has just started in tropical areas of the Eastern lowlands of Santa Cruz department, while planting of the important winter potato crop has started in the highland valleys. Total production of wheat in 2005 is forecast at 102 000 tonnes, well above last two years' output that was affected by dry weather conditions. By contrast, 2005

maize crop production is estimated at about 600 000 tonnes, slightly below the last five years average.

Wheat imports in marketing year 2005/06 (July/June) are forecast to remain similar to the level of about 400 000 tonnes imported in the previous year.

#### BRAZIL (27 September)

From the beginning of September, normal to abundant rains have maintained soil moisture levels for winter wheat in key growing areas of Southern Brazil (Parana and Rio Grande do Sul), but it disrupted the start of harvesting operations in some localised Northern growing areas. As a consequence of several factors, such as low prices, high national stocks and dry weather conditions at planting, 2005/06 wheat planted area has significantly decreased, especially in Southern producing states, leading to an anticipated production of 5.2 million tonnes, about 9 percent below the previous year's output. Harvesting of 2005 second season maize crop (safrinha) in Centre-South states is about to be completed and production is expected at only 7.6 million tonnes, far from the good result of 10.7 million tonnes in 2004 and the record crop of 12.8 million tonnes of 2003. This result is essentially due to irregular weather conditions in São Paulo state. Aggregate maize production for 2005 is estimated at 34.9 million tonnes, about 17 percent less than the 2004 good crop. Planting of the important 2005/06 summer season maize crop has just started in Rio Grande do Sul, while better weather conditions are expected in South-East and Centre-West states. Poor prospects for maize prices in 2006, high production costs and better prices for soybeans may induce farmers to reduce planted area for maize. Some concerns are also reported on possible reduced use of fertilizers and pesticides, as a consequence of farmers' indebtedness following last year's poor crop and the strength of the local currency. Despite some losses due to the drought in Rio Grande do Sul State, paddy production in 2005 is estimated at record level of more than 13 million tonnes, largely due to an increase in planted area attributed to high prices in 2004.

#### CHILE (26 September)

Planting of 2006 winter wheat crop, to be harvested from December to March, has been recently completed and early official estimates indicate considerable reduction in the area planted, from 420 000 to 350 000 hectares. Planting of 2006 maize crop is about to start in departments VI, VII and north of VIII and planting intentions point to 120 000 hectares, about 10 percent less than last year. The reduction of planted area with wheat and maize crops is mainly due to the low prices obtained during 2005 marketing year and the consequent farmers' decision to divert land toward more profitable crops, such as barley or vegetables. For instance, planted area of 2006 barley crop is expected to increase from 22 000 to almost 30 000 hectares as a consequence of the establishment of new contracts with national breweries, which guarantee prices and marketing to farmers.

Import requirements for marketing year 2005/06 (July/June) are forecast at 640 000 tonnes of maize (mostly yellow maize), 320 000 tonnes of wheat and 90 000 tonnes of rice.

#### COLOMBIA (27 September)

Harvesting of 2005 first season cereal crops is well advanced, while in some areas with adequate soil moisture land is under preparation for planting second season rainfed cereal crops. Maize aggregate production (both seasons) for 2005 is provisionally forecast at 1.5 million tonnes, compared to last five years average of 1.2 million tonnes. This result is mainly due to favourable weather conditions in Caribbean coastal areas during planting and development of first season crops. Production of sorghum is expected to be about average 235 000 tonnes. Paddy production, an important staple food in Colombian diet, is tentatively estimated slightly below 2.6 million tonnes, approximately 5 percent less than the previous year as a consequence of reduced planted area associated with falling prices.

Wheat and maize import requirements for 2005 marketing year (January/December) are forecast at about 1.2 million tonnes and 1.85 million tonnes respectively. The international community continues providing food assistance in various parts of the country to the internally displaced population, victims of the civil strife affecting the nation.

#### ECUADOR (30 September)

Unfavourable dry weather conditions are affecting several areas. In particular, coastal departments are experiencing a reduction in quantity and quality of pastures, with negative consequences on livestock production. The price of milk is already showing an upward trend. Maize and paddy crops have only marginally been affected by the drought because the bulk of their harvest took place between May and July and currently the majority of soils are in fallow period. Some concerns are related to the minor (summer) maize crop (mainly white) production in the inter-Andean departments of Azuay, Chimborazo and Pichincha which is about to be harvested in October. Paddy and maize production in 2005 are tentatively forecast at about 1.3 million tonnes and 670 000 tonnes respectively, volumes slightly above the previous year when plantings were seriously affected by low soil moisture.

While the country is self-sufficient in rice, import requirements for 2005/06 marketing year (January/December) are forecast at 380 000 tonnes of maize and 515 000 tonnes of wheat.

#### PERU (30 September)

The bulk of 2005 wheat crop has been harvested and production is tentatively forecast at about 170 000 tonnes, slightly more than the previous year, but still below last five years average. Harvesting of 2005 white and yellow maize crops has been virtually completed under normal weather conditions in highland departments of Cajamarca, San Martin, La Libertad and Apurimac, while it is still underway (especially yellow maize) in coastal departments of Lambayeque and Lima. Maize aggregate production for 2005 is expected at about 1.3 million tonnes, nearly 8 percent more than 2004 harvest that was affected by drought. Harvesting of the paddy crop in the northern main growing areas has been completed and 2005 output is expected to reach 2.2 million tonnes, about 20 percent above the 2004 seriously drought-affected crop.

Wheat and maize (mostly yellow for the poultry industry) import requirements in marketing year 2005/06 (July/June) are estimated at 1.5 million tonnes and 1.2 million tonnes respectively.

#### URUGUAY (30 September)

Planting of 2005 winter wheat and barley crops has been recently completed with some delay due to continuing and heavy precipitations that hindered planting operations. Area planted for 2005 with wheat and barley crops is 154 000 and 82 000 hectares, respectively, below official planting intentions and less than previous year's record area. It is worth to highlight the 40 percent reduction in planted area with barley crop, following the reduced demand of the local beer industry. Planting of 2006 summer maize and sorghum crops, to be harvested from March, just started and planting intentions point to an average 60 000 hectares for maize and an increase from 19 000 to 25 000 hectares for sorghum.

#### VENEZUELA (30 September)

Harvesting of 2005/06 marketing year maize crop is underway in central states of Portuguesa, Guarico and Barinas. Maize crop production (essentially white maize for human consumption) is estimated below 1.9 million tonnes, about 10 percent less than the previous year as a consequence of reduced plantings following low prices, but still above last five years average. Harvesting of 2005 summer paddy crop is also underway in the states of Portuguesa, Guarico and Cojedes and 2005/06 marketing year paddy production is tentatively estimated at 940 000 tonnes.

Wheat and maize import requirements for marketing year 2005/06 (July/June) are expected to remain stable at 1.5 million tonnes and 400 000 tonnes respectively as in the previous year.

## **EUROPE**

### EU (11 October)

Latest estimates put the EU's aggregate cereal output in 2005 at about 255 million tonnes, about 13 percent down from last year's bumper crop, and about 3 percent below the average of the past five years. Of the total, wheat is estimated to account for some 123 million tonnes, 10 percent down from 2004. The reduction is largely a result of a return to normal yields throughout the region after exceptionally good levels last year under near optimum conditions. Although crops in the Iberian Peninsula were devastated by drought, these countries account for only a relatively small proportion of the EU total so the impact of this was minimal at the regional level. However, regarding durum wheat specifically, which traditionally accounts for about 8 percent of the total wheat crop, the decline in output this year is much more marked. Plantings were reduced sharply in Spain and Italy, two of the main producers, and these and the other durum producing countries were also among the worst hit by the drought. The EU's total durum crop is estimated to be just over 7 million tonnes compared to the record of almost 12 million tonnes last year. The small coarse grain crops have mostly been harvested under favourable conditions, but with both area and yield down compared to last year, a significant cut in production is expected by 15 percent for barley, 22 percent for rye and about 11 percent for oats. Furthermore heavy summer rainfall in some parts, particularly in Germany, has reduced considerably the quality of this year's crops. As for maize, the bulk of the crop has still to be gathered. Summer drought has reduced yields of the region's main crops in France, Italy and Spain. Although the drought has been quite devastating at the local level in some countries, particularly in Spain and Portugal, the overall impact is not as great as with the more widespread drought in 2003.

The winter cereal crops for harvest in 2006 are already mostly planted and germinated in northern parts of the EU, where topsoil moisture for establishment has been generally adequate. In the eastern countries, widespread rain showers in late September and early October continued to be of some benefit to the late summer crops, still immature in some parts, but hampered fieldwork for autumn planting. In southern parts, prevailing dry weather in the past few weeks has aided summer crop harvesting and field preparation for winter crop planting but good rains are needed in the drought-plagued Iberian Peninsula to replenish depleted moisture supplies for the upcoming winter grain planting.

### ALBANIA (11 October)

Output of cereals in 2005 is estimated at about 590 000 tonnes, similar to the previous year's level. Wheat is estimated to account for about 350 000 tonnes. The cereal import requirement for 2005/06 is expected to remain about the average of the past five years at around 370 000 tonnes, most of which is expected to be wheat.

### BELARUS (5 October)

Latest reports point to an aggregate cereal harvest of nearly 6 million tonnes, slightly down on last year's harvest estimated at about 6.1 million tonnes. The harvest is nearly complete and includes some 980 000 tonnes of wheat, 1.8 million tonnes of barley, 1.7 million tonnes of rye and 625 000 tonnes of maize. Aggregate cereal imports during the 2005/06 marketing year is forecast at about 525 000 tonnes, similar to the imports during the preceding marketing year. This year's cereal imports include 240 000 tonnes of food-quality wheat, 240 000 tonnes of maize and 33 000 tonnes of barley. Cereal exports, mainly rye, is forecast at 100 000 tonnes during the 2005/06 marketing year.

**BOSNIA-HERZEGOVINA (6 October)**

Latest estimates point to an aggregate cereal harvest of slightly over 1 million tonnes, some 240 000 tonnes down on last year's harvest. This aggregate includes 180 000 tonnes of wheat, 750 000 tonnes of maize and 55 000 tonnes of barley. Heavy rains and some flooding during summer compromised some cereal crops. Aggregate cereal import requirement for the 2005/06 marketing year is forecast at 570 000 tonnes including 80 000 tonnes of food aid requirement.

**BULGARIA (11 October)**

Cereal output in 2005 fell sharply from the bumper crop in the previous year. Wheat output was officially estimated at about 3.3 million tonnes, about 17 percent down from the previous year, despite a similar area sown. The reduction in output was mainly a result of extensive damage to young plants early in the season by plagues of mice, and damage incurred by torrential rains and floods during the spring and summer. The barley crop also decreased sharply, reflecting a sharp reduction in the area sown and lower yields reflecting the generally poorer growing conditions during the season than in the previous year. The Government is providing financial support to farmers for autumn wheat planting for the 2006 crop, to assist them to plant a normal area, which might otherwise have been difficult after losses caused by this year's adverse weather on top of increased costs of production, fuel in particular.

**CROATIA (6 October)**

Cereal harvesting is complete and aggregate harvest is estimated at about 3.1 million tonnes slightly up on last year's harvest despite a delay in spring planting following heavy rains. This year's cereal harvest includes some 500 000 tonnes of wheat, 2.4 million tonnes of maize and 173 000 tonnes of barley. Nearly 250 000 tonnes of maize is earmarked for exports during the 2005/06 marketing year. During the same period aggregate cereal imports are forecast at about 192 000 tonnes, including 120 000 tonnes of wheat, 50 000 tonnes of maize and some 10 000 tonnes of barley.

**ESTONIA (6 October)**

Latest reports indicate that Estonia has harvested some 600 000 tonnes of cereals, including 180 000 tonnes of wheat, 290 000 tonnes of barley and 40 000 tonnes of rye. Similar amounts were harvested last year. Spring cereals account for about 84 percent of the total area planted with cereals. Total cereal import requirement for the 2005/06 marketing year is forecast at about 229 000 tonnes, including 136 000 tonnes of wheat, 40 000 tonnes of maize and 33 000 tonnes of barley.

**LATVIA (5 October)**

Latest reports indicate that Latvia has harvested just over 1 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 490 000 tonnes of wheat, 270 000 tonnes of barley and 150 000 tonnes of rye. Aggregate cereal import requirement for the 2005/06 marketing year is estimated at 151 000 tonnes of mainly wheat and exports during the same period are estimated at 52 000 tonnes.

**LITHUANIA (4 October)**

Aggregate cereal harvest is estimated at about 2.75 million tonnes, slightly down on the harvest in 2004. This year's 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 2005/06 marketing year is estimated at 250 000 tonnes and imports for the same period is estimated at 214 000 tonnes.

**MOLDOVA (3 October)**

Cereal harvesting is complete and aggregate harvest this year is estimated at 2.4 million tonnes, some 100 000 tonnes down on last year's bumper harvest. This aggregate includes over 1 million

tonnes of wheat, 1.2 million tonnes of maize and 150 000 tonnes of barley. Aggregate cereal exports during the 2005/06 marketing year are forecast at 400 000 tonnes including 100 000 tonnes of wheat, 200 000 tonnes of maize and 100 000 tonnes of barley. The country could certainly export higher amounts but the tendency is to keep relatively high stocks given past experiences with food shortages.

#### ROMANIA (11 October)

A very wet summer has had a mixed impact for the 2005 cereal crops. The excessive rainfalls in July and August were too late to have much beneficial effect for wheat yields, and instead had an overall detrimental impact on the quality and size of the crop through disrupting harvesting activities, as well as causing complete loss of crops in some localized areas where severe flooding occurred. The wheat output in 2005 is estimated at about 7.3 million tonnes, 6 percent down from last year's bumper crop but still well above the average of the past five years. Despite a significant increase in plantings last autumn, this year's average yield is estimated to be sharply below the record level achieved in 2004. However, this relatively good crop, coming on the heels of the bumper output last year, is expected to lead to a further build-up of wheat reserves in the country, even after a likely increase in exports. The country exported an estimated 100 000 tonnes in 2004/05, but could ship up to 230 000 tonnes of wheat duty-free to EU member states alone in 2005/06. However, as some compensation for the negative impact on wheat, the ample summer precipitation was favourable for the summer maize crop, ensuring another year of above-average yields and production, although down from last year's bumper level.

#### RUSSIAN FEDERATION (7 October)

Cereal harvesting is nearly complete, except in Northern Russia. Aggregate cereal harvest is estimated to match last year's good harvest estimated at about 76 million tonnes. This aggregate includes some 47 million tonnes of wheat, 16.2 million tonnes of barley, 3 million tonnes of maize and 3.6 million tonnes of rye. Aggregate area planted with cereal in 2004/05 totalled some 42.2 million hectares compared with 42.9 million hectares in 2003/04. Aggregate cereal exports during the 2005/06 marketing year are estimated at about 9.5 million tonnes, including 8.5 million tonnes of wheat and 996 000 tonnes of barley. Aggregate cereal imports, mainly food quality wheat and some maize and barley, are forecast at about 2.5 million tonnes during the 2005/06 marketing 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, 30 000 live in Ingushetia and 9 000 live in Dagestan. Under the current 18-month Emergency Operation (EMOP), which began in January 2004 and has been extended till December 2005, WFP has been assisting some 259 000 most vulnerable people in Chechnya and Ingushetia with 47 882 tonnes of food.**

#### SERBIA AND MONTENEGRO (7 October)

Latest reports indicate that cereal harvesting is complete and estimated at about 9 million tonnes, about 0.6 million tonnes down on last year's above average harvest. Some delay in spring planting following heavy rains in early Spring is said to be the main cause of the lower than expected harvest. This year's aggregate harvest includes some 2 million tonnes of wheat, 6.5 million tonnes of maize and some 400 000 tonnes of barley. Cereal exports during the 2005/06 marketing year is forecast at about 575 000 tonnes, including 200 000 tonnes of wheat and 350 000 tonnes of maize. Cereal imports during the same period includes some 95 000 tonnes of food quality wheat and 10 000 tonnes of rice.

#### SLOVAK REPUBLIC (11 October)

Cereal production is estimated above average again in 2005 although about 4 percent down from the bumper 2004 crop. The reduction this year is attributed largely to smaller plantings of barley and unfavourable weather during the summer, which delayed the harvest and caused damage to wheat

and barley crops. The summer rain was actually beneficial for the maize crop and production of maize is forecast to increase to a bumper level of almost 950 000 tonnes.

#### SLOVENIA (11 October)

The 2005 cereal output is estimated at about 500 000 tonnes, 13 percent down from the 2004 bumper crop but still close to the average of the past five years. Crops were planted on a similar area to the previous year but growing conditions were less favourable than those in 2004 and yields were lower. The wheat crop in particular was damaged by heavy rains during the harvest period, which not only reduced the output from earlier expectations but also reduced the grain quality, which will mean less revenue for farmers from the sale of the crop. South eastern parts of the country are reported to have suffered the worst rain damage, and the effects could be felt in the next year or two as farmers' funds for planting their next crops are expected to be significantly reduced.

#### THE FORMER YUGOSLAV REPUBLIC OF MACEDONIA (11 October)

Cereal output in 2005 is estimated down from the good level in 2004, but still above the average of the past five years. As in other parts of the region, summer rainfall hampered the winter wheat harvest but was favourable for the summer maize crop.

#### UKRAINE (7 October)

Aggregate cereal harvest, which has nearly been completed, is estimated at about 35 million tonnes, more than 6 million tonnes down on the harvest in 2004/05 marketing year. The aggregate harvest this year includes some 18.2 million tonnes of wheat, 8.8 million tonnes of barley and 4.9 million tonnes of maize. Adverse weather conditions in spring and part of summer compromised some of the spring cereals, mainly maize and barley. Aggregate cereal export during the 2005/06 marketing year is forecast at about 10.3 million tonnes some 868 000 tonnes down on the previous year. Cereal exports include 5.2 million tonnes of wheat, 3.1 million tonnes of barley and 1.8 million tonne of maize.

### **NORTH AMERICA**

#### CANADA (11 October)

In Canada, harvesting of the bulk of the 2005 grain crop started in late August. Progress has been somewhat slow this year due to rainfall and cool temperatures and as of late September, the harvest was reported to be about 70 percent complete, about 10 days behind the normal pace. The northern and central parts of the Saskatchewan and Alberta grain belts were lagging furthest behind. However, the good rainfall throughout the season was generally favourable for crop yields, especially wheat, and another above-average output is expected. Latest official forecasts put the 2005 wheat production at almost 25.5 million tonnes, just slightly below last year's output but some 13 percent above the average of the past five years. Despite the smallest planted area in about 3 decades yields are near-record. The barley crop, forecast at 12 million tonnes, would also be just short of last year's level, because of reduced plantings and yields, but would still be above the five-year average.

#### UNITED STATES (12 October)

The spring wheat crops were mostly gathered by the middle of September under favourable dry conditions. However, after spring wheat yields were recorded somewhat lower than anticipated earlier, the estimate of the country's aggregate output of wheat in 2005 has been lowered slightly from previous expectations to 57.1 million tonnes in the October USDA Crop Production Report, about 3 percent down from 2004. As of 11 October, it was reported that almost 70 percent of next year's winter wheat crop had been planted, which was on par with last year's planting pace and the 5-year average. Plants are emerging well under generally favourable conditions.

Regarding coarse grains, prospects were not altered significantly by the devastating impact of Hurricane Katrina. Damage to crops was mainly limited to the northern Mississippi Delta where sugarcane, cotton and soybean are the major cultivations. Further to the north in the eastern Corn Belt and Ohio Valley, crops benefited from the additional moisture that arrived in these areas. Of far more impact on the major maize crop this year was prevailing hot and dry weather in the central and southern Corn Belt for most of June, July and early August, which significantly reduced yield potential in these areas. As of early October, the maize harvest was reported to be about 36 percent complete, about the average for the time of year, but only 55 percent of the total crop was rated as good/excellent, compared with 75 percent at the same time last year. The latest official forecast foresees a total maize output of about 276 million tonnes. This would be 8 percent down from last year's record crop but would still be the second largest crop on record as, despite the likelihood of below average yields, a very large area has been sown this year. The country's aggregate coarse grain output is forecast at 292 million tonnes.

## **OCEANIA**

### **AUSTRALIA (11 October)**

The harvest of the 2005 winter grains is just starting in some northern parts of the country. The outlook for this year's production is much more favourable than the prospective at the outset of the season. After very dry conditions during the main planting period, good rains finally arrived in the second half of June, just in time for some intensive late planting activity. As a result of the season's rainfall pattern, farmers are reported to have planted less wheat, which is normally planted in the first part of the planting period, but increased the area sown with barley, which was planted after the late rains and is the normal choice when the planting date is late, as it performs relatively better than wheat. Yields are expected to vary greatly according to locality, with some areas where rains continued during September, such as New South Wales, faring better than others, which remained fairly dry overall, such as Queensland. Although early harvest results are quite favourable, forecasts of production continue to vary quite greatly and will not firm up until more of the crop has been gathered across all regions of the country. However, it now seems likely that wheat crop in 2005 will be at least 20 million tonnes, close to last year's level, while output of barley may increase as a result of the increased area, and reach at least 6.7 million tonnes.

Planting of the summer crop of sorghum (for harvest in 2006) is carried out in September and October. Early prospects were relatively favourable reflecting the build-up of sufficient soil moisture supplies for planting when the winter rains finally arrived, and early tentative forecasts pointed to an increase in plantings by some 10 percent, with farmers expected to make use of fallow that could not be planted to winter grains because of the earlier dryness. However, predominantly dry weather continuing throughout September in Queensland has reduced expectations in this region, where a large share of the summer crops are produced.

**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
<b>AFRICA</b>		<b>31 414.7</b>	<b>3 140.8</b>	<b>34 555.5</b>	<b>37 739.3</b>	<b>33 431.7</b>	<b>2 823.4</b>	<b>30 608.3</b>
<b>Northern Africa</b>		<b>14 441.9</b>	<b>20.1</b>	<b>14 462.0</b>	<b>16 595.0</b>	<b>16 595.0</b>	<b>8.2</b>	<b>16 586.8</b>
Egypt	July/June	10 979.9	20.1	11 000.0	12 701.0	12 701.0	8.2	12 692.8
Morocco	July/June	3 462.0	0.0	3 462.0	3 894.0	3 894.0	0.0	3 894.0
<b>Eastern Africa</b>		<b>3 967.7</b>	<b>1 489.8</b>	<b>5 457.5</b>	<b>6 385.2</b>	<b>5 890.8</b>	<b>1 905.7</b>	<b>3 985.1</b>
Burundi	Jan./Dec.	40.1	55.9	96.0	85.0	41.5	41.4	0.1
Comoros	Jan./Dec.	34.3	0.0	34.3	38.0	8.6	0.0	8.6
Djibouti	Jan./Dec.	70.8	11.5	82.3	71.0	39.1	8.7	30.4
Eritrea	Jan./Dec.	134.8	266.9	401.7	423.0	222.2	152.4	69.8
Ethiopia	Jan./Dec.	176.5	538.3	714.8	650.0	705.0	703.4	1.6
Kenya	Oct./Sept.	1 204.2	66.3	1 270.5	1 950.0	1 950.0	139.5	1 810.5
Rwanda	Jan./Dec.	196.7	27.6	224.3	219.0	37.0	18.7	18.3
Somalia	Aug./July	481.0	23.1	504.1	404.0	404.0	52.4	351.6
Sudan	Nov./Oct.	1 068.6	226.4	1 295.0	1 596.0	1 647.4	610.4	1 037.0
Tanzania	June/May	483.2	134.3	617.5	668.2	668.2	38.8	629.4
Uganda	Jan./Dec.	77.5	139.5	217.0	281.0	167.8	140.0	27.8
<b>Southern Africa</b>		<b>2 785.0</b>	<b>1 080.8</b>	<b>3 865.8</b>	<b>3 487.9</b>	<b>3 487.9</b>	<b>381.4</b>	<b>3 106.5</b>
Angola	April/March	617.2	219.8	837.0	833.8	833.8	59.8	774.0
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	33.2	256.8
Malawi	April/March	86.5	14.5	101.0	263.4	263.4	30.4	233.0
Mozambique	April/March	595.9	276.3	872.2	767.6	767.6	52.0	715.6
Swaziland	May/April	113.7	15.5	129.2	137.6	137.6	2.8	134.8
Zambia	May/April	228.7	68.7	297.4	124.6	124.6	62.9	61.7
Zimbabwe	April/March	583.6	437.1	1 020.7	820.4	820.4	134.4	686.0
<b>Western Africa</b>		<b>8 963.1</b>	<b>439.0</b>	<b>9 402.1</b>	<b>9 918.2</b>	<b>6 618.5</b>	<b>456.4</b>	<b>6 162.1</b>
<b>Coastal Countries</b>		<b>6 933.3</b>	<b>250.7</b>	<b>7 184.0</b>	<b>7 525.0</b>	<b>5 036.7</b>	<b>163.8</b>	<b>4 872.9</b>
Benin	Jan./Dec.	150.0	18.0	168.0	152.0	142.7	14.0	128.7
Côte d'Ivoire	Jan./Dec.	1 100.0	35.0	1 135.0	1 155.0	623.2	8.4	614.8
Ghana	Jan./Dec.	707.4	66.7	774.1	755.0	463.2	46.4	416.8
Guinea	Jan./Dec.	343.9	17.2	361.1	375.0	155.8	20.6	135.2
Liberia	Jan./Dec.	152.1	71.8	223.9	225.0	168.0	47.0	121.0
Nigeria	Jan./Dec.	4 123.4	10.5	4 133.9	4 470.0	3 283.0	0.0	3 283.0
Sierra Leone	Jan./Dec.	245.5	31.5	277.0	288.0	100.8	27.4	73.4
Togo	Jan./Dec.	111.0	0.0	111.0	105.0	100.0	0.0	100.0
<b>Sahelian Countries</b>		<b>2 029.8</b>	<b>188.3</b>	<b>2 218.1</b>	<b>2 393.2</b>	<b>1 581.8</b>	<b>292.6</b>	<b>1 289.2</b>
Burkina faso	Nov./Oct.	147.4	24.0	171.4	230.3	67.3	35.8	31.5
Cape Verde	Nov./Oct.	38.6	35.5	74.1	100.0	63.5	42.2	21.3
Chad	Nov./Oct.	80.0	31.1	111.1	136.3	80.6	55.3	25.3
Gambia	Nov./Oct.	147.3	3.6	150.9	143.3	52.8	7.9	44.9
Guinea Bissau	Nov./Oct.	49.5	6.9	56.4	75.1	63.6	8.3	55.3
Mali	Nov./Oct.	222.8	0.9	223.7	211.0	61.6	8.8	52.8
Mauritania	Nov./Oct.	226.1	42.6	268.7	359.0	294.3	67.0	227.3
Niger	Nov./Oct.	199.8	19.8	219.6	167.0	105.6	48.6	57.0
Senegal	Nov./Oct.	918.3	23.9	942.2	971.2	792.5	18.7	773.8
<b>Central Africa</b>		<b>1 257.0</b>	<b>111.1</b>	<b>1 368.1</b>	<b>1 353.0</b>	<b>839.5</b>	<b>71.7</b>	<b>767.8</b>
Cameroon	Jan./Dec.	522.8	29.7	552.5	510.0	482.9	11.9	471.0
Cent.Afr.Rep.	Jan./Dec.	54.9	4.1	59.0	45.5	11.9	2.2	9.7
Congo, Dem.Rep.	Jan./Dec.	361.3	69.3	430.6	480.0	242.0	51.7	190.3
Congo, Rep.	Jan./Dec.	287.2	5.1	292.3	288.0	86.8	2.0	84.8
Eq. Guinea	Jan./Dec.	19.8	0.0	19.8	16.0	9.7	0.0	9.7
Sao Tome	Jan./Dec.	11.0	2.9	13.9	13.5	6.2	3.9	2.3

**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
<b>ASIA/NEAR EAST</b>		<b>38 965.6</b>	<b>2 436.0</b>	<b>41 401.6</b>	<b>50 513.8</b>	<b>48 378.5</b>	<b>1 797.8</b>	<b>46 580.7</b>
Afghanistan	July/June	381.3	124.9	506.2	1 733.0	1 787.0	183.5	1 603.5
Armenia	July/June	126.0	42.0	168.0	169.0	163.0	3.0	160.0
Azerbaijan	July/June	790.0	6.0	796.0	1 149.0	1 142.0	35.0	1 107.0
Bangladesh	July/June	2 692.1	256.9	2 949.0	3 537.0	3 537.0	337.7	3 199.3
Bhutan	July/June	56.5	3.5	60.0	66.0	66.0	1.3	64.7
Cambodia	Jan./Dec.	51.6	28.2	79.8	150.0	11.7	0.7	11.0
China	July/June	11 369.4	30.6	11 400.0	16 100.0	16 100.0	66.9	16 033.1
Georgia	July/June	518.0	84.0	602.0	811.0	961.0	66.0	895.0
India	April/March	168.0	36.5	204.5	254.7	254.7	45.3	209.4
Indonesia	April/March	8 129.1	212.1	8 341.2	6 843.7	6 843.7	47.1	6 796.6
Iraq	July/June	3 046.6	417.4	3 464.0	4 139.0	4 139.3	9.8	4 129.5
Korea, D.P.R.	Nov./Oct.	333.2	588.5	921.7	1 247.8	1 247.8	742.5	505.3
Kyrgyz Republic	July/June	78.0	1.0	79.0	158.0	100.0	2.0	98.0
Lao, P.D.R.	Jan./Dec.	9.0	25.1	34.1	27.6	6.1	6.1	0.0
Maldives	Jan./Dec.	33.5	7.5	41.0	42.0	9.8	8.1	1.7
Mongolia	Oct./Sept.	194.4	53.6	248.0	263.0	263.0	39.4	223.6
Nepal	July/June	112.5	8.8	121.3	140.0	140.0	11.8	128.2
Pakistan	May/April	388.0	14.0	402.0	1 515.8	1 515.8	7.7	1 508.1
Philippines	July/June	4 012.4	106.1	4 118.5	4 938.0	4 938.2	48.2	4 890.0
Sri Lanka	Jan./Dec.	1 318.0	35.3	1 353.3	1 214.2	618.3	78.8	539.5
Syria	July/June	2 196.1	8.9	2 205.0	2 780.0	2 780.0	10.5	2 769.5
Tajikistan	July/June	278.0	86.0	364.0	381.0	245.0	40.0	205.0
Timor-Leste	July/June	62.0	0.0	62.0	42.0	42.0	0.0	42.0
Turkmenistan	July/June	34.0	0.0	34.0	44.0	4.0	0.0	4.0
Uzbekistan	July/June	268.0	82.0	350.0	408.0	258.0	0.0	258.0
Yemen	Jan./Dec.	2 319.9	177.1	2 497.0	2 360.0	1 205.1	6.4	1 198.7
<b>CENTRAL AMERICA</b>		<b>1 288.0</b>	<b>177.5</b>	<b>1 465.5</b>	<b>1 562.5</b>	<b>1 562.5</b>	<b>183.4</b>	<b>1 379.1</b>
Haiti	July/June	499.0	77.9	576.9	625.8	625.8	116.7	509.1
Honduras	July/June	513.6	64.5	578.1	651.6	651.6	19.7	631.9
Nicaragua	July/June	275.4	35.1	310.5	285.1	285.1	47.0	238.1
<b>SOUTH AMERICA</b>		<b>867.4</b>	<b>5.3</b>	<b>872.7</b>	<b>1 019.8</b>	<b>1 019.8</b>	<b>47.0</b>	<b>972.8</b>
Ecuador	July/June	867.4	5.3	872.7	1 019.8	1 019.8	47.0	972.8
<b>OCEANIA</b>		<b>415.2</b>	<b>0.0</b>	<b>415.2</b>	<b>420.2</b>	<b>115.1</b>	<b>0.0</b>	<b>115.1</b>
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	114.3	0.0	114.3
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	0.3	0.0	0.3
<b>EUROPE</b>		<b>1 569.6</b>	<b>26.4</b>	<b>1 596.0</b>	<b>1 434.0</b>	<b>1 445.0</b>	<b>8.4</b>	<b>1 436.6</b>
Albania	July/June	377.6	26.4	404.0	396.0	396.0	8.4	387.6
Belarus	July/June	612.0	0.0	612.0	567.0	523.0	0.0	523.0
Bosnia-Herzegovina	July/June	580.0	0.0	580.0	471.0	526.0	0.0	526.0
<b>TOTAL</b>		<b>74 520.5</b>	<b>5 786.0</b>	<b>80 306.5</b>	<b>92 689.6</b>	<b>85 952.6</b>	<b>4 860.0</b>	<b>81 092.6</b>

SOURCE: FAO

1/ Includes food deficit countries with per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. 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.

ESTIMATED CEREAL IMPORT REQUIREMENTS OF LOW-INCOME FOOD-DEFICIT COUNTRIES 1/  
b) 2005/06 estimates (in thousand tonnes)

COUNTRY	Marketing year	2004/05			2005/06			
		Actual imports			Total import requirements (excluding re-exports)	Import position		
		Commercial purchases	Food aid	Total commercial and aid		Total commercial and aid	Food aid allocated committed or shipped	Commercial purchases
<b>AFRICA</b>		<b>22 484.8</b>	<b>620.3</b>	<b>23 105.1</b>	<b>23 177.0</b>	<b>3 746.3</b>	<b>459.4</b>	<b>3 286.9</b>
<b>Northern Africa</b>		<b>16 586.8</b>	<b>8.2</b>	<b>16 595.0</b>	<b>16 018.0</b>	<b>2 161.3</b>	<b>0.0</b>	<b>2 161.3</b>
Egypt	July/June	12 692.8	8.2	12 701.0	11 601.0	1 690.5	0.0	1 690.5
Morocco	July/June	3 894.0	0.0	3 894.0	4 417.0	470.8	0.0	470.8
<b>Eastern Africa</b>		<b>2 791.5</b>	<b>230.7</b>	<b>3 022.2</b>	<b>2 770.0</b>	<b>92.3</b>	<b>89.4</b>	<b>2.9</b>
Kenya	Oct./Sept.	1 810.5	139.5	1 950.0	1 800.0	36.0	36.0	0.0
Somalia	Aug./July	351.6	52.4	404.0	450.0	40.5	40.5	0.0
Tanzania	June/May	629.4	38.8	668.2	520.0	15.8	12.9	2.9
<b>Southern Africa</b>		<b>3 106.5</b>	<b>381.4</b>	<b>3 487.9</b>	<b>4 389.0</b>	<b>1 492.7</b>	<b>370.0</b>	<b>1 122.7</b>
Angola	April/March	774.0	59.8	833.8	739.0	157.0	32.1	124.9
Lesotho	April/March	244.6	5.9	250.5	303.0	111.4	11.9	99.5
Madagascar	April/March	256.8	33.2	290.0	174.0	20.6	17.1	3.5
Malawi	April/March	233.0	30.4	263.4	852.0	143.3	95.5	47.8
Mozambique	April/March	715.6	52.0	767.6	869.0	331.5	37.1	294.4
Swaziland	May/April	134.8	2.8	137.6	111.0	29.0	3.0	26.0
Zambia	May/April	61.7	62.9	124.6	271.0	23.4	8.3	15.1
Zimbabwe	April/March	686.0	134.4	820.4	1 070.0	676.5	165.0	511.5
<b>ASIA/NEAR EAST</b>		<b>44 324.5</b>	<b>955.2</b>	<b>45 279.7</b>	<b>37 239.4</b>	<b>5 358.0</b>	<b>263.1</b>	<b>5 094.9</b>
Afghanistan	July/June	1 603.5	183.5	1 787.0	390.0	19.2	19.2	0.0
Armenia	July/June	160.0	3.0	163.0	163.0	1.8	0.3	1.5
Azerbaijan	July/June	1 107.0	35.0	1 142.0	852.0	171.3	1.1	170.2
Bangladesh	July/June	3 199.3	337.7	3 537.0	3 150.0	981.8	35.0	946.8
Bhutan	July/June	64.7	1.3	66.0	71.0	0.0	0.0	0.0
China	July/June	16 033.1	66.9	16 100.0	12 900.0	1 196.0	0.0	1 196.0
Georgia	July/June	895.0	66.0	961.0	680.0	121.4	0.0	121.4
India	April/March	209.4	45.3	254.7	650.0	26.4	24.6	1.8
Indonesia	April/March	6 796.6	47.1	6 843.7	5 741.4	1 579.3	30.5	1 548.8
Iraq	July/June	4 129.5	9.8	4 139.3	4 430.0	352.0	27.6	324.4
Kyrgyz Republic	July/June	98.0	2.0	100.0	115.0	0.9	0.0	0.9
Mongolia	Oct./Sept.	223.6	39.4	263.0	303.0	29.2	29.2	0.0
Nepal	July/June	128.2	11.8	140.0	140.0	10.2	10.2	0.0
Pakistan	May/April	1 508.1	7.7	1 515.8	601.0	140.2	0.0	140.2
Philippines	July/June	4 890.0	48.2	4 938.2	4 326.0	416.6	75.1	341.5
Syria	July/June	2 769.5	10.5	2 780.0	2 115.0	302.5	2.9	299.6
Tajikistan	July/June	205.0	40.0	245.0	242.0	9.2	7.4	1.8
Timor-Leste	July/June	42.0	0.0	42.0	43.0	0.0	0.0	0.0
Turkmenistan	July/June	4.0	0.0	4.0	44.0	0.0	0.0	0.0
Uzbekistan	July/June	258.0	0.0	258.0	283.0	0.0	0.0	0.0
<b>CENTRAL AMERICA</b>		<b>1 379.1</b>	<b>183.4</b>	<b>1 562.5</b>	<b>1 580.0</b>	<b>391.2</b>	<b>167.3</b>	<b>223.9</b>
Haiti	July/June	509.1	116.7	625.8	595.0	147.9	51.4	96.5
Honduras	July/June	631.9	19.7	651.6	650.0	164.6	85.5	79.1
Nicaragua	July/June	238.1	47.0	285.1	335.0	78.7	30.4	48.3
<b>SOUTH AMERICA</b>		<b>972.8</b>	<b>47.0</b>	<b>1 019.8</b>	<b>946.0</b>	<b>94.3</b>	<b>17.0</b>	<b>77.3</b>
Ecuador	July/June	972.8	47.0	1 019.8	946.0	94.3	17.0	77.3
<b>EUROPE</b>		<b>1 436.6</b>	<b>8.4</b>	<b>1 445.0</b>	<b>1 465.0</b>	<b>63.6</b>	<b>0.0</b>	<b>63.6</b>
Albania	July/June	387.6	8.4	396.0	370.0	21.4	0.0	21.4
Belarus	July/June	523.0	0.0	523.0	525.0	42.2	0.0	42.2
Bosnia-Herzegovina	July/June	526.0	0.0	526.0	570.0	0.0	0.0	0.0
<b>TOTAL</b>		<b>70 597.8</b>	<b>1 814.3</b>	<b>72 412.1</b>	<b>64 407.4</b>	<b>9 653.4</b>	<b>906.8</b>	<b>8 746.6</b>

SOURCE: FAO

for footnote, see previous page.

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