



CROP PROSPECTS and FOOD SITUATION

Quarterly Global Report

Countries in need of
external assistance
for food

39

COUNTRIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD

FAO assesses that globally 39 countries are in need of external assistance for food. Persisting conflicts continue to be the dominant factor driving the high levels of severe food insecurity. Weather shocks have also adversely impacted food availability and access.

Asia	0.0
Africa	-3.6
Central America and the Caribbean	+0.7
South America	-9.3
North America	-1.9
Europe	-1.4
Oceania	+9.5
World	-1.5

WORLD

Cereal production 2018 over 2017

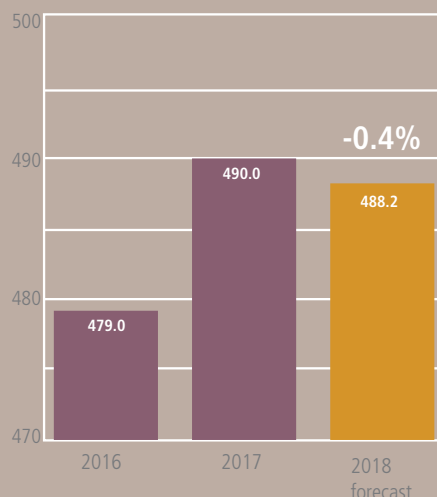
(rice in milled terms)

-1.5%

LIFDC
Cereal production 2018
over 2017

-0.4%

(million tonnes)



REGIONAL HIGHLIGHTS

AFRICA Poor rains sharply curtailed 2018 production expectations in Southern Africa, while in North Africa prospects are favourable. Abundant rains in East Africa boosted crop prospects in 2018, although they also triggered floods causing losses and damages in the agriculture sector. Agro-pastoralists in West Africa are facing heightened food insecurity due to unfavourable weather conditions, which has also raised uncertainty over 2018 crop prospects. Conflicts in several countries continue to acutely impact agricultural capacities.

ASIA In the Far East, the 2018 paddy output could reach a record high, supported by government initiatives. By contrast, in the Near East and CIS Asia cereal harvests are anticipated at or below average levels, resting on poor rains, while ongoing conflicts in parts of the Near East continue to incapacitate the agriculture sector.

LATIN AMERICA AND THE CARIBBEAN A reduced 2018 cereal output compared to last year's record is expected in South America, on account of dry weather conditions. In Central America and the Caribbean, maize production is set to remain at a high level.

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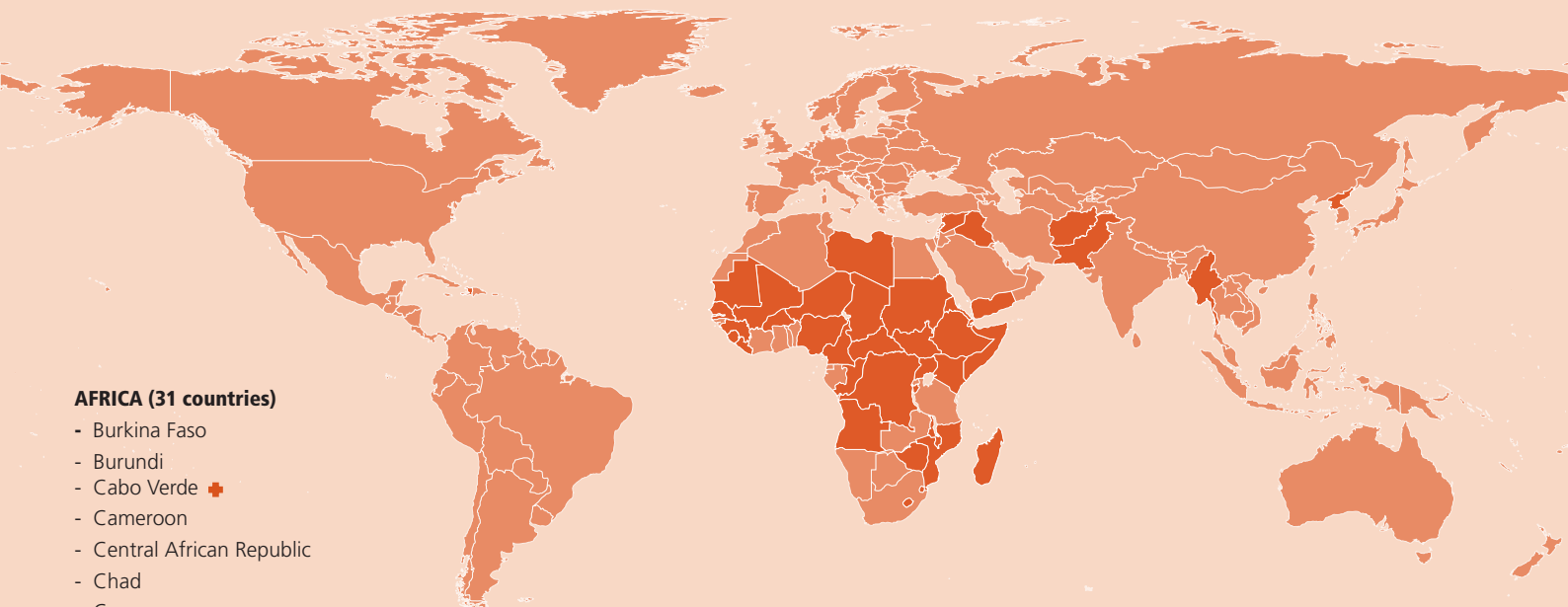
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COUNTRIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD



Source: GIEWS

AFRICA (31 countries)

- Burkina Faso
- Burundi
- Cabo Verde +
- Cameroon
- Central African Republic
- Chad
- Congo
- Democratic Republic of Congo
- Djibouti
- Eritrea
- Ethiopia
- Guinea
- Kenya
- Lesotho
- Liberia
- Libya
- Madagascar
- Malawi
- Mali
- Mauritania
- Mozambique
- Niger
- Nigeria
- Senegal +
- Sierra Leone
- Somalia
- South Sudan
- Sudan
- Swaziland
- Uganda
- Zimbabwe

ASIA (7 countries)

- Afghanistan
- Democratic People's Republic of Korea
- Iraq
- Myanmar
- Pakistan
- Syrian Arab Republic
- Yemen

LATIN AMERICA AND THE CARIBBEAN (1 country)

- Haiti
- + New Entry

AFRICA (31 COUNTRIES)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/ SUPPLIES

Cabo Verde

Poor performance of the 2017 agro-pastoral cropping season caused significant loss of livelihoods

- According to the March 2018 "Cadre Harmonisé" analysis, about 192 000 people, 35 percent of the population, are estimated to be in need of food assistance from March to May mainly due to pasture and agricultural production deficits. This figure is expected to decrease to 80 000 people during June to August thanks to the onset of the rainfalls.

Central African Republic

Conflict, displacements and food supply constraints

- The Internally Displaced People (IDPs) caseload in March 2018 was estimated at about 687 000, a 14 percent increase since October 2017. About 1.6 million people (34 percent of the total population) are estimated to be in need of urgent assistance for food due to the persisting widespread insecurity, several consecutive years of reduced agricultural production and poorly functioning markets especially for displaced persons, host families and returnees.
- Violent clashes and inter-communal tensions continue to increase, exacerbating the massive displacements, with a severe negative impact on the food security situation.

WIDESPREAD LACK OF ACCESS

Burundi

Civil insecurity, economic downturn and localized crop production shortfalls

- Disruptions to markets, farming activities and livelihoods, coupled with limited humanitarian assistance and declining food import capacity, continue to seriously affect food security conditions. The area most affected by food insecurity is the Ruyigi Province in the west. About 1.8 million people are estimated to be severely food insecure.

Chad

Civil insecurity, internal displacements and deterioration of pastoral conditions

- According to the March 2018 "Cadre Harmonisé", about 624 000 people were estimated to be in need of food assistance from March to May. About 990 000 are projected to be food insecure during June to August due to the serious deterioration of pastoral conditions in the Sahel.
- Nearly 1.9 million people remained internally displaced, almost entirely by the insurgency in the northeast.
- Approximately 450 000 refugees are recorded.

Democratic Republic of the Congo

Conflict and displacements in eastern and southern areas as well as an influx of refugees straining resources of host communities

- About 7.7 million people are estimated to be in acute food insecurity and livelihood crisis.

The country hosts 182 000 refugees from the Central African Republic, while numbers have recently increased from South Sudan to 91 000, and from Burundi to 47 000. As of February 2018, the IDP caseload was estimated at 4.5 million.

- An outbreak of Ebola Virus Disease (EVD) has been reported and as of 18 May, 45 cases have been confirmed.

Djibouti

Impact of consecutive unfavourable rainy seasons on pastoral livelihoods

- About 197 000 people are severely food insecure, mainly concentrated in pastoral areas north of Obock City and in southeastern border areas, which were affected by consecutive unfavourable rainy seasons.
- As of late May, about 3 000 individuals had been displaced by floods, which were triggered by Cyclone Sagar which struck the country on 19 and 20 May.

Eritrea

Economic constraints have increased the population's vulnerability to food insecurity

Ethiopia

Impact of drought on local livelihood systems

- In late February 2018, 7.88 million people were estimated to be food insecure, mainly in southeastern agro-pastoral areas, affected by drought conditions prevailing between mid-2016 and late 2017.
- As of late May, almost 220 000 individuals had been displaced by floods which were triggered by torrential rains since April and by Cyclone Sagar which struck the country on 19 and 20 May.

Niger

Civil conflict and pastoral deficit hinder food security conditions

- According to the last "Cadre Harmonisé" analysis, approximately 787 000 people currently require immediate assistance. This number is expected to slightly increase to about 800 000 people in the June-August period.
- Due to civil conflict in neighbouring countries, more than 166 000 people reside as refugees, of which 108 000 are from Nigeria and 57 000 are from Mali.

Nigeria

Persisting conflict results in population displacements, market disruptions and limited access to food aid in northern areas

- According to the March 2018 "Cadre Harmonisé" analysis, about 3.1 million people require assistance. This figure is projected to increase to almost 5.3 million from June to August.
- Market functionality and livelihood activities remain disturbed by the ongoing civil insecurity, limiting food access to vulnerable households. The areas inaccessible to humanitarian interventions are facing the worse food security conditions.

South Sudan

Conflict, civil insecurity and severe economic downturn

- Despite sustained humanitarian assistance, food insecurity still affects large segments of the population. The number of severely food insecure people for the period May-July is estimated at 7.1 million, due to persisting insecurity, trade disruptions and high food prices.

SEVERE LOCALIZED FOOD INSECURITY

Burkina Faso

Tight supplies and high prices

- According to the March 2018 "Cadre Harmonisé" analysis, about 742 000 people are estimated to be in need of food assistance from March to May. This figure is expected to increase to over 950 000 from June to August mainly due to localized production deficits.
- About 25 000 refugees, most of them from Mali, are estimated to be living in the country.

Cameroon

Influx of refugees putting strain on host communities and displacements

- The number of refugees from the Central African Republic was estimated at 256 000 as of April 2018. Insecurity along the borders with Nigeria also led to the internal displacement of 241 000 individuals.

Congo

Influx of refugees straining the already limited resources of host communities

- As of end-November 2017, about 32 000 refugees from the Central African Republic are sheltering in the country.

Guinea

Localized production shortfalls

- About 34 000 people are estimated to be in need of food assistance.

Kenya

Consecutive unfavourable rainy seasons affect crop and livestock production

- About 2.35 million people are severely food insecure, mainly located in eastern, southeastern and coastal areas, affected by drought conditions prevailing between mid-2016 and late 2017.
- As of late May, more than 300 000 individuals had been displaced by floods, which were triggered by torrential rains since March.

Lesotho

Localized production shortfalls

- Reflecting expectations of a reduced cereal output in 2018, food security conditions are expected to worsen.
- An estimated 225 000 people were in need of food assistance in 2017.

Liberia

Localized production shortfalls and influx of refugees

- About 29 000 people are estimated to be in need of food assistance.

Libya

Civil insecurity

- The number of people in need of food assistance is estimated at 0.4 million, with refugees, asylum seekers and internally displaced among the most vulnerable.
- Food shortages are reported mostly in the south and east where basic food items are in short supply. Access to subsidized food among the affected population is limited.

Madagascar

Dry spells and impact of cyclones

- Food security conditions are expected to be stressed in southwestern areas, due to unfavourable seasonal rains and, therefore, expected production decreases.
- However, at the national level, rice production is expected to increase in 2018, easing supply pressure and helping to improve food availability.

Malawi

Reduced cereal production

- Food security conditions are expected to intensify in 2018 compared to the

previous year, reflecting expectations of a below average cereal output in 2018.

- In 2017, 0.84 million people were estimated to be in need of humanitarian assistance.

Mali

Civil insecurity in northern areas and limited access due to falling income from pastoral production

- The country is hosting approximately 20 000 refugees, 50 000 internally displaced people and 64 000 returnees that depend mainly on humanitarian assistance.
- About 387 000 people are estimated to be in need of food assistance from March to May according to the March 2018 “Cadre Harmonisé” analysis. This figure is projected to increase to 933 000 from June to August as the civil conflict is expected to persist.

Mauritania

Declines in agricultural and pastoral production result in unfavourable food security outcomes

- According to the March 2018 “Cadre Harmonisé” analysis, about 350 000 people are in need of food assistance from March to May, while some 538 000 people will require assistance from June to August given their below average cereal supplies and weak household purchasing power.
- About 58 000 refugees, mostly from Mali, reside in the country.

Mozambique

Weather shocks

- Food security conditions are expected to worsen in 2018 in southern and some central provinces due to the unfavourable weather conditions that are anticipated to cause a reduction in the 2018 cereal harvest.

Senegal

Poor pastoral conditions have led to an unfavourable food security situation in northern parts of the country

- According to the March 2018 “Cadre Harmonisé” analysis, about 320 000 people are assessed to be in need of food assistance from March to May, while 750 000 people are estimated to be in need of assistance from June to August.

- An estimated 15 000 refugees, mostly from Mauritania, are residing in the country.

Sierra Leone

Floods and localized production shortfalls

- About 12 000 people are estimated to be severely food insecure.

Somalia

Conflict, civil insecurity and widespread drought conditions

- About 2.7 million people are estimated to be in need of emergency assistance, mainly IDPs and agro-pastoral communities affected by drought conditions prevailing between mid-2016 and late 2017.
- As of late May, about 227 000 individuals had been displaced by floods triggered by torrential rains since April.

Sudan

Conflict and civil insecurity

- The number of severely food insecure people for the period May-July is estimated at 6.2 million, mainly IDPs and host communities in conflict-affected areas. Vulnerable households affected by soaring food prices and crop production shortfalls during the 2018 season are also of concern.

Swaziland

Reduced crop production

- An expected decrease in cereal production in 2018 is anticipated to aggravate food security conditions compared to the previous year.

Uganda

Below-average crop production

- About 0.44 million people are estimated to be severely food insecure due to the lingering effects of two consecutive seasons of reduced agricultural outputs in 2016.
- More than 1 million refugees from South Sudan are hosted in camps in the northwestern parts of the country and depend on humanitarian assistance.

Zimbabwe

Food access constraints

- An expected fall in cereal production is anticipated to stress food security conditions in the second half of 2018, particularly in southern and western

areas. In the previous year, over 1 million people were estimated to be food insecure.

ASIA (7 COUNTRIES)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/SUPPLIES

Syrian Arab Republic

Civil conflict

- About 6.5 million people are food insecure and 4 million are at risk of food insecurity.
- Although some international food assistance is being provided, Syrian refugees are also straining host communities' resources in neighbouring countries.

WIDESPREAD LACK OF ACCESS

Democratic People's Republic of Korea

Reduced agricultural output and economic downturn

- The 2017 main season is estimated to have decreased compared to last year's near-average level due to water deficits.
- As a result, most households are anticipated to continue to experience borderline or poor food consumption rates.

Yemen

Conflict, poverty and high food and fuel prices

- An estimated 17.8 million people are food insecure and require urgent humanitarian assistance, a 5 percent increase over 2017 estimates.

SEVERE LOCALIZED FOOD INSECURITY

Afghanistan

Continuing conflict and population displacement

- Almost 1.9 million people are severely food insecure and 5.7 million moderately food insecure.
- So far in 2018, over 100 000 people were displaced by conflict, adding to

500 000 displaced in 2017 and over 650 000 displaced in 2016.

Iraq

Civil conflict

- As of January 2018, about 2.6 million people were internally displaced.
- About 800 000 people were in need of food security assistance in December 2017.

Myanmar

Conflict in parts of Kachin, Shan and resurgence of violence in Rakhine

- According to the latest data from UNOCHA (May 2018), an estimated 905 000 refugees from Myanmar were in Bangladesh and 241 000 people were internally displaced in Kachin, Kayin, Shan and Rakhine states due to ongoing conflict. These populations rely mainly on humanitarian assistance to cover their basic needs.

Pakistan

Population displacement and localized cereal production shortfalls

- In Tharparkar District and the surrounding areas of Sindh Province, the drought-affected cereal production and the loss of livestock for the third consecutive year have aggravated food insecurity and caused acute malnutrition.
- The country hosts close to 1.4 million registered and unregistered Afghan refugees. Most of these people are in need of humanitarian assistance.

LATIN AMERICA AND THE CARIBBEAN (1 COUNTRY)

SEVERE LOCALIZED FOOD INSECURITY

Haiti

Recurrent droughts and hurricane damage

- As a result of the impact of recurring droughts in 2014 and 2016, coupled with the effects of hurricanes Matthew and Irma in 2016 and 2017, respectively, an estimated 1.32 million people are in need of food assistance.

Terminology

Countries requiring external assistance for food 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.

* Unfavourable Production Prospects

Countries facing unfavourable crop production prospects are countries where forecasts point to a decrease in the cereal output compared to the five-year average, as a result of a reduction of the area planted and/or yields due to adverse weather conditions, plant pests and diseases, conflicts and other negative factors. This list does not include countries where production declines are mainly driven by deliberate/predetermined economic and/or policy decisions (see Regional Reviews [pages 11, 20, 26](#)).

GLOBAL CEREAL OVERVIEW

Cereal Supply and Demand Overview¹

Global prospects improve but production still forecast below last year's record

FAO forecasts world cereal production in 2018 at 2 610 million tonnes, 3 million tonnes higher than the preliminary projection made in May. However, at this level, global production would still be down 40.6 million tonnes (1.5 percent) on a yearly basis.

World wheat production is forecast at 754.1 million tonnes, following a 7.5 million tonnes upward revision this month. The monthly increase mostly relates to Argentina, as well as Canada and the United States of America, where improved weather conditions have boosted prospects for winter and spring outputs, respectively. Recent official estimates

from India also point to a higher-than-previously expected output, further boosting the global production outlook.

For coarse grains, world production in 2018 has been revised downwards by 5.2 million tonnes and is now forecast at 1 345 million tonnes, 3.2 percent (44.3 million tonnes) down from the 2017 record high. The downward revision, made in June, mostly concerns forecasts for sorghum production, which have been lowered for the Sudan and the United States of America. Global maize production in 2018 has been lowered slightly, to 1 046 million tonnes with large downward revisions in China (Mainland), reflecting area contractions as farmers shift to more profitable crops, and in Brazil, where a continuation of dry weather is foreseen to curb plantings and yields of the second season crop. These declines

Table 1. World cereal production¹
(million tonnes)

	2016	2017 estimate	2018 forecast	Change: 2018 over 2017 (%)
Asia	1 132.0	1 150.4	1 150.0	0.0
Far East	1 028.6	1 045.3	1 048.1	0.3
Near East	66.6	69.4	68.3	-1.5
CIS in Asia	36.9	35.7	33.5	-6.1
Africa	170.3	186.6	179.9	-3.6
North Africa	30.8	36.2	38.0	4.8
West Africa	57.1	59.9	56.8	-5.1
Central Africa	5.0	4.5	4.5	-0.6
East Africa	52.7	48.3	49.3	2.2
Southern Africa	24.7	37.6	31.3	-16.9
Central America and the Caribbean	44.8	44.6	45.0	0.7
South America	174.3	216.7	196.5	-9.3
North America	531.8	493.9	484.3	-1.9
Europe	508.2	523.8	516.5	-1.4
European Union	299.5	310.3	306.5	-1.2
CIS in Europe	192.9	202.0	196.4	-2.7
Oceania	53.5	34.6	37.8	9.5
World	2 614.9	2 650.7	2 610.0	-1.5
Developing countries	1 464.9	1 535.0	1 513.5	-1.4
Developed countries	1 149.9	1 115.7	1 096.5	-1.7
- wheat	759.7	757.2	754.1	-0.4
- coarse grains	1 354.0	1 388.9	1 344.6	-3.2
- rice (milled)	501.2	504.6	511.3	1.3

Note: Totals and percentage change computed from unrounded data.

¹ Includes rice in milled terms.

¹ Based on the [FAO Cereal Supply and Demand Brief](#) released on 7 June 2018.

are expected to be nearly offset by improved yield prospects in the Russian Federation, Ukraine and the United States of America.

FAO's May forecast of world rice production has been raised by 0.7 million tonnes to 511.3 million tonnes, 1.3 percent above the 2017 all-time high. The revision primarily reflects improved prospects for India, consistent with the higher official estimates for the country's 2017 production. Nonetheless, expectations of smaller-than-previously-predicted yield declines have resulted in a slight increase in Brazil's forecast production.

Global cereal utilization to reach a new peak in 2018/19

World cereal utilization in 2018/19 is forecast at a record level of 2 646 million tonnes, 1.2 percent above the 2017/18 season. At this level, it would be around 0.5 percent below the ten-year trend. Increases in food, feed and industrial uses are behind the growth in total consumption of cereals.

Utilization of wheat is forecast to reach 743 tonnes in 2018/19, up almost 5 million tonnes on the previous season. Global food use of wheat is expected to increase in line with population growth, while total feed use is projected to expand faster than in 2017/18, increasing by about 1.3 percent despite large supplies of cheaper alternative coarse grains.

Total utilization of coarse grains in 2018/19 is now predicted to reach almost 1 394 million tonnes, over 21 million tonnes above the previous season's level and 20 million tonnes above the May forecast. The sharp month-on-month increase reflects upward adjustments to the forecasts for industrial use of maize in China (Mainland) and the United States of America.

Global rice utilization is forecast to expand by 1 percent in 2018/19 to reach 509.3 million tonnes. Food use is predicted to account for 411.7 million tonnes of this volume, enabling world per capita food use of rice to remain stable at around 53.9 kg.

Trade in 2018/19 to reach a new high

World trade in cereals in 2018/19 is forecast at 409.6 million tonnes, up 0.5 percent (2 million tonnes) from 2017/18 and hitting a new record. The new forecast is 3.4 million tonnes higher than FAO's first trade forecast for 2018/19 published in May.

Global trade in coarse grains in 2018/19 (July/June) is now pegged at 187.2 million tonnes, up 0.9 percent from 2017/18, with maize trade expected to rise to 147 million tonnes, 1.1 percent higher than in 2017/18. A combination of generally stronger import demand in Asia and continued large export availabilities is behind the year-on-year expansion in world maize trade. World wheat trade in 2018/19

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

	2016/17	2017/18 estimate	2018/19 forecast	Change: 2018/19 over 2017/18 (%)
Production ¹	2 614.9	2 650.7	2 610.0	-1.5
Developing countries	1 464.9	1 535.0	1 513.5	-1.4
Developed countries	1 149.9	1 115.7	1 096.5	-1.7
Trade ²	405.2	407.6	409.6	0.5
Developing countries	117.2	140.3	137.1	-2.3
Developed countries	288.1	267.2	272.5	2.0
Utilization	2 570.4	2 614.8	2 646.6	1.2
Developing countries	1 661.0	1 698.3	1 727.9	1.7
Developed countries	909.5	916.5	918.7	0.2
Per caput cereal food use (kg per year)	147.8	148.1	148.1	0.0
Stocks ³	782.8	816.6	772.1	-5.4
Developing countries	572.2	602.9	581.3	-3.6
Developed countries	210.6	213.7	190.8	-10.7
World stock-to-use ratio (%)	29.9	30.9	28.5	-7.7

Note: Totals and percentage change computed from unrounded data.

¹ Data refer to calendar year of the first year shown and includes rice in milled terms.

² 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.

³ Data are based on an aggregate of carryovers level at the end of national crop years and, therefore, do not represent world stock levels at any point in time.

(July/June) is forecast at 175 million tonnes, close to the estimated volume for 2017/18. Overall, smaller imports by African countries are expected to nearly offset larger purchases by Asian countries, whereas on the export side, larger sales by the European Union, the Russian Federation and the United States of America are likely to more than offset anticipated declines in exports from Argentina and Ukraine.

World trade in rice in calendar year 2018 is expected to fall only marginally short of the 2017 record high, to total 47.8 million tonnes. Among exporters, an expected bumper harvest may enable India in 2018 to ship its second highest volume on record, despite prospects of subsiding demand from some of its key South Asian markets.

Global cereal stocks raised sharply on historical revisions to maize inventories in China (Mainland)

FAO's forecast for world cereal stocks at the close of seasons ending in 2019 now stands at 772 million tonnes, up nearly 37 million tonnes from the previous report in May, but still 44.5 million tonnes (5.4 percent) below their opening levels. At this level, the ratio of global cereal carryovers at the end of the 2018/19 season to trend utilization in 2019/20 would stand at 28.5 percent, down slightly from the 2017/18 season but still a relatively high ratio, suggesting a continuation of ample cereal supply prospects also in the 2018/19 season.

The large month-on-month revision in June mainly reflects upward adjustments to the estimates of China's (Mainland) maize inventories, subsequent to some lowering of the country's industrial use

of maize in earlier years. The cumulative effect of these adjustments was an increase of almost 63 million tonnes in the size of maize stocks of China (Mainland) in 2018/19, which now stand at 122 million tonnes. Despite this, the revised forecast still points to a notable (24 million tonnes) year-on-year decrease in maize stocks held in China (Mainland), reflecting the anticipated drop in the country's maize production this year and rising domestic demand. Globally, total stocks of coarse grains are projected to decline for the first time in five years to 315 million tonnes, resulting in the world stock-to-use ratio dropping from 26.4 percent in 2017/18 to 22 percent in 2018/19.

Global wheat stocks for crop years ending in 2019 are currently pegged at a record 283 million tonnes, almost 6 million tonnes larger than their already high opening level. The new forecast is also 4.4 million tonnes above the May forecast, and this is mostly on account of larger ending stocks expected in Argentina, the European Union and India. However, excluding year-on-year accumulation of inventories in China (Mainland), world wheat stocks would decline by almost 6 million tonnes from their opening level.

Following a 0.8-million-tonne upward revision since May, global rice reserves at the close of 2018/19 are now expected to surpass their opening level by 1.4 percent, to reach 173.8 million tonnes. China (Mainland) and India are envisaged to drive this accumulation, although carryovers are also seen edging up in Indonesia and the United States of America, while Bangladesh, Brazil and Egypt may draw on their reserves.

LOW-INCOME FOOD-DEFICIT COUNTRIES' FOOD SITUATION OVERVIEW²

Table 3. Basic facts of Low-Income Food-Deficit Countries (LIFDCs) cereal situation

(million tonnes, rice in milled basis)

	2016/17	2017/18 estimate	2018/19 forecast	Change: 2018/19 over 2017/18 (%)
Cereal production¹	479.0	490.0	488.2	-0.4
excluding India	235.1	235.2	231.3	-1.7
Utilization	527.2	525.7	529.1	0.6
Food use	411.1	418.4	423.8	1.3
excluding India	216.2	221.3	224.4	1.4
Per caput cereal food use (kg per year)	146.6	146.7	146.1	-0.4
excluding India	146.1	146.2	145.0	-0.8
Feed	43.4	44.2	43.4	-1.9
excluding India	27.2	27.5	26.7	-3.0
End of season stocks²	92.8	99.4	98.2	-1.2
excluding India	58.3	59.1	53.9	-8.7

¹ Data refer to calendar year of the first year shown.

² May not equal the difference between supply and utilization because of differences in individual country marketing years.

Table 4. Cereal production¹ of LIFDCs

(million tonnes)

	2016	2017 estimate	2018 forecast	Change: 2018 over 2017 (%)
Africa (37 countries)	123.1	124.4	121.0	-2.8
East Africa	52.7	48.3	49.3	2.2
Southern Africa	8.3	11.7	10.4	-11.7
West Africa	57.1	59.9	56.8	-5.1
Central Africa	5.0	4.5	4.4	-0.6
Asia (11 countries)	354.7	364.4	366.1	0.5
CIS in Asia	11.3	11.0	9.6	-13.4
Far East	333.4	344.9	348.4	1.0
- India	243.9	254.8	256.9	0.8
Near East	10.0	8.5	8.1	-4.5
Central America and the Caribbean (2 countries)	1.2	1.2	1.1	-3.0
Oceania (2 countries)	0.0	0.0	0.0	0.0
LIFDC (52 countries)	479.0	490.0	488.2	-0.4

Note: Totals and percentage change computed from unrounded data.

¹ Includes rice in milled terms.

Unfavourable weather negatively weighs on LIFDC production prospects in 2018

FAO's forecast for aggregate cereal production of Low-Income Food-Deficit Countries (LIFDCs) in 2018 is pegged at 488.2 million tonnes, about 1.7 million tonnes (0.4 percent) less than the previous year, but well above the average of the previous five years. The forecast year-on-year decline stems mainly from reduced production forecasts in the countries of CIS Asia, and Southern and West Africa.

In Southern Africa and CIS Asian countries, despite improved weather conditions in the latter half of the agricultural campaign, early seasonal rainfall deficits adversely affected crop development and lowered yield potentials. Consequently, cereal outputs are forecast to drop sharply from the good levels of 2017 and, in some countries, to fall below the previous five-year average. In West Africa, while still early in the season, prospects for the 2018 crops are mixed. This reflects expectations of poor rains in coastal countries, while in the Sahelian countries harvests are likely to revert back to average levels from last year's highs. Production declines are also forecast in the Near East, due to dry weather conditions that aggravated the negative effects of conflicts on 2018 crops. In these countries, cereal harvests are forecast at well below-average levels.

² The inclusion of a country in the Low-Income Food-Deficit Countries (LIFDCs) group is based on three criteria: 1) the level of the annual per capita Gross National Income (GNI); 2) the net food trade position; and 3) self exclusion (when countries that meet the first two criteria request to be excluded from the category). The current (2016) list of the LIFDCs includes 52 countries, two less than in the 2015 list but with some changes. For full details see: www.fao.org/countryprofiles/lifdc

Cereal production is forecast to increase in the Far East. The year-on-year growth is mostly associated with India, on account of a record wheat output driven by bumper yields, and Bangladesh, where the paddy output is anticipated to rebound from the weather-reduced harvest of 2017. Countries in East Africa are also expected to gather larger cereal harvests in 2018, due to beneficial rains during the first cropping season, with harvests underway. The likelihood of average to above-average precipitations for the "long-rains" (June-September) further boosted production expectations in the subregion. The production outlook in Central Africa and Central America point to a mostly unchanged harvest in 2018 compared to the near-average levels of the previous year.

Import needs decline in the Far East, but expected to rise in parts of Africa due to unfavourable production prospects

FAO's forecast for cereal imports by LIFDCs in the 2017/18 marketing year stands at 64.3 million tonnes, showing a slight year-on-year contraction. Most of the decrease results from lower import expectations in the Far East, where a rebound in Bangladesh's output cut import requirements by over 2 million tonnes, while a smaller volume is expected to be imported into India. Similarly, imports are likely to be reduced in East African countries, resting on expectations of larger domestic outputs. Conversely, in the Southern African and CIS Asian countries, imports are forecast to increase as these countries seek to bolster supplies on account of weather-reduced domestic production in 2018.

Table 5. Cereal imports of LIFDCs
(thousand tonnes)

	2016/17 or 2017	2017/18 or 2018		2018/19 or 2019	
	Actual imports	Import forecast	of which food aid	Import requirement ¹	of which food aid
Africa (37 countries)	35 853	35 064	1 035	35 634	828
East Africa	11 301	11 623	733	10 903	528
Southern Africa	3 833	2 719	15	2 933	13
West Africa	18 400	18 462	134	19 482	134
Central Africa	2 318	2 260	153	2 316	153
Asia (11 countries)	29 211	29 538	725	26 979	725
CIS in Asia	4 916	4 651	1	5 003	1
Far East	14 122	14 135	97	11 074	97
Near East	10 172	10 752	627	10 902	627
Central America and the Caribbean (2 countries)	1 386	1 157	10	1 186	10
Oceania (2 countries)	471	491	0	522	0
LIFDC (52 countries)	66 920	66 251	1 770	64 321	1 563

Note: Totals computed from unrounded data.

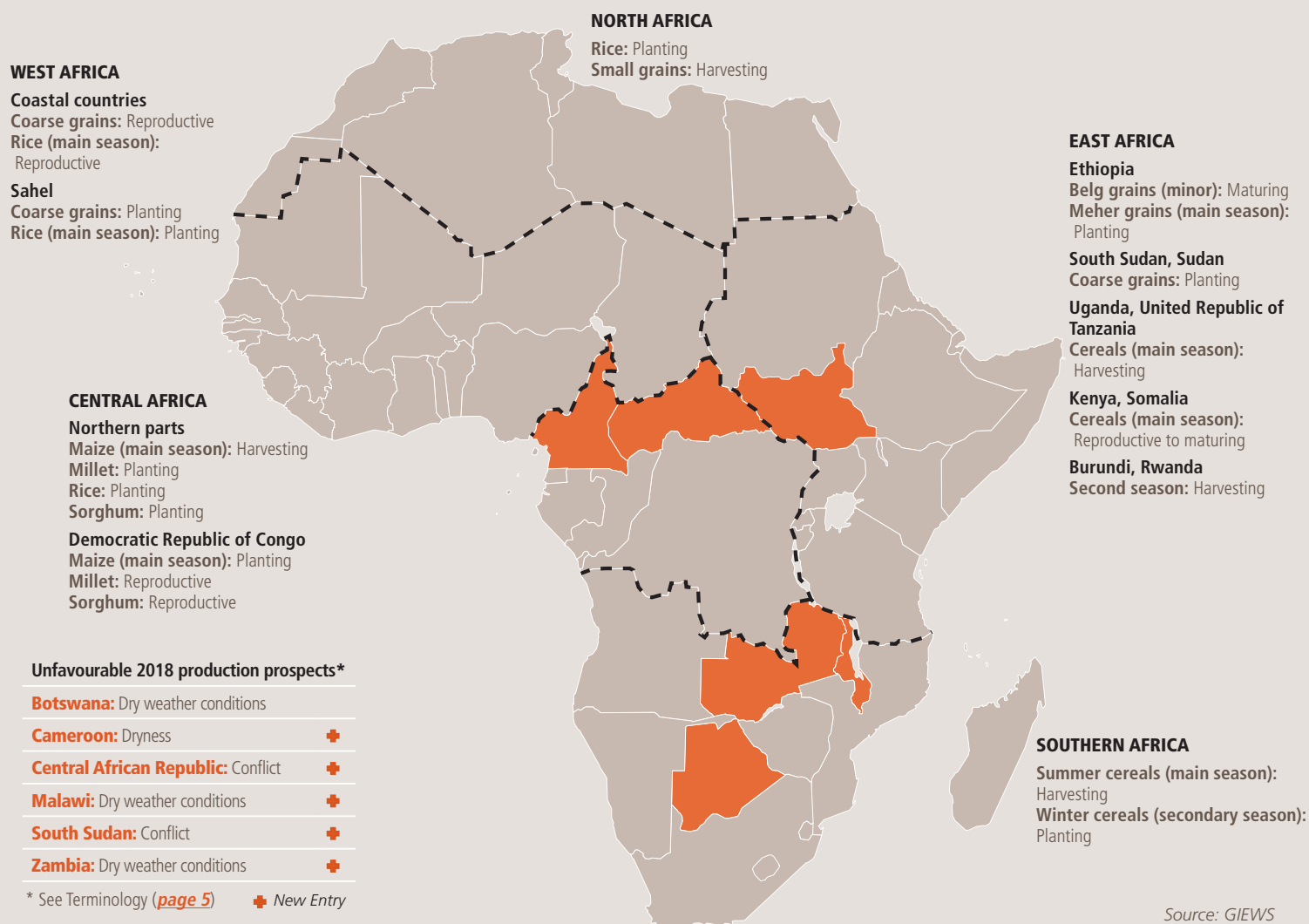
¹ The import requirement is the difference between utilization (food, feed, other uses, exports plus closing stocks) and domestic availability (production plus opening stocks).

REGIONAL REVIEWS

AFRICA

Note: Situation as of May

■ ■ Subregional borders

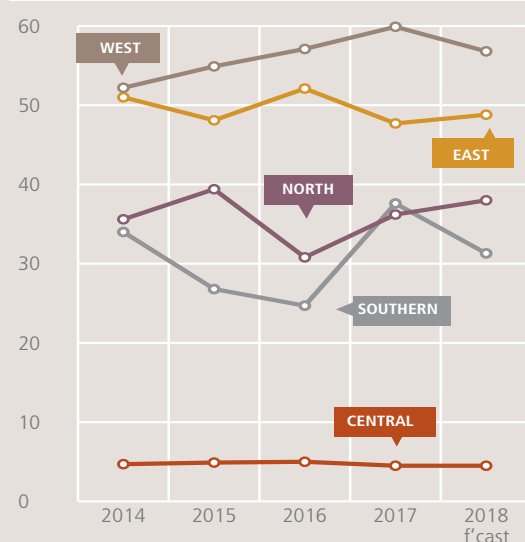


Source: GIEWS

Africa Production Overview

FAO forecasts a 3.6 percent drop in the aggregate 2018 African cereal output to 179.9 million tonnes, but still an above-average level. This year's foreseen production decline would mostly result from a forecast cut in Southern Africa's output, driven by a mid-season dry spell that is foreseen to push most national harvests to a well below-average level compared to the previous year's bumper highs. An uncertain outlook in West Africa, where planting is underway, also weighs negatively on overall production prospects, with the harvest forecast to fall from last year's high level, reflecting mixed weather forecasts, but remain above average in most countries.

In East Africa, heavy rains during the first season boosted production expectations in 2018, however, the abundant precipitation also triggered flooding, mainly affecting Ethiopia, Kenya and Somalia, causing damages and losses in the agriculture sector. Harvesting of the 2018 main season crops will begin in July in Central Africa, where persisting conflicts in several countries continues to impede agricultural production. In North Africa, an above-average output is forecast, reflecting improved rains at the start of this year that alleviated early seasonal water deficits.

Cereal production
(million tonnes)

NORTH AFRICA



Slightly above average 2018 winter harvest expected

In **Egypt**, **Libya** and **Morocco** harvesting the 2018 winter wheat, the most important winter grain, started in May and is expected to conclude by mid-June. Wheat harvests usually take place in June in Tunisia and from mid-June to mid-August in **Algeria**. In all countries, a smaller crop of winter barley is harvested before the winter wheat. With the exception of **Egypt**, which relies on irrigation to produce a stable cereal crop, production in the rest of the subregion varies greatly year to year depending on the rainfall variation.

Despite rainfall deficits accumulated early in the season across the subregion, the overall 2018 cereal production is forecast at an above average level, reflecting expectations of unchanged or increased outputs across the subregion compared to last year. Sufficient rainfall in February and March eliminated pockets of winter drought and improved yield prospects. In **Morocco**, the wheat output is expected to be on par with the previous year and almost 20 percent above average. In **Algeria**, the 2017/18 winter wheat production is expected to recover slightly from the previous year's weather-stricken harvest and is likely to be close to average despite irregular precipitation in eastern and southern parts. In **Tunisia**, production is expected at 1.7 million tonnes, over 50 percent more

than in the previous year and the average. In **Egypt**, a close to average production of mostly irrigated wheat is forecast. The **Libyan** winter-wheat harvest is expected at a below-average level of 140 000 tonnes on par with the previous year.

FAO's preliminary forecasts puts the subregion's aggregate wheat output at 20.7 million tonnes, about 6 percent up on last year's weather-reduced production and the five-year average. The subregional barley production is put at about 4.6 million tonnes, some 13 percent above the output of the previous year, driven by increases in **Morocco** and **Tunisia**, and 18 percent above average. At 7.4 million tonnes, the production of maize, produced primarily in **Egypt**, is expected to be slightly above the 2017 harvest but 6 percent below the five-year average.

All *North African* countries rely heavily on wheat imports from the international market to cover their domestic consumption needs. With a slightly above-average 2017 harvest, the subregion's aggregate cereal import requirement (of which wheat, accounts for about 60 percent) for the 2017/18 marketing year (July/June) is estimated at approximately 50.3 million tonnes, 5 percent above the previous five-year average and about the same level as last year.

Food inflation stable or decreasing, but high in Libya

Food inflation rates across the subregion followed uneven developments. The highest food inflation rate was reported in **Libya**, supported by insecurity-induced supply chain disruptions and shortages of foreign currencies. Although easing from a record level of 50 percent in December 2017, the food inflation rate remained high at 31 percent in February 2018 (latest available

estimate). Elevated food inflation rates were also reported in **Egypt** (11.4 percent in April 2018, down from its peak of over 40 percent a year ago, supported by high transportation costs and supply bottlenecks) and **Tunisia** (8.9 percent in April 2018, relatively stable since November 2017, supported by currency devaluation). A low food price inflation rate of 3.3 percent was reported in **Morocco** (an increase from negative levels registered in the autumn of 2017). Food prices fell by 1.5 percent in **Algeria** in April 2018 (down from 9 percent in October 2017), following restrictions on selected imports in an effort to curb, among others, imported food price inflation.

WEST AFRICA



Uncertain prospects for cereal crops in 2018

The cropping season is underway in most of the Sudanian zone (**Ghana**, **Côte d'Ivoire**, southern **Mali** and **Burkina Faso**, central and north **Nigeria**, **Benin** and **Togo**) where planting of the 2018 main season maize crop, to be harvested from July, was completed in May. The rainy season has started in the Sahelian zone (**Niger**, **Mali**, **Chad**, **Senegal** and **Mauritania**) with agricultural activities mainly dominated by tillage and planting of the millet crop, which is expected to be harvested in October. Planting of coarse grain crops is progressively moving northwards with the onset of seasonal rains.

Table 6. North Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2016	2017 estim.	2018 f'cast	2016	2017 estim.	2018 f'cast	2016	2017 estim.	2018 f'cast	2016	2017 estim.	2018 f'cast	Change: 2018/2017 (%)
North Africa	15.3	19.5	20.7	11.1	12.2	13.0	6.4	6.4	6.2	32.7	38.2	39.9	4.4
Algeria	2.4	2.4	2.6	1.0	1.0	1.1	0.0	0.0	0.0	3.4	3.4	3.7	8.0
Egypt	9.0	8.8	9.1	8.9	8.0	8.3	6.3	6.4	6.1	24.2	23.2	23.5	1.6
Morocco	2.7	7.1	7.1	0.8	2.7	2.9	0.1	0.1	0.1	3.6	9.8	10.0	1.7
Tunisia	0.9	1.1	1.7	0.4	0.5	0.8	0.0	0.0	0.0	1.3	1.6	2.5	52.5

Note: Totals and percentage change computed from unrounded data.

According to the results of the 5th Seasonal Weather Prediction Forum (PRESASS) in Sudano-Sahelian countries in May 2018, above average to average rainfall amounts are forecast from June to August for most countries. These climatic conditions, assuming normal availability of inputs and no major outbreaks of pests, are broadly favourable and agricultural production is expected at average to above-average levels in 2018. However, in the coastal zone from **Senegal** to **Liberia**, below-average cumulative rainfall is expected and, therefore, crop development is predicted to be adversely affected. These weather

conditions might also cause increased incidences of pest outbreaks (notably millet caterpillars), which further negatively weighs on production prospects.

The rainy season in pastoral areas should normally start from mid-June. However, rains were recorded earlier than normal in May and resulted in localized germination and the development of herbaceous plants, improving pasture availability for small ruminants. Livestock feeding conditions, however, are still poor in most pastoral zones, where grazing and water supplies remain generally non-existent. The high cost of animal care and the general decline in exports of live animals to **Nigeria** and **Libya** due to conflicts, have caused a drastic drop in incomes for pastoralist households, limiting their access to food.

Above-average 2017 subregional cereal output, albeit uneven across countries

The aggregate 2017 cereal production is estimated at 66.6 million tonnes, about 5 percent higher than the previous year and almost 15 percent above average. The Sahelian countries harvested 26.4 million tonnes of cereals, about 4 percent higher than previous year and 17 percent above average. Above-average outputs were also recorded in **Mali**, **Niger**, **Chad** and **Senegal**. However, poor

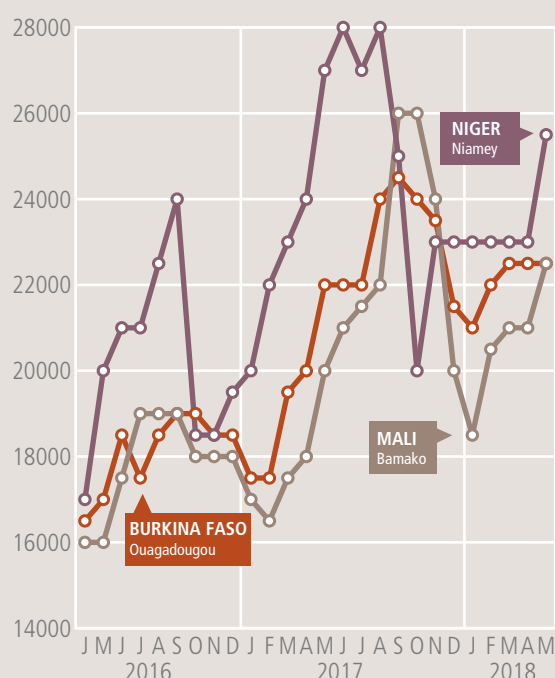
precipitation affected productions in **Burkina Faso** (3 percent below average), **Mauritania** (10 percent) and **the Gambia** (40 percent). In **Cabo Verde**, severe drought conditions caused almost the total loss of the 2017 maize production, which amounts, on average, to about 5 000 tonnes.

Prices of coarse grains follow normal seasonal trends but have increased year-on-year

The traditional trade channels between surplus and structurally deficit areas are less active compared to normal because of the security situation, inflation, the currency weakness in some countries and rising in prices in source markets. However, imports from the international market continue to supply the major reference markets in the subregion. Demand, particularly for millet and sorghum for human consumption, remains strong due to the advent of Ramadan in May, seed requirements and stock rebuilding by pastoralists returning from transhumance (May-June).

In the Sahel, prices of local products such as millet and sorghum have generally remained stable, although some slight seasonal increases have been observed. Compared to the previous year, prices in April increased by 31 percent for millet in Moussoro (**Chad**), 67 percent for sorghum in Saint Louis (**Senegal**) and 31 percent for millet in Sikasso (**Mali**), due to strong demand. In **Niger**, the recent lifting of the export ban by the Government of Nigeria resulted in increased market supplies and, as a result, prices decreased up to 20 percent on a yearly basis.

Millet prices in selected West African markets
(CFA Franc BCEAO (XOF)/100kg)



Source: Afrique Verte.

Table 7. West Africa cereal production
(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals ¹			
	2016	2017 estim.	2018 f'cast	2016	2017 estim.	2018 f'cast	2016	2017 estim.	2018 f'cast	Change: 2018/2017 (%)
West Africa	46.2	48.5	45.1	17.0	18.0	18.3	63.3	66.6	63.6	-4.4
Burkina Faso	4.4	4.2	4.2	0.4	0.3	0.4	4.8	4.5	4.6	2.0
Chad	2.6	3.1	2.8	0.3	0.3	0.3	2.9	3.4	3.0	-10.9
Ghana	2.1	2.4	2.1	0.7	0.7	0.8	2.8	3.1	2.9	-7.2
Mali	6.0	6.5	6.3	2.8	2.9	2.9	8.8	9.5	9.2	-3.0
Niger	5.7	5.7	5.1	0.1	0.1	0.1	5.9	5.9	5.2	-11.0
Nigeria	18.9	19.0	18.0	6.5	7.0	7.2	25.5	26.1	25.3	-3.0

Note: Totals and percentage change computed from unrounded data.

¹ Total cereals includes wheat, coarse grains and rice (paddy).

In coastal countries, maize prices remained generally stable from March to April. Compared to the previous year, prices of maize in Cinkasse (**Togo**) were 43 percent higher and 45 percent up in Wa (**Ghana**), reflecting increased demand for human consumption and seed needs. In **Nigeria**, prices of coarse grains stabilized compared to the previous year, but remained higher year-on-year, with millet prices in the northern city of Maiduguri up by 57 percent due to a weaker currency, persisting civil insecurity and high fuel prices.

Worsening food security conditions in pastoral areas and civil conflicts constrain more people to food emergency

The primary concern across the Sahel is in adequate access to food due to localized 2017 production deficits, above-average prices and a general decline in income levels, due to reduced sales of livestock. These conditions have further compounded the existing acute food insecurity, particularly in areas most affected by civil conflicts or areas with large concentrations of IDPs and refugees, such as northern **Mali**, northeast **Nigeria**, eastern and western **Niger**, western **Chad** and northern **Cameroon**. Here, humanitarian assistance needs to be scaled up in order to adequately mitigate food insecurity.

Poor households in rural areas and market-dependent households in urban areas will also require additional food assistance towards the peak of the lean period in July-August to meet minimum food needs and to prevent pronounced

food consumption gaps and high risk of acute malnutrition.

According to the last Cadre Harmonisé analyses, food and nutrition conditions in the Sahelian Belt (**Burkina Faso**, **Mali**, **Mauritania**, **Niger**, **Senegal** and **Chad**) remain precarious among poor and very poor households. During the period between March and May, about 7.1 million people are estimated to be food and nutrition insecure. This figure is projected to increase to 10.6 million people in the June-August period. However, the situation has improved in northeastern **Nigeria** (Adamawa, Borno and Yobe states) compared to previous years due to humanitarian assistance. In the Gulf of Guinea countries, food security conditions have remained stable.

The security situation across the region remains particularly worrying in the Lake Chad Basin. This situation continues to disrupt the free movement of people and commodities, economic recovery, humanitarian access, trade opportunities and has resulted in increased numbers of IDPs. According to the Agency of the United Nations High Commissioner for Refugees (UNHCR), about 2.2 million people are internally displaced in the Lake Chad Basin region, including 1.7 million in northeast **Nigeria**. The conflict has also resulted in 203 000 refugees and about 482 000 IDPs in **Cameroon**, **Chad** and **Niger**. The affected populations, traditionally agro-sylvopastoralists, suffer from the loss of their livelihoods and depend heavily on food assistance, as well as support from host communities.

CENTRAL AFRICA



Persisting conflict in the Central African Republic, the Democratic Republic of the Congo continue to adversely affect production prospects

Harvesting of the 2018 main season crops is set to begin in July in central and southern parts of Cameroon and the Central African Republic. In **Cameroon**, rainfall has generally been adequate since the beginning of the cropping season from March to the beginning of May. However, dryness in some localized areas has negatively affected maize crop-growing conditions. FAO is providing support to about 58 000 conflict-affected farmers through the distribution of seeds, tools and fertilizers. In **the Central African Republic**, seasonal rains commenced on time in March in bi-modal rainfall areas of the centre and the south, facilitating planting of the 2018 maize crop. Although rainfall has generally been favourable, crop production was adversely impacted by the widespread conflict, which reduced the planted area, exacerbated input shortages and caused the depletion of the already inadequate households' productive assets. In **the Democratic Republic of the Congo**,

Table 8. Central Africa cereal production
(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals ¹			
	2016	2017 estim.	2018 f'cast	2016	2017 estim.	2018 f'cast	2016	2017 estim.	2018 f'cast	Change: 2018/2017 (%)
Central Africa	4.6	4.1	4.0	0.7	0.7	0.7	5.3	4.8	4.8	-0.5
Cameroon	3.1	2.7	2.6	0.4	0.4	0.4	3.5	3.0	3.0	-0.7
Central African Republic	0.1	0.1	0.1	0.0	0.0	0.0	0.1	0.1	0.1	-6.3
Democratic Republic of the Congo	1.2	1.2	1.2	0.3	0.3	0.3	1.6	1.5	1.6	0.5

Note: Totals and percentage change computed from unrounded data.

¹ Total cereals includes wheat, coarse grains and rice (paddy).

harvesting of the 2018 maize crop was concluded in May in southern uni-modal rainfall areas, while the 2018 secondary season maize harvest is still underway in central and northern bi-modal rainfall areas. Overall weather conditions in most areas of the Democratic Republic of the Congo have been favourable during the cropping season thus benefiting crop development. In the North Kivu, South Kivu and Tanganyika maize-growing regions, infestations of Fall Armyworm have reportedly resulted in significant losses. Moreover, the continuing disruption of agricultural activities and a reduced planted area in conflict zones of Kasai and Tanganyika regions have hampered crop prospects. In **the Republic of the Congo**, harvesting of the second season crops started in June and production is expected to be slightly above average due to adequate cumulative rainfall across the season in most departments. In **Gabon**, harvesting of the second season crops is also about to begin. Erratic rainfall in some localized areas in January and February delayed planting operations but nonetheless production is forecast at near-average levels.

High food prices in parts of the Democratic Republic of Congo, the Central African Republic and Cameroon

In recent months, cereal prices have reached well above-average levels in the Democratic Republic of Congo, the Central African Republic and in Cameroon where the food and livestock markets continue to be disrupted by the ongoing conflict. In **the Democratic Republic of the Congo**, food prices have been on the rise in recent months due to the conflict in Kasai, North Kivu, South Kivu, Ituri and Tanganyika regions. Average inflation rates surged to about 42 percent in 2017 from an estimated 18 percent in 2016. The steep rise was spurred by high Government spending and declining export revenues owing to low international prices of the mining sector's exported commodities. In 2018, the inflation rate is expected

to fall to about 26 percent. Moreover, since the beginning of 2017, the local currency depreciated significantly against the US dollar. As a result, there has been an upward pressure on domestic food supplies due to the reduced imports from neighbouring countries, while the import's inflationary pressure has contributed to higher food prices. By contrast, in **the Central African Republic**, the annual inflation rate has been declining in recent years due to disrupted livelihoods, reduced employment opportunities and an overall deterioration of purchasing power, which has lowered consumer demand. However, food prices have increased in recent months especially in the conflict-affected areas, due to below-average market supplies, sharply-curtailed market activity as well as the degraded state and rising levels of insecurity on the main roads (illegal check-points and ambushes, for example). In **Cameroon**, cereal prices have also increased in recent months and are well above average, severely hampering the access to food.

Food insecurity situation remains critical in parts due to persisting conflict

The protracted and widespread insecurity in the Central African Republic, as well as the escalation of the civil conflict in eastern and southern areas of the Democratic Republic of the Congo, have resulted in massive population displacements, hindering food availability and access. According to UNOCHA, at the end of March 2018, about 569 000 refugees from the Central African Republic have sought refuge in neighbouring Cameroon, the Democratic Republic of the Congo, Chad and the Republic of the Congo, increasing the strain on the limited resources of the host communities. In addition, the IDP caseload in the Central African Republic was estimated at about 687 000 people out of a total population of 4.5 million, which represents an increase of 56 percent compared to year-earlier levels. The food

security situation in **the Central African Republic** remains critical especially for displaced persons, host families and returnees. Persisting widespread insecurity remains the leading cause heightened food insecurity. Moreover, this situation is exacerbated by several consecutive years of reduced agricultural production and poorly functioning markets. According to the latest Integrated Food Security Phase Classification (IPC), valid for the period from March to August 2018, about 1.6 million people (34 percent of the total population) are estimated to be in need of urgent assistance (IPC Phase 3: "Crisis" and IPC Phase 4: "Emergency") of which more than 484 000 people face IPC Phase 4: "Emergency". In **the Democratic Republic of the Congo**, civil conflict has continued to severely damage the local livelihood systems and caused massive population displacements. Since 2013, the civil conflict has persistently escalated in eastern and southern areas. Moreover, there has been a major humanitarian crisis in the Kasai Region since September 2016. As of February 2018, the total IDP caseload in the country was estimated at 4.5 million. The country also hosts 541 000 refugees from Burundi, the Central African Republic, Rwanda and South Sudan putting additional pressure on the already limited resources. An outbreak of the Ebola Virus Disease (EVD) has been reported and, as of 18 May, 45 cases have been confirmed.

In **Cameroon**, the overall food security situation has also worsened sharply in recent years, mainly due to civil insecurity. The majority of the vulnerable groups are located in the regions of Adamaoua, East, North and Far North, where a substantial and increasing number of households are resorting to negative coping strategies. According to UNHCR, the country hosts about 256 000 refugees from the Central African Republic and 95 000 refugees from Nigeria. Moreover, the IDP caseload in Cameroon was estimated at about 241 000.

EAST AFRICA



Abundant rains benefit crops and rangelands but also triggered widespread floods

In central and southern parts of the subregion, including **Burundi, Rwanda, eastern Kenya, southern Somalia, the United Republic of Tanzania and Uganda**, harvesting of the 2018 main season cereal crops is underway or about to start. The March to May rainy season has been characterized by exceptionally high precipitations across the subregion, with cumulative rainfall estimated at up to twice the long-term average (1982-2012). The abundant rains had a positive impact on crop establishment and development, illustrated by good vegetation conditions across all cropping areas and, as a result, crop prospects for the 2018 first season are generally favourable. However, the heavy rains also triggered widespread floods, mainly in central and southern **Somalia**, southeastern **Ethiopia** and **Kenya**, which resulted in loss of life, displacement, damage to farmland and livestock deaths. Subsequently, on 20-21 May, a tropical cyclone hit **Djibouti**, eastern **Ethiopia** and northwestern **Somalia**, displacing a

significant number of people. Overall, about 760 000 individuals have been displaced in these countries by these extreme climatic events (219 000 in **Ethiopia**, 227 000 in **Somalia**, 311 000 in **Kenya**, 3 000 in **Djibouti**). In **Somalia**, the damage to about 14 000 hectares of cropped land in the high potential riverine irrigated areas of Juba, Gedo, Hiran and Lower Shabelle regions is expected to result in a substantial production shortfall of the “gu” crop. However, the ample areas available for recession agriculture and the increased irrigation water availability due to high river levels will likely result in an above-average off-season harvest in September in these areas, thus partially offsetting the anticipated cereal production decline of the main “gu” crop.

In northern parts of the subregion, including **Eritrea, Ethiopia, South Sudan and the Sudan**, crops are at varying stages of development. In **Ethiopia**, harvesting of secondary season “belg” crop normally starts in June. In southern Tigray, eastern Amhara and eastern Oromia regions, dry conditions in March forced farmers to re-plant. In these areas the “belg” harvest is likely to be delayed, with negative effects on the planting of the major “meher” crops, which normally commences in June, and resulting in a shortened crop development period. By contrast, in northeastern SNNPR, “belg” rains had a good performance so far, benefiting crop development. In southern bi-modal rainfall areas of **South Sudan**, planting of the first season crops, to be harvested from July, was completed in April and adequate precipitations benefited crop establishment and development. In central and northern uni-modal rainfall areas, planting operations

started in mid-May, about two weeks later than normal, due to a delayed onset of seasonal rains. Across the country, agricultural activities continue to be affected by the protracted and widespread insecurity, which is constraining access to fields and continues to cause large scale displacement of people and damage to households’ productive assets. In addition, Fall Armyworm outbreaks are likely to further constrain yields. In **the Sudan**, planting of the 2018 crops, for harvest from October, has just started. The planted area and yields are likely to be affected by severe fuel shortages and by the low availability and very high prices of agricultural inputs, due to sustained inflation and dwindling foreign currency reserves constraining imports.

According to the latest weather forecast by the Greater Horn of Africa Climate Outlook Forum (GHACOF), the June-to-September rainy season, the main rainy season in northern and western parts of the subregion, is expected to be characterized by average to above-average precipitations over **the Sudan, South Sudan, Ethiopia, Eritrea, Uganda** and in major growing areas of Rift Valley and Western provinces of **Kenya**.

In most pastoral and agro-pastoral areas, where drought conditions prevailed between mid-2016 and November 2017, abundant rains in March and April 2018 offset the accumulated moisture deficits and prompted a substantial regeneration of rangeland resources. In northern and eastern **Kenya**, southeastern **Ethiopia**, central and northern **Somalia**, which experienced the most severe rainfall deficits during the past three rainy seasons, heavy rains resulted in marked improvements of

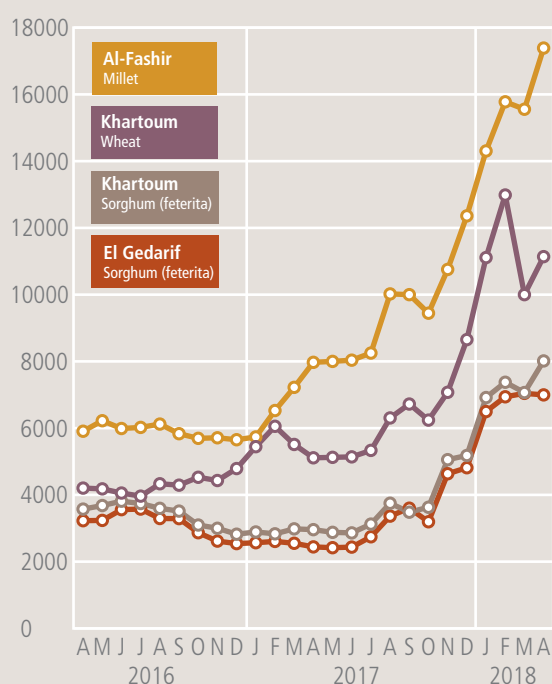
Table 9. East Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Total cereals ¹			
	2016	2017 estim.	2018 f'cast	2016	2017 estim.	2018 f'cast	2016	2017 estim.	2018 f'cast	Change: 2018/2017 (%)
East Africa	5.5	5.4	5.5	44.4	40.7	41.3	54.2	49.4	50.7	2.6
Ethiopia	4.5	4.5	4.5	20.7	20.5	20.5	25.4	25.1	25.1	0.0
Kenya	0.2	0.2	0.3	3.6	3.2	3.5	3.9	3.6	3.9	8.9
Sudan	0.5	0.5	0.5	8.0	4.7	5.5	8.5	5.2	6.0	15.9
Uganda	0.0	0.0	0.0	3.2	3.4	3.4	3.4	3.6	3.6	0.4
United Republic of Tanzania	0.1	0.1	0.1	7.0	7.1	7.2	10.5	9.7	10.4	8.0

Note: Totals and percentage change computed from unrounded data.

¹ Total cereals includes wheat, coarse grains and rice (paddy).

Wholesale prices of selected cereals in the Sudan (Sudanese pound (SDG) /tonne)



Source: Food Security Information for Action (SIFISIA).

vegetation conditions, which are currently above average in most areas. Rainfall surpluses have also resulted in the complete recharge of most water sources and consequently livestock trekking distances to watering points from grazing fields have decreased to historically low levels. Livestock body conditions, which declined to very low levels over more than one year of drought substantially improved since the start of the rainy season and they are currently at near-average to average levels. By contrast, in northern pastoral areas of **Ethiopia** (Afar and Northern Somali regions) “sugum/belg” rains started in April, with about a one-month delay, and current vegetation conditions are poor.

Prices of cereals at exceptionally high levels in the Sudan and in South Sudan

In several countries of the subregion, prices of cereals declined in recent months when 2017 secondary season harvests became available for consumption and, in April, they were generally at low levels. By contrast, in **the Sudan** and in **South Sudan**, prices have been rising and are at exceptionally high levels. In **the Sudan**, prices of sorghum, millet and wheat were more than twice their year-earlier levels and at record or near-record highs as of April. The significantly elevated levels result from a surge in prices since late 2017, driven by

the removal of wheat subsidies in the 2018 budget, which increased demand for millet and sorghum as substitute foods and by a strong depreciation of the local currency that triggered a significant rise in the general inflation rate.

The removal of subsidies on electricity, high fuel prices and localized but substantial crop production shortfalls in 2017 provided further support. In March, prices had levelled off or declined briefly, reflecting sorghum sales at subsidized prices and local wheat harvests, before resuming their increasing trend. In **South Sudan**, prices of maize and sorghum increased by 10-20 percent between January and April, when they were about 30 percent higher than the already high levels a year earlier and five times higher than 24 months earlier, driven by widespread insecurity,

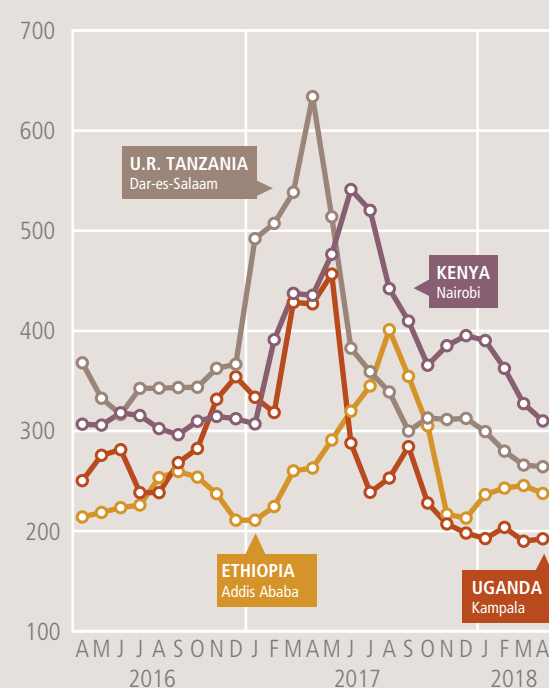
a tight supply situation and a significant depreciation of the local currency. In **Somalia**, prices of locally-produced coarse grains declined by 10-30 percent between January and April in several key markets of the south as the “deyr” harvest, gathered in January, and the recently-completed “deyr” off-season harvest increased supplies. By contrast, prices remained firm in the capital, Mogadishu, due to sustained demand. In **Kenya**, prices of maize declined by 10-15 percent between February and April as the “short-rains” harvest, completed in March in southeastern and coastal marginal agricultural areas, boosted market supplies. Similarly, in **the United Republic of Tanzania**, prices of maize decreased by 5-30 percent over the same period following the “vuli” harvest, completed in February in northeastern bi-modal rainfall areas. In **Uganda** and **Ethiopia**, prices of maize remained mostly stable in recent months. In **Kenya**, the **United Republic of Tanzania** and **Uganda** prices of maize in April were about 50 percent below the high levels of 12 months

earlier, when drought conditions seriously affected crop production. By contrast, in **Ethiopia**, prices in April were up to about 15 percent higher than their year earlier levels, supported by a weaker currency, after a 15 percent devaluation against the US dollar introduced in October 2017.

Food security improving in several countries, except in flood-affected areas and in South Sudan

The aggregate number of people in need of humanitarian assistance in the subregion is estimated at about 28.5 million, with the largest caseloads recorded in **Ethiopia** (7.9 million), **South Sudan** (7.1 million) and **the Sudan** (6.2 million). Food security conditions are improving in central and southern countries of the subregion (**Uganda**, except the Karamoja Region, **Kenya**, **Rwanda**, **Burundi**, **Somalia** and **the United Republic of Tanzania**) as the main season green crops are becoming available for household consumption and increased labour opportunities, associated with agricultural operations, are facilitating market food purchases. By contrast, in northern countries (**Ethiopia**, **Eritrea**, **the Sudan** and **South Sudan**), the situation is deteriorating with the progress of the lean season, which will peak in August/September just prior to the 2018 main harvest.

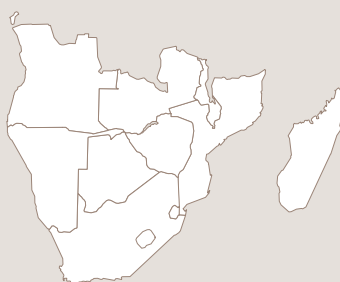
Maize prices in selected East African markets (USD/tonne)



Source: Regional Agricultural Trade Intelligence Network; Ethiopian Grain Trade Enterprise.

In most agro-pastoral areas, the food security situation has improved since March 2018 as the abundant seasonal precipitations resulted in an improvement in terms of trade for pastoralists and increased milk production. However, in the areas most affected by the floods and by the cyclone, crop and livestock losses have resulted in the deterioration of the food security situation of the displaced population and food shortages have been reported. In **South Sudan**, a reduced 2017 cereal harvest resulted in an earlier-than-normal start of the lean season, with an increase of the food insecure caseload from 4.8 million people at the end of 2017 to 6.3 million for the February-April 2018 period. According to the Integrated Phase Classification (IPC) analysis, a further deterioration in the food security situation is anticipated in the absence of humanitarian assistance between May and July, the peak of the lean season, with 7.1 million people estimated to be severely food insecure and about 155 000 people anticipated to face IPC Phase 5: "Catastrophe" food insecurity conditions in former Jonglei, Unity, Upper Nile and Western Bahr El Ghazal states.

SOUTHERN AFRICA



Maize production set to decline in 2018, but remain above average

Harvesting of the 2018 cereal crops is well underway and the production outlook for maize, the primary food staple, indicates a year-on-year decline in most countries compared to the record and bumper highs of 2017. However, at the subregional level, the production is still expected to remain above average. This year's foreseen declines would mostly result from a period of well below-average rains and higher-than-average temperatures in January and early February 2018, a period when the maize crop is more susceptible to moisture stress. As a result, maize yields are forecast to decline in 2018,

while a reduced area harvested, reflecting a decrease in plantings (partly on account of lower maize prices) and increased crop losses (due to the higher incidences of weather shocks), further negatively weighs on the production outlook. Infestations of Fall Armyworm have also caused yield decreases in localized areas. Improved rains from late February alleviated some of the early seasonal moisture stress and averted a steeper decline in yields. In some localized areas, heavy downpours caused crop losses in February and March.

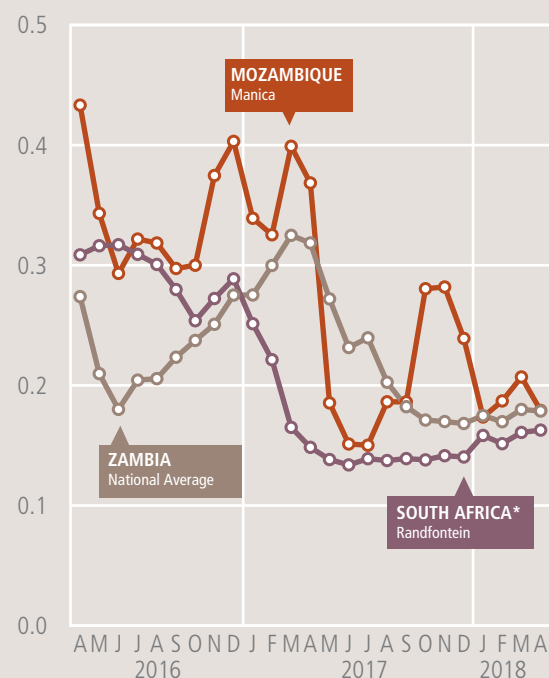
In aggregate, the subregional maize output in 2018 is preliminarily forecast at 25.4 million tonnes, about 20 percent less than the record level in 2017, but still about 1 million tonnes above the previous five-year average. The bulk of this year's decline is expected to occur in **South Africa**, with production forecast at 13.4 million tonnes, a year-on-year fall of 3.4 million tonnes but still above the previous five-year average. Large production declines are also forecast in **Malawi** and **Zambia**, where maize outputs are anticipated to drop to below-average levels. In **Angola**, **Mozambique** and **Zimbabwe**, productions are preliminarily forecast to fall

Table 10. Southern Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2016	2017 estim.	2018 f'cast	2016	2017 estim.	2018 f'cast	2016	2017 estim.	2018 f'cast	2016	2017 estim.	2018 f'cast	Change: 2018/2017 (%)
Southern Africa	2.2	1.8	1.8	19.6	33.4	26.7	4.3	3.7	4.2	26.1	38.9	32.6	-16.0
- excl. South Africa	0.3	0.3	0.2	10.9	16.0	12.8	4.3	3.7	4.2	15.5	20.1	17.2	-14.5
Madagascar	0.0	0.0	0.0	0.3	0.3	0.3	3.8	3.1	3.6	4.1	3.4	3.9	13.8
Malawi	0.0	0.0	0.0	2.4	3.6	2.9	0.1	0.1	0.1	2.5	3.7	3.0	-18.5
Mozambique	0.0	0.0	0.0	2.1	2.6	2.3	0.3	0.4	0.4	2.4	3.0	2.8	-9.7
South Africa	1.9	1.5	1.5	8.7	17.3	13.9	0.0	0.0	0.0	10.6	18.8	15.5	-17.7
Zambia	0.3	0.2	0.1	2.9	3.7	2.4	0.0	0.0	0.0	3.2	3.9	2.6	-33.8
Zimbabwe	0.0	0.1	0.1	0.6	2.5	1.9	0.0	0.0	0.0	0.6	2.5	1.9	-23.6

Note: Totals and percentage change computed from unrounded data.

White maize prices in selected Southern African markets (USD/kg)



* Wholesale prices, all others retail prices

Sources: Central Statistical Office, Zambia; Sistema De Informação De Mercados Agrícolas De Moçambique, Mozambique; SAFEX Agricultural Products Division, South Africa.

by less than 0.5 million tonnes, respectively, from their 2017 levels, which would still maintain higher-than-average harvests in 2018. In the small cereal-producing countries of **Botswana**, **Lesotho**, **Namibia** and **Swaziland**, outputs are forecast to decrease, with only Namibia expected to gather an above-average maize harvest.

Regarding other cereal crops, aggregate outputs of millet and sorghum are forecast to decrease, due to similar poor weather conditions. By contrast, rice production is forecast to rise to a near-average level from the previous year's below-average output. The expected increase is mostly associated with **Madagascar**, the subregion's main rice producer, where favourable weather conditions boosted prospects for paddy yields following a drought-reduced output in 2017.

Overall, cereal production in 2018 is forecast at an above-average level of 32.6 million tonnes, although 6.2 million tonnes down from the record high of 2017.

Above-average opening stocks bolster national cereal supplies

The record high maize harvest in 2017 enabled countries to build up inventories and, as a result, opening stocks for the 2018/19 marketing year (generally April/March) are estimated at above-average levels. Higher stocks are anticipated to partly cushion the impact of forecast production decreases in 2018, helping to contain import requirements to below-average levels in 2018/19. However, on a yearly basis, import needs are expected to expand.

As in previous years, maize exports from **South Africa** are

expected to satisfy most of the subregion's import needs and the country is forecast to export around 2.3 million tonnes in 2018/19. Reduced exports are forecast for other countries, mainly **Zambia**, reflecting lower domestic availabilities compared to the previous year.

Prices of maize remained low and stable

Despite some seasonal increases, prices of maize have remained relatively unchanged since the start of 2018. On a yearly basis, reflecting the overall favourable supply conditions, prices are also mostly below their levels of 2017. In **South Africa**, spill-over effects from the international market and a weaker local currency resulted in moderate price rises in recent months. However, month-on-month gains were capped by favourable production

and supply prospects in 2018/19. In **Mozambique**, **Zambia** and **Zimbabwe**, prices of maize grain have remained relatively flat, or even weakened in some markets, as traders and farmers off-loaded their stocks in preparation for the new supplies arriving from the upcoming harvest. In **Malawi**, prices have firmed up slightly, but still remained down on a yearly basis. In the import-dependent countries of **Namibia** and **Swaziland**, reduced grain prices in **South Africa** have continued to sustain lower year-on-year maize meal prices. Prices of rice continued to decrease in **Madagascar** from the record high levels reached in January. The recent declines mostly reflect increased market supplies from the minor 2018 rice crop, while the expected increase in paddy production in 2018 is anticipated to help alleviate the supply pressure following the sharply-reduced 2017 harvest.

In general, food inflation rates across the subregion have been tempered by the good supply conditions in the first half of 2018, however, the forecast production decreases are expected to put prices under increased upward pressure later in the year.

Lower harvests expected to aggravate food security

The forecast reduction in agricultural outputs in 2018 is expected to exacerbate food insecurity in the countries and areas where dry weather conditions were most intense. As a result, the total number of food insecure in the subregion is foreseen to rise on a yearly basis, but still remain well below the levels experienced in 2016, when an El Niño-impacted agricultural season severely worsened the food security situation. The 2018 national Vulnerability Assessment Committees' evaluations have just been conducted or are currently underway, with results expected to be released by late June and July. In the previous year, the number of food insecure (valid up to March 2018) was estimated at 4.3 million people³, a three-year low.

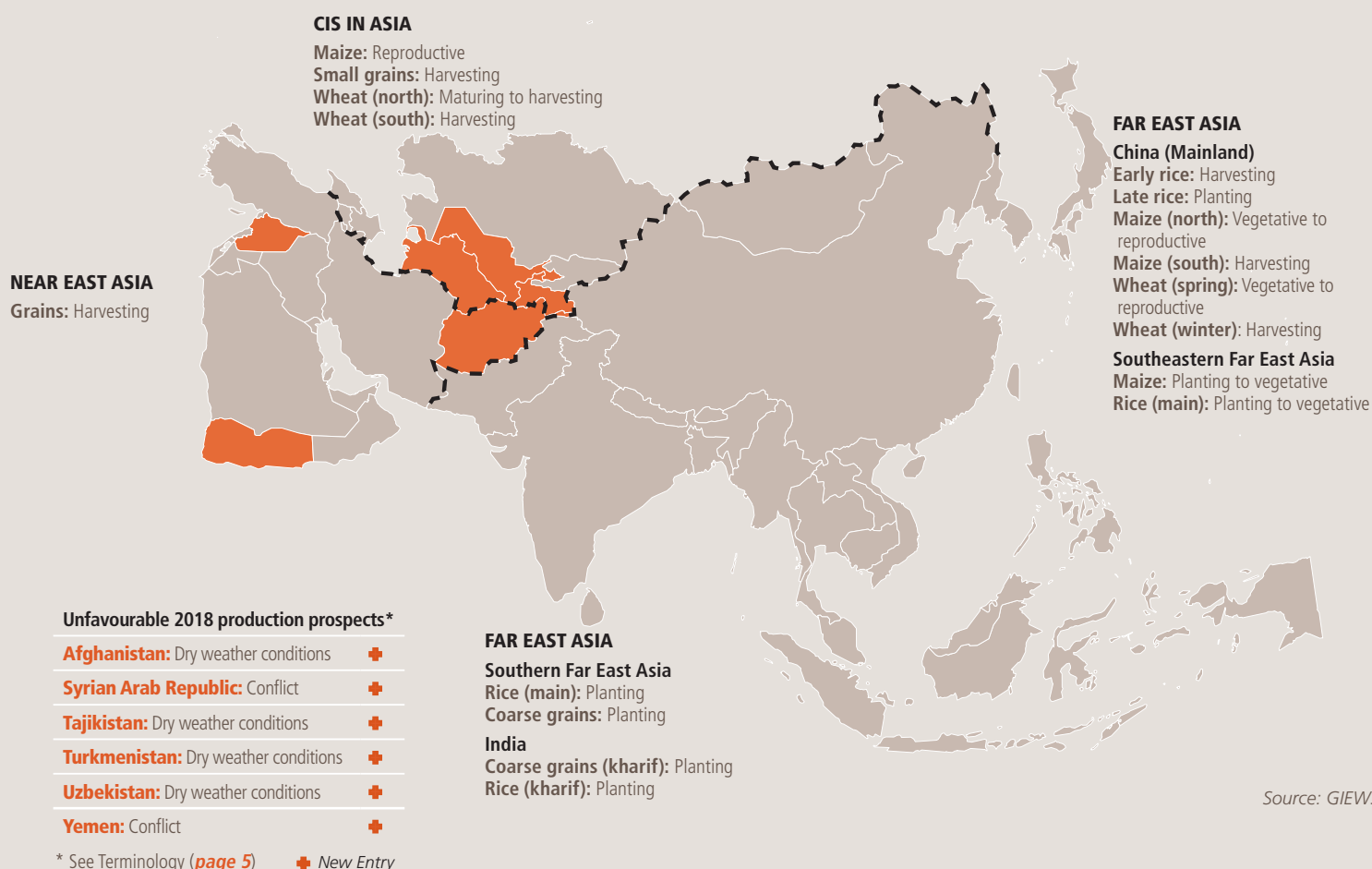
³ Based on the 2017 Vulnerability Assessment Committees' evaluation. This figure excludes Angola (official estimates are not available) and South Africa (figures are not directly comparable with data from other countries).

REGIONAL REVIEWS

ASIA

Note: Situation as of May

■ Subregional borders



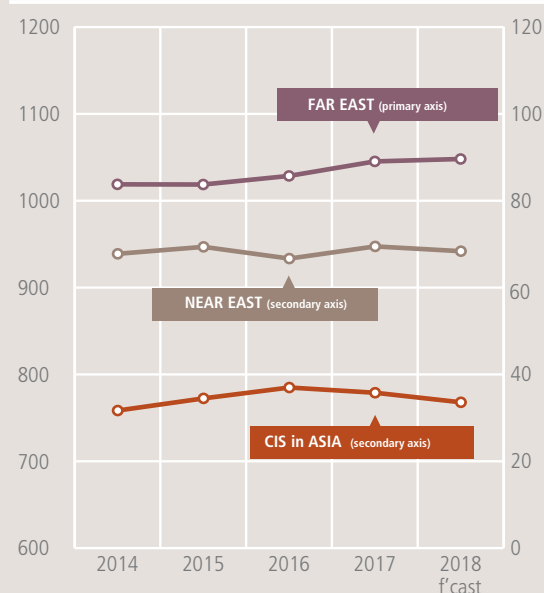
Source: GIEWS

Asia Production Overview

Total cereal production in Asia is forecast at 1 150 million tonnes in 2018, virtually unchanged from the above-average output in 2017. Production in the Far East is forecast to rise on a yearly basis, helped by government support measures and more remunerative producer prices for the paddy crop, which are expected to help drive area expansions and production increases.

By contrast, lower outputs are anticipated in the CIS Asian countries in 2018 on account of dry weather conditions during the winter months that dampened wheat yield expectations; harvests are forecast at below-average levels.

In the Near East, production is expected at average levels, after beneficial rains in recent months had offset the negative impact on crop development due to an extended dry period early in the season. Ongoing conflicts also continue, however, to severely afflict the agriculture sector in several countries.

Cereal production
(million tonnes)

FAR EAST



Wheat production in 2018 estimated close to last year's bumper level

Harvesting of the 2018, predominantly irrigated winter crops, mostly wheat, is almost complete. Bumper outputs are anticipated in most countries following generally beneficial weather conditions and adequate supplies of fertilizers and irrigation water. In **China (Mainland)**, the subregion's main producer, the 2018 wheat output is officially forecast at 129.6 million tonnes, close to last year's record level and slightly above the five-year average, reflecting high plantings and bumper yields. In **India**, the latest official reports put the 2018 wheat output at an all-time high of 98.6 million tonnes,

primarily due to record yields that are expected to more than compensate for a 4 percent decrease in plantings. In **Pakistan**, the 2018 wheat output is forecast to decline slightly, due to constrained water availability and input supplies. Above-average outputs are expected in **Bangladesh** and **Nepal**. Similarly, wheat production is forecast at an above-average level in **Mongolia** and in **the Democratic People's Republic of Korea**, a recovery from last year's drought-reduced level.

Cereal harvests in 2018 preliminarily forecast to remain close to last year's record level

Planting of the 2018 main season rice and coarse grains crops, to be harvested from September onwards, is currently underway in the Northern Hemisphere. In the countries along or south of the equator the 2018 main crop harvests have just been completed and planting of the secondary season crops has started.

The subregion's aggregate 2018 paddy output is preliminarily forecast at 690.8 million tonnes, slightly above last year's record level. The increase is mostly based on expectations of planting expansions supported by

more remunerative producer prices and Government support measures. This would be particularly the case for **India**, where government assistance, in the form of large purchases at minimum support prices, are expected to boost plantings. The 2018 outputs in the countries that were previously affected by unfavourable weather conditions in 2017, including **Bangladesh** and **Viet Nam**, are expected to recover. In **Sri Lanka**, a partial recovery is forecast, however, the 2018 paddy output is still anticipated to remain below average due to erratic distribution of rains and tight water supplies for irrigation. In **China (Mainland)**, planting contractions associated with the Government's efforts to curb plantings and avoid over-supply problems is expected to result in a year-on-year decrease in the 2018 aggregate output.

Early prospects for production of coarse grains, mostly maize, indicate a marginal decrease in the 2018 aggregate output, reflecting area contractions in **China (Mainland)**, the subregion's main producer, as farmers prefer to plant more profitable crops, in particular soybeans. Elsewhere in the subregion, the output of coarse grains is expected to remain close to last year's bumper levels, mostly reflecting expectations that the planted areas will remain high, supported by strong demand from the feed industry. Overall, the subregion's aggregate output of coarse grains in 2018 is forecast to remain above the five-year average.

Table 11. Far East cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2016	2017 estim.	2018 f'cast	2016	2017 estim.	2018 f'cast	2016	2017 estim.	2018 f'cast	2016	2017 estim.	2018 f'cast	Change: 2018/2017 (%)
Far East	251.2	258.7	258.5	328.4	334.0	331.4	676.3	682.0	690.8	1 255.9	1 274.7	1 280.6	0.5
Bangladesh	1.3	1.4	1.5	2.5	2.8	3.0	52.1	50.8	53.0	55.9	55.1	57.5	4.4
Cambodia	0.0	0.0	0.0	0.7	1.2	1.0	10.0	10.5	10.7	10.6	11.7	11.7	-0.4
China (Mainland)	128.9	129.8	129.6	229.2	226.1	223.2	208.7	210.3	208.1	566.8	566.2	560.8	-0.9
India	92.3	98.5	98.6	41.9	44.8	44.8	164.5	167.3	170.3	298.7	310.5	313.7	1.0
Japan	0.8	0.9	0.9	0.2	0.2	0.2	10.7	10.4	10.4	11.6	11.5	11.5	-0.2
Myanmar	0.1	0.1	0.1	2.3	2.4	2.4	28.6	29.5	30.4	31.1	32.0	33.0	2.9
Nepal	1.7	1.8	1.9	2.7	2.9	2.7	5.2	5.2	5.3	9.6	9.9	9.8	-0.5
Pakistan	25.5	25.8	25.4	6.7	6.5	6.5	10.3	11.2	11.4	42.4	43.4	43.3	-0.3
Philippines	0.0	0.0	0.0	7.2	7.9	8.0	18.5	19.4	19.7	25.8	27.3	27.7	1.5
Republic of Korea	0.0	0.0	0.0	0.2	0.2	0.2	5.6	5.3	5.2	5.9	5.5	5.5	-1.5
Thailand	0.0	0.0	0.0	4.7	5.0	5.1	32.4	33.7	34.5	37.2	38.7	39.5	2.2
Viet Nam	0.0	0.0	0.0	5.3	5.1	5.2	43.2	42.8	44.2	48.4	48.0	49.4	2.9

Note: Totals and percentage change computed from unrounded data.

Subregional cereal imports in 2018/19 to remain high, while exports forecast close to last year's low level

Aggregate cereal imports in the 2018/19 marketing year are preliminarily forecast at 132.7 million tonnes, a small decrease compared with the previous year's high level but still above the five-year average. The bulk of the projected year-on-year decrease is a result of lower wheat demand from **India**, reflecting its record output and improved domestic availabilities. Imports of rice in 2018 are forecast to increase from last year's level, mostly reflecting the higher import needs from Indonesia and the Philippines. By contrast, subregional imports of coarse grains are forecast to increase slightly from the previous year's average level, reflecting expectations of increased demand from the feed industry in **Viet Nam**.

Exports of cereals consist mostly of rice. In 2018, aggregate rice exports are forecast at 39.6 million tonnes, close to the previous year's above-average level.

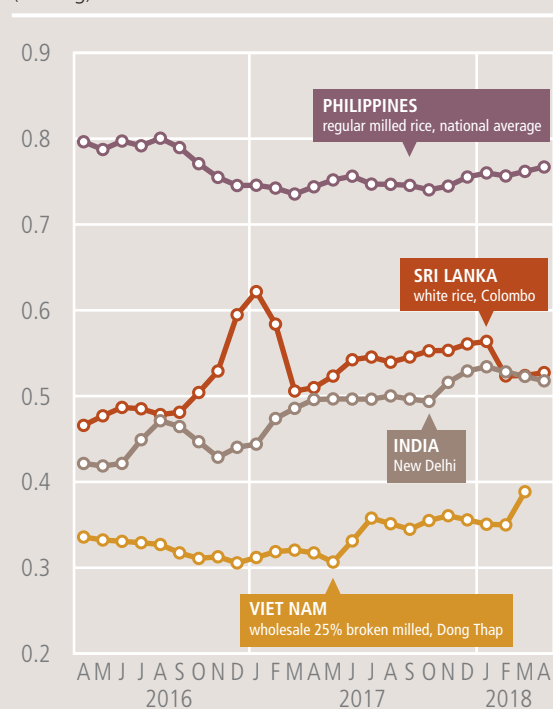
Domestic prices of rice showed mixed trends, while wheat prices declined seasonally

Prices of rice showed mixed trends between March and May, and were higher than their year-earlier levels in most countries of the subregion. Among the main exporters, prices increased since March in **Thailand**, supported by firm demand. By contrast, in

Viet Nam, improved market supplies from the adequate 2018 main crop weighed on prices during the last three months. In **Myanmar**, after steady increases since the start of the year, prices decreased in April reflecting growing supplies from the 2018 secondary harvest. Similarly, improved supplies from the record 2017 harvest in **Cambodia** pressured prices downward in some markets. In **India**, prices remained generally stable as downward supply pressure from the 2018 record secondary harvest was mostly offset by the impact of large Government purchases.

As for importing countries, prices continued their upward trend in **the Philippines**, mostly sustained by increases in fuel prices and declines in Government inventories, although adequate supplies from the bumper 2017 harvest limited further gains. In an effort to replenish the State reserves, the Government launched tenders, in May, to import a total of 500 000 tonnes of rice. Similarly, prices decreased slightly in **Sri Lanka** reflecting the recently-completed, although below-average 2018 main harvest. In **Indonesia** and **Bangladesh**, prices of

Rice retail prices in selected Far East countries (USD/kg)



Sources: Department of Census and Statistics, Sri Lanka; Ministry of Consumer Affairs, India; Bureau of Agriculture Statistics, the Philippines; Agriinfo, Viet Nam.

rice were on the decrease since March reflecting improved market availabilities from the 2018 main harvests and imports.

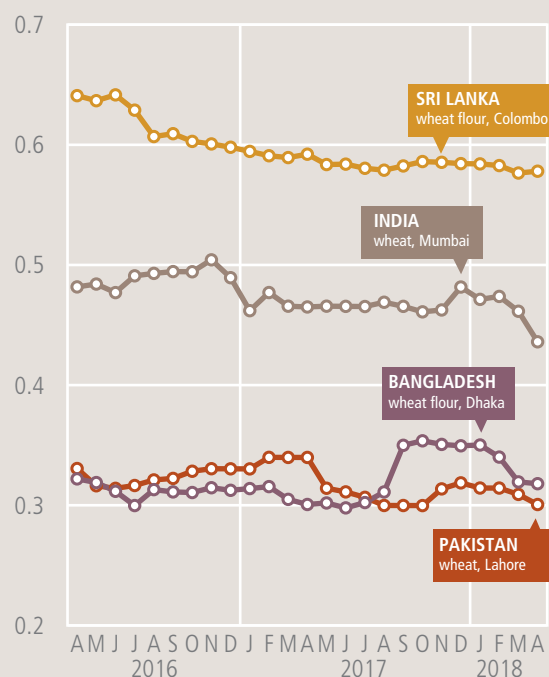
As for wheat and wheat flour, prices generally decreased, reflecting good supplies throughout the subregion. The strongest price decreases were registered in **Pakistan**, which is currently harvesting

Table 12. Far East cereal production and anticipated trade in 2018/19 ¹
(thousand tonnes)

	Avg 5-ys (2013/14 to 2017/18)	2017/18	2018/19	2018/19 over 2017/18 (%)	2018/19 over 5-yr avg (%)
Coarse grains					
Exports	3 729	2 817	2 839	0.8	-23.9
Imports	64 289	64 756	66 259	2.3	3.1
Production	328 105	334 039	331 359	-0.8	1.0
Rice (milled)					
Exports	37 616	39 647	39 420	-0.6	4.8
Imports	15 029	15 903	13 662	-14.1	-9.1
Production	446 037	452 611	458 272	1.3	2.7
Wheat					
Exports	3 982	2 101	2 320	10.4	-41.7
Imports	46 953	52 698	51 544	-2.2	9.8
Production	250 671	258 672	258 489	-0.1	3.1

¹ Marketing year July/June for most countries. Rice trade figures are for the second year shown.

Wheat and wheat flour retail prices in selected Far East countries (USD/kg)



Sources: Pakistan Bureau of Statistics; Ministry of Consumer Affairs, India; Management Information System and Monitoring, Bangladesh; National Bureau of Statistics of China.

the 2018 main crop. Similarly, in **India**, the improved supplies from the 2018 main crop softened wheat prices. Prices remained relatively stable in **Sri Lanka**, reflecting the adequate market supplies from the high imports in recent months, and in **Bangladesh**, also due to imports as well as supplies from the 2018 wheat harvest, which has just been completed.

Overall stable food security situation, but concerns remain in some countries

Overall food security conditions are stable in most countries of the subregion. However, there are pockets of severe food insecurity in several countries, including Bangladesh, the Democratic People's Republic of Korea, Myanmar and Pakistan. Conflicts in parts of Myanmar triggered large scale population displacements; according to the latest data from UNOCHA (May 2018), an estimated 905 000 refugees from Myanmar sought refuge in Cox's Bazar District in **Bangladesh** and 241 000 people remain internally displaced in Kachin, Kayin, Shan and Rakhine states of Myanmar. These populations mainly rely on humanitarian assistance to cover their basic needs. In **Pakistan**, the drought-affected cereal production and the loss of livestock for the third

consecutive year have aggravated food insecurity and caused acute malnutrition in Tharparkar District and the surrounding areas of Sindh Province. The country also hosts close to 1.4 million registered and unregistered Afghan refugees, which rely on humanitarian assistance. The food security situation also remains a concern in

the Democratic People's Republic of Korea, due to reduced agricultural output in 2017 and the economic downturn.

NEAR EAST



Average 2018 cereal output expected

Harvesting of the 2018 winter cereal crops began in May and is expected to be completed in July in most of the subregion. In **Turkey**, the subregion's main cereal producer, despite localized autumn dryness up to mid-November 2017 in some eastern areas, abundant moisture across the main growing areas later in the season improved crop prospects. The first production forecast from the Turkish Statistical Institute indicates a cereal harvest of 36 million tonnes, of which 21 million tonnes of wheat, 7.4 million tonnes of barley and 6 million tonnes of maize, on par with last year and the five-year average.

An extended dry spell which prevailed across parts of **the Islamic Republic of Iran**, **Iraq** and **the Syrian Arab Republic** from

Table 13. Near East cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2016	2017 estim.	2018 f'cast	2016	2017 estim.	2018 f'cast	2016	2017 estim.	2018 f'cast	2016	2017 estim.	2018 f'cast	Change: 2018/2017 (%)
Near East	42.8	45.1	43.9	20.9	21.3	21.4	4.6	4.7	4.7	68.2	71.1	70.0	-1.5
Afghanistan	4.6	4.3	4.0	0.6	0.7	0.8	0.5	0.5	0.5	5.7	5.5	5.2	-5.1
Iran (Islamic Republic of)	11.1	13.5	13.5	3.8	4.0	3.7	2.9	3.1	3.0	17.8	20.6	20.2	-1.6
Iraq	3.1	3.5	3.0	0.8	1.1	1.0	0.2	0.3	0.3	4.0	4.9	4.3	-11.1
Syrian Arab Republic	2.9	1.8	1.7	0.7	0.9	0.8	0.0	0.0	0.0	3.6	2.7	2.5	-8.6
Turkey	20.6	21.5	21.0	13.8	13.7	14.1	0.9	0.9	0.9	35.3	36.1	36.1	-0.2

Note: Totals and percentage change computed from unrounded data.

October 2017 to February 2018 was partially compensated by good precipitation received in March and April. Rainfall was deemed to be sufficient to bring cereal production in **the Islamic Republic of Iran** to about 20.2 million tonnes, slightly below last year's record harvest but about 12 percent above the five-year average. Consequences of the ongoing conflict on input and labour availabilities is likely to have prevented some fields in **Iraq** and **the Syrian Arab Republic** from being sown or harvested. Coupled with the lingering effects of early season dryness, cereal production in **Iraq** and **the Syrian Arab Republic** is expected at 4.3 and 2.5 million tonnes, respectively, both below the previous year's output and the average level.

In **Afghanistan**, a late onset of the rains hampered the planting of winter crops across the country. During the season, rainfall amounts have been below average, constraining crop development and limiting water supplies for irrigation of the spring crops. Consequently, a below-average cereal crop of 5.2 million tonnes is expected to be harvested. In **Yemen**, a late onset of the rains aggravated the conflict-related challenges faced by farmers and further endangered agricultural livelihoods.

At the subregional level, early production estimates indicate an aggregate wheat output of about 43.9 million tonnes, about 3 percent below last year's output but matching the five-year average. Total cereal production in 2018 is forecast at an average level of 70 million tonnes.

Subregional cereal imports in the 2018/19 (July/June) marketing year are forecast at 68.8 million tonnes, about the same as the previous year and about 5 percent above the five-year average, supported by growth in coarse grain imports for feed. At 28.6 million tonnes, the wheat import requirement is forecast to remain similar to the previous year and average levels.

Persisting conflicts continue to worsen food security of large numbers of people

In **Yemen**, according to the 2018 Humanitarian Needs Overview, approximately 17.8 million Yemenis are estimated to be food insecure, a 5 percent increase over the 2017 estimates. This figure includes 8.4 million people which are severely food insecure and at risk of starvation, about 24 percent more than in 2017. Any disruption of trade flows threatens the continuity of market supplies and, consequently, the food security of large numbers of people. Significant price differences persist among markets and prices across the country are generally well above the pre-crisis levels (February 2015), in some cases have even doubled.

In **the Syrian Arab Republic**, as of September 2017 (latest available figures), about 6.5 million people faced large food consumption gaps or the accelerated depletion of livelihood assets. An additional 4 million people are at risk of food insecurity. In **Afghanistan**, almost 1.9 million people were considered to be severely food insecure (IPC Phase 4:

"Emergency") and 5.7 million moderately food insecure (IPC Phase 3: "Crisis") between August and November 2017 (last figures available), a significant increase from the 4.3 million people who were in IPC Phases 3 and 4 between July and December 2016.

CIS IN ASIA⁴



Cereal production in 2018 forecast slightly below average

Sowing of 2018 spring crops is virtually complete and winter crops, to be harvested in June, are reaching maturation. The aggregate cereal production is forecast to decline to 33.9 million tonnes in 2018, about 6 percent less than last year's level and slightly below the five-year average. The subregion's wheat production in 2018, which in general accounts for more than 70 percent of the total cereal output, is forecast at 24.7 million tonnes, down 7 percent on a yearly basis. The decline is mainly due to below-average precipitation during the winter months in Tajikistan, Turkmenistan and Uzbekistan, which had

Table 14. CIS in Asia cereal production

(million tonnes)

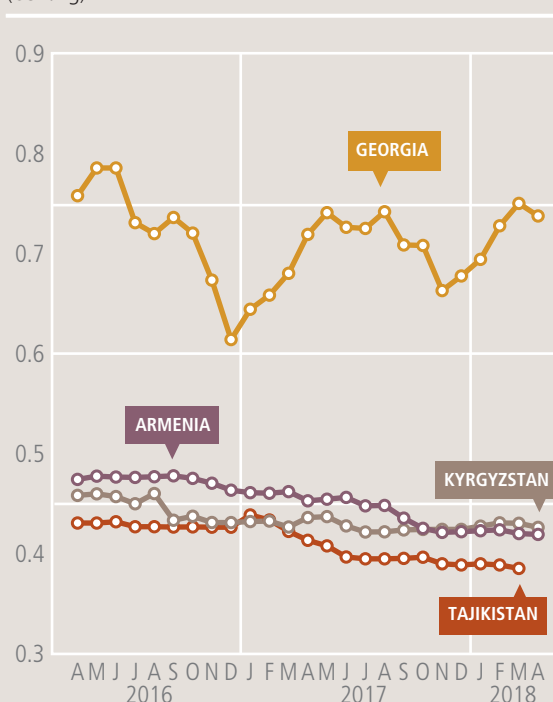
	Wheat			Coarse grains			Total cereals ¹			
	2016	2017 estim.	2018 f'cast	2016	2017 estim.	2018 f'cast	2016	2017 estim.	2018 f'cast	Change: 2018/2017 (%)
CIS in Asia	27.4	26.5	24.7	8.9	8.6	8.2	37.2	36.1	33.9	-6.0
Armenia	0.4	0.3	0.4	0.2	0.2	0.2	0.6	0.5	0.6	5.9
Azerbaijan	1.8	1.7	1.8	1.2	1.2	1.2	3.0	2.9	3.0	3.9
Georgia	0.1	0.1	0.1	0.3	0.2	0.3	0.4	0.3	0.4	42.4
Kazakhstan	15.0	14.8	14.0	4.5	4.6	4.5	20.0	19.9	19.0	-4.4
Kyrgyzstan	0.7	0.7	0.7	1.1	1.1	1.1	1.8	1.8	1.8	2.0
Tajikistan	0.9	0.9	0.7	0.4	0.4	0.3	1.4	1.4	1.1	-19.6
Turkmenistan	1.6	1.1	1.0	0.1	0.1	0.1	1.8	1.3	1.2	-7.9
Uzbekistan	6.9	6.9	6.0	1.1	0.9	0.6	8.3	8.1	6.8	-15.4

Note: Totals and percentage change computed from unrounded data.

¹ Total cereals includes wheat, coarse grains and rice (paddy).

⁴ Georgia is no longer a member of CIS but its inclusion in this group is maintained for the time being.

Retail wheat flour prices in selected CIS in Asia countries (national averages)
(USD/kg)



Source: National Statistical Service of Republic of Armenia; National Statistical Committee of the Kyrgyz Republic; State Committee on Statistics, Republic of Tajikistan; National Statistics Office of Georgia.

negative impacts on crop development, reducing yield expectations. In **Uzbekistan**, aggregate cereal production is anticipated to decline by 15 percent to a below-average level of 6.8 million tonnes. Most of the decrease would result from a reduced wheat output, which is forecast at 6 million tonnes, 13 percent below the high level of 2017. In **Turkmenistan**, where the forecast for the 2018 cereal crop is set at 1.2 million tonnes, 8 percent less than the below-average level of 2017. In **Tajikistan**, although the majority of the crops are irrigated, low snow cover during the winter raised concerns over potential water shortages for irrigation, especially in Khatlon Region, which produces 60 percent of the national cereal output. As a result, aggregate 2018 cereal production in Tajikistan is preliminarily forecast at a below-average level of 1.1 million tonnes, 20 percent below the previous year. A small decline in production is also expected in **Kazakhstan**, where the wheat output is forecast at an average level of 14 million

tonnes, 5 percent down from the bumper crop of 2017. The projected decrease is mainly due to a reduction in plantings following the implementation of the Government's Programme for 2017-2021, which aims to reduce the cropped area of wheat from 12.4 million hectares to 10.1 million hectares, in favour of more profitable oil crops. According to the Programme, the Government has stopped issuing subsidized credits for wheat production. Barley and maize production in 2018 is estimated to be close to the high levels of the previous years.

In the Caucasian countries, production prospects are generally favourable. In **Armenia, Azerbaijan and Georgia**, the 2018 cereal output is forecast at above-average levels due to beneficial weather

conditions since the start of the cropping season, which had a positive impact on yields. Elsewhere, in **Kyrgyzstan**, total cereal production is forecast at a well above-average level of 1.8 million tonnes, marking a small increase from the high level of last year. The small rise reflects adequate precipitation throughout the season which had a positive effect on crops.

Cereal exports in 2018/19 forecast below last year's level, while imports are set to increase slightly

Total wheat shipments (wheat and wheat flour in grain equivalent) from **Kazakhstan**, the main exporter of the subregion, are forecast at 7.3 million tonnes, about 300 000 tonnes below the 2017/18 level, reflecting a decline in wheat production and increasing competition with grains from the Russian Federation.

The remaining countries of the subregion depend on cereal imports from Kazakhstan

and the Russian Federation. Aggregate subregional imports in 2018/19 are forecast at 7.7 million tonnes, 3 percent above last year, mainly on account of an expected increase in import demand for wheat from **Tajikistan, Uzbekistan and Turkmenistan**, reflecting expectations of lower domestic outputs.

Export and domestic prices were below their values of a year earlier

In **Kazakhstan**, export prices of milling wheat strengthened over the last three months supported by trends in international markets but remained lower than a year earlier. At the same time, in the domestic market, prices of wheat flour were stable and slightly below their levels a year earlier, reflecting adequate market supplies.

In the importing countries of the subregion, prices of wheat flour remained stable or declined over the last three months on account of the good domestic supplies from the local harvests and cheaper imports from the key subregional supplier, Kazakhstan. In **Armenia and Kyrgyzstan**, prices of wheat flour remained virtually unchanged over the last three months and below a year earlier. Prices in **Tajikistan** weakened further since March and were well below their year earlier levels, on account of the good output last year and reduced prices of imported wheat. Moreover, the decline in rail-cargo tariffs from Uzbekistan, the re-opening of border crossings between the two countries and the Government's efforts to increase domestic milling capacity, thus reducing the share of imported wheat flour, also contributed to lowering price levels. Prices of wheat flour declined in **Georgia** and were only slightly above their values a year earlier. In **Azerbaijan**, prices remained unchanged over the previous three months and slightly below their values last year.

In most countries of the subregion, prices of potatoes, another key staple, increased seasonally since March to levels well above those a year earlier, due to the reduced subregional output in 2017.

REGIONAL REVIEWS

LATIN AMERICA AND THE CARIBBEAN

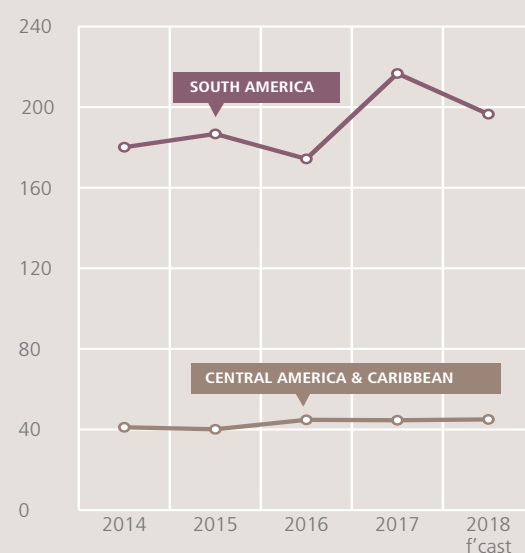


Source: GIEWS

Latin America and the Caribbean Production Overview

FAO forecasts Latin America and the Caribbean's 2018 cereal production at 250.4 million tonnes, an 7 percent decrease from the record output in 2017. The contraction is mainly associated with the drought-affected maize production in the major producers, Argentina and Brazil. By contrast, maize production in Central America and the Caribbean is forecast to increase, based on expectations of favourable weather conditions.

Wheat production is forecast to follow mixed trends in Central and South America in 2018. In Mexico, the major wheat producer in Central America, a record low planted area to wheat is forecast to sharply curb this year's output, while production in South America's major wheat producer, Argentina, is forecast to rise on account of an expansion in the area sown.

Cereal production
(million tonnes)

CENTRAL AMERICA AND THE CARIBBEAN



Wheat crop forecast at a low level in 2018

In **Mexico**, virtually the only wheat producer in the subregion, harvesting of the 2018 autumn/winter crop is underway. The winter season production, accounting for 95 percent of the annual national output, is expected to decrease as a result of the record low wheat plantings and insufficient soil moisture in the major producing department of Sonora, which lowered yield prospects. For the 2018 spring/summer season, based on recent data from the planting intention survey, the area sown is expected to contract by about 17 percent compared to the previous year, further weighing on the overall production outlook. As a result, the aggregate wheat production in 2018 is forecast at a below-average level of 3.5 million tonnes.

Maize production set to remain high for second consecutive year in 2018

FAO's preliminary forecast points to a record aggregate maize output of 33 million tonnes in 2018, about 11 percent above the five-year average. This would mainly reflect a bumper production in Mexico for the

third consecutive year, which accounts for 86 percent of the subregion's total maize output.

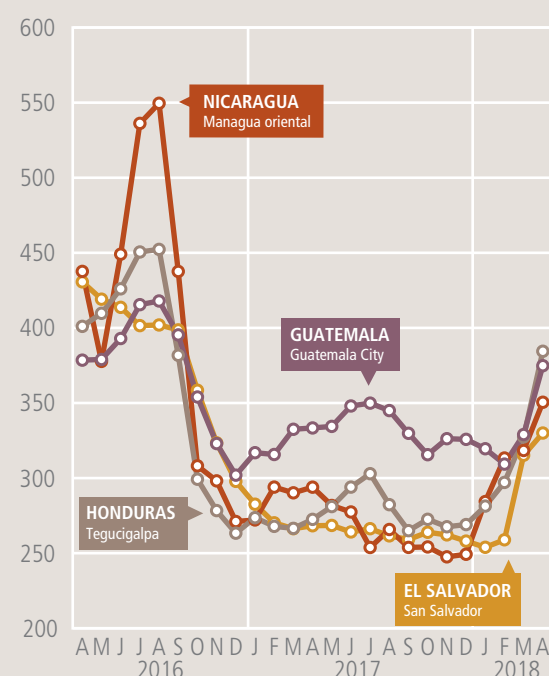
Harvesting of the 2018 winter maize crop started in late February in **Mexico**, while planting operations of the summer crop started in May. The planted area for the summer season crop is estimated to be similar to last year's record high, which assuming normal weather conditions, is expected to keep the maize output at an above-average level. Elsewhere in the subregion, planting of the main "primera" season maize crop, to be harvested from late August, is underway and early prospects are generally favourable. Neither the El Niño nor the La Niña phenomena are expected from May to July, as a result, weather conditions are likely to be favourable for crop development. Some degree of uncertainty exists in areas of **El Salvador**, **Honduras** and **Nicaragua** bordering the Golfo de Fonseca, resting on an increased likelihood of below-average rains in July, which may coincide with a period of prolonged heat. In **Nicaragua**, the distribution of inputs and access to credit was hindered by the recent conflict, adversely impacting planting operations. FAO's first forecast for the subregion's (excluding Mexico) maize output in 2018 stands at 4.8 million tonnes, about 12 percent above the previous five-year average.

In the Caribbean countries of **Haiti** and the **Dominican Republic**, planting operations of maize started with the onset of seasonal rains in April. Rainfall amounts are expected at average levels during June and July, favouring the production outlook.

Prices of white maize increased seasonally, exacerbated by high fuel costs

Prices of white maize rose seasonally in most countries during the February-April period and came under further upward pressure due to increased fuel costs,

Wholesale white maize prices in selected countries in Central America
(USD/tonne)



Sources: Secretaría de Agricultura y Ganadería, Honduras; Ministerio de Agricultura, Ganadería y Alimentación, Guatemala; Ministerio agropecuario y forestal, Nicaragua; Dirección General de Economía Agropecuaria, El Salvador.

Table 15. Latin America and the Caribbean cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2016	2017 estim.	2018 f'cast	2016	2017 estim.	2018 f'cast	2016	2017 estim.	2018 f'cast	2016	2017 estim.	2018 f'cast	Change: 2018/2017 (%)
Central America & Caribbean	3.9	3.5	3.5	39.1	39.2	39.4	2.9	3.0	3.1	45.8	45.7	46.1	0.8
El Salvador	0.0	0.0	0.0	1.0	1.0	1.1	0.0	0.0	0.0	1.1	1.0	1.1	8.2
Guatemala	0.0	0.0	0.0	1.9	1.9	2.0	0.0	0.0	0.0	2.0	2.0	2.0	1.1
Honduras	0.0	0.0	0.0	0.3	0.7	0.7	0.1	0.1	0.1	0.4	0.7	0.7	2.2
Mexico	3.9	3.5	3.5	34.3	34.2	34.3	0.2	0.3	0.3	38.5	38.0	38.1	0.4
Nicaragua	0.0	0.0	0.0	0.5	0.5	0.5	0.4	0.4	0.4	0.9	0.9	0.9	0.1
South America	29.5	25.7	28.3	129.1	174.1	151.9	23.2	25.0	24.1	181.8	224.8	204.3	-9.1
Argentina	18.6	18.5	20.0	47.0	56.4	48.2	1.4	1.3	1.3	67.0	76.2	69.5	-8.8
Brazil	6.8	4.2	4.9	65.8	102.5	87.9	10.6	12.3	11.5	83.3	119.1	104.4	-12.4

Note: Totals and percentage change computed from unrounded data.

resulting in significantly higher year-on-year price levels. The sharpest increases were recorded in **Honduras** and **El Salvador**, where prices were more than 40 and 30 percent higher year-on-year, respectively. In **Nicaragua**, prices of maize increased by 28 percent from March to May 2018, pushing up prices by 50 percent on a yearly basis. Also in **Guatemala**, seasonal increases were stronger than in the previous years due to the increased fuel costs, even though market availabilities remain adequate as a result of imports and ongoing harvests in northern maize-producing areas. In **Mexico**, prices increased moderately in April ahead of the secondary season harvest but were still lower than a year earlier, reflecting ample supplies from the 2017 harvests. In **Haiti**, prices of domestically-produced maize meal remained generally stable in the March-April period on account of the adequate supplies from the recently-completed minor autumn harvest. In the **Dominican Republic**, prices remained lower than in the same period last year, reflecting a favourable supply situation.

SOUTH AMERICA



Dry weather conditions results in reduced 2018 maize outputs compared to last year's record level

Aggregate maize production in 2018, with the harvest underway, is forecast at 139.4 million tonnes, well below last year's record level. The expected decline is mainly due to the forecast production declines in Argentina and Brazil, which together account for about 90 percent of the subregion's output.

In **Argentina**, drought conditions in Córdoba, Buenos Aires and La Pampa departments in the first months of 2018 are expected to cause a decrease in production for the "temprano" season, which accounts for about half of the total maize output. However, a record high area sown and, consequently, an expected production rebound for the secondary season ("tardío") crop, is anticipated to help keep aggregate production at an above average level in 2018. Officially forecast at 42 million tonnes, this year's output is still 15 percent below last year's record level. In **Brazil**, the 2018 first season maize production was adversely affected by erratic rainfall and reduced sowings reflecting lower maize prices prior to the planting period in late 2017, which encouraged farmers to shift to soybean cultivation instead of maize. The decrease in maize plantings is expected to continue into the second season, with the area sown officially estimated to be 4.5 percent below last year's level. Furthermore, dry weather conditions prevailed in the southwestern main maize-producing areas in April, raising concerns for crop development. In aggregate, the 2018 maize production in Brazil is forecast at 85 million tonnes, 14.3 million tonnes (15 percent) below last year's record level. In **Paraguay**, where the maize "zafriña" crop is to be harvested in August, an expected decline in yields, due to dry weather conditions, is forecast to cause a small decline in production. By contrast, an above-average maize harvest is forecast in **Peru**, reflecting both a larger harvested area and higher yields. In **Colombia**, 2018 maize production is expected to remain at a below-average level on account of the decline in the planted area.

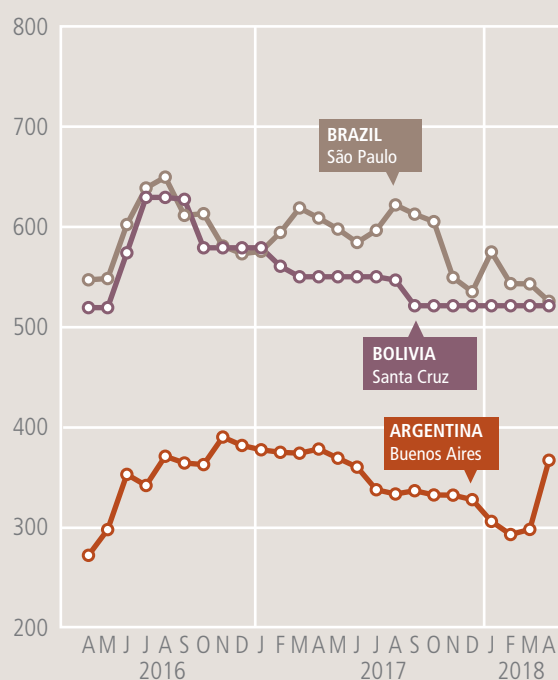
Planting of the 2018 wheat crop is underway in most countries of the subregion, with some localized exceptions in **Brazil** where dryness delayed planting operations in the major wheat-producing regions. The 2018 subregion's wheat production

is forecast at an above-average level, due to positive prospects in **Argentina**, the major producer of the subregion. The buoyant outlook mostly reflects an expected 5 percent increase in the planted area and favourable rains in May that increased soil moisture. FAO's preliminary forecast puts the 2018 subregion's wheat production at 28.3 million tonnes, of which Argentina would account for 20 million tonnes. In **Chile**, overall beneficial weather conditions in wheat-growing areas (Regions VII, VIII and IX) have boosted wheat yields and the output is forecast at an average level, a substantial recovery from last year's low level.

Cereal exports in 2018/19 expected at record levels

Aggregate exports of cereals in the 2018/19 marketing year, mainly maize, are forecast at a record 79.2 million tonnes. These high expectations mainly reflect weakening local currencies in **Argentina** and **Brazil**, that increased countries' competitiveness in the international market. Maize exports are forecast at about 60 million tonnes, close to the previous year's record level, and wheat exports from the region are expected at

Wholesale wheat flour prices in selected countries in South America (USD/tonne)



Sources: Servicio Informativo de Mercados Agropecuarios, Bolivia; Instituto de Economía Agrícola, Brazil; Bolsa de Cereales, Argentina.

13.9 million tonnes, well above average, mostly resulting from a larger wheat output.

Prices of wheat and maize rose significantly in Argentina and Brazil

In **Argentina**, prices of wheat grain increased significantly during the first four months of 2018 due to the strong export demand sustained by the depreciation of the local currency. In **Brazil**, prices of wheat strengthened in line with seasonal

trends and with increased imports due to the reduced 2017 harvest. In the major importing countries, **Colombia**, **Ecuador** and **Peru**, prices of wheat flour were around their year-earlier values, mainly due to adequate imports, while they increased in **Bolivia (Plurinational State of)** in April, although remained around their levels of last year. In **Chile**, wheat grain prices increased slightly in March after the completion of the reduced harvest but remained stable in April following large imports in early 2018.

Prices of yellow maize surged during March and April 2018 in **Argentina** and **Brazil**, key producers and exporters. In the two countries, prices have increased since December 2017, underpinned by strong demand and an anticipated drought-affected 2018 output. Elsewhere in the subregion, prices of yellow maize in February were below their year-earlier levels, which further declined seasonally in April in **Bolivia (Plurinational State of)**, **Chile** and **Ecuador**.

REGIONAL REVIEWS

NORTH AMERICA, EUROPE AND OCEANIA

Note: Situation as of May

NORTH AMERICA

Canada
Maize: Planting
Small grains: Vegetative

United States of America
Maize: Vegetative
Small grains: Maturing to harvesting

EUROPE

Northern Europe
Small grains: Reproductive

Southern Europe
Maize: Vegetative to reproductive
Small grains: Maturing to harvesting

CIS in Europe:
Maize: Reproductive
Small grains: Maturing to harvesting
Wheat: Maturing to harvesting

OCEANIA

Australia
Cereals (summer): Vegetative
Cereals (winter): Planting

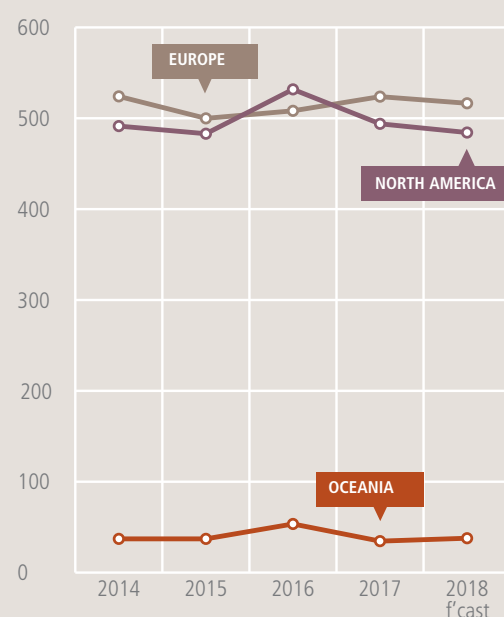
Source: GIEWS

North America, Europe and Oceania Production Overview

In North America, cereal production in 2018 is expected to decline, mostly on account of a forecast reduction in the maize output in the United States of America, driven by lower plantings as farmers opted to switch to more profitable crops, including soybeans. For wheat, production forecasts indicate a partial recovery in Canada and the United States of America.

In Europe, the aggregate cereal output is expected to decrease in 2018. The bulk of the decline is set to occur in CIS countries, where unfavourable weather is anticipated to result in a reduced wheat crop, notably in the Russian Federation. Cereal production in the European Union is also forecast to fall from the bumper high of 2017, but remain well above the previous five-year average.

In Oceania, Australia's 2018 wheat production is forecast to partially recover from the previous year's drought-reduced level, but remains below average.

Cereal production
(million tonnes)

NORTH AMERICA



United States of America's wheat production forecast at a below-average level in 2018

In the United States of America, harvesting of the 2018 winter wheat crop is underway. The aggregate 2018 wheat output, including a forecast for the spring crop to be harvested in August, is expected at 49.6 million tonnes, about 5 percent higher than in 2017 although still below the five-year average. The projected year-on-year increase mainly reflects an estimated expansion in plantings and expectations of higher yields for the spring crop, which would more than compensate the likely reduction in yields of winter crops; as of 20 May, around 35 percent of the winter wheat was rated as poor to very poor (compared to 15 percent in the corresponding period of 2017), on account of unfavourable weather conditions during the January-March period.

Regarding maize, the area planted in 2018 is estimated to have decreased compared to the already below-average level of 2017, as farmers switched to more profitable crops, including soybeans. Assuming average yields, maize production in 2018 is officially

forecast at 356.6 million tonnes, 4 percent below 2017's level, which would keep this year's output below the previous five-year average and mark a second consecutive annual production decline.

In **Canada**, the 2018 wheat harvest is underway. Production is officially forecast at 31.3 million tonnes, virtually unchanged from the below-average level of 2017, reflecting a 5 percent increase in the planted area that is expected to be offset by a similar reduction in yields.

are expected to have a positive impact on yields, counteracting the impact of reduced sowings. As a result, the 2018 total wheat production is forecast at an average level of 150 million tonnes.

The 2018 maize crop was planted in April-May and the area planted is estimated to have declined to the lowest level in seven years. Consequently, maize production is forecast to decline by 8 percent to a below-average level of 61 million tonnes. By contrast, the 2018 barley output is forecast at an above-average level of 62 million tonnes, 5 percent above the already high level of 2017, on account of expectations of higher yields due to favourable weather conditions.

EUROPE



CIS IN EUROPE

Cereal output in 2018 forecast close to the record high of the previous year

Harvesting of the winter cereal crops started at the beginning of June, while planting of

the spring crops, which started in March, is virtually complete. FAO's preliminary forecast for the 2018 subregional cereal output is put at 198 million tonnes, just 2 percent below the record level of the previous year. The aggregate wheat output is forecast at 108 million tonnes, 8 percent below the exceptional level of 2017. Most of the decline is expected to occur in **the Russian Federation**, where wheat production is forecast at 78 million tonnes, about 8 million tonnes below the 2017

EUROPEAN UNION

Favourable production prospects for 2018 wheat output

In the *European Union*, the 2018 winter wheat harvest is underway and production prospects are generally favourable. Well-distributed rains and warmer temperatures in spring benefited the development of winter wheat crops and the emergence of newly-planted spring crops. If favourable weather conditions persist, they

Table 16. North America, Europe and Oceania cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2016	2017 estim.	2018 f'cast	2016	2017 estim.	2018 f'cast	2016	2017 estim.	2018 f'cast	2016	2017 estim.	2018 f'cast	Change: 2018/2017 (%)
North America	95.0	77.4	80.9	429.7	410.9	397.0	10.2	8.1	9.2	534.8	496.3	487.1	-1.9
Canada	32.1	30.0	31.3	26.7	26.3	26.8	0.0	0.0	0.0	58.9	56.3	58.1	3.2
United States of America	62.8	47.4	49.6	403.0	384.6	370.1	10.2	8.1	9.2	476.0	440.0	428.9	-2.5
Europe	252.0	271.9	262.1	253.7	249.4	252.0	4.1	3.9	3.9	509.8	525.3	518.0	-1.4
Belarus	2.3	2.6	2.6	4.7	5.0	5.6	0.0	0.0	0.0	7.1	7.6	8.2	7.0
European Union	144.5	152.0	150.0	153.2	156.6	154.8	3.0	2.9	2.8	300.6	311.4	307.6	-1.2
Russian Federation	73.3	85.9	78.0	43.4	44.3	42.9	1.1	1.0	1.0	117.7	131.1	121.9	-7.0
Serbia	2.9	2.3	2.5	8.0	4.5	6.4	0.0	0.0	0.0	10.9	6.8	8.9	31.2
Ukraine	26.1	26.2	26.0	39.4	34.1	37.5	0.1	0.1	0.1	65.6	60.3	63.6	5.5
Oceania	34.8	21.6	24.2	18.4	12.4	13.1	0.3	0.8	0.8	53.5	34.8	38.1	9.4
Australia	34.4	21.2	23.7	17.8	11.8	12.5	0.3	0.8	0.8	52.4	33.9	37.0	9.3

Note: Totals and percentage change computed from unrounded data.

record level, reflecting a reduced area sown and a decline in yields. The contraction in the area planted was a consequence of adverse weather conditions during the planting period, which hampered spring sowings. The unfavourable weather also had some negative effects on yields, which are, however, still forecast above the five-year average. In aggregate, cereal production in the Russian Federation is forecast at 122 million tonnes in 2018, about 7 percent below the previous year's level, but still above the five-year average.

In **Ukraine**, the 2018 cereal output is expected to rebound from last year's average level and is forecast at about 64 million tonnes, which is the third highest output on record. The increase mainly reflects the favourable prospects for maize production, which is anticipated to increase by 17.6 percent to 28.2 million tonnes, well above the previous five-year average, on account of an expansion in the planted area. The wheat output is expected at 26 million tonnes, close to 2017's high level. In

Belarus, spring planting operations started ahead of the normal seasonal calendar due to dry and warm weather, but moisture deficits may affect the development of the spring crops in the next months. Taking into account a minor increase in the planted area, aggregate cereal production in Belarus is forecast at 8.2 million tonnes, 7 percent above 2017's level and close to the five-year average. In **the Republic of Moldova**, timely rainfall in May improved winter and spring crop conditions, boosting yield prospects. As a result, FAO's early forecast for 2018 aggregate cereal production stands at a well above-average level of 3.1 million tonnes. However, this year's output is still expected to be slightly below 2017's high level mostly stemming from a likely decrease in maize production, as yields are expected to return to average levels from the record highs of 2017. The wheat output is forecast at 1.3 million tonnes, close to the above-average level of last year.

Cereal exports in 2018/19 set to surpass last year's record

Total subregional cereal exports in the 2018/19 marketing year (July/June) are forecast at 91.7 million tonnes, slightly up compared to 2017/18. In **the Russian Federation**, wheat and wheat flour shipments are set to surpass the record of last year and to reach 40 million tonnes in 2018/19, pushing up total cereals exports to 50 million tonnes. Despite expectations of smaller domestic outputs this year, ample domestic supplies from last year, together with strong demand and high international prices, are anticipated to stimulate an increase in wheat shipments.

In **Ukraine**, exports are also expected to increase to 42 million tonnes, of which maize shipments are forecast at a record level of 21 million tonnes, 3 million tonnes above the average level of 2017/18,

owing to higher domestic production. Wheat shipments are forecast to be close to 17 million tonnes, a 3 percent decline from 2017/18 but still above the five-year average.

Export prices of wheat underpinned by strong import demand

In the exporting countries of the subregion, prices of wheat strengthened over the last three months amid strong demand, currency movements and trends in the international markets. In **Ukraine** and **the Russian Federation**, export prices of milling wheat increased slightly and reached levels more than 10 percent higher than a year earlier. In these countries, domestic prices of wheat grain and wheat flour changed little in April and were lower than a year earlier in the Russian Federation, while in Ukraine they were above year-earlier levels amid high inflation rates.

Wheat export prices in Russian Federation and Ukraine (USD/tonne)



Source: International Grains Council.

OCEANIA



Wheat production in 2018 is forecast below the five-year average

In **Australia**, planting of the 2018 wheat crop started in May and will continue until August, with harvest operations expected to start in October. Production is officially forecast at 23.7 million tonnes, 12 percent above the drought-reduced level of 2017, but still below average. This outlook assumes normal weather conditions for the rest of the season, despite hot and dry weather in March and April, prior to the planting period, which caused low soil moisture levels; in Western Australia, which accounts for more than 40 percent of the total wheat production, rainfall in March and April was around 30 percent of its average.

STATISTICAL APPENDIX

Table A1. Global cereal supply and demand indicators

	Average 2013/14 - 2017/18	2014/15	2015/16	2016/17	2017/18	2018/19
Ratio of world stocks to utilization (%)						
Wheat	32.5	30.6	32.2	35.0	37.3	37.4
Coarse grains	24.8	25.1	25.4	25.9	26.4	22.0
Rice	33.8	34.2	33.6	33.6	33.7	33.7
Total cereals	28.8	28.4	28.9	29.9	30.9	28.5
Ratio of major grain exporters' supplies to market requirements (%) ¹	123.4	124.3	123.9	123.4	122.5	118.2
Ratio of major exporters' stocks to their total disappearance (%) ²						
Wheat	18.5	18.1	17.9	20.2	20.8	19.4
Coarse grains	13.3	14.3	12.6	13.6	15.0	11.8
Rice	21.9	24.6	19.7	18.7	17.4	17.8
Total cereals	17.9	19.0	16.7	17.5	17.8	16.3
	Annual trend growth rate 2008-2017	2014	Change from previous year			2018
			2015	2016	2017	
Changes in world cereal production (%)	1.6	1.8	-1.0	2.8	1.4	-1.5
Changes in cereal production in the LIFDCs (%)	1.9	3.2	-3.2	4.4	2.1	-0.4
Changes in cereal production in the LIFDCs excluding India (%)	2.2	5.8	-1.2	3.8	-0.3	-1.7
		2015	2016	2017	2018*	Change 2018* over 2017*
Selected cereal price indices³						
Wheat		143.9	125.2	133.4	143.3	13.3%
Maize		161.2	151.0	146.3	160.3	6.3%
Rice		210.5	193.5	206.4	227.6	16.3%

Notes:

Utilization is defined as the sum of food use, feed and other uses.

Cereals refer to wheat, coarse grains and rice; grains refer to wheat and coarse grains (barley, maize, millet, sorghum and cereals NES).

¹ Major wheat exporters are: Argentina, Australia, Canada, the European Union, Kazakhstan, the Russian Federation, Ukraine and the United States of America; major coarse grains exporters are Argentina, Australia, Brazil, Canada, the European Union, the Russian Federation, Ukraine and the United States of America; major rice exporters are India, Pakistan, Thailand, the United States of America and Viet Nam.

² Disappearance is defined as domestic utilization plus exports for any given season.

³ Price indices: The Wheat Price Index has been constructed based on the International Grains Council Wheat Price Index, rebased to 2002-2004=100; for maize, the U.S. maize No.2 Yellow (delivered U.S. Gulf ports) with base 2002-2004=100; for rice, the FAO Rice Price Index, 2002-2004=100, is based on 16 rice export quotations.

* January-May average.

Table A2. World cereal stocks¹*(million tonnes)*

	2014	2015	2016	2017	2018 estimate	2019 forecast
TOTAL CEREALS	638.3	714.4	743.8	782.8	816.6	772.1
Wheat	197.0	216.8	236.5	258.6	277.4	283.4
held by:						
- main exporters ²	57.1	68.2	69.7	81.8	84.2	79.2
- others	139.9	148.6	166.8	176.8	193.2	204.2
Coarse grains	275.1	328.6	339.8	355.2	367.8	314.9
held by:						
- main exporters ²	84.5	111.2	99.8	110.3	124.3	97.6
- others	190.6	217.4	240.0	244.9	243.5	217.3
Rice (milled basis)	166.2	168.9	167.5	169.1	171.3	173.8
held by:						
- main exporters ²	49.6	43.6	34.6	33.0	31.1	32.0
- others	116.6	125.3	132.9	136.1	140.2	141.8
Developed countries	152.0	182.0	181.1	210.6	213.7	190.8
Australia	7.8	7.8	6.6	11.2	9.5	8.5
Canada	15.2	10.4	10.0	12.4	10.6	10.5
European Union	32.7	40.1	36.4	33.2	38.4	35.2
Japan	7.1	7.1	7.4	7.1	6.9	7.0
Russian Federation	7.9	12.7	11.3	18.3	25.0	20.9
South Africa	1.7	3.4	3.8	1.8	5.0	4.7
Ukraine	10.6	12.3	9.3	7.8	5.8	6.9
United States of America	51.4	69.0	76.1	95.8	88.1	72.1
Developing countries	486.3	532.4	562.8	572.2	602.9	581.3
Asia	403.1	430.8	460.9	470.7	479.6	469.1
China (Mainland)	258.2	282.7	326.0	351.8	357.1	346.5
India	49.6	48.9	41.9	34.5	40.3	44.3
Indonesia	10.9	9.9	9.6	8.9	10.3	10.6
Iran (Islamic Republic of)	6.0	9.9	10.4	8.4	6.7	6.4
Korea, Republic of	3.7	3.9	4.3	3.8	2.9	2.9
Pakistan	5.2	6.2	5.2	5.1	4.3	2.8
Philippines	3.2	4.2	4.0	3.7	4.5	4.6
Syrian Arab Republic	3.2	2.0	1.5	2.0	2.0	1.7
Turkey	7.2	6.3	5.9	4.7	5.9	5.2
Africa	43.3	49.1	52.8	51.5	53.7	51.1
Algeria	4.2	5.0	5.7	5.6	5.2	4.7
Egypt	6.2	6.3	7.1	6.6	6.5	6.5
Ethiopia	2.3	3.3	4.1	4.4	4.1	4.0
Morocco	5.5	5.2	8.5	6.5	8.7	9.4
Nigeria	1.8	3.4	3.6	3.0	2.3	2.1
Tunisia	1.0	1.2	1.0	0.9	0.9	1.2
Central America	7.2	8.1	9.7	12.6	13.7	11.8
Mexico	3.3	3.6	4.6	6.5	7.6	6.0
South America	32.3	44.0	39.0	37.0	55.4	48.8
Argentina	6.4	11.5	7.6	8.4	13.7	10.7
Brazil	12.5	17.5	14.2	8.1	19.3	14.3

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

¹ Stocks data are based on an aggregate of carryovers at the end of national crop years and do not represent world stock levels at any point in time.² Major wheat exporters are Argentina, Australia, Canada, the European Union, Kazakhstan, the Russian Federation, Ukraine and the United States of America; major coarse grains exporters are Argentina, Australia, Brazil, Canada, the European Union, the Russian Federation, Ukraine and the United States of America; major rice exporters are India, Pakistan, Thailand, the United States of America and Viet Nam.

Table A3. Selected international prices of wheat and coarse grains

(USD/tonne)

	Wheat			Maize		Sorghum
	US No.2 Hard Red Winter Ord. Protein ¹	US Soft Red Winter No.2 ²	Argentina Trigo Pan ³	US No.2 Yellow ²	Argentina ³	US No.2 Yellow ²
Annual (July/June)						
2004/05	154	138	123	97	90	99
2005/06	175	138	138	104	101	108
2006/07	212	176	188	150	145	155
2007/08	361	311	318	200	192	206
2008/09	270	201	234	188	180	170
2009/10	209	185	224	160	168	165
2010/11	316	289	311	254	260	248
2011/12	300	256	264	281	269	264
2012/13	348	310	336	311	278	281
2013/14	318	265	335	217	219	218
2014/15	266	221	246	173	177	210
2015/16	211	194	208	166	170	174
2016/17	197	170	190	156	172	151
Monthly						
2016 - May	193	189	202	169	187	153
2016 - June	198	186	210	181	197	170
2016 - July	188	168	210	161	179	147
2016 - August	188	157	215	150	177	140
2016 - September	188	158	201	148	170	141
2016 - October	193	164	184	152	174	146
2016 - November	191	167	176	152	178	143
2016 - December	187	162	168	154	181	154
2017 - January	201	173	177	159	183	155
2017 - February	210	180	186	163	179	157
2017 - March	198	176	191	159	163	150
2017 - April	191	173	189	157	164	150
2017 - May	200	175	189	158	161	158
2017 - June	226	182	190	158	155	164
2017 - July	240	206	193	159	150	173
2017 - August	201	173	190	148	149	170
2017 - September	215	176	181	147	149	169
2017 - October	214	177	182	148	149	171
2017 - November	220	176	179	148	150	167
2017 - December	219	171	178	149	158	174
2018 - January	229	178	178	156	164	178
2018 - February	240	191	189	164	177	188
2018 - March	245	198	211	171	188	181
2018 - April	240	198	229	175	189	180
2018 - May	250	211	261	179	192	165

Sources: International Grains Council and USDA.

¹ Delivered United States f.o.b. Gulf.² Delivered United States Gulf.³ Up River f.o.b.

Table A4a. Estimated cereal import requirements of Low-Income Food-Deficit Countries¹ in 2017/18 or 2018*(thousand tonnes)*

	Marketing year	2016/17 or 2017			2017/18 or 2018
		Commercial purchases	Food aid	Total imports (commercial and aid)	Total import requirements (excl. re-exports)
AFRICA		34 863.9	988.6	35 852.5	35 064.4
East Africa		10 702.3	599.0	11 301.3	11 623.3
Burundi	Jan/Dec	160.9	15.0	175.9	176.0
Comoros	Jan/Dec	46.0	0.0	46.0	56.0
Djibouti	Jan/Dec	81.0	4.0	85.0	85.0
Eritrea	Jan/Dec	447.7	0.0	447.7	448.3
Ethiopia	Jan/Dec	1 677.6	54.0	1 731.6	1 720.0
Kenya	Oct/Sept	3 220.0	80.0	3 300.0	3 580.0
Rwanda	Jan/Dec	165.0	0.0	165.0	160.0
Somalia	Aug/Jul	750.0	170.0	920.0	920.0
South Sudan	Nov/Oct	500.0	60.0	560.0	665.0
Sudan	Nov/Oct	2 100.0	182.0	2 282.0	2 360.0
Uganda	Jan/Dec	537.5	23.0	560.5	518.0
United Republic of Tanzania	Jun/May	1 016.6	11.0	1 027.6	935.0
Southern Africa		3 739.9	93.2	3 833.1	2 719.2
Lesotho	Apr/Mar	249.5	14.0	263.5	177.1
Madagascar	Apr/Mar	431.0	17.1	448.1	861.0
Malawi	Apr/Mar	540.0	6.0	546.0	167.0
Mozambique	Apr/Mar	1 295.0	1.0	1 296.0	1 146.0
Zimbabwe	Apr/Mar	1 224.4	55.1	1 279.5	368.1
West Africa		18 257.0	143.1	18 400.1	18 461.9
Coastal Countries		13 144.0	44.5	13 188.5	13 578.5
Benin	Jan/Dec	426.0	6.0	432.0	527.0
Côte d'Ivoire	Jan/Dec	2 065.0	5.5	2 070.5	2 030.5
Ghana	Jan/Dec	1 280.0	5.0	1 285.0	1 285.0
Guinea	Jan/Dec	822.0	5.5	827.5	797.5
Liberia	Jan/Dec	490.0	12.0	502.0	437.0
Nigeria	Jan/Dec	7 390.0	0.0	7 390.0	7 870.0
Sierra Leone	Jan/Dec	426.0	10.0	436.0	356.0
Togo	Jan/Dec	245.0	0.5	245.5	275.5
Sahelian Countries		5 113.0	98.6	5 211.6	4 883.4
Burkina Faso	Nov/Oct	683.0	10.0	693.0	708.0
Chad	Nov/Oct	121.0	38.6	159.6	169.6
Gambia	Nov/Oct	252.0	1.5	253.5	258.5
Guinea-Bissau	Nov/Oct	133.0	6.3	139.3	134.3
Mali	Nov/Oct	451.2	0.0	451.2	451.2
Mauritania	Nov/Oct	590.9	16.1	607.0	583.8
Niger	Nov/Oct	625.0	18.0	643.0	668.0
Senegal	Nov/Oct	2 256.9	8.1	2 265.0	1 910.0
Central Africa		2 164.7	153.3	2 318.0	2 260.0
Cameroon	Jan/Dec	1 335.0	10.0	1 345.0	1 270.0
Central African Republic	Jan/Dec	61.0	23.0	84.0	86.0
Democratic Republic of the Congo	Jan/Dec	749.7	120.3	870.0	885.0
Sao Tome and Principe	Jan/Dec	19.0	0.0	19.0	19.0

Source: FAO

¹ The Low-Income Food-Deficit Countries (LIFDCs) group includes net food deficit countries with annual per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. USD 1 985 in 2013); for full details see <http://www.fao.org/countryprofiles/lifdc>

Table A4b. Estimated cereal import requirements of Low-Income Food-Deficit Countries¹ in 2017/18 or 2018*(thousand tonnes)*

	Marketing year	2016/17 or 2017			2017/18 or 2018
		Commercial purchases	Food aid	Total imports (commercial and aid)	Total import requirements (excl. re-exports)
ASIA		28 521.6	689.0	29 210.6	29 537.8
Cis in Asia		4 915.2	1.0	4 916.2	4 651.2
Kyrgyzstan	Jul/Jun	921.2	1.0	922.2	822.2
Tajikistan	Jul/Jun	1 147.0	0.0	1 147.0	1 032.0
Uzbekistan	Jul/Jun	2 847.0	0.0	2 847.0	2 797.0
Far East		14 054.4	68.0	14 122.4	14 134.6
Bangladesh	Jul/Jun	6 506.5	0.0	6 506.5	10 560.0
Democratic People's Republic of Korea	Nov/Oct	390.0	66.0	456.0	641.0
India	Apr/Mar	6 030.9	0.0	6 030.9	1 951.0
Nepal	Jul/Jun	964.2	2.0	966.2	820.8
Pakistan	May/Apr	162.8	0.0	162.8	161.8
Near East		9 552.0	620.0	10 172.0	10 752.0
Afghanistan	Jul/Jun	2 882.0	100.0	2 982.0	3 012.0
Syrian Arab Republic	Jul/Jun	2 650.0	290.0	2 940.0	3 430.0
Yemen	Jan/Dec	4 020.0	230.0	4 250.0	4 310.0
CENTRAL AMERICA AND THE CARIBBEAN		1 375.9	10.1	1 386.0	1 157.1
Haiti	Jul/Jun	815.9	10.1	826.0	650.1
Nicaragua	Jul/Jun	560.0	0.0	560.0	507.0
OCEANIA		471.2	0.0	471.2	491.2
Papua New Guinea	Jan/Dec	420.2	0.0	420.2	440.2
Solomon Islands	Jan/Dec	51.0	0.0	51.0	51.0
TOTAL		65 232.6	1 687.7	66 920.3	66 250.5

Source: FAO

¹ The Low-Income Food-Deficit Countries (LIFDCs) group includes net food deficit countries with annual per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. USD 1 985 in 2013); for full details see <http://www.fao.org/countryprofiles/lifdc>

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