



# Crop Prospects and Food Situation

## HIGHLIGHTS

- **World cereal production in 2006 is forecast to decline marginally from last year's good level.** Wheat output is expected to decrease reflecting smaller crops in the United States and the CIS in Europe, due to adverse weather. Production of coarse grains is tentatively forecast to decline mostly as a result of reduced plantings anticipated in the United States. Rice output may increase as very early prospects are favourable.
- In **Eastern Africa**, recent rains eased somewhat drought conditions in the pastoral areas of the Horn, where 7.9 million people require emergency food aid. In **Southern Africa**, the 2006 maize crop, being gathered, has recovered from last year's drought-affected harvest in most countries of the subregion. However, in **South Africa** and **Angola** production will decline. In **North Africa**, bumper wheat and barley crops are in prospect.
- In **Asia**, the outlook for the 2006 wheat crop, being harvested, has deteriorated in India, but it is positive in other main producers of the region. Emergency assistance is needed in **Mongolia** and **Timore-Leste** following a sharply reduced 2005 cereal production.
- In **Latin America and the Caribbean**, the 2006 wheat output is anticipated substantially up in **Mexico**. In **South America**, maize output is forecast as sharply down in **Argentina** but production will recover in **Brazil**. However, rice crop in Brazil is put well below the record level of 2005. In **Paraguay**, the soybean crop will be again severely reduced by dry weather.
- A larger 2006 wheat crop is forecast in the **EU** but production is expected to decline in the **United States**. In the **Russian Federation** and **Ukraine** wheat production is put sharply down due to an abnormally cold winter.

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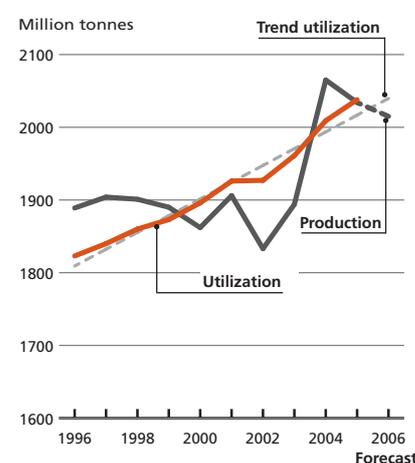
In order to provide readers with more focused, better sequenced and integrated information, GIEWS is streamlining its main publications into two complementary products: *Crop Prospects and Food Situation* and *Food Outlook - Global Market Analysis*. This report is designed to retain several key components of the two previous reports, *Foodcrops and Shortages*, and *Food Supply Situation and Crop Prospects in sub-Saharan Africa (Africa Report)*, and present information and analysis in a more concise and useful format. The purpose of this publication will be to provide expert assessment of the food situation at regional levels and in vulnerable countries. Each report will also include an up-to-date brief on the world cereal supply and demand situation. This publication will appear six times per year. The first issue of the new *Food Outlook* will be released in June.

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### World cereal production and utilization (rice in milled terms)

- **If global cereal utilization remains close to trend in 2006/07, it would exceed the current forecast for production, which could lead to a drawdown of global cereal stocks for the second consecutive year.**



# Global cereal supply and demand brief

## FAO's first forecast for 2006 points to another slight decrease in world cereal production

Based on the condition of cereal crops already in the ground and planting intentions for those to be sown later this year, and assuming normal weather for

the remainder of the season, FAO's first forecast for world cereal production in 2006 points to a decrease of about 19 million tonnes, to 2 015 million tonnes. However, even at this lower level, world cereal output in 2006 would be the third highest on record and above the five-year average.

FAO forecasts world wheat output in 2006 at almost 620 million tonnes, down 6 million tonnes from 2005. The decrease from the previous year mostly reflects smaller harvests anticipated in the European CIS and the United States of America due to area reductions following unfavourable winter weather conditions. By contrast, good yield prospects are expected to help production to recover in the EU and North Africa, while prospects for major wheat producing countries in Asia are mixed. A good harvest is expected in China, but in India the crop will be lower than earlier anticipated.

Regarding coarse grains, FAO provisionally forecasts world production in 2006 at about 973 million tonnes, down nearly 16 million tonnes from the level in 2005. However, in spite of this decline, global production would still exceed the average of the past five years. Most of the decrease is expected in the United States, where in March the Government projected a possible 5 percent decline in this year's maize area. Also in Argentina, the planted area is 10 percent smaller and harvesting is currently underway amid wet weather which is likely to lower yields. A sharp drop in output is also forecast for the Republic of South Africa, mainly reflecting a decrease in the maize area due to low prices during the planting period and a high level of carry-over stocks.

For rice, the paddy season is well advanced among countries located south and along the equator, but is just starting in the northern hemisphere, where the bulk of the world's rice is produced. Based on the first and very tentative FAO forecast, global rice production in 2006 could rise to 423 million tonnes (milled terms), about 3 million tonnes more than in 2005.

**Table 1: World cereal<sup>1</sup> production - first forecast for 2006 (million tonnes)**

	2005 estimate	2006 forecast	Change: 2006 over 2005 (%)
<b>Asia</b>	<b>883.1</b>	<b>890.9</b>	<b>0.9</b>
Far East	773.0	782.0	1.2
Near East in Asia	72.0	72.4	0.6
CIS in Asia	28.6	27.6	-3.7
<b>Africa</b>	<b>127.9</b>	<b>124.9</b>	<b>-2.3</b>
North Africa	29.1	33.7	15.8
Western Africa	43.2	42.6	-1.3
Central Africa	3.4	3.3	-2.5
Eastern Africa	29.2	26.2	-10.3
Southern Africa	23.0	19.1	-17.0
<b>Central America &amp; Caribbean</b>	<b>34.9</b>	<b>37.2</b>	<b>6.6</b>
<b>South America</b>	<b>109.2</b>	<b>110.5</b>	<b>1.2</b>
<b>North America</b>	<b>416.5</b>	<b>396.5</b>	<b>-4.8</b>
<b>Europe</b>	<b>422.0</b>	<b>415.5</b>	<b>-1.5</b>
EU 25	259.2	269.0	3.8
CIS in Europe	121.5	106.5	-12.3
<b>Oceania</b>	<b>40.7</b>	<b>39.7</b>	<b>-2.4</b>
<b>World</b>	<b>2 034.2</b>	<b>2 015.3</b>	<b>-0.9</b>
Developing countries	1 102.8	1 118.5	1.4
Developed countries	931.5	896.8	-3.7
- wheat	626.0	619.6	-1.0
- coarse grains	988.4	972.6	-1.6
- rice (milled)	419.8	423.1	0.8

<sup>1</sup>Includes rice in milled terms.

Note: Totals computed from unrounded data.

## Cereal production in 2005 down from the previous year's record

With firmer information available on the last of the 2005 crops, FAO's latest estimate of world cereal production in 2005 has been revised upward to 2 034 million tonnes (rice in milled terms), an increase of nearly 30 million tonnes since December but still below the previous year's record. While harvested areas remained largely unchanged from the previous year, the average yields fell slightly because of less favourable weather conditions which mostly affected wheat and coarse grains crops in several developed countries. However, in the developing countries and, more notably, in the Low-Income Food-Deficit Countries (LIFDCs), 2005 saw a significant increase in cereal harvests.

Global rice production rose sharply in 2005, up 11 million tonnes, which lifted it to a record high of nearly 420 million tonnes (milled terms). This result reflected relatively favourable weather conditions in Asia, western Africa and South America and the positive effects of high prices in 2004, which had prompted a general increase in plantings. For wheat, latest estimates put global output in 2005 at 626 million tonnes, 6 million tonnes below the previous year's record. Wheat production soared to record levels in Asia and recovered significantly also in Australia but these increases were not sufficient to fully offset for sharp declines in the EU, North Africa and Argentina. World coarse grain output in 2005 is estimated at 988 million tonnes, 36 million tonnes below 2004, which was, however, a record year. The bulk of the decline was due to smaller barley and maize harvests in the EU and the United States while the overall coarse grain production in the developing

Table 2. Basic facts of world cereal situation (*million tonnes*)

	2003/04	2004/05	2005/06	Change: 2005/06 over 2004/05 (%)
<b>PRODUCTION<sup>1</sup></b>	<b>1 893.8</b>	<b>2 065.0</b>	<b>2 034.2</b>	<b>-1.5</b>
wheat	560.4	631.9	626.0	-0.9
coarse grains	940.4	1 024.6	988.4	-3.5
rice (milled)	393.0	408.5	419.8	2.8
<b>SUPPLY<sup>2</sup></b>	<b>2 376.1</b>	<b>2 477.8</b>	<b>2 502.4</b>	<b>1.0</b>
wheat	762.7	791.3	802.6	1.4
coarse grains	1 101.0	1 173.3	1 180.6	0.6
rice	512.4	513.2	519.3	1.2
<b>UTILIZATION</b>	<b>1 960.7</b>	<b>2 009.1</b>	<b>2 038.0</b>	<b>1.4</b>
wheat	601.0	616.1	627.7	1.9
coarse grains	950.5	978.5	991.3	1.3
rice	409.3	414.5	419.1	1.1
Per caput cereal food use ( <i>kg per year</i> )	152.4	151.4	152.1	0.5
<b>TRADE<sup>3</sup></b>	<b>236.3</b>	<b>244.1</b>	<b>240.9</b>	<b>-1.3</b>
wheat	102.9	110.5	109.0	-1.3
coarse grains	106.7	104.6	104.0	-0.6
rice	26.7	29.0	27.9	-3.7
<b>END OF SEASON STOCKS<sup>4</sup></b>	<b>413.2</b>	<b>469.4</b>	<b>462.0</b>	<b>-1.6</b>
wheat	159.4	176.7	173.6	-1.7
- main exporters <sup>5</sup>	38.6	56.1	54.7	-2.5
coarse grains	149.1	193.3	188.6	-2.4
- main exporters <sup>5</sup>	48.3	93.1	97.1	4.4
rice	104.7	99.5	99.8	0.4
- main exporters <sup>5</sup>	68.6	66.6	67.2	0.8

### Low-Income Food-Deficit countries<sup>5</sup>

<b>Cereal production<sup>1</sup></b>	<b>788.9</b>	<b>810.9</b>	<b>846.6</b>	<b>4.4</b>
<i>excluding China and India</i>	273.4	265.6	286.7	8.0
<b>Utilization</b>	<b>885.9</b>	<b>1 044.2</b>	<b>1 067.9</b>	<b>2.3</b>
Food use	631.5	632.8	645.1	2.0
<i>excluding China and India</i>	254.4	256.5	266.5	3.9
Per caput cereal food use ( <i>kg per year</i> )	157.8	155.8	156.6	0.5
<i>excluding China and India</i>	155.8	154.0	156.9	1.9
Feed	156.6	155.3	158.6	2.1
<i>excluding China and India</i>	37.6	38.2	40.4	5.8
<b>End of season stocks<sup>4</sup></b>	<b>240.0</b>	<b>227.0</b>	<b>222.0</b>	<b>-2.2</b>
<i>excluding China and India</i>	45.8	45.9	49.1	6.8

<sup>1</sup> Data refer to calendar year of the first year shown.

<sup>2</sup> Production plus opening stocks.

<sup>3</sup> For wheat and coarse grains, trade refers to exports based on July/June marketing season. For rice, trade refers to exports based on the calendar year of the second year shown.

<sup>4</sup> May not equal the difference between supply and utilization because of differences in individual country marketing years.

<sup>5</sup> For definition see notes on back cover.

countries and the LIFDCs (as groups) increased slightly.

### Cereal utilization expanding at a slower pace in 2005/06

After a robust growth in world cereal utilization in 2004/05, up 2.5 percent from the previous season, the rate of growth in 2005/06 is forecast to slow down to about 1.5 percent, to reach 2 038 million tonnes. At this level, world cereal utilization would be slightly above global cereal production in 2005. Reduced feed grain supplies, resulting from lower levels of coarse grain production, a rebound in international grain prices, and outbreaks of animal diseases have contributed to slower growth in overall cereal feed utilization in 2005/06. Total feed utilization in 2005/06 is currently forecast at 746 million tonnes, down 7 million tonnes, or 0.8 percent, from the previous season. Feed use of coarse grains is forecast to drop most, by about 10 million tonnes compared to the previous season, to 618 million tonnes. The bulk of this decline is concentrated in a few countries, namely the United States, the Russian Federation and Ukraine.

By contrast, food usage of cereals is expected to demonstrate another modest growth in 2005/06. Total food use is forecast at 982 million tonnes, up 17 million tonnes, or 1.8 percent from 2004/05. The increase leads to a slight rise in world per caput consumption level of cereals, to 152 kg, and a marginal improvement also in per caput food consumption in LIFDCs, to nearly 157 kg, the latter driven almost exclusively by a strong recovery in the cereal supply

situation in several countries in western Africa and higher consumption of rice and coarse grains as food. About 420 million tonnes of rice are estimated to be consumed in 2005/06, mostly as food, 6 million tonnes more than in the previous year. On average, per caput rice food intake could rise slightly to 57 kg per year. Industrial usage of cereals is also forecast to register a strong growth in 2005/06 but the increase is mainly associated with higher use of maize for production of ethanol in a handful of countries, led by the United States. The recent surge in fuel prices has further accelerated efforts by many countries to invest and expand their grain-based ethanol production capacity to meet their growing fuel needs, a trend which is expected to continue as countries try to lessen their dependency on petroleum.

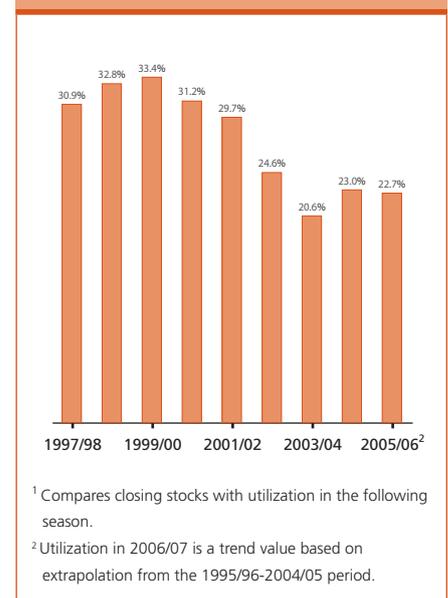
### Cereal stocks declining again

After a sharp rebound in 2005, world cereal stocks by the close of the seasons ending in 2006 are likely to decline to 462 million tonnes, down 7 million tonnes, or 1.6 percent, from their opening level. This decline would have been much higher given the fall in world cereal production in 2005 but a slow increase in total cereal utilization in 2005/06 is considered to require a smaller reduction in world inventories than would have been the case if utilization continued to grow at the previous season's pace. The anticipated drawdown in world cereal stocks mostly represents a decrease in world wheat and coarse grain inventories, given sharp falls

in their production in 2005. Based on the latest supply and demand estimates for 2005/06, the global cereal stocks-to-utilization ratio, which compares the level of inventories at the close of a season to utilization in the next, would stay at around 23 percent, similar to the previous season and 2 percentage points above the low reached in 2003/04.

Total coarse grain stocks are currently forecast to reach 189 million tonnes, down almost 5 million tonnes from the previous season, with most of the decline in the EU and the CIS countries in Europe. Wheat stocks are also forecast to decline, to 174 million tonnes, down 3 million tonnes, with drops in stocks in the EU, China, Morocco and Turkey exceeding increases in several other

Figure 1. World cereal stock-to-utilization ratio<sup>1</sup>



countries, most notably in Australia and Canada. For rice, in spite of sizeable gains in 2005, global production would be just sufficient to cover utilization, so global rice inventories are likely to be unchanged around their opening level of 99 million tonnes. If confirmed, this could signal the conclusion of the downward adjustment process of stocks initiated in 2000.

**Cereal trade to decline slightly in 2005/06<sup>1</sup>**

Cumulative small declines in exports of nearly all major types of cereals contribute to almost 3 million tonnes reduction in world cereal trade to 241 million tonnes in 2005/06; out of which world wheat trade is forecast to reach 109 million tonnes, coarse grains 104 million tonnes, and rice 27.9 million tonnes. The bulk of the reduction in world cereal trade is driven by only a handful of importing countries, mostly LIFDCs. This season’s lower wheat purchases by China account for most of the decrease in world imports. In China, wheat imports are forecast to decline by nearly 6 million tonnes following the rebound in domestic wheat production. Elsewhere, smaller maize imports by Canada and rice imports by Nigeria, Bangladesh and the Philippines are also contributing to the forecast decline in world cereal trade this season. However, a number of countries are also seen to increase

<sup>1</sup> Any reference to wheat includes wheat flour in grain equivalent.

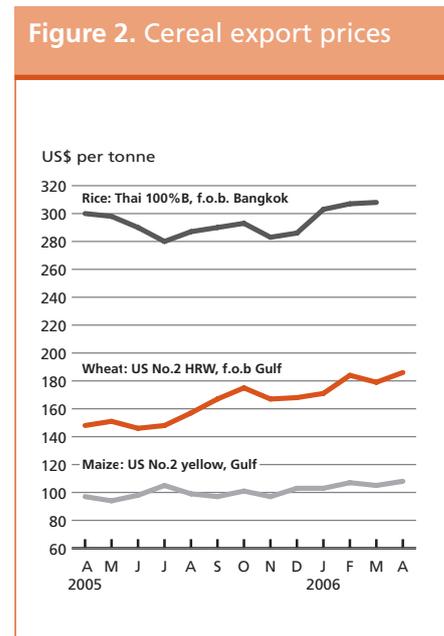
their cereal imports in 2005/06; most notably, Iraq which is returning to the world market as a major wheat buyer, countries in North Africa which need to import more wheat this season due to poor harvests in 2005, and Brazil, which is forecast to increase its purchases of not only wheat and maize but also rice, due mainly to tighter supplies and strong demand.

On the export side, total cereal shipments by major exporters are seen down for wheat but up for coarse grains and rice. In the wheat market, subdued world demand coupled with large supplies from the Russian Federation and Ukraine has lessened the impact of this season’s sharp decline in exportable supplies in Argentina. In the coarse grain market, larger sales are expected from all major exporters except for Australia while higher exports from China, the Republic of South Africa and the Russian Federation are also seen to offset reductions from Brazil, Bulgaria and Romania. For rice, exports are seen to contract somewhat in 2006, reflecting expectations of smaller shipments from India, Pakistan and the United States, only part of which is likely to be compensated by larger sales from China and, in particular, Thailand.

**Cereal prices gaining strength in 2005/06**

International prices for all major cereals registered considerable gains in 2005/06 (July/June) and most prices have also edged upwards during the first quarter of 2006. Since the

beginning of the current marketing season, wheat prices remained largely above the corresponding period in the previous season because of a decline in 2005 production and a cut in Argentine supplies and consequently exports. The new 2006 crop wheat received initial supports from the uncertainty for this year’s winter wheat planting, unfavourable weather and strong sales. During the first quarter of 2006, wheat prices averaged about 14 percent higher than in the corresponding period last year. However, improving crop outlook in recent weeks and early prospects for a reasonably balanced world supply and demand situation in 2006/07 have lessened the possibility of much higher wheat prices in the coming season. For rice, the FAO rice price index, which had been stable at



101 from June to December 2005, rose to 103 in January 2006 and to 105 in February and March 2006, partly sustained by large purchases by several countries in Asia, and a tightening of export availabilities in major exporting countries. Coarse grain prices have also strengthened since the start of the season. In spite of increased world production and large supplies of feed wheat, international prices remained strong, driven mostly by strong demand for industrial usage, mainly ethanol production in the United States, and still strong feed demand despite the spread of avian influenza. In recent weeks international prices also strengthened in reaction to reports of smaller maize plantings in the United States while speculative buying in the futures markets, fuelled by surge in prices of metals and energy, also provided support.

## Low-Income Food-Deficit country food situation overview

### Good start of the 2006 cereal season in Low-Income Food-Deficit countries

Early prospects for the 2006 cereal production are favourable in the group of 82 Low-Income Food-Deficit Countries (LIFDCs). In Southern Africa, where the main season cereal crop is being harvested, good outputs are expected in most countries. In Asia Far East, Near East and CIS countries, harvesting of the wheat and early rice crops has started and the outlook is overall positive, although in India the wheat crop will be lower than early anticipated. By contrast, in

South America, floods in Ecuador have impaired prospects for the 2006 maize and rice crops. Elsewhere, planting of the main cereal seasons is about to start or is scheduled later in the year.

### Significant increase in 2005 cereal production

FAO's latest estimate of the 2005 aggregate cereal output in LIFDCs indicates a significant increase of 4.4 percent from the previous year's level. Excluding China and India, the aggregate production of the rest of the LIFDCs expanded at a higher rate of 8

### Food supply difficulties persist in many countries around the world despite good 2005 cereal harvests

In eastern Africa, despite some recent beneficial rains in pastoral areas of Ethiopia, Somalia, Kenya and Djibouti, some 7.9 million are still suffering from the effects of prolonged drought. When chronically vulnerable population in these countries is included, the number of people at food risk increases to about 16 million. In Eritrea and Sudan, notwithstanding this year's good harvests, large numbers of population continue to require humanitarian assistance as a consequence of past and current conflicts. In southern Africa, the difficult food situation of some 12 million people, including those chronically food insecure, has eased with the current good 2006 cereal harvest and food aid distributions. In western Africa, despite a recovery in last year's cereal production, assistance to strengthen access to food for vulnerable households continue to be needed, particularly in agro-pastoral

areas of Niger. In Asia, emergency food aid is necessary in Mongolia and Timor-Leste, which gathered sharply reduced 2005 cereal crops, in DPR Korea and Bangladesh for chronically vulnerable populations, as well as for those affected by civil strife in Afghanistan, Iraq and Nepal. Protracted assistance is also required for the victims of the Tsunami in southern Asia and the earthquake October last year in Pakistan. In Latin America and the Caribbean, the food situation in Haiti remains tight due to civil strife and external food assistance continues to be required. In Guatemala, El Salvador, Nicaragua and Honduras, food aid is being delivered to vulnerable groups. In South America, in Colombia, large numbers of IDP's as a result of prolonged civil conflict are in need of humanitarian assistance. Similarly, in Europe, large numbers of IDPs require food aid in Chechnya, in the Russian Federation.

percent. This reflects good cereal crops in almost all sub-regions of the world, with the main exceptions of countries in Southern Africa, Morocco and Somalia that were affected by drought.

### Cereal imports to decline in 2005/06

Total cereal imports by the LIFDCs in marketing years 2005/06 or 2006 (calendar year) are currently forecast close to 84 million tonnes, which is down 12 percent from the previous season's high of almost 96 million tonnes. More than half of the decline is in China, following good 2005 cereal production. Import requirements also declined in most other countries of the Far East Asia, including Pakistan, DPR Korea and Indonesia which gathered bumper cereal harvests in 2005. Similarly, lower imports are expected in Western Africa and CIS Asia where the 2005 cereal production recovered markedly from the reduced levels of the previous year. However, import needs, in particular food aid, increased by almost one-quarter in Southern Africa, where adverse weather sharply reduced the 2005 cereal production, especially in Zambia, Zimbabwe and Malawi.

### Food aid requirements uncovered in Eastern Africa

Out of the total LIFDC's imports in 2005/06, some 6 percent, or 4.85 million tonnes of cereals, is required in the form of food aid. Over half of the volume is needed for drought-affected and chronically food insecure populations in Southern Africa and Eastern Africa, where notwithstanding a bumper aggregate cereal crop, serious food

shortages have emerged in Somalia and pastoral areas of Kenya and Ethiopia due to prolonged drought conditions. Substantial amounts of food assistance are also required in Far East Asia for chronically vulnerable populations in DPR Korea and Bangladesh, in spite of overall improved food supply situations. By April 2006, available information indicated that some 65 percent of the total food aid requirements of LIFDCs have been secured by distributions/pledges. In Southern Africa, where the marketing year (April/March) has just

finished, virtually all the requirements were covered by food aid commitments but the slow pace of distributions resulted in food difficulties. Similarly, the 2005/06 (July/June) food aid needs of vulnerable people in the three LIFDCs of Central America and the Caribbean (Haiti, Honduras and Nicaragua) were fully covered by donor's commitments. However, in Eastern Africa, where the marketing year of most countries starts in January, half of the food aid requirements (January/December) are still uncovered. More pledges are urgently needed.

**Table 3. Cereal import position of the Low-Income Food-Deficit countries (000 tonnes)<sup>1</sup>**

	2004/05 Actual imports	2005/06			
		Requirements <sup>2</sup>		Import position <sup>3</sup>	
		Total imports:	of which food aid	Total imports:	of which food aid
<b>Africa (44)</b>	<b>40 504</b>	<b>37 930</b>	<b>2 950</b>	<b>18 684</b>	<b>1 870</b>
Northern Africa	16 787	15 508		11 234	5
Eastern Africa	6 700	5 793	1 665	2 107	831
Southern Africa	3 458	4 382	699	3 702	690
Western Africa	12 049	10 738	506	1 523	324
Central Africa	1 511	1 510	80	119	21
<b>Asia (25)</b>	<b>50 853</b>	<b>41 661</b>	<b>1 501</b>	<b>24 301</b>	<b>979</b>
Far East	3 099	2 538	190	1 865	54
Near East	36 251	28 258	1 086	16 675	847
CIS in Asia	11 504	10 865	225	5 760	78
<b>Central America (3)</b>	<b>1 539</b>	<b>1 682</b>	<b>252</b>	<b>1 119</b>	<b>275</b>
<b>South America (1)</b>	<b>1 020</b>	<b>931</b>	<b>50</b>	<b>706</b>	<b>17</b>
<b>Oceania (6)</b>	<b>407</b>	<b>416</b>	<b>0</b>	<b>42</b>	<b>0</b>
<b>Europe (3)</b>	<b>1 572</b>	<b>1 730</b>	<b>100</b>	<b>717</b>	<b>1</b>
<b>Total (82)</b>	<b>95 896</b>	<b>84 350</b>	<b>4 853</b>	<b>45 570</b>	<b>3 143</b>

<sup>1</sup> For more details see Table A1 in the Statistical appendix.

<sup>2</sup> For definition of **import requirements** see terminology on back cover.

<sup>3</sup> Estimates based on information available as of April 2006.

# Regional reviews

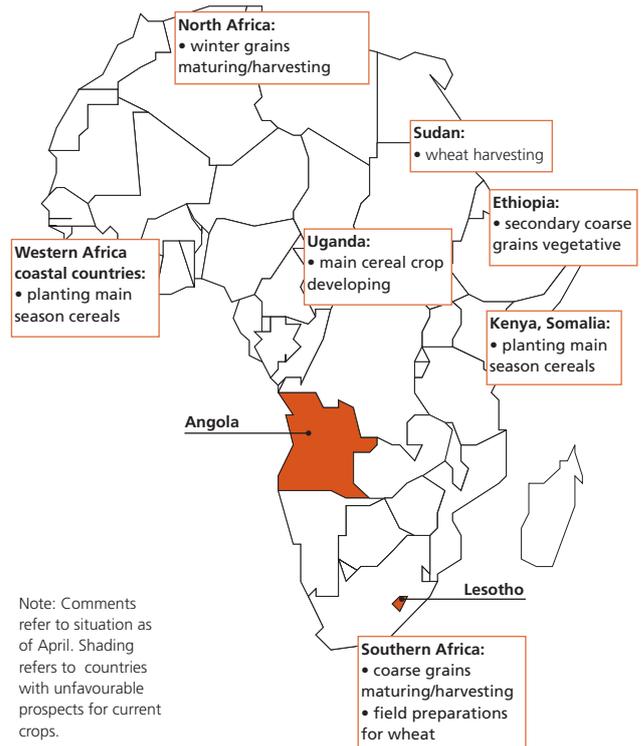
## Africa

### North Africa

Harvesting of the winter grains (mainly wheat and barley), which make up the bulk of the subregion's cereal crop is underway. Prospects are very favourable for the 2006 cereal production reflecting above-average precipitation throughout the season across most of the subregion. FAO forecasts the aggregate output of wheat in the subregion at 17.4 million tonnes, 20 percent up from the previous year's drought-reduced level, while that of barley is put at 4.2 million tonnes, an increase of almost 70 percent, both results being well above the recent average. In **Egypt**, the largest producer in the subregion, cereal crops are mostly irrigated and yields remain relatively constant. An increasing trend in production over the past few years has thus come mostly from expansion in the area dedicated to cereal crops. The area sown to wheat, which is the most profitable winter crop, is officially estimated to have expanded again last autumn, and output is expected to rise further from the bumper level of almost 8.2 million tonnes already achieved in 2005. In **Morocco**, aside from the exceptionally favourable weather conditions, government policy to encourage investment in agriculture, in particular, increased subsidies to farmers to expand mechanization and use of high quality seeds, is reported to have also made a significant contribution to improved production prospects this year.

### Western Africa

In Western Africa, normal to above normal rains in March and early April in the coastal areas along the Gulf of Guinea provided adequate soil moisture for planting of the 2006 main season cereal crops, which is underway. In the Sahel countries, planting is scheduled to begin in May. The 2005 aggregate cereal crop of the region was estimated at record levels in both the coastal and the Sahel countries mainly reflecting favourable growing conditions during the season. In the Sahel countries, production recovered sharply from the previous year's drought and locust affected harvest. However, relatively high food prices are reported in several countries with negative effects on access to food by poor households, including those living in chronically food-



deficit agro-pastoral areas of Niger. Consequently, in spite of the improved food supply situation in the subregion in 2005/06, assistance is still needed mostly for income generating and asset reconstitution activities in order to strengthen access to food by vulnerable households. In Guinea, Liberia and Sierra Leone, humanitarian assistance is also provided to internally displaced people and refugees.

### Central Africa

Rainfall has been adequate since the start of the growing season, allowing land preparation and planting of the 2006 cereal crops to progress in **Cameroun** and the **Central African Republic**. In the latter country, however, agricultural recovery and food security continue to be hampered by persistent insecurity and inadequate availability of agricultural inputs, notably in northern parts. In the **Democratic Republic of Congo**, weather has been generally favourable but security problems have been responsible for worsening the food security situation especially in the eastern and north-eastern provinces.

## Eastern Africa

The 2006 main season cereal crops are being planted and/or maturing in Somalia, Kenya and Uganda, while in Ethiopia, Eritrea and Sudan sowing is not due to commence for about a month. Harvesting of the 2005/06 secondary season crops is completed in most countries of the region except in Ethiopia, where the "belg" crops are scheduled to be harvested from June, and Sudan where harvesting of the wheat crop is underway. Favourable rains were recently reported along the coast of Kenya, northern Tanzania, Lake Victoria Basin and the belg producing areas of Ethiopia. These rains were a welcome respite but it is too early to know if there has been any significant benefit on agricultural production. By contrast, below average rainfall, so far, in the drought-affected areas of southern Somalia, northern and north-eastern Kenya, and south-eastern Ethiopia is a cause for serious concern. The outlook for the March to May 2006 rainfall point

to an increased likelihood of near to below normal rainfall over much of the severely affected areas.

FAO's latest estimates put the subregion's aggregate 2005 cereal output close to 30 million tonnes, about 19 percent higher than in the previous year and well above the average of the past five years. This mainly reflects generally favourable weather conditions in major growing areas. In **Ethiopia**, cereal output increased by 15 percent on the previous year's good level. In **Sudan**, the 2005/06 cereal crop increased by nearly 58 percent compared to the drought-affected 2004 harvest as a result also of good rains and also improved security in southern areas. In **Tanzania** and **Uganda**, the aggregate 2005 cereal crops are estimated slightly above the previous year's good levels. In **Kenya**, the 2005/06 cereal crop increased 29 percent above the previous year to some 3.4 million tonnes. In **Eritrea**, the 2005 cereal output, currently estimated at about 150 000 tonnes is nearly double the previous

**Table 4. Africa cereal production (million tonnes)**

	Wheat			Coarse grains			Rice (paddy)			Total Cereals		
	2004	2005 estim.	2006 f'cast	2004	2005 estim.	2006 f'cast	2004	2005 estim.	2006 f'cast	2004	2005 estim.	2006 f'cast
<b>Africa</b>	<b>22.4</b>	<b>20.1</b>	<b>22.3</b>	<b>82.2</b>	<b>94.1</b>	<b>88.6</b>	<b>19.4</b>	<b>20.8</b>	<b>21.3</b>	<b>123.9</b>	<b>135.0</b>	<b>132.3</b>
<b>North Africa</b>	<b>17.2</b>	<b>14.6</b>	<b>17.4</b>	<b>12.9</b>	<b>10.3</b>	<b>12.0</b>	<b>6.4</b>	<b>6.2</b>	<b>6.2</b>	<b>36.5</b>	<b>31.0</b>	<b>35.7</b>
Egypt	7.2	8.2	8.7	7.8	7.7	7.8	6.4	6.1	6.2	21.3	22.0	22.6
Morocco	5.5	3.0	5.0	3.0	1.3	2.7	-	-	-	8.6	4.3	7.7
<b>Western Africa</b>	<b>0.1</b>	<b>0.1</b>	<b>0.1</b>	<b>28.1</b>	<b>37.4</b>	<b>36.6</b>	<b>8.1</b>	<b>9.1</b>	<b>9.6</b>	<b>36.2</b>	<b>46.6</b>	<b>46.3</b>
Nigeria	0.1	0.1	0.1	13.7	19.6	19.6	3.5	4.2	4.8	17.3	23.9	24.5
<b>Central Africa</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>2.9</b>	<b>3.1</b>	<b>3.0</b>	<b>0.4</b>	<b>0.4</b>	<b>0.4</b>	<b>3.3</b>	<b>3.5</b>	<b>3.4</b>
<b>Eastern Africa</b>	<b>3.2</b>	<b>3.3</b>	<b>2.6</b>	<b>20.5</b>	<b>24.9</b>	<b>22.7</b>	<b>1.2</b>	<b>1.4</b>	<b>1.3</b>	<b>25.0</b>	<b>29.6</b>	<b>26.6</b>
Ethiopia	2.3	2.4	1.7	7.9	9.5	8.3	-	-	-	10.2	11.9	10.0
Sudan	0.4	0.4	0.4	3.1	5.2	4.3	-	-	-	3.5	5.6	4.8
<b>Southern Africa</b>	<b>1.9</b>	<b>2.1</b>	<b>2.1</b>	<b>17.8</b>	<b>18.5</b>	<b>14.4</b>	<b>3.3</b>	<b>3.6</b>	<b>3.8</b>	<b>23.0</b>	<b>24.2</b>	<b>20.3</b>
Madagascar	-	-	-	0.4	0.4	0.4	3.0	3.4	3.5	3.4	3.8	3.9
South Africa	1.7	1.9	1.9	10.3	12.3	6.7	-	-	-	12.0	14.1	8.6
Zimbabwe	0.1	0.1	0.1	1.1	0.7	1.0	-	-	-	1.2	0.8	1.1

Note: Totals computed from unrounded data.

year's poor crop and about one-third above average. However, even in good years, Eritrea produces only a fraction of its total food requirements and largely depends on imports. By contrast, in **Somalia**, a poor secondary "deyr" season was preceded by the worst main "Gu" harvest in the last decade. Latest estimates put the aggregate cereal output in 2005/06 at 146 000 tonnes, nearly 50 percent below the previous year.

Despite the bumper aggregate 2005 cereal crop, large areas in the subregion face severe drought conditions which, coupled with the effects of past and ongoing conflicts, have put millions of people on the brink of starvation. Food problems are particularly serious in southern Somalia, and pastoral areas of northern and eastern Kenya, and south-eastern Ethiopia. The drought which has affected contiguous areas of these three neighbouring countries has increased the vulnerability of mobile pastoralist communities as they have found it difficult to find water and pasture in the region, including across international borders. Responses to mitigate the effects of the drought need to have a regional perspective to avoid large-scale population movements from areas where there is no response to areas where assistance is being provided. With the drought, competition for scarce resources has fuelled violence among rival pastoral tribes forced to share a dwindling supply of water and grazing land. Although recent rains have alleviated somewhat the situation, humanitarian

assistance is still necessary for large numbers of people affected by several months of food and water shortages. The international response so far is insufficient, particularly the non-food assistance. Increased interventions in food, water, health and nutrition, and livestock needs are urgently required.

Current estimates of the number of vulnerable people (both chronic and acute) in the countries affected by the current drought in the Horn of Africa are given in Table 5.

In the Great Lakes, in **Burundi** and **Rwanda**, planting of the main season (2006B) cereal and other food crops, usually carried out from February to April, was delayed due to the late start of the rains in the region. Heavy rains were received in March, continuing well into April. Production of the 2006A season crops, already harvested in January, was reduced compared to the previous year due to prolonged dry spells during the growing season in October-November.

### Southern Africa

In Southern Africa, harvest of the 2006 main season cereal crop has started in several areas, while in others it is scheduled for May. Prospects are generally good in most countries. Rains during the growing season, especially during the critical months of January and February, have been very favourable for crop development. In particular, central parts of the region received abundant precipitation. However, erratic rains, including some dry spells, were experienced in parts of South Africa, Lesotho, Swaziland, as well as in northern areas of Malawi, Zambia and Mozambique. In the western edge of the subregion, dry weather affected cereal crops in south west Angola. At the same time, leaching of nutrients due to excessive rains and water logging conditions, at certain periods, has been a problem in parts of Mozambique, Malawi, Zimbabwe, Namibia, and Angola. Estimated cumulative rainfall during the first half and the second half of the season is shown in Figures 3 and 4. Overall good rains notwithstanding, this year's crop yields will also depend on availability of key inputs (fertilizer, chemicals and/or labour for weeding, etc.).

Despite the generally favourable growing conditions this season, the aggregate 2006 coarse grain crop is forecast by FAO to decline by some 22 percent from 2005 to a reduced level of some 14.4 million tonnes. This reflects a sharp decrease in

**Table 5. Horn of Africa: estimates of vulnerable population in drought-affected countries**

	<b>Population at risk (Chronic + Acute)</b>	<b>Of which: Acute (Relief) current drought emergency (as of early April 2006)</b>
Ethiopia	10 million	2.6 million (of which 1.7 million in south-eastern pastoral areas.)
Kenya	3.5 million	3.5 million
Somalia	2.1 million	1.7 million
Djibouti	150 000	80 000
<b>Total</b>	<b>15.75 million</b>	<b>7.88 million</b>

South Africa, by far the largest producer of the subregion, which more than offset improved harvests in most other countries. Excluding South Africa, however, the aggregate 2006 coarse grain crop increases by almost a quarter. Output of the major staple maize is forecast at 6.9 million tonnes, the largest crop since 2000, about 27 percent up from last year's drought-affected output and 21 percent above the five-year average (see Table 6). In **South Africa**, a contraction of 39 percent in the area planted with maize, caused primarily by low maize prices in 2005, will result in a severely reduced crop this year. Output is forecast to decline by over 5 million tonnes from the year before. Nevertheless, due to a bumper harvest in 2005, current stocks (end of March) are estimated at a record level of over 4.5 million

tonnes and food availability at national and regional levels is not likely to be negatively affected by the low harvest. Production of maize is also forecast to decline in **Angola** as a result of dry spells in the main south-western cereal growing area, which has been experiencing drought conditions since planting in October last year. The drought has also negatively affected pastures and cattle conditions. In order to get a more precise evaluation of the situation, an FAO/WFP Crop and Food Supply Assessment Mission (CFSAM) is in Angola in May. By contrast, substantial recovery in the maize and cereal output from the reduced crop of the previous year is expected in Botswana, Malawi, Zambia, Namibia, and Mozambique. In **Zimbabwe**, early forecasts for the maize crop point also to a substantial recovery from last year's

Figure 3. Seasonal cumulative rainfall from 1 October to 31 December 2005 as percentage of normal (1961-90) for the SADC region

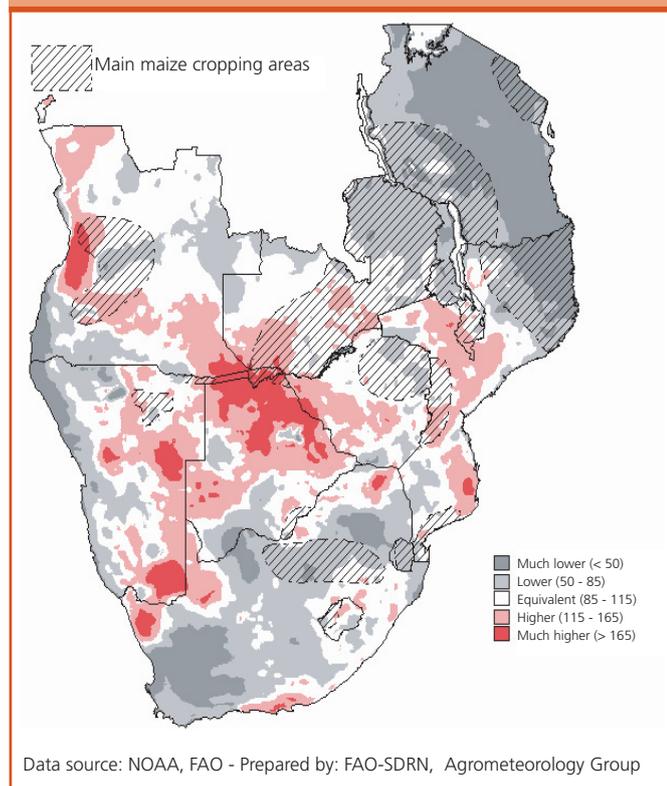
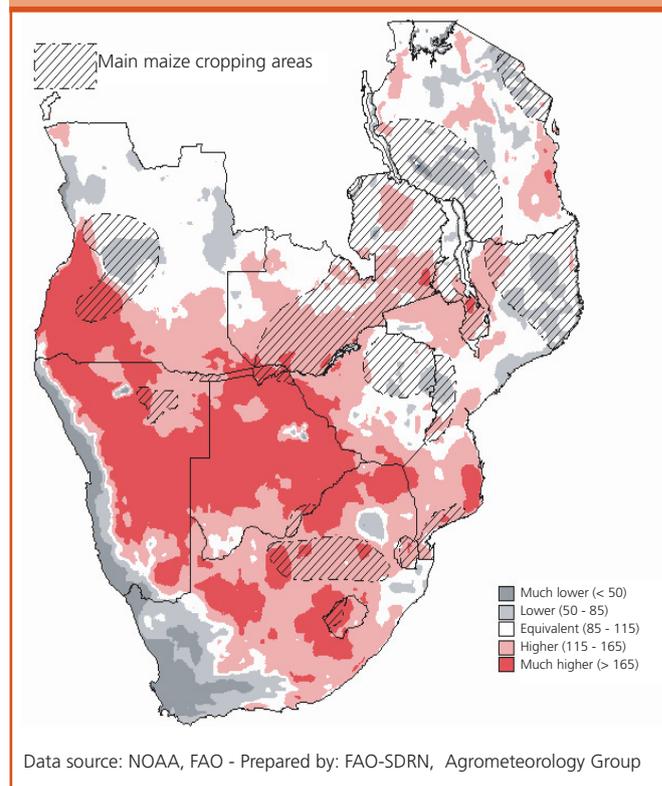


Figure 4. Seasonal cumulative rainfall from 1 January to 31 March 2006 as percentage of normal (1961-90) for the SADC region



drought affected production, which, however, will remain well below the levels before the persisting economic crisis. Despite a good rainfall season and adequate seed availability, shortages of fertilizers, as a result of limited domestic production and lack of significant imports due to scarce foreign currency, coupled with shortages of mechanical and human labour, are expected to have negative impact on maize yields. In Madagascar and Swaziland, preliminary estimates suggest no significant changes in 2006 cereal production from the above average levels of last year. In Lesotho, production will remain around the poor levels of the past three years.

Prospects for planting of the 2006 wheat crop from May are favourable. In **South Africa**, which accounts for about 90 percent of the subregion's production, planting intentions indicate a slight increase in the area which, however, will remain below the five-year average. The increase in plantings reflects higher domestic and international prices since the beginning of the year, as well as

improved residual soil moisture in growing areas.

The "hungry season" has reached its peak in southern Africa, with household food stocks nearly exhausted. However, early harvest or use of green maize is expected to provide some relief before the main harvest becomes available. Following last year's poor crop, nearly 12 million people in the subregion have been affected by food insecurity, including a large number in a chronic situation. Emergency assistance is being provided in Zimbabwe, Malawi, Swaziland, Lesotho, Mozambique and Zambia. The overall cereal import requirement of the subregion, excluding South Africa, for the 2005/06 marketing year (April/March), was estimated at about 5.2 million tonnes, comprising 700 000 tonnes of food aid. Virtually all the food aid requirements have been covered by pledges and on-going distributions are contributing to improve the food situation of the most vulnerable households. However, commercial imports of cereals, estimated at some 3.4 million tonnes by the end of April, fall short of requirements, especially those of wheat and rice. Due to the slow pace of commercial and food aid imports, prices of maize have been on the rise in several countries in past months. In particular, food shortages in Zimbabwe and Malawi, are reflected in rising staple food prices. In **Zimbabwe**, the maize price in the parallel market was Z\$600 000/20kg in first week of March up from about Z\$400 000 from the month before. Prices of most cereal based goods have gone up by about one-third in about one month keeping in track with the national inflation rate of over 900 percent in March. Food aid distributions in February reached 54 000 tonnes and the same levels were planned for March and April. In **Malawi**, despite substantial imports of maize through informal cross-border trade, prices of maize are three times above their levels at the beginning of the marketing year. Maize quotations have also increased sharply in Zambia. Due to the start of early harvest, maize prices in most countries have either stabilized or began to fall in April.

Prospects for the regional food supply in the forthcoming 2006/07 marketing year look relatively favourable. In **South Africa**, closing maize stocks on 30 April 2006 are projected at about 4 million tonnes and total domestic supply (2006 production plus the carry over stocks) is forecast to be about 10 million tonnes. Given the estimated total domestic utilization of about 8.4 million tonnes (including about 600 000 tonnes of strategic reserves)

**Table 6. Southern Africa maize production - forecast for 2006 (000 tonnes)**

	2001-05 av.	2005 estim.	2006 f'cast	2006 over 2005 (%)	2006 over av. (%)
<b>Southern Africa</b>	<b>15 463</b>	<b>17 125</b>	<b>13 256</b>	<b>-23</b>	<b>-14</b>
<b>Southern Africa excl. South Africa</b>	<b>5 667</b>	<b>5 409</b>	<b>6 879</b>	<b>27</b>	<b>21</b>
<b>Increase from 2005</b>					
Botswana	7	4	10	150	43
Malawi	1 623	1 253	1 950	56	20
Namibia	33	41	45	10	36
Mozambique	1 252	1 403	1 500	7	20
Zambia	906	866	1 200	39	32
Zimbabwe	844	550	950	73	13
<b>No significant change from 2005</b>					
Lesotho	103	92	92	0	-11
Madagascar	274	350	350	0	28
Swaziland	76	82	82	0	8
<b>Decrease from 2005</b>					
Angola	549	768	700	-9	28
South Africa	9 796	1 1716	6 377	-46	-35

in South Africa, the potential exportable surplus is likely to be around 1.6 million tonnes. This surplus would be enough to cover the aggregate maize import requirements of other countries of the subregion, tentatively estimated at about 1.5 million tonnes (based on the preliminary forecast of maize production for 2006 and the historical utilization in the region). Prices of white maize on SAFEX have increased substantially since planting time last November and by early April they had almost doubled their level of a year ago. (see Table 7). The increase was partly a recovery from the price slump in the previous year and partly a reflection of generally tight supplies in the subregion. The increase in price is lower in US dollar terms due to the appreciation of the South Africa Rand since mid November 2005. Further, in anticipation of the reduction in the domestic maize production in South Africa, contrary to the usual post-harvest trend, the SAFEX futures price of white maize is firming up by moving from R1099/t in April to R1163/t in December 2006. However, the ample carryover stocks and the anticipated improved harvest in the other countries of the subregion are likely to limit further increases in prices.

**Table 7. Safex white maize prices**

	April 2005	Nov. 2005	April 2006	Change: April 2006 over Nov. 2005	Change: April 2006 over April 2005
Rand/tonne	550	829	1 099	32.6%	99.8%
US\$/tonne	93.96	127.25	175.96	38.3%	87.3%

### AFRICA: Countries in crisis requiring external assistance and main reasons (24)

#### Exceptional shortfall in aggregate food production/supplies

Burundi	Civil strife, IDPs, returnees and dry spells
Eritrea	Drought, IDPs, returnees, high food prices
Lesotho	Multiple years drought, HIV/AIDS impact
Somalia	Drought, civil strife
Swaziland	Multiple years drought, HIV/AIDS impact
Zimbabwe	Deepening economic crisis

#### Widespread lack of access

Liberia	Post-conflict recovery period, IDPs
Mauritania	After effects of 2004 drought and locusts
Niger	After effects of 2004, avian influenza
Sierra Leone	Post-conflict recovery period, refugees

#### Severe localized food insecurity

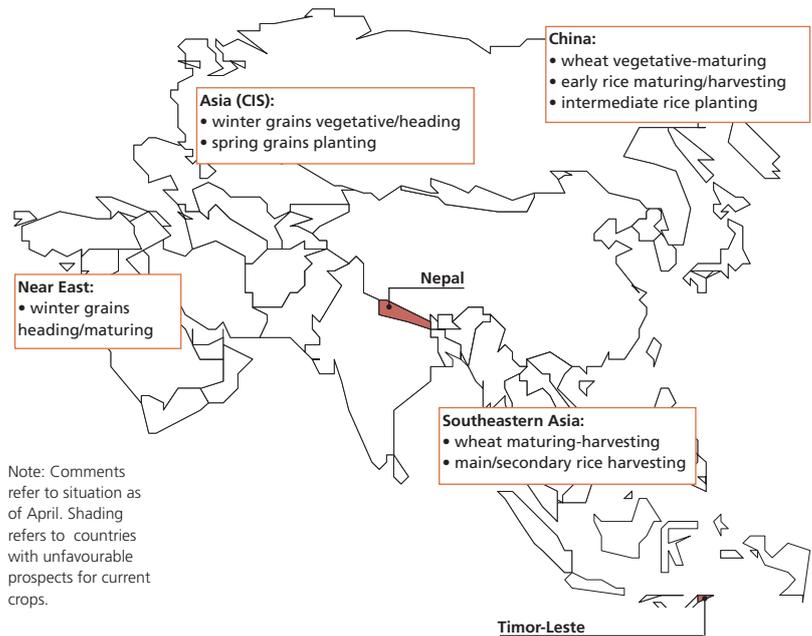
Angola	Resettlement of returnees, adverse weather in parts
Burkina Faso	After effects of 2004 drought and locusts, avian influenza
Chad	Refugees, insecurity
Central Afr. Rep.	Recent civil strife, insecurity
Congo, Dem. Rep.	Civil strife, IDPs and refugees
Congo Rep. of	IDPs, refugees
Côte d'Ivoire	Civil strife, IDPs, avian influenza
Ethiopia	IDPs, low incomes, drought in Ogaden region
Guinea	IDPs, refugees
Kenya	Drought in parts
Mali	After effects of 2004 drought and locusts
Sudan	Civil strife, returnees, drought in parts
Tanzania, U.R.	Drought in parts
Uganda	Civil strife, IDPs

Note: For explanation of terminology see back cover.

## Asia

### Far East

Harvesting of the 2006 main winter wheat and first rice crops is underway or about to start in several countries of the subregion, while planting of spring coarse grains will begin soon. Prospects for the 2006 wheat crop are overall favourable reflecting generally satisfactory growing conditions. However, in **India**, the outlook for the harvest has deteriorated in the past month due to abnormally low temperatures and untimely rains. The 2006 wheat production is likely to be lower than earlier anticipated, although still average. Given the outlook for a smaller crop, as well as the depletion of stocks, the Government is planning to import 2.5 to 3 million of wheat in the 2006/07 marketing year. This will change India's trade position from a large exporter of wheat in the last years to a large importer. In **China**, the main winter wheat and the early (secondary) paddy crop are maturing in the major growing regions and latest forecast points to a slight increase in outputs from the above-average levels of last year. This reflects better yields and somewhat larger plantings for the third consecutive year in response to higher producer prices and government support policies. The latter include reduced agricultural taxes, direct subsidies to farmers and minimum support prices. In **Pakistan** a good wheat crop is expected, although lower than last year's bumper harvest, as a result of increased availability of irrigation water, good management practices and increased applications of fertilizers and herbicides. By contrast, in **Bangladesh** wheat production this season is forecast to fall by 18 percent, despite a larger area planted, due to dry weather and shortage of fertiliser. However, the outlook for the irrigated "boro" paddy crop, being harvested, is positive. In **Nepal**, after a downturn in 2005 paddy production affected by drought, this season's wheat production is officially forecast to decline 10 percent from the 2005 crop, reflecting dry weather. In southern parts of the subregion, where



harvesting of the main rice crops is underway or near completion, prospects are favourable in Indonesia, Sri Lanka and Cambodia, and the outputs are expected to be around the above-average levels of the previous year. In **Vietnam**, transplanting of the main winter-spring crop is complete and another large crop is officially forecast. Harvesting of the dry season (secondary) paddy crop has started in Philippines and Thailand, with good crops expected in both countries, reflecting adequate weather conditions during the growing season.

The overall food supply situation is satisfactory after last year's bumper cereal harvests in most countries of the subregion, including China, India, Bangladesh, Pakistan, Indonesia and DPR Korea. In the latter, the 2005 cereal crop was the largest in ten years, reflecting favourable weather, coupled with strong government support in mobilizing workers from the cities at critical periods of the season and providing seeds and other inputs. However, in spite of this positive development, chronic food insecurity remains widespread. The Government stopped all humanitarian aid by the United Nations on 31 December

2005 and accepts only assistance that addresses medium and long-term needs. The food situation gives cause for concern in **Mongolia** where the 2005 wheat crop, virtually the only cereal produced in the country, declined by some 44 percent from the previous year's level. The 2005/06 (October/September) cereal import requirements are estimated at 323 000 tonnes. Some food aid in wheat has reportedly been donated by Japan and the United States of America, and more food aid imports are anticipated from the Russian Federation and China. Similarly, in **Timor-Leste** the 2005 production of the staple maize and rice crops was severely reduced by drought followed by floods and strong winds during the harvest period of February 2006, especially in the district of Oecussi. In **Nepal**, the tight food supply situation following last year's drought-affected rice crop has been aggravated by armed conflict between the Government and rebel forces. In **Pakistan**, WFP continue to provide food aid to some 670 670 000 people left homeless by the severe earthquake of October 2005. The Government and the humanitarian community are moving from emergency relief

to recovery assistance in the areas hit by the earthquake. Recovery activities also continue in **Indonesia's Aceh Province** and Nias Island, where some 29 000 hectares out of 37 500 hectares damaged by the tsunami disaster of December 2004 have been rehabilitated. However, 300 000 Internally Displaced Persons still depend on food aid and emergency employment schemes. In **Sri Lanka**, WFP will extend its operations through 2007 for some 347 000 people affected by the tsunami, with focus on long-term recovery rather than free food distribution.

### Near East

Precipitation in March and early April in several countries, after a predominantly dry winter, was beneficial to winter grains for harvest from May. The development of the winter crops at the end of January early February 2006 was delayed compared with last year in most countries of the subregion. In **Turkey** and the **Islamic Republic of Iran**, the largest producers in the subregion, harvest of the winter wheat and barley crops is scheduled from June. Early prospects point to another above -average output.

**Table 8. Asia cereal production (million tonnes)**

	Wheat			Coarse grains			Rice (paddy)			Total Cereals		
	2004	2005 estim.	2006 f'cast	2004	2005 estim.	2006 f'cast	2004	2005 estim.	2006 f'cast	2004	2005 estim.	2006 f'cast
<b>Asia</b>	<b>255.0</b>	<b>266.2</b>	<b>268.0</b>	<b>230.0</b>	<b>237.9</b>	<b>239.6</b>	<b>551.6</b>	<b>567.4</b>	<b>573.8</b>	<b>1 036.6</b>	<b>1 071.5</b>	<b>1 081.4</b>
<b>Far East</b>	<b>186.6</b>	<b>193.0</b>	<b>195.4</b>	<b>205.8</b>	<b>212.6</b>	<b>214.5</b>	<b>535.7</b>	<b>550.8</b>	<b>557.8</b>	<b>928.1</b>	<b>956.3</b>	<b>967.7</b>
Bangladesh	1.3	1.1	0.9	0.1	0.1	0.1	37.7	41.1	41.4	39.1	42.3	42.4
China	92.0	96.6	99.1	140.4	144.3	144.9	180.5	183.4	186.6	412.9	424.3	430.6
India	72.1	72.0	73.1	31.9	33.4	34.3	128.0	131.8	134.0	231.9	237.2	241.4
Indonesia	-	-	-	11.2	12.4	12.4	54.1	54.1	54.3	65.3	66.5	66.6
Pakistan	19.5	21.6	20.5	3.3	3.0	3.0	7.5	8.2	8.0	30.3	32.8	31.5
Thailand	-	-	-	4.4	4.5	4.4	28.5	29.9	30.5	33.0	34.4	34.9
Viet Nam	-	-	-	3.4	3.8	4.0	36.2	35.8	36.5	39.6	39.5	40.5
<b>Near East</b>	<b>45.9</b>	<b>48.2</b>	<b>48.6</b>	<b>19.6</b>	<b>20.9</b>	<b>20.8</b>	<b>4.3</b>	<b>4.6</b>	<b>4.7</b>	<b>69.8</b>	<b>73.7</b>	<b>74.2</b>
Iran (Islamic Republic of)	14.0	14.5	14.5	4.4	4.4	4.6	3.1	3.3	3.4	21.5	22.2	22.5
Turkey	20.7	20.2	21.0	12.2	12.8	12.6	0.5	0.5	0.6	33.4	33.6	34.2
<b>CIS in Asia</b>	<b>21.5</b>	<b>24.0</b>	<b>22.9</b>	<b>4.4</b>	<b>4.2</b>	<b>4.1</b>	<b>0.7</b>	<b>0.6</b>	<b>0.7</b>	<b>26.5</b>	<b>28.8</b>	<b>27.8</b>
Kazakhstan	9.9	11.5	10.9	2.4	2.3	2.3	0.3	0.3	0.3	12.7	14.1	13.5

Note: Totals computed from unrounded data.

In **Afghanistan**, rains and snow in early April in north-western and central parts, following below -average precipitation in the previous months, provided relief to the 2006 main wheat crop, to be harvested from May. However, dry weather persists in extreme southern areas. Relatively warm weather in previous months has also caused early snow -melt, which may result in water deficit in the streams and reservoirs for the much needed irrigation during summer and late spring. More rains are needed in the coming weeks to avoid yield reductions. A total of 4.8 million vulnerable people are targeted for assistance under the current WFP Protracted Relief and Recovery Operation (PRRO). In **Iraq**, recent reports indicate a significant rise in population displacement with between 30 000 to 40 000 people fleeing their homes in the past few weeks as a result of the ongoing sectarian violence. Most of the displacement has occurred in Baghdad, Anbar and Diyala governorates. In another development, the Ministry of Trade has cancelled several items provided by a monthly food-ration programme. Subsidies on staples including salt and beans have been cut, but the trade ministry will continue supplying families with four essential items: sugar, rice, flour and cooking oil. As a result of the reduction of the monthly food ration, the price of some staple food has increased. Families have relied on government-subsidized ration programmes ever since the application of United Nations-imposed sanctions on Iraq in 1991. Nearly 96 percent of the country's 28 million people receive food rations on a monthly basis.

### Asian CIS

Prospects for the 2006 winter cereal crops, to be harvested from July, are favourable. Above-average rains and snowfall in the past months provided adequate moisture for the developing crops and ensured sufficient water for the extensive irrigation systems of the region. Irrigation in the region, except the new lands of Kazakhstan, is essential for crop production. Aggregate winter cereal harvest, which accounts for roughly half of the annual production, is tentatively forecast at about 13 million tonnes, slightly down on last year's above -average harvest. In **Kazakhstan**, by far the largest producer of the subregion, the outlook for the winter crops is satisfactory reflecting good rains and a generally mild winter, except in some areas in the Northern

territories. However, spring and early summer precipitation will be determinant factors in the final output. Exports by Kazakhstan are crucial for the food security of other food-deficit countries of the region. In 2005/06 marketing year cereal exports are projected at about 4.4 million tonnes, mostly wheat, and the country reportedly has sufficient carry-over stocks to be able to export similar quantities during the 2006/07 marketing year. In **Uzbekistan**, the main winter wheat crop is reported in good condition but output is expected to be lower than the above-average crop of last year. The country has made significant efforts to increase cereal production over the past few years. It has not only become virtually food self-sufficient but has also been able to export some half a million tonnes of wheat per year over the past three years. In **Turkmenistan**, good precipitation in winter benefited winter wheat, while adequate snow cover in **Tajikistan** is seen to ensure adequate irrigation water throughout summer. Prospects for the winter crops are also satisfactory in **Azerbaijan, Kyrgyzstan**.

### ASIA: Countries in crisis requiring external assistance and main reason (9)

#### Widespread lack of access

Afghanistan	Civil strife, IDPs, returnees and avian influenza
Iraq	Conflict and insecurity, IDPs
Korea, DPR	Economic constraints
Mongolia	Adverse weather conditions
Nepal	Civil strife
Timor-Leste	Adverse weather conditions, civil strife

#### Severe localized food insecurity

Indonesia (Aceh Prov.)	After effects of the Tsunami
Pakistan	After effects of the Kashmir earthquake
Sri Lanka	After effects of the Tsunami, insecurity

Note: For explanation of terminology see back cover.

## Latin America and the Caribbean

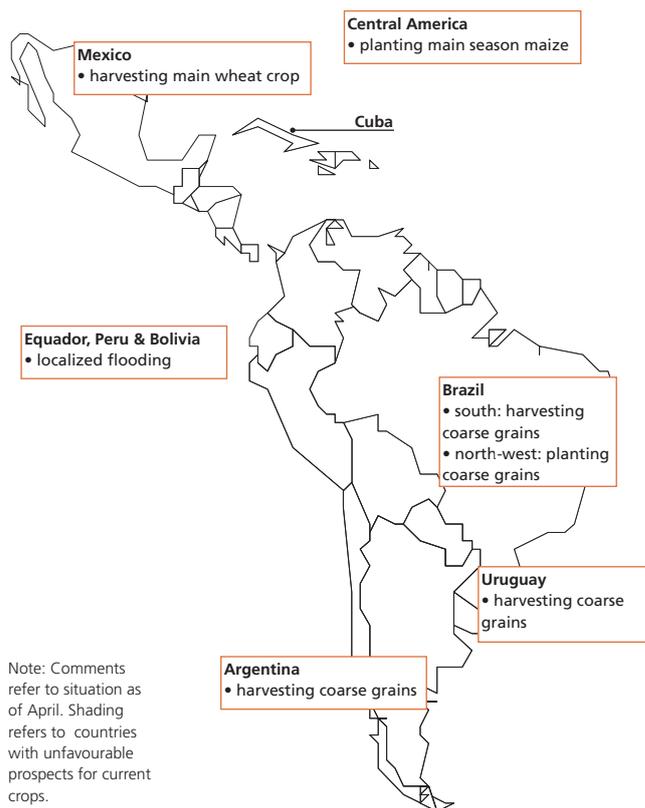
### Central America and the Caribbean

Harvesting of the 2006 main irrigated wheat crop is underway in **Mexico**, virtually the sole producer in the subregion. Early official forecasts point to a good production of some 3 million tonnes, an increase of 10 percent from the previous year, due to an expansion in area planted and adequate availability of irrigation water in north-western producing states of Sonora and Baja California. Planting of the 2006 main season coarse grain crops, mainly maize, is expected to start at the beginning of May with the arrival of first seasonal precipitations in Mexico and other Central American countries.

The 2005 aggregate cereal output of the subregion is estimated at 35.7 million tonnes, well below the previous year's level and some 900 000 tonnes below the average of the last five years. The decline in production reflects a reduced coarse grain crop in Mexico, affected by insufficient rains during the growing season, which more than offset satisfactory outputs in most other countries. The reduced maize output in Mexico, coupled with an increase in demand from the domestic feed industry in the country, is expected to result in significantly higher maize imports in 2005/06 (July/June). In Guatemala, El Salvador, Nicaragua and Honduras, food assistance from the international community continues to be delivered to vulnerable rural families and communities affected by hurricanes during the second half of 2005. Food aid is also distributed to vulnerable populations in Haiti, where the food situation continues to be tight due to civil conflict and declining agricultural productivity.

### South America

Harvesting of the 2006 main season coarse grain and rice crops is underway. Preliminary estimates indicate an aggregate coarse grain production of about 72 million tonnes, slightly below last year's average level. This reflects a widespread reduction in planted area and lower yields due to a mid-season dry spell, only partially compensated by a better crop production in Brazil. In **Argentina**, where harvest of maize crop is delayed due to heavy rains during last weeks of March and to the priority given by farmers



to harvesting of soyabeans, the 2006 maize crop production is officially forecast at 13.8 million tonnes, well below the record of 20.5 million tonnes obtained in 2005. Area planted declined by 10 percent in response to low prices, higher production costs

### LATIN AMERICA AND THE CARIBBEAN: Countries in crisis requiring external assistance and main reason (5)

#### Widespread lack of access

Haiti Insecurity, constraints to agriculture

#### Severe localized food insecurity

Colombia Civil strife, IDPs  
 Cuba Lower planted area and yields  
 Guatemala After effects of Hurricanes  
 Honduras After effects of Hurricanes

Note: For explanation of terminology see notes on back cover.

and higher export taxes, while yields were reduced by prolonged dry weather. As a result export prices of Argentina maize are well above their levels of a year earlier. In Uruguay, 2006 maize production is expected to decrease substantially from last year due to inadequate soil moisture, in particular in northern departments. In **Brazil**, the area planted to the main season maize crop increased 11 percent in response to unattractive prices for soyabeans and technical need for rotation. In addition, yields are expected to recover from last year's drought-reduced levels. Aggregate 2006 maize crop production (first and second seasons) is tentatively forecast at about 41.9 million tonnes, 20 percent higher than in 2005 and above average. By contrast, Brazil's paddy crop, which accounts for some 80 percent of the production of the region, is forecast at 11.5 million tonnes, substantially below the 2005 record output but still average. This decrease is the result of a 20 percent contraction in planted area mainly induced by low domestic prices following the bumper harvest of the previous year. In **Paraguay**, dry weather conditions have seriously affected the 2006 soyabean crop, now being harvested. In particular, yields of early planted short-cycle varieties in north-western departments, which represent about half of national production, are estimated to be slightly below one tonne per hectare compared to the average of 2.6 tonnes per

hectare. Initial official production estimates of 5.5 million tonnes have been revised downward to 3.6 million tonnes, very similar to the previous two years' outputs that also suffered from limited water availability.

In Andean countries, an intense rainy season starting in early February has caused damages to infrastructure and localized losses of food and cash crops in some areas of Colombia, Ecuador, Bolivia and Peru. In **Colombia**, flooding and mudslides are reported in several Pacific and Andean departments, with losses of human lives and damages to rural and urban infrastructures, in particular in the Valle del Cauca department. In **Ecuador**, floods in February and March have negatively affected prospects for the 2006 paddy and maize crops, especially in the coastal provinces of Guayas, Los Ríos and Manbi where replanting activities are underway with the support of the Ministry of Agriculture and Livestock through distribution of seeds and fertilizers. In **Bolivia**, at the beginning of March, the Government has declared a national emergency in the Departments of La Paz, Beni and Potosi and appealed for international assistance. In **Peru**, the department of Tumbes in the north and the departments of Cusco, Puno and Arequipa in the south have been most affected.

**Table 9. Latin America and Caribbean cereal production (million tonnes)**

	Wheat			Coarse grains			Rice (paddy)			Total Cereals		
	2004	2005 estim.	2006 f'cast	2004	2005 estim.	2006 f'cast	2004	2005 estim.	2006 f'cast	2004	2005 estim.	2006 f'cast
<b>Latin America &amp; Caribbean</b>	<b>27.7</b>	<b>23.3</b>	<b>26.8</b>	<b>108.3</b>	<b>103.3</b>	<b>104.5</b>	<b>25.7</b>	<b>26.5</b>	<b>24.5</b>	<b>161.7</b>	<b>153.1</b>	<b>155.9</b>
<b>Central America &amp; Caribbean</b>	<b>2.4</b>	<b>3.0</b>	<b>3.1</b>	<b>33.5</b>	<b>30.3</b>	<b>32.4</b>	<b>2.4</b>	<b>2.5</b>	<b>2.6</b>	<b>38.3</b>	<b>35.7</b>	<b>38.1</b>
Mexico	2.4	3.0	3.1	29.7	26.2	28.5	0.3	0.3	0.3	32.4	29.6	31.9
<b>South America</b>	<b>25.3</b>	<b>20.2</b>	<b>23.7</b>	<b>74.8</b>	<b>73.0</b>	<b>72.2</b>	<b>23.3</b>	<b>24.1</b>	<b>22.2</b>	<b>123.4</b>	<b>117.4</b>	<b>118.1</b>
Argentina	16.0	12.1	16.0	18.7	24.7	17.1	1.1	1.0	1.0	35.7	37.7	34.2
Brazil	5.8	4.7	4.9	44.9	37.3	44.2	12.8	13.2	11.7	63.5	55.2	60.9
Colombia	-	-	-	1.6	1.7	1.6	2.7	2.6	2.6	4.4	4.3	4.3

Note: Totals computed from unrounded data.

## North America, Europe and Oceania

### North America

In the **United States**, the arrival of much-needed precipitation in the central and southern Great Plains in March benefited the winter wheat crop that has been stressed by prevailing drought conditions throughout the season so far. However, the condition of crops in the drought-affected areas, which account for a major proportion of the winter wheat production, remains below normal. According to the first Crop Progress and Condition Report for 2006, based on conditions as of late March, 31 percent of the crop was rated as very poor or poor compared to just 6 percent with such a low rating at the same time last year. The spring wheat planting has just started and conditions are reported to be generally favourable. Regarding planted areas, the official Prospective Plantings Report as issued at the end of March, indicates that, while the winter wheat plantings increased by 2 percent, the spring wheat area is expected to decrease

by about 1 percent, and in particular, the durum area could fall sharply. Based on these official planting indications, and assuming mostly average yields and area abandonment, with some adjustment for the impact of the winter drought, FAO forecasts total United States' wheat production in 2006 to decline to 55 million tonnes.

Some early coarse grains crops are already in the ground in southern parts, but the bulk of maize planting in the Corn Belt states starts in April. Early indications point to a significant decrease of 5 percent in maize plantings but a marginal increase for sorghum. Producers are expected to shift land out of maize to other less input intensive crops, such as soya beans, due to high fertilizer and fuel costs.

In **Canada**, planting of wheat is due to start in May and a predicted increase of about 8 percent in the non-durum wheat area is expected to be mostly offset by a sharp reduction in the durum area by 27 percent. Production is expected to remain close to the previous year's good level. Output of coarse grains may rise slightly as barley and oats plantings are expected to increase.

Table 10. North America, Europe and Oceania cereal production (*million tonnes*)

	Wheat			Coarse grains			Rice (paddy)			Total Cereals		
	2004	2005 estim.	2006 f'cast	2004	2005 estim.	2006 f'cast	2004	2005 estim.	2006 f'cast	2004	2005 estim.	2006 f'cast
<b>North America</b>	<b>84.6</b>	<b>84.1</b>	<b>81.8</b>	<b>346.6</b>	<b>325.4</b>	<b>308.3</b>	<b>10.5</b>	<b>10.1</b>	<b>9.2</b>	<b>441.7</b>	<b>419.6</b>	<b>399.3</b>
Canada	25.9	26.8	26.8	26.7	26.3	26.7	-	-	-	52.6	53.0	53.5
United States	58.7	57.3	55.0	319.9	299.1	281.6	10.5	10.1	9.2	389.1	366.5	345.8
<b>Europe</b>	<b>219.3</b>	<b>206.9</b>	<b>195.8</b>	<b>244.9</b>	<b>212.7</b>	<b>217.3</b>	<b>3.4</b>	<b>3.3</b>	<b>3.4</b>	<b>467.6</b>	<b>423.0</b>	<b>416.5</b>
EU	137.5	123.6	128.0	152.4	133.7	139.1	2.8	2.6	2.7	292.7	260.0	269.8
Romania	7.8	7.3	6.0	16.8	11.5	11.9	-	-	-	24.5	18.9	17.9
Serbia and Montenegro	2.8	2.0	2.2	7.2	7.2	6.9	-	-	-	9.9	9.2	9.1
<b>CIS in Europe</b>	<b>64.8</b>	<b>68.3</b>	<b>54.2</b>	<b>59.7</b>	<b>52.7</b>	<b>51.8</b>	<b>0.6</b>	<b>0.7</b>	<b>0.7</b>	<b>125.1</b>	<b>121.7</b>	<b>106.7</b>
Russian Federation	45.4	47.6	42.0	30.3	28.2	26.5	0.5	0.6	0.6	76.2	76.3	69.0
Ukraine	17.5	18.7	10.6	23.1	18.6	19.7	0.1	0.1	0.1	40.7	37.4	30.4
<b>Oceania</b>	<b>22.9</b>	<b>25.4</b>	<b>24.9</b>	<b>12.7</b>	<b>15.1</b>	<b>14.2</b>	<b>0.6</b>	<b>0.3</b>	<b>1.0</b>	<b>36.1</b>	<b>40.8</b>	<b>40.1</b>
Australia	22.6	25.1	24.5	12.1	14.5	13.6	0.5	0.3	1.0	35.3	39.9	39.1

Note: Totals computed from unrounded data.

## Europe

In the **EU**, early indications point to a larger cereal crop this year. Although spring planting still has to be completed in many countries, and several parts are encountering delays because of unseasonably cold and wet weather, the increase is already firmly predicted on the basis of the winter crop areas and conditions. Soil moisture levels for autumn planting of the winter cereals were satisfactory in most countries, including Spain and Portugal, affected by drought during the previous season.

France is expected to contribute to a large part of the overall increase in the EU cereal output this year. Its wheat and barley crops are both forecast to increase following larger plantings and improved yield prospects. Likewise, Spain is expected to substantially increase both its wheat and barley production. Elsewhere among EU members, Hungary and Poland are expected to increase their wheat output significantly, despite an uncertain start to the season because of delayed planting due to wet conditions in the former country and unusually dry conditions in the latter. Germany is expected to produce an above-average crop of barley this year following increased plantings. Throughout the EU, barley output may increase somewhat following abolition of EU price support payments for rye, which could shift some land into barley.

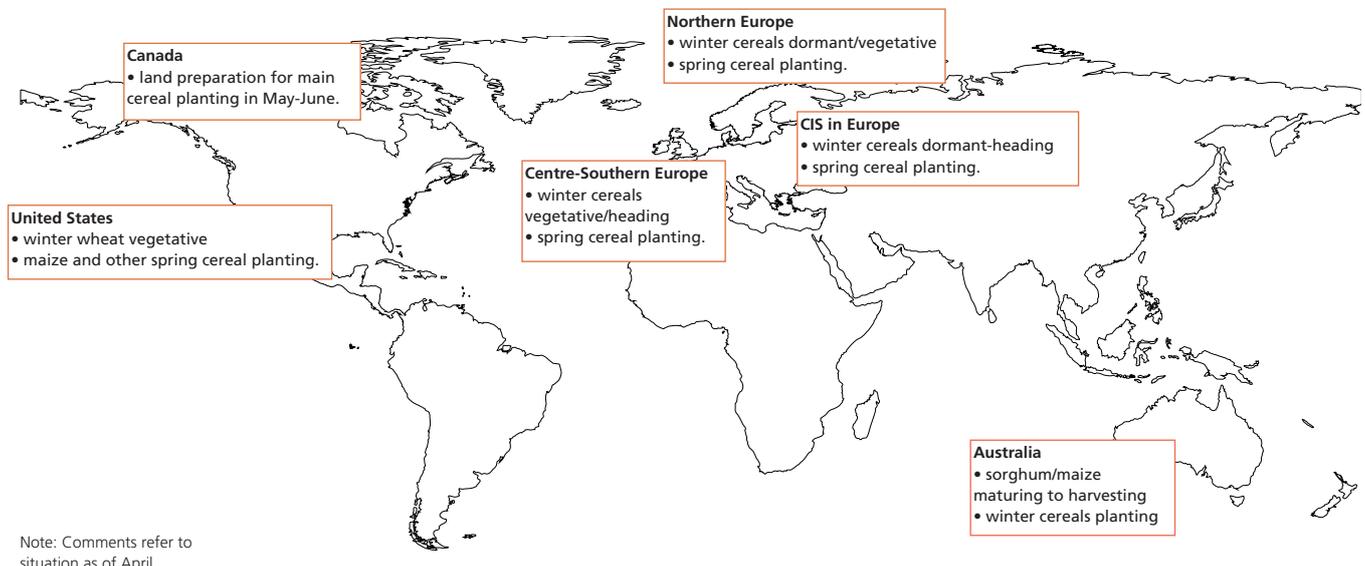
### EUROPE: Countries in crisis requiring external assistance and main reason (1)

Severe localized food insecurity

Russian Federation (Chechnya)      Civil strife

Note: For explanation of terminology see notes on back cover.

In the **Balkan Peninsula**, reduced cereal harvests are forecast for the two largest producing countries, Romania and Bulgaria. The area of winter grains sown last autumn in both countries was reportedly reduced as the delayed 2005 harvest hampered planting activity and weather conditions since then have been far from ideal. Temperatures in March remained below the seasonal averages slowing crop growth in many parts while heavy rainfall combined with rapid snowmelt across the area in late April led to severe flooding in several main wheat producing areas. The full impact of the flood damage on this year's cereal production is not yet known but could be significant in some parts. In the **European CIS** (The Russian Federation, The Ukraine, Belarus and Moldova), an abnormally cold winter has compromised significant areas planted with winter cereals. The effect has been particularly severe in the



Volga basin of the Russian Federation and some parts of the Ukraine and Belarus, where some 20 to 22 percent of the area planted has been compromised. Winterkill in these two main cereal producers of the subregion is usually between 5 and 8 percent. Much of this lost area is normally replanted with spring cereals but lack of sufficient farm inputs, in particular machinery, and prohibitive fuel prices make it unlikely that such a large area could be replanted. Aggregate winter cereal output in the region is tentatively forecast at about 42 million tonnes, some 27 percent down from the harvest in 2005. This will certainly compromise the subregion's ability to match the high cereal exports of the past few years but both the Ukraine and the Russian Federation have significant stocks from last year's good harvest and will continue to remain important players in the international grain market. During the current marketing year

cereal exports from the Russian Federation are estimated at over 11.6 million tonnes, while those from Ukraine are estimated at some 10.7 million tonnes of cereals, mainly wheat and barley.

### Oceania

In **Australia**, the harvest of the minor summer coarse grain crop (mostly sorghum) began in March. Latest forecasts point to a below-average output of about 1.8 million tonnes, substantially down from last year's good crop, because of lack of rainfall since December. Early indications for the 2006 wheat crop, to be planted later this year, point to a possible increase in plantings in response to favourable export prospects. However, a return to normal yields after last year's above-average levels could, nevertheless, result in a slightly smaller crop than last year's bumper 25 million tonnes.

Table A1. Estimated cereal import requirements of Low-Income Food-Deficit countries (000 tonnes)

	Marketing year	2004/05 or 2005			2005/06 or 2006			
		Actual imports		Total commercial and aid	Total import requirements (excl. re-exports) <sup>1</sup>	Import position <sup>2</sup>		
		Commercial purchases	Food aid			Total commercial and aid	Food aid allocated, committed or shipped	Commercial purchases
<b>AFRICA</b>		<b>37 346.7</b>	<b>3 157.5</b>	<b>40 504.2</b>	<b>37 930.3</b>	<b>18 684.4</b>	<b>1 870.4</b>	<b>16 814.0</b>
<b>Northern Africa</b>		<b>16 778.8</b>	<b>8.2</b>	<b>16 787.0</b>	<b>15 508.0</b>	<b>11 233.8</b>	<b>5.3</b>	<b>11 228.5</b>
Egypt	July/June	12 732.8	8.2	12 741.0	11 001.0	8 055.4	5.3	8 050.1
Morocco	July/June	4 046.0	0.0	4 046.0	4 507.0	3 178.4	0.0	3 178.4
<b>Eastern Africa</b>		<b>4 591.3</b>	<b>2 108.6</b>	<b>6 699.9</b>	<b>5 793.0</b>	<b>2 107.0</b>	<b>830.6</b>	<b>1 276.4</b>
Burundi	Jan./Dec.	42.1	53.9	96.0	123.0	33.5	33.5	0.0
Comoros	Jan./Dec.	38.0	0.0	38.0	40.0	14.8	0.0	14.8
Djibouti	Jan./Dec.	56.2	19.0	75.2	72.0	14.9	0.9	14.0
Eritrea	Jan./Dec.	159.8	222.7	382.5	383.0	68.4	61.0	7.4
Ethiopia	Jan./Dec.	26.4	807.1	833.5	461.0	283.5	283.5	0.0
Kenya	Oct./Sept.	1 518.5	134.5	1 653.0	1 608.0	497.0	107.4	389.6
Rwanda	Jan./Dec.	192.0	23.0	215.0	234.0	12.7	10.6	2.1
Somalia	Aug./July	394.7	45.7	440.4	510.0	137.0	92.1	44.9
Sudan	Nov./Oct.	1 441.9	634.7	2 076.6	1 600.0	549.4	146.4	403.0
Tanzania,U.R.	June/May	683.8	34.3	718.1	516.0	437.5	44.6	392.9
Uganda	Jan./Dec.	37.9	133.7	171.6	246.0	58.3	50.6	7.7
<b>Southern Africa</b>		<b>3 050.6</b>	<b>407.2</b>	<b>3 457.8</b>	<b>4 382.0</b>	<b>3 701.8</b>	<b>690.2</b>	<b>3 011.6</b>
Angola	April/March	767.9	56.4	824.3	724.0	465.3	48.7	416.6
Lesotho	April/March	224.6	5.7	230.3	248.0	207.9	14.9	193.0
Madagascar	April/March	254.9	35.1	290.0	339.0	155.9	33.7	122.2
Malawi	April/March	205.0	61.5	266.5	521.0	461.4	223.0	238.4
Mozambique	April/March	715.6	47.4	763.0	880.0	812.5	74.5	738.0
Swaziland	May/April	134.9	4.4	139.3	108.0	104.1	15.3	88.8
Zambia	May/April	61.7	62.9	124.6	253.0	208.1	60.1	148.0
Zimbabwe	April/March	686.0	133.8	819.8	1 309.0	1 286.6	220.0	1 066.6
<b>Western Africa</b>		<b>11 494.3</b>	<b>554.3</b>	<b>12 048.6</b>	<b>10 737.8</b>	<b>1 522.6</b>	<b>323.7</b>	<b>1 198.9</b>
<b>Coastal Countries</b>		<b>8 879.6</b>	<b>235.0</b>	<b>9 114.6</b>	<b>8 099.1</b>	<b>949.6</b>	<b>131.8</b>	<b>817.8</b>
Benin	Jan./Dec.	164.2	13.3	177.5	158.0	47.9	1.4	46.5
Côte d'Ivoire	Jan./Dec.	1 240.0	15.0	1 255.0	1 206.1	116.6	11.8	104.8
Ghana	Jan./Dec.	823.1	55.7	878.8	751.0	124.3	59.4	64.9
Guinea	Jan./Dec.	349.5	30.1	379.6	370.0	5.8	5.8	0.0
Liberia	Jan./Dec.	147.2	87.8	235.0	250.0	52.9	29.6	23.3
Nigeria	Jan./Dec.	5 774.2	0.0	5 774.2	4 970.0	540.5	0.0	540.5
Sierra Leone	Jan./Dec.	254.9	33.1	288.0	289.0	29.7	23.6	6.1
Togo	Jan./Dec.	126.5	0.0	126.5	105.0	31.9	0.2	31.7
<b>Sahelian Countries</b>		<b>2 614.7</b>	<b>319.3</b>	<b>2 934.0</b>	<b>2 638.7</b>	<b>573.0</b>	<b>191.9</b>	<b>381.1</b>
Burkina faso	Nov./Oct.	365.5	29.8	395.3	248.4	25.9	22.2	3.7
Cape Verde	Nov./Oct.	53.2	31.0	84.2	107.2	21.9	21.9	0.0
Chad	Nov./Oct.	73.7	63.1	136.8	104.4	45.0	38.1	6.9
Gambia	Nov./Oct.	126.3	9.0	135.3	146.8	25.5	6.5	19.0
Guinea Bissau	Nov./Oct.	74.2	9.3	83.5	81.9	4.9	1.9	3.0
Mali	Nov./Oct.	242.3	19.9	262.2	271.8	42.6	13.4	29.2
Mauritania	Nov./Oct.	356.0	57.4	413.4	332.6	92.0	47.9	44.1
Niger	Nov./Oct.	375.3	80.0	455.3	324.9	39.8	33.8	6.0
Senegal	Nov./Oct.	948.2	19.8	968.0	1 020.7	275.4	6.2	269.2
<b>Central Africa</b>		<b>1 431.7</b>	<b>79.2</b>	<b>1 510.9</b>	<b>1 509.5</b>	<b>119.2</b>	<b>20.6</b>	<b>98.6</b>
Cameroon	Jan./Dec.	637.1	13.0	650.1	607.0	36.2	1.7	34.5
Cent.Afr.Rep.	Jan./Dec.	42.8	3.6	46.4	46.5	2.2	2.2	0.0
Congo, Dem.Rep.	Jan./Dec.	445.0	53.1	498.1	525.0	46.1	16.4	29.7
Congo, Rep.	Jan./Dec.	274.8	5.0	279.8	295.0	32.9	0.0	32.9
Eq. Guinea	Jan./Dec.	22.5	0.0	22.5	22.0	1.5	0.0	1.5
Sao Tome	Jan./Dec.	9.5	4.5	14.0	14.0	0.3	0.3	0.0

Table A1. (continued)

	Marketing year	2004/05 or 2005			2005/06 or 2006			
		Actual imports			Total import requirements (excl. re-exports) <sup>1</sup>	Import position <sup>2</sup>		
		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>47 469.8</b>	<b>3 383.5</b>	<b>50 853.3</b>	<b>41 660.8</b>	<b>24 300.6</b>	<b>978.6</b>	<b>23 322.0</b>
<b>CIS in Asia</b>		<b>2 825.0</b>	<b>274.0</b>	<b>3 099.0</b>	<b>2 538.0</b>	<b>1 865.1</b>	<b>53.9</b>	<b>1 811.2</b>
Armenia	July/June	160.0	3.0	163.0	150.0	24.8	3.1	21.7
Azerbaijan	July/June	1 113.0	34.0	1 147.0	852.0	825.7	5.6	820.1
Georgia	July/June	903.0	66.0	969.0	695.0	663.9	11.4	652.5
Kyrgyz Republic	July/June	71.0	131.0	202.0	115.0	63.2	0.9	62.3
Tajikistan	July/June	316.0	40.0	356.0	356.0	191.3	32.9	158.4
Turkmenistan	July/June	4.0	0.0	4.0	44.0	0.9	0.0	0.9
Uzbekistan	July/June	258.0	0.0	258.0	326.0	95.3	0.0	95.3
<b>Far East</b>		<b>34 248.9</b>	<b>2 001.7</b>	<b>36 250.6</b>	<b>28 257.8</b>	<b>16 675.1</b>	<b>846.9</b>	<b>15 828.2</b>
Bangladesh	July/June	3 198.8	338.2	3 537.0	3 250.0	2 458.5	193.4	2 265.1
Bhutan	July/June	64.7	1.3	66.0	71.0	0.2	0.2	0.0
Cambodia	Jan./Dec.	140.7	9.3	150.0	60.0	12.5	1.7	10.8
China	July/June	15 993.1	66.9	16 060.0	10 432.0	6 226.4	0.0	6 226.4
India	April/March	209.3	45.4	254.7	650.0	154.1	72.3	81.8
Indonesia	April/March	6 590.5	53.2	6 643.7	5 741.4	4 009.2	62.8	3 946.4
Korea, D.P.R.	Nov./Oct.	72.4	1 263.5	1 335.9	980.0	406.3	393.0	13.3
Lao, P.D.R.	Jan./Dec.	12.3	15.8	28.1	37.4	0.6	0.6	0.0
Mongolia	Oct./Sept.	208.6	39.4	248.0	323.0	109.2	29.7	79.5
Nepal	July/June	126.4	13.6	140.0	140.0	9.9	9.7	0.2
Pakistan	May/April	1 508.1	7.7	1 515.8	601.0	601.0	0.0	601.0
Philippines	July/June	4 890.0	48.2	4 938.2	4 726.0	2 602.8	69.3	2 533.5
Sri Lanka	Jan./Dec.	1 166.0	99.2	1 265.2	1 180.0	84.4	14.2	70.2
Timor-Leste	July/June	68.0	0.0	68.0	66.0	0.0	0.0	0.0
<b>Near East</b>		<b>10 395.9</b>	<b>1 107.8</b>	<b>11 503.7</b>	<b>10 865.0</b>	<b>5 760.4</b>	<b>77.8</b>	<b>5 682.6</b>
Afghanistan	July/June	1 603.1	183.9	1 787.0	450.0	105.9	41.8	64.1
Iraq	July/June	3 611.3	898.6	4 509.9	5 430.0	3 794.3	28.8	3 765.5
Syria	July/June	2 744.4	10.5	2 754.9	2 265.0	1 586.9	7.0	1 579.9
Yemen	Jan./Dec.	2 437.1	14.8	2 451.9	2 720.0	273.3	0.2	273.1
<b>CENTRAL AMERICA</b>		<b>1 359.1</b>	<b>179.9</b>	<b>1 539.0</b>	<b>1 682.0</b>	<b>1 119.2</b>	<b>275.4</b>	<b>843.8</b>
Haiti	July/June	478.1	117.4	595.5	607.0	428.1	131.6	296.5
Honduras	July/June	632.0	19.7	651.7	740.0	464.0	113.8	350.2
Nicaragua	July/June	249.0	42.8	291.8	335.0	227.1	30.0	197.1
<b>SOUTH AMERICA</b>		<b>972.8</b>	<b>47.0</b>	<b>1 019.8</b>	<b>931.0</b>	<b>706.1</b>	<b>17.0</b>	<b>689.1</b>
Ecuador	July/June	972.8	47.0	1 019.8	931.0	706.1	17.0	689.1
<b>OCEANIA</b>		<b>407.0</b>	<b>0.0</b>	<b>407.0</b>	<b>415.7</b>	<b>42.0</b>	<b>0.0</b>	<b>42.0</b>
Kiribati	Jan./Dec.	8.7	0.0	8.7	8.7	0.0	0.0	0.0
Papua New Guinea	Jan./Dec.	349.3	0.0	349.3	358.0	42.0	0.0	42.0
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	0.0	0.0	0.0
<b>EUROPE</b>		<b>1 564.0</b>	<b>8.4</b>	<b>1 572.4</b>	<b>1 730.0</b>	<b>717.2</b>	<b>1.2</b>	<b>716.0</b>
Albania	July/June	468.1	8.4	476.5	440.0	200.6	1.2	199.4
Belarus	July/June	566.0	0.0	566.0	720.0	327.5	0.0	327.5
Bosnia-Herzegovina	July/June	529.9	0.0	529.9	570.0	189.1	0.0	189.1
<b>TOTAL</b>		<b>89 119.4</b>	<b>6 776.3</b>	<b>95 895.7</b>	<b>84 349.8</b>	<b>45 569.5</b>	<b>3 142.6</b>	<b>42 426.9</b>

<sup>1</sup> For definition of **import requirements** see terminology on back cover.<sup>2</sup> Estimates based on information available as of April 2006.

## Terminology

- **The Low-Income Food-Deficit (LIFDC) group of countries** includes food deficit countries with per caput annual income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. US\$1 465 in 2003), which is in accordance with the guidelines and criteria agreed to by the CFA should be given priority in the allocation of food aid.
- The **import requirement** is the difference between **utilization** (food, feedother uses, exports plus closing stocks) and **domestic availability** (production plus opening stocks). Utilization is based on historical values, adjusted upon assessment of the country's current economic situation.
- **The main wheat and coarse grain exporters** are Argentina, Australia, Canada, the EU and the United States. The main **rice** exporters are China (including Taiwan Province), Pakistan, Thailand, the United States and Viet Nam.
- **Countries facing unfavourable prospects for current crops** are countries where prospects point to a shortfall in production of current crops as a result of the area planted and/or adverse weather conditions, plant pests, diseases and other calamities, which indicate a need for close monitoring of the crop for the remainder of the growing season.
- **Countries in Crisis Requiring External Assistance** are expected to lack the resources to deal with reported critical problems of food insecurity. Food crises are nearly always due to a combination of factors, but for the purpose of response planning, it is important to establish whether the nature of food crises is **predominantly** related to lack of food availability, limited access to food, or severe but localized problems. Accordingly, the list of countries requiring external assistance is organized into three broad, not mutually exclusive, categories:
  - Countries facing an **exceptional shortfall in aggregate food production/supplies** as a result of crop failure, natural disasters, interruption of imports, disruption of distribution, excessive post-harvest losses, or other supply bottlenecks.
  - Countries with **widespread lack of access**, where a majority of the population is considered to be unable to procure food from local markets, due to very low incomes, exceptionally high food prices, or the inability to circulate within the country.
  - Countries with **severe localized food insecurity** due to the influx of refugees, a concentration of internally displaced persons, or areas with combinations of crop failure and deep poverty.

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

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### GIEWS

### The Global Information and Early Warning System of FAO

Continuously monitors crop prospects and food security situation at global, regional, national and sub-national levels and warns of impending food difficulties and emergencies. Established in the wake of the world food crisis of the early 1970's the GIEWS maintains a unique database on all aspects of food supply and demand for every country of the world. The System regularly provides policy makers and the international community with up-to-date and accurate information so that timely interventions can be planned and suffering avoided.

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