Food and Agriculture Organization of the United Nations

#3
SEPTEMBER 2019

CROP PROSPECTS and FOOD SITUATION

Quarterly Global Report

COUNTRIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD

FAO assesses that globally 41 countries, of which 31 in Africa, continue to be in need of external assistance for food. Conflicts are the main cause of the high levels of severe food insecurity, while adverse weather conditions have also affected agricultural production, reducing food availability and access.

Asia	1.0
Africa	-5.3
Central America and the Caribbean	2.9
South America	15.7
North America	-3.0
Europe	6.5
Oceania	16.1
World	**2.1**

WORLD

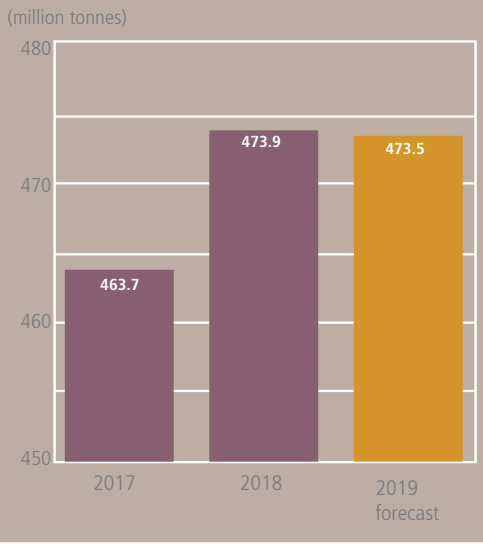
Cereal production 2019 over 2018
(yearly percentage change)

+2.1%

LIFDCs

Cereal production 2019 over 2018

-0.1%



REGIONAL HIGHLIGHTS

AFRICA Severe dryness in East Africa has affected production prospects for the 2019 main crops and degraded pasture conditions, while rainfall deficits resulted in output cuts in Southern Africa and North Africa. Insecurity and localized dry weather conditions worsened expectations for the 2019 production in West Africa.

ASIA Cereal output in the Near East increased in 2019, with improved security conditions contributing to a production upturn in the Syrian Arab Republic. In Far East Asia, mainly driven by a larger wheat output in India, aggregate cereal production is foreseen to rise in 2019. Cereal harvests are also expected to increase in CIS Asia.

LATIN AMERICA AND THE CARIBBEAN Record cereal harvest estimated in South America in 2019, resting on large outputs in Argentina and Brazil. In Central America and the Caribbean, crop prospects are favourable in Mexico, but irregular distribution of seasonal rainfall has diminished production outlooks in other countries of the subregion.

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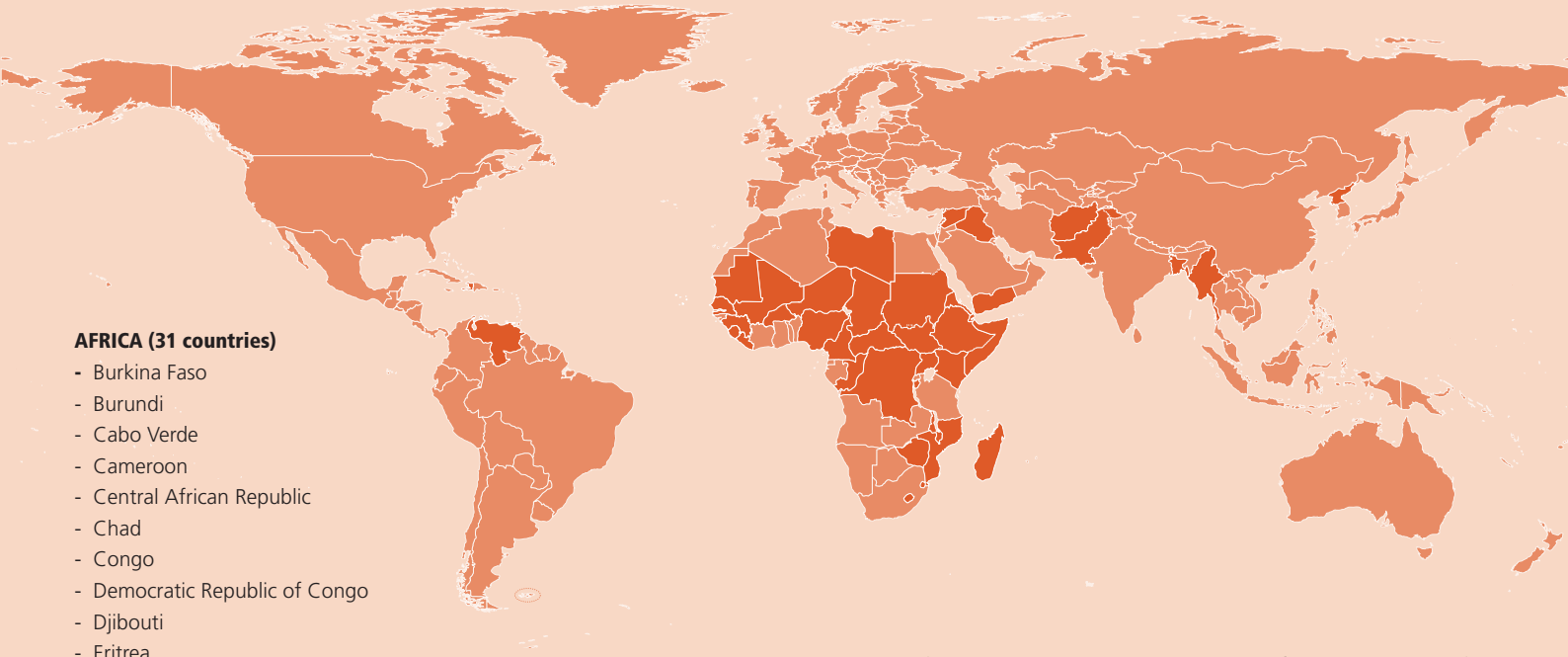
COUNTRIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD



AFRICA (31 countries)
- Burkina Faso
- Burundi
- Cabo Verde
- Cameroon
- Central African Republic
- Chad
- Congo
- Democratic Republic of Congo
- Djibouti
- Eritrea
- Eswatini
- Ethiopia
- Guinea
- Kenya
- Lesotho
- Liberia
- Libya
- Madagascar
- Malawi
- Mali
- Mauritania
- Mozambique
- Niger
- Nigeria
- Senegal
- Sierra Leone
- Somalia
- South Sudan
- Sudan
- Uganda
- Zimbabwe

ASIA (8 countries)
- Afghanistan
- Bangladesh
- Democratic People's Republic of Korea
- Iraq
- Myanmar
- Pakistan
- Syrian Arab Republic
- Yemen

LATIN AMERICA AND THE CARIBBEAN (2 countries)
- Haiti
- Venezuela

Source: GIEWS (disputed territories and boundaries in conformity with UN maps)**
** See Terminology (**page 5**)

AFRICA (31 COUNTRIES)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/ SUPPLIES

Central African Republic

Conflict, displacements and food supply constraints

- The number of severely food insecure people decreased by 10 percent to 1.81 million in August 2019, compared to a year before. This is mainly the result of localized security improvements, which allowed some Internally Displaced Persons (IDPs) to return to their place of origin. However, the country continues to experience a precarious humanitarian situation and persistent insecurity is still affecting households' access to food and livelihoods, significantly disrupting livestock, fishing and agricultural activities in eastern and southeastern areas.

Kenya

Consecutive unfavourable rainy seasons

- About 3.1 million people are severely food insecure, mainly located in northern and eastern areas as a result of the cumulative impact of poor 2018 October-December "short-rains" and severe dryness during most of the 2019 March-May "long-rains" season.

Somalia

Conflict, civil insecurity and consecutive unfavourable rainy seasons

- About 2.1 million people are estimated to be in need of emergency assistance, mainly agro-pastoral and pastoral communities affected by poor 2018 October-December "Deyr" rains and severe dryness during most of the 2019 April-June "Gu" season.

Zimbabwe

Reduced cereal production and significant increases in food prices

- The number of food insecure people has increased considerably in 2019/20. The figure is projected to almost double to 5.5 million people on a yearly basis in the January-March 2020 period.
- The driving factors are the sharply reduced cereal harvest, steep increases in staple food prices and a poor economic environment that has diminished income-generating opportunities.

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 most food insecurity areas are in the westernmost parts of Makama, Rutana, Ruygi and Cankuzo provinces, where torrential rains in 2018 triggered floods and landslides resulting in crop losses.
- About 1.72 million people were estimated to be severely food insecure in late 2018 (latest available information).

Chad
Civil insecurity and border closure with Libya
- According to the last "Cadre Harmonisé", about 640 000 people were estimated to be food insecure between June and August 2019.
- Nearly 133 000 people remained internally displaced, almost entirely on account of the insurgency in the northeast and, in addition, the country hosts about 464 000 refugees.

Democratic Republic of the Congo
Conflict and displacements in eastern and southern areas as well as influx of refugees straining resources of host communities
- As of August 2019, 15.9 million people were estimated to be severely food insecure.
- As of 31 May, the country hosted about 537 000 refugees, more than 30 percent of which are located in the region of North Kivu.
- The Ebola Virus Disease (EVD) continues to be a growing and serious concern. WHO reported that, as of August, a total of 3 000 people had been affected, of which nearly 2 000 have died.

Djibouti
Impact of consecutive unfavourable rainy seasons on pastoral livelihoods
- About 150 000 people were estimated to be severely food insecure in 2018 (latest available information) in rural areas, due to consecutive unfavourable rainy seasons.

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

Ethiopia
Impact of drought on local livelihood systems
- An estimated 8.5 million people were estimated to be severely food insecure in early 2019, mainly in southeastern agro-pastoral areas due to the cumulative impact of the poor 2018 October-December "Deyr/Hageya" and severe dryness during most of the 2019 April-June "Gu/Genna" season.
- As of August, about 88 000 households had been displaced by floods triggered by torrential rains since May.

Niger
Civil conflict affects eastern and western areas
- According to the last "Cadre Harmonisé" analysis, about 1.2 million people in the June-August 2019 period are assessed to be in need of immediate assistance.
- Due to the civil conflict in neighbouring countries, more than 104 000 are internally displaced, about 176 000 people reside as refugees, of which 119 000 are from Nigeria and 56 000 are from Mali.

Nigeria
Persisting conflict result in unfavourable food security conditions in northern areas
- According to the last "Cadre Harmonisé" analysis, about 5 million people were assessed to be in need of assistance between June and August 2019.
- Due to persisting civil insecurity, over 1.9 million people are internally displaced. 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 was estimated in August at 6.35 million, 54 percent of the total population. The dire food security situation is a result of persisting insecurity, insufficient food supplies, an economic downturn, trade disruptions and high food prices.
- In addition, the internally displaced caseload was estimated at 1.83 million people in July 2019, while as of August about 9 500 households had been displaced by floods triggered by torrential rains since June.

SEVERE LOCALIZED FOOD INSECURITY

Burkina Faso
Civil insecurity in the north
- According to the last "Cadre Harmonisé" analysis, the number of people in need of food assistance was estimated to be 687 000 for the June-August 2019 period, mainly due to civil insecurity in the north.
- An estimated 26 000 refugees, most of them from Mali, are living in the country, while about 220 000 individuals are internally displaced.

Cabo Verde
Poor performance of the 2018 agro-pastoral cropping season
- According to the last "Cadre Harmonisé" analysis, about 9 000 people (approximately 2 percent of the total population) were estimated to be in Phase 3: "Crisis" and above the June-August 2019 period.

Cameroon
Civil strife and influx of refugees putting strain on host communities
- The number of IDPs in the Far North Region is estimated to have increased since late 2018, to 263 000 as of March 2019.
- In the Northwest and Southwest regions, 1.3 million people were estimated to be in need of assistance in June 2019 and 531 000 people were internally displaced.
- The country also hosts about 108 000 refugees from Nigeria and nearly 288 000 refugees from the Central African Republic, as of the end of July.

Congo
Influx of refugees straining the already limited resources of host communities
- An estimated 20 000 refugees from the Democratic Republic of the Congo were sheltering in the country as of July 2019.

Eswatini
Localized production shortfalls
- About 232 400 people are projected to be in need of humanitarian assistance between October 2019 and March 2020, up from an estimated 166 000 people estimated for the corresponding period in 2018/19.
- The lower cereal harvest, on account of adverse weather conditions, is the main cause of the aggravated food security situation.

Guinea
Localized production shortfalls
- About 288 000 people are estimated to be in need of food assistance during June to August 2019.

Lesotho

Reduced cereal production

- An estimated 433 410 people (about 30 percent of the rural population) are projected to be food insecure between October 2019 and March 2020, up from the previous year's number.
- The aggravated food security situation was mostly caused by the weather-driven decline in cereal production.

Liberia

High food prices

- According to the last "Cadre Harmonisé" analysis, about 41 000 people are estimated to be in Phase 3: "Crisis" and above in the June-August 2019 period. The country is hosting approximately 8 700 refugees.

Libya

Civil insecurity

- The total number of people in need of humanitarian assistance is estimated at 0.82 million (11 percent of the population), of which 0.3 million persons require food assistance. Refugees, asylum seekers and internally displaced are among the most vulnerable.

Madagascar

Constrained access to food

- Nearly 1 million people are assessed to be food insecure, mostly located in the vulnerable southern regions. This number is, however, below the estimated caseload of the previous year, reflecting a larger cereal harvest in 2019.

Malawi

Localized production shortfalls

- The number of people assessed to be food insecure has declined in 2019/20, on account of an overall improved agricultural season and consequently larger harvest.
- However, an estimated 1.1 million people, mostly located in southern districts, require assistance between October 2019 and March 2020, due to localized production shortfalls.

Mali

Persistent civil insecurity in the centre and north of the country

- The country is hosting approximately 27 000 refugees, while 148 000 internally displaced people and 74 000 returnees depend on humanitarian assistance.
- About 549 000 people were estimated to be in need of food assistance between June and August 2019, according to the last "Cadre Harmonisé" analysis, as a result of the persisting civil conflict.

Mauritania

Reduced availability of pasture

- According to the last "Cadre Harmonisé" analysis, about 607 000 people were assessed to be in need of assistance between June and August 2019.
- About 58 000 refugees, mostly from Mali, reside in the country.

Mozambique

Cyclone damage and production shortfalls

- The impact of two major cyclones and severe dry conditions resulted in an increase in food insecurity in central and southern regions.
- In total, an estimated 1.65 million people are assessed to be food insecure.

Senegal

Rainfall deficits in localized areas

- According to the last "Cadre Harmonisé" analysis, about 341 000 people are estimated to be in need of assistance between June and August 2019.
- An estimated 14 500 refugees, mostly from Mauritania, are residing in the country.

Sierra Leone

High food prices

- About 124 000 people are estimated to be severely food insecure during June-August 2019.

Sudan

Conflict, civil insecurity and soaring food prices

- The number of severely food insecure people was estimated at 5.76 million for the January-March 2019 period, mainly IDPs and host communities in conflict-affected areas. Vulnerable households affected by soaring food prices are also of concern.
- As of early September, about 346 000 individuals have been displaced by floods triggered by torrential rains in August.

Uganda

Localized crop production shortfalls and refugee influx

- About 0.5 million people are estimated to be severely food insecure in eastern Teso Region and northeastern Karamoja Region, mainly as a result of a sharply reduced 2018 crop production.
- About 834 000 refugees from South Sudan and about 366 000 refugees from the Democratic Republic of the Congo are hosted in camps and rely on humanitarian assistance.

ASIA (8 COUNTRIES)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/SUPPLIES

Syrian Arab Republic

Civil conflict

- About 6.5 million people are estimated to be food insecure and in need of food and livelihood support. An additional 2.5 million people are at risk of food insecurity and need livelihood support to strengthen their resilience.
- 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

Production shortfalls of the 2019 main season crops and economic downturn

- The 2019 main season food crop production is forecast below the previous five years due to below-average rains and low water irrigation availabilities between mid-April and mid-July.
- According to a joint FAO/WFP rapid Food Security Assessment Mission, conducted from 29 March to 12 April, 10.1 million people (40 percent of the total population) are food insecure and in urgent need of food assistance.

Yemen

Conflict, poverty and high food and fuel prices

- The Integrated Food Security Phase Classification (IPC) hot-spot analysis, carried out in April 2019 in 29 out of the 45 most affected districts, assessed that about 1.25 million people were severely food insecure (IPC Phases 3 and 4 combined), down from an estimated 1.55 million reported in December 2018 for those districts only.

SEVERE LOCALIZED FOOD INSECURITY

Afghanistan

Civil conflict and population displacement

- The Humanitarian Needs Overview (HNO) from December 2018 estimates that 13.5 million people are facing IPC Phase 3: "Crisis" or worse levels of food insecurity, of which 3.6 million are facing IPC Phase 4: "Emergency" levels. Continuing conflict, natural hazards and limited economic opportunities have increased the vulnerability of the poorest households, including subsistence farmers.

Bangladesh

Large numbers of refugees putting strain on host communities

- According to the latest figures from UNHCR (August 2019), about 910 000 Rohingya refugees from Myanmar were sheltering in Bangladesh, mainly in the Cox's Bazar District. Most refugees fled to Bangladesh following the resurgence of violence in Rakhine State in Myanmar in late August 2017.

Iraq

Civil conflict

- An estimated 1.8 million people remained internally displaced.
- Some 2.4 million people are vulnerable to food insecurity.

Myanmar

Conflict in parts of Kachin, Shan and Rakhine states

- According to the latest data from the UN-OCHA (May 2019), an estimated 160 000 people were internally displaced in Rakhine State and 106 500 in Kahin and Shan states due to recurrent violent conflict. About 720 000 Rohingya refugees fled to Bangladesh, following the resurgence of violence in Rakhine State in late August 2017. These IDPs reside in temporary settlements, where they suffer from high levels of food insecurity and require humanitarian assistance to cover their basic needs.

Pakistan

Population displacement and localized cereal production shortfalls

- In parts of Balochistan and Sindh districts, persisting dry conditions in 2018 and 2019 led to a reduction in cereal output and losses of livestock, aggravating food insecurity and causing 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 and have strained the already limited resources of the host communities.

LATIN AMERICA AND THE CARIBBEAN (2 COUNTRIES)

WIDESPREAD LACK OF ACCESS

Venezuela

Severe economic crisis

- Amidst the severe and protracted economic crisis, the number of refugees and migrants from Venezuela is estimated at 4.3 million persons. They have settled in neighbouring countries in South America and the Caribbean. Humanitarian needs to assist refugees and migrants in host countries are significant.
- On account of hyper inflation, purchasing power has been severely eroded, resulting in acute constraints on households' access to food. In addition, cereal production in 2019 is anticipated to decline from last year's already low level, mostly reflecting the lack of agricultural inputs.

SEVERE LOCALIZED FOOD INSECURITY

Haiti

Prolonged dry spells and high inflation

- About 2.6 million people were forecast to be in need of assistance as of August 2019, due to the adverse impact of dry spells on cereal production (especially maize), coupled with high prices of imported goods, including rice.

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):
page 11 (Africa)
page 22 (Asia)
page 29 (Latin America and the Caribbean)

****** The boundaries shown and the designations used on the **maps** do not imply the expression of any opinion whatsoever on the part of FAO concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers and boundaries. Dashed lines on the maps represent approximate border lines for which there may not yet be full agreement.

GLOBAL CEREAL OVERVIEW

Cereal Supply and Demand Overview[1]

Cereal supplies more abundant in 2019/20 than earlier anticipated

Global cereal supplies in 2019/20 are expected to be higher than earlier anticipated following this month's rise in the world cereal production forecast. Nonetheless, world inventories would still need to be drawn down, albeit less significantly than predicted at the start of the season, in order to meet the expected increase in utilization in 2019/20.

FAO's new forecast for global cereal **production** in 2019 stands at 2 708 million tonnes, 23 million tonnes higher than the forecast made in July and now 55.4 million tonnes (2.1 percent) above the 2018 outturn. Almost the entire monthly increase is on account of an upward revision made to the forecast for world maize production, now pegged at 1 124 million tonnes, 2.0 percent higher than in July and up 0.7 percent from 2018. These more buoyant expectations mostly stem from improved yield prospects in the United States of America, despite excessive rainfall through much of the planting season. Additionally, with the maize harvest nearing completion in Brazil, the country's 2019 production forecast was lifted recently, further augmenting global prospects.

These positive revisions outweighed an anticipated reduction in global wheat production in 2019, which FAO now pegs at 767 million tonnes, 4 million tonnes lower than in July. Reduced crop productivity in the Russian Federation and the European Union was only partially offset by an increase in production estimates for China (Mainland) and the United States of America resulting from positive yield revisions.

Table 1. World cereal production[1]
(million tonnes)

	2017	2018 estimate	2019 forecast	Change: 2019 over 2018 (%)
Asia	***1 202.3***	***1 200.1***	***1 211.8***	***1.0***
Far East	*1 100.2*	*1 101.8*	*1 106.9*	*0.5*
Near East	*67.4*	*64.0*	*69.2*	*8.2*
CIS in Asia	*34.7*	*34.3*	*35.6*	*3.9*
Africa	***188.3***	***192.5***	***182.3***	***-5.3***
North Africa	*36.0*	*38.5*	*35.6*	*-7.5*
West Africa	*59.3*	*63.1*	*60.9*	*-3.5*
Central Africa	*4.5*	*4.6*	*4.7*	*2.7*
East Africa	*50.1*	*56.0*	*52.9*	*-5.6*
Southern Africa	*38.4*	*30.3*	*28.2*	*-6.7*
Central America and the Caribbean	***44.1***	***42.3***	***43.6***	***2.9***
South America	***215.5***	***195.8***	***226.6***	***15.7***
North America	***494.2***	***496.7***	***481.6***	***-3.0***
Europe	***523.8***	***495.8***	***527.9***	***6.5***
European Union	*309.7*	*293.2*	*315.7*	*7.7*
CIS in Europe	*202.6*	*187.3*	*197.6*	*5.5*
Oceania	***34.6***	***29.9***	***34.7***	***16.1***
World	***2 702.7***	***2 653.1***	***2 708.5***	***2.1***
Developing countries	*1 641.3*	*1 621.9*	*1 655.4*	*2.1*
Developed countries	*1 061.4*	*1 031.2*	*1 053.1*	*2.1*
- wheat	*759.6*	*730.7*	*766.9*	*5.0*
- coarse grains	*1 433.7*	*1 405.1*	*1 424.3*	*1.4*
- rice (milled)	*509.4*	*517.3*	*517.3*	*0.0*

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 5 September 2019.

Even with this month's downward revision, this year's global wheat output is still forecast to exceed 2018's outturn by 36 million tonnes (5.0 percent).

The latest forecast for global rice production (milled equivalent) in 2019 is set at 517 million tonnes, a slight upward revision from the July report and now on par with last year's record level. China (Mainland) accounts for the bulk of this increase, as farmers planted more paddy fields than previously anticipated, driven by expectations of better profitability. Similarly, in the United States of America, mirroring fewer than previously anticipated cuts in plantings, stemming from adverse weather and poor price prospects, production has been revised upwards. These increases are expected to more than offset a slight contraction in Bangladesh, on account of lower area sown, mostly owing to low market prices.

The record world cereal **utilization** forecast for 2019/20 has been further increased to 2 715 million tonnes, up 7 million tonnes from July and 37.1 million tonnes (1.4 percent) higher than in 2018/19. The forecast for total wheat utilization has been raised slightly (by 1.6 million tonnes) since the previous report to 760 million tonnes, pointing to a new peak and a 1.8 percent increase over 2018/19. While, in absolute terms, higher food consumption is the main driver behind this year-on-year growth in world wheat utilization, the overall feed use of wheat is expected to increase by 3.7 percent. This would represent a faster annual growth than in recent years, with a robust increase in feed use of wheat especially in the European Union and the United States of America. Total utilization of coarse grains in 2019/20 is pegged at 1 437 million tonnes, also marking a new record, up some 5 million tonnes from the July forecast and 1.2 percent (17 million tonnes) larger than in 2018/19. Higher utilization of maize and barley account for most of the upward revision since July as well as the bulk of the expected increase from the previous season, more than offsetting a small decrease in the use of sorghum. World rice utilization in 2019/20 is anticipated to reach an all-time high of 519 million tonnes, up 1.3 percent year on year and resulting in a 0.5 kg annual expansion in the per capita intake.

The forecast for world cereal **stocks** by the close of the 2020 seasons has been raised by 19.4 million tonnes since July to just over 847 million tonnes, but still down nearly 16 million tonnes (1.8 percent) from their opening levels. With this revision, the world stocks-to-use ratio for cereals in 2019/20 is expected to reach 30.3 percent, down slightly from 2018/19 but still a relatively high ratio, pointing to another comfortable season in terms of global supplies. The

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

	2017/18	2018/19 estimate	2019/20 forecast	Change: 2019/20 over 2018/19 (%)
Production [1]	***2 702.7***	***2 653.1***	***2 708.5***	***2.1***
Developing countries	*1 641.3*	*1 621.9*	*1 655.4*	*2.1*
Developed countries	*1 061.4*	*1 031.2*	*1 053.1*	*2.1*
Trade [2]	***421.9***	***414.2***	***414.8***	***0.1***
Developing countries	*154.3*	*149.0*	*162.0*	*8.8*
Developed countries	*267.6*	*265.2*	*252.7*	*-4.7*
Utilization	***2 654.7***	***2 678.3***	***2 715.4***	***1.4***
Developing countries	*1 795.1*	*1 820.4*	*1 845.5*	*1.4*
Developed countries	*859.6*	*857.9*	*869.9*	*1.4*
Per caput cereal food use (kg per year)	*149.3*	*149.5*	*149.4*	*-0.1*
Stocks [3]	***877.8***	***863.1***	***847.4***	***-1.8***
Developing countries	*681.8*	*674.8*	*663.1*	*-1.7*
Developed countries	*196.0*	*188.3*	*184.3*	*-2.1*
World stock-to-use ratio (%)	***32.5***	***31.6***	***29.6***	***-6.2***

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.

upward adjustment since July is mostly on account of much larger maize inventories that are forecast to be accumulated in the United States of America, where this year's production prospects have improved considerably compared with earlier expectations. As a result, total coarse grain stocks at the global level are now projected at 395 million tonnes, some 24 million tonnes higher than the level anticipated in July but still 20 million tonnes (4.8 percent) below their opening levels. By contrast, the FAO forecast for world wheat stocks has been lowered by nearly 5 million tonnes since July, to 273.6 million tonnes, putting this season's inventory level at 6 million tonnes (2.2 percent) above the previous season but still almost 10 million tonnes short of the 2017/18 record. This month's downward revision is mostly triggered by forecast cuts for ending stock levels in several major exporting countries, in particular the Russian Federation, due to smaller production prospects than were earlier anticipated. While world wheat inventories by the close of seasons in 2020 would still show an increase from their opening levels, this is mainly on expectation of another sharp rise in inventories held by China (Mainland) which would more than offset the anticipated declines in a number of major exporting countries. Total wheat stocks in China (Mainland) are currently set to reach an all-time high of 129 million tonnes, some 9.5 million tonnes (7.9 percent) above their opening levels. Global rice stocks at the close of 2019/20 are now pegged at 179 million tonnes, down fractionally from July's forecast and 1.0 percent below the 2018/19 high. Rice importers are envisaged to account for all of this season's reduction, amid expectations that countries such as Bangladesh, China (Mainland) and Indonesia will trim the large inventories they amassed over the previous season.

FAO's forecast for world **trade** in cereals in 2019/20 stands at nearly 415 million tonnes, unchanged from the July forecast. This season's trade is foreseen to remain close to the estimated trade volume for 2018/19, with expected increases in wheat and rice trade almost offsetting reduced trade prospects for maize and sorghum. The forecast for world wheat trade in 2019/20 (July/June) remains at 173 million tonnes, up 5 million tonnes (3.0 percent) from 2018/19, mostly supported by stronger import demand in Morocco and several countries in Asia. The increase is expected to be mostly met by higher shipments from Argentina, the European Union and Ukraine. However, this season's wheat sales by the world's largest exporter, the Russian Federation, are forecast to contract to 32.5 million tonnes, down 3 million tonnes from 2018/19 due to tighter export availabilities. The forecast of world rice trade in 2020 (January-December) has been reduced by 0.5 million tonnes to 48 million tonnes, mainly reflecting prospects of lower import demand by China (Mainland). Despite this revision, however, global rice trade is still forecast to surpass the 2019 level by 1.6 million tonnes (3.3 percent), with the recovery expected to be largely met by greater exports by China (Mainland) and India. While unchanged from the previous forecast, world trade in coarse grains in 2019/20 (July/June) is still seen heading towards a significant annual contraction, by 6 million tonnes (3.0 percent) to 193.2 million tonnes. The bulk of the predicted decrease is driven by a likely drop in world maize trade, which, at 160 million tonnes, would be 5.7 million tonnes smaller than in 2018/19, mainly on lower import demand in Canada, China (Mainland) and particularly the European Union. Given the prospect for reduced world trade, reductions in maize shipments from the United States of America, Ukraine and, to a lesser extent, also South Africa, are likely to more than compensate for bigger sales by Argentina, Brazil and the Russian Federation.

LOW-INCOME FOOD-DEFICIT COUNTRIES' FOOD SITUATION OVERVIEW[2]

Table 3. Basic facts of Low-Income Food-Deficit Countries (LIFDCs) cereal situation
(million tonnes, rice in milled basis)

	2017/18	2018/19 estimate	2019/20 forecast	Change: 2019/20 over 2018/19 (%)
Cereal production[1]	***463.7***	***473.9***	***473.5***	***-0.1***
excluding India	*246.3*	*252.1*	*249.4*	*-1.1*
Utilization	***503.8***	***516.8***	***521.7***	***1.0***
Food use	*382.2*	*391.0*	*395.9*	*1.3*
excluding India	*215.1*	*221.1*	*224.6*	*1.6*
Per caput cereal food use *(kg per year)*	*149.5*	*150.5*	*149.9*	*-0.4*
excluding India	*152.0*	*153.0*	*152.1*	*-0.6*
Feed	*55.1*	*55.9*	*56.2*	*0.6*
excluding India	*39.9*	*40.8*	*40.4*	*-1.2*
End of season stocks[2]	***97.5***	***100.3***	***100.2***	***-0.1***
excluding India	*60.7*	*57.1*	*53.0*	*-7.2*

[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 production[1] of LIFDCs
(million tonnes)

	5-year average	2018 estimate	2019 forecast	Change: 2019 over 2018 (%)
Africa *(37 countries)*	***100.6***	***109.8***	***104.0***	***-5.2***
East Africa	*51.7*	*56.0*	*52.9*	*-5.6*
Southern Africa	*10.0*	*10.8*	*9.8*	*-9.5*
West Africa	*34.2*	*38.4*	*36.8*	*-4.3*
Central Africa	*4.7*	*4.5*	*4.6*	*2.7*
Asia *(11 countries)*	***351.8***	***363.0***	***368.3***	***1.5***
CIS in Asia	*10.6*	*9.6*	*10.4*	*8.2*
Far East	*332.4*	*346.9*	*350.2*	*0.9*
- India	*247.8*	*260.9*	*263.4*	*1.0*
Near East	*8.8*	*6.5*	*7.7*	*19.3*
Central America and the Caribbean *(2 countries)*	***1.1***	***1.2***	***1.2***	***-2.0***
Oceania *(1 country)*	***0.0***	***0.0***	***0.0***	***0.0***
LIFDCs *(51 countries)*	***453.4***	***473.9***	***473.5***	***-0.1***

Note: Totals and percentage change computed from unrounded data.
The five-year average refers to the 2014-2018 period.
[1] Includes rice in milled terms.

Production in Low-Income Food-Deficit Countries set to remain unchanged in 2019

FAO's forecast for aggregate cereal production for Low-Income Food-Deficit Countries (LIFDCs) stands at 473.5 million tonnes in 2019, a comparable level to the outturn in 2018 and 20 million tonnes above the previous five-year average. The unchanged year-on-year output is mostly a result of a reduced production forecast in sub-Saharan Africa, despite a recent upturn in the production outlook in some countries, which is expected to be offset by a larger output in *Asia*.

The largest production declines in sub-Saharan Africa are estimated in *Southern Africa* and *East Africa*. In the former, the impact of two major cyclones and significant rainfall deficits sharply reduced outputs in **Mozambique**, as well as in **Zimbabwe**, where the harvest is estimated to have declined to a well below-average level. More beneficial rains were observed in **Madagascar** and **Malawi**, and consequently harvests are forecast to have increased to near-average levels. In *East Africa*, drought conditions earlier in the year depressed first season outputs and a continuation of poor rains curtailed prospects for the main season harvests in several countries. The largest year-on-year decreases, in relative terms, are forecast in **Kenya**, **Somalia** and **the Sudan**, where outputs are anticipated at below-average levels. In *West Africa*, localized dry weather conditions have diminished cereal production prospects in several coastal countries. In addition, civil insecurity and conflicts, notably in northeast **Nigeria**, the Lake **Chad** Basin and central **Mali**, have continued to undermine agricultural

[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 (2018) list of the LIFDCs includes 51 countries, one less than in the previous list but with some changes. For full details see: www.fao.org/countryprofiles/lifdc

productive capacities, reducing crop prospects in the affected areas. Aggregate cereal production in West Africa is still forecast at an above-average level, but down from the record 2018 output. In *Central Africa*, the persisting conflict and civil unrest has dampened expectations for the 2019 harvests.

In *Asia*, aggregate cereal production in the *Far East* subregion is forecast to grow to a well above-average level in 2019, primarily driven by a larger wheat output in India on account of record high yields. Smaller output increases are forecast in **Bangladesh**, **the Democratic People's Republic of Korea** and **Nepal**, which combined more than offset an expected production decline in **Viet Nam**. In the *Near East*, abundant and well-distributed rainfall, coupled with improved security conditions, led to an expansion in plantings in **the Syrian Arab Republic**, which instigated a production increase in 2019. However, the output still remained well below the pre-crisis level (2002-2011). Favourable weather conditions also lifted cereal production in **Afghanistan**, while in **Yemen** the conflict has continued to severely debilitate the agriculture sector.

Import requirements forecast to grow in sub-Saharan Africa

Overall, aggregate cereal imports for LIFDCs are forecast to increase in 2019/20 to 73.3 million tonnes, following a reduction in the import volume in 2018/19, which was the first year-on-year decrease in seven years. The bulk of this year's estimated increase emanates from *Southern Africa*, mostly reflecting a well above-average import forecast for **Zimbabwe**, where a sharp cut in the 2019 harvest requires the country to significantly bolster domestic availabilities with external supplies. Import needs are also estimated to increase in *East African* and *West African* countries, but by a lesser extent. Decreases in import quantities are forecast in several *Asian* countries, notably **Bangladesh**, **Nepal** and **Uzbekistan**, as larger domestic harvests are expected to bolster national supplies and consequently lower import needs.

Table 5. Cereal imports of LIFDCs
(thousand tonnes)

	2017/18 or 2018	2018/19 or 2019		2019/2020 or 2020	
	Actual imports	Import forecast	*of which food aid*	Import requirement [1]	*of which food aid*
Africa *(37 countries)*	***28 990***	***27 615***	***1 008***	***30 646***	***1 173***
East Africa	*12 212*	*11 208*	*698*	*12 129*	*828*
Southern Africa	*2 942*	*2 506*	*15*	*3 673*	*19*
West Africa	*11 321*	*11 324*	*139*	*12 145*	*170*
Central Africa	*2 515*	*2 577*	*156*	*2 698*	*156*
Asia *(11 countries)*	***44 667***	***42 018***	***986***	***41 130***	***824***
CIS in Asia	*4 857*	*4 944*	*0*	*4 870*	*0*
Far East	*29 308*	*25 528*	*359*	*24 839*	*197*
Near East	*10 502*	*11 547*	*627*	*11 422*	*627*
Central America and the Caribbean *(2 countries)*	***1 390***	***1 395***	***10***	***1 460***	***10***
Oceania *(1 country)*	***64***	***64***	***0***	***62***	***0***
LIFDC *(51 countries)*	***75 111***	***71 092***	***2 004***	***73 298***	***2 007***

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 August
Subregional borders
Territories/boundaries**

NORTH AFRICA
Coarse grains: Harvesting
Rice: Maturing

WEST AFRICA
Coastal countries
Cereals (main season): Harvesting
Cereals (secondary season): Planting
Sahel
Cereals: Maturing

EAST AFRICA
Eritrea, Ethiopia, South Sudan, Sudan
Grains (main season): Maturing
Kenya, Somalia, Uganda
Cereals (main season): Harvesting
Cereals (secondary season): Land preparation and planting
Burundi, Rwanda
Cereals (secondary season): Planting

CENTRAL AFRICA
Northern parts
Maize (main season): Harvesting
Millet: Harvesting
Rice: Harvesting
Sorghum: Harvesting
Democratic Republic of Congo
Maize (main season): Planting
Millet: Harvesting
Sorghum: Harvesting

SOUTHERN AFRICA
Crops (main season): Land preparation
Winter cereals (secondary season): Reaching maturity

Unfavourable 2019 production prospects*
Kenya: Dry weather conditions
South Sudan: Conflict

*/** See Terminology (*page 5*)

Source: GIEWS
(disputed territories and boundaries in conformity with UN maps)**

Africa Production Overview

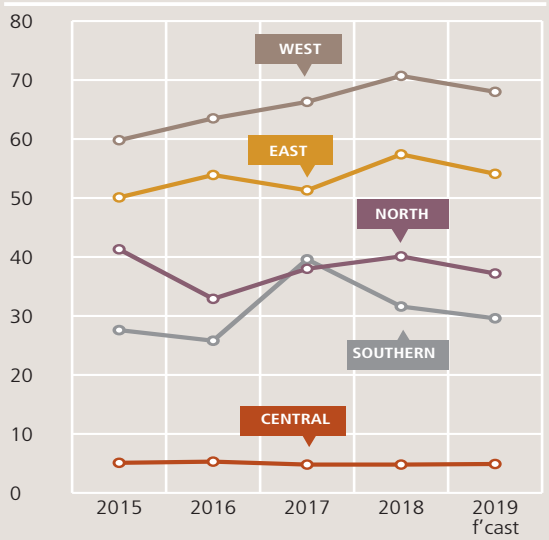
Aggregate cereal production in Africa is forecast at 193.8 million tonnes in 2019, an above-average outturn but approximately 10 million tonnes below the high of 2018. The yearly decline is mainly associated with a drop in coarse grains production in Southern Africa on account of unfavourable rains and the impact of cyclones. Similarly, In North Africa, rainfall deficits caused a decline in cereal production and the aggregate output is estimated to be marginally below average in 2019.

Dry conditions in East Africa, which severely impacted first season outputs earlier in the year, have continued in several areas and diminished production prospects for the main season outputs.

In West Africa, poor rains in coastal countries, as well as persisting insecurity and conflict, have led to a decline in the production forecast for the 2019 crops compared to the high of 2018; nonetheless the total output is still anticipated to stay above average.

In Central Africa, the agriculture sector continues to be debilitated by conflicts in several countries, hampering prospects in 2019.

Cereal production
(million tonnes)



NORTH AFRICA

Close-to-average cereal production in 2019

The 2019 wheat and barley harvest was completed in mid-August. Maize and rice crops in **Egypt** will be harvested from early October.

The subregion's aggregate cereal production is preliminarily forecast at an average level of 37.2 million tonnes in 2019, about 7 percent below the previous year. The wheat output is estimated at about 19.4 million tonnes and barley production at about 4.2 million tonnes, both below last year's outputs but close to the average. The year-on-year decrease in wheat and barley production is driven mostly by a sharp production decline in **Morocco**, where below-average rainfall amounts since December 2018, combined with above-average temperatures, constrained crop yields particularly in the northeast (Oriental) and central parts of the country. At 4.5 million tonnes, the 2019 wheat harvest in **Morocco** is over 60 percent below the previous year's abundant harvest and over 30 percent below average. Similarly, at 1.3 million tonnes, barley production in 2019 is about 60 percent below the average. A sharper decrease in subregional production was buffered by a bumper output in **Tunisia**. However, heavy rains towards the end of the season in resulted in water logging in the north and central regions, while high temperatures increased incidences of fires before the harvest, constraining the overall production. In 2019, about 1.5 million tonnes of wheat (about one-third more than last year's average harvest) and 700 000 tonnes of barley (more than twice as much as last year and 45 percent above average) were harvested in **Tunisia**. In **Egypt**, owing to the increasing use of improved seed varieties, production of wheat, which is mostly produced under irrigation, increased by 5 percent compared to the average. The maize harvest is forecast at a near-average level of 7.5 million tonnes, although localized outbreaks of Fall Armyworm (FAW) could constrain yields. In **Libya**, conflict-related constraints have caused a lack of inputs and inflated prices, curtailing production capacities.

The subregion's aggregate cereal import requirement (of which wheat accounts for about 60 percent) for the 2019/20 marketing year (July/June) is estimated at approximately 50.5 million tonnes, 2.4 million more than the previous five-year average and the previous year, reflecting decreased domestic availabilities (particularly in Morocco) and steady population growth in the subregion.

Food inflation rates eased or remained stable

Across the subregion, year-on-year food inflation rates in July 2019 eased or remained stable, supported by generally lower international food prices. In **Algeria** and **Morocco**, where the governments provide widespread subsidies on basic food commodities, food inflation rates reported in July 2019 were negative. In **Egypt**, which experienced bouts of high food prices in the past, the cost of food in July 2019 increased by 9 percent on a yearly basis. The Government of Egypt is striving to target food subsidies to the more needy with the use of smartcards. In **Tunisia**, the food price inflation in July 2019 was recorded at 6.5 percent, a half percentage point higher than June 2019 which marked the end of Ramadan, but a decrease from the 12-month peak of 8.2 percent registered in February 2019. Although the Government of Tunisia continues to subsidize food, inflation in the country is driven mostly by a weakening currency. The food inflation rate also decreased in **Libya**, down from between 10 and 20 percent in the first nine months of 2018 to negative 4 percent in February 2019 (latest available data). The decrease was supported by improved hard currency distribution and lower import costs reflecting decreasing international food prices.

Table 6. North Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	Change: 2019/2018 (%)
North Africa	***19.2***	***21.3***	***19.4***	***12.7***	***13.8***	***12.8***	***6.0***	***5.0***	***5.1***	***38.0***	***40.1***	***37.2***	***-7.2***
Algeria	*2.8*	*3.9*	*4.0*	*1.2*	*2.0*	*2.1*	*0.0*	*0.0*	*0.0*	*4.0*	*6.0*	*6.1*	*1.7*
Egypt	*9.1*	*8.8*	*9.2*	*8.6*	*8.3*	*8.4*	*5.9*	*4.9*	*5.0*	*23.6*	*22.0*	*22.6*	*3.0*
Morocco	*6.1*	*7.3*	*4.5*	*2.4*	*3.1*	*1.4*	*0.0*	*0.1*	*0.1*	*8.5*	*10.5*	*6.0*	*-42.7*
Tunisia	*1.1*	*1.1*	*1.5*	*0.5*	*0.4*	*0.7*	*0.0*	*0.0*	*0.0*	*1.6*	*1.4*	*2.2*	*56.8*

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2014-2018 period.

WEST AFRICA

Continuing civil unrest and localized dry conditions lower production prospects in 2019

Harvesting of the main season maize crop was completed in August in the southern areas of the subregion, while in the Sahel region the growth stage for cereal crops range from the vegetative to reproductive phases, and harvests are expected to start from October. The aggregate cereal output is forecast at 68 million tonnes in 2019, 2.7 million tonnes below the 2018 record level, but still 4 million tonnes higher than the previous five-year average. A reduced rice output, forecast to decline by about 1.4 million tonnes year on year, accounts of the bulk of this year's estimated production decrease, followed by estimated declines for maize, millet and sorghum production. The lower production prospects in 2019 mainly reflect the impact of the ongoing civil insecurity and localized dry weather conditions.

There was a generally timely start to the 2019/20 main cropping season, with the onset of seasonal rains in March in southern areas and in mid-June in the Sahel region. Precipitation since the beginning of the season has also been mostly beneficial and resulted in generally favourable crop conditions. There are, however, some concerns for millet and sorghum crops in parts of **Mauritania**, **Senegal**, **the Gambia**, **Cabo Verde** and **Guinea-Bissau** due to a delayed start of the rainy season followed by below average and erratic rainfall that affected early crop growth. In **Mauritania**, as of mid-August, 90 percent of the hydro-meteorological stations had registered large rainfall deficits compared to the long-term average (1981-2010). In **Senegal** and **the Gambia**, remote-sensed vegetation indices (including the *FAO Agricultural Stress Index*) highlighted high levels of vegetation stress in various departments.

Ongoing conflicts also continue to affect farming activities, limiting farmers' access to land and causing a shortage of inputs. The conflicts and civil insecurity are affecting northeast **Nigeria**, the Lake Chad Basin, the Lac and Tibesti regions of **Chad**, northern and central **Mali**. In the Liptako-Gourma Region, which includes parts of **Burkina Faso**, **Mali** and **Niger**, high levels of insecurity and conflict in many areas have been affecting agro-pastoral activities during the crucial months between June and September, and are leading to increasing displacement, humanitarian needs and food insecurity. In northeast and northwest Nigeria, conflict incidents and violence by armed groups in recent months have been very high and have strongly hindered agro-pastoral activities.

Favourable seasonal rains in most pastoral areas of the subregion increased water and pasture availability, improving livestock body conditions and enhancing the market value of animals. The health situation remains overall stable in the Liptako-Gourma Region and the Lake Chad Basin, despite the persisting negative impact on livestock production due to conflict and civil insecurity. By contrast, in Mauritania, the rainy season had a poor performance for the second consecutive year, especially in the districts of Assaba, Brakna, Gorgol, Inchiri and Tagant, resulting in an early start of the pastoral lean season in February-March and a faster-than-normal depletion of rangeland resources. Across northern **Senegal** and southwestern **Mauritania**, remote sensing analysis for grassland conditions also indicated the lowest level of biomass production in the last 20 years.

Most countries, including Chad, Burkina Faso, Mali and Niger, have reported outbreaks of Fall Armyworm and locusts, which have caused localized crop losses. Torrential rains in July and August resulted in flooding and localized damage of standing crops in **Sierra Leone**, **Niger**, **Mali**, **Nigeria** and **Benin**, affecting thousands of people and causing the loss of livelihoods.

Coarse grain supplies remain satisfactory due to large carryover stocks

On account of the record 2018 harvests, almost all countries of the subregion registered above-average coarse grain opening stocks for the 2019/20 marketing year (generally November/October), which are foreseen to attenuate the impact of the reduced outputs in 2019. Despite these stocks, the imports requirement for the subregion in the 2019/20 marketing year (November/October) will remain high at approximately 20 million tonnes.

Table 7. West Africa cereal production
(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals [1]			
	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	Change: 2019/2018 (%)
West Africa	***45.7***	***50.1***	***48.8***	***18.1***	***20.5***	***19.1***	***64.0***	***70.7***	***68.0***	***-3.8***
Burkina Faso	*4.1*	*4.8*	*4.3*	*0.3*	*0.4*	*0.4*	*4.5*	*5.2*	*4.7*	*-9.9*
Chad	*2.5*	*2.8*	*2.6*	*0.3*	*0.3*	*0.3*	*2.8*	*3.0*	*2.9*	*-5.6*
Ghana	*2.3*	*2.7*	*2.4*	*0.7*	*0.8*	*0.9*	*3.0*	*3.5*	*3.3*	*-3.3*
Mali	*6.1*	*7.0*	*7.1*	*2.6*	*3.2*	*2.8*	*8.8*	*10.2*	*9.9*	*-2.9*
Niger	*5.5*	*6.0*	*5.7*	*0.1*	*0.1*	*0.1*	*5.7*	*6.1*	*5.9*	*-3.8*
Nigeria	*18.3*	*19.2*	*19.3*	*7.8*	*8.9*	*8.0*	*26.1*	*28.2*	*27.3*	*-3.2*

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2014-2018 period.
[1] Total cereals includes wheat, coarse grains and rice (paddy).

Cereal prices stable, except in areas affected by conflict

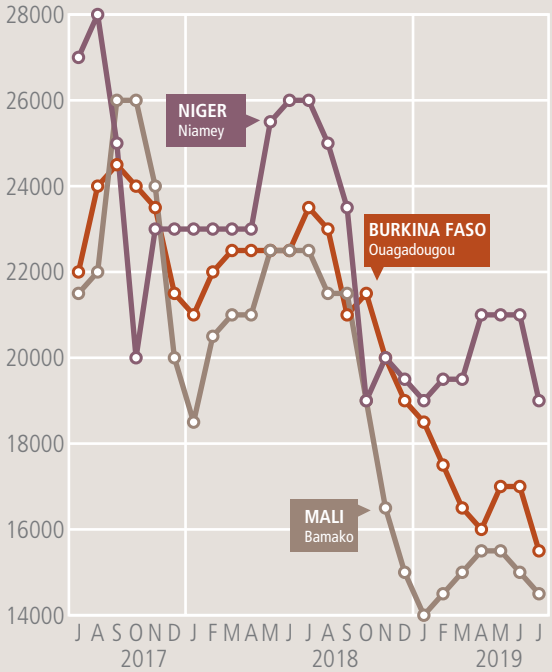
Market supplies increased in August and early September compared to previous months due to newly harvested maize and tubers in coastal countries, while demand is mostly stable, partly due to sustained food assistance operations. As a result, in most countries, prices of coarse grains remained generally stable in recent months and were down from a year earlier due to well-supplied markets supported by regular imports and carryover stocks from the bumper 2018 harvests. In **Chad**, **Burkina Faso**, **Mali** and **Niger**, prices of millet and sorghum were generally unchanged or declined in some markets and were well below their values in August 2018, reflecting adequate supplies and support from government subsidized sales. In **Senegal**, prices of coarse grains remained stable in recent months or strengthened in line with seasonal trends. In **Ghana**, prices of maize remained relatively stable, owing to the downward pressure from ample domestic supplies. Similarly, in **Nigeria**, prices of coarse grains remained generally stable or declined slightly in most markets due to adequate supplies. By contrast, in northeastern conflict-affected areas, disruptions to trade flows and marketing activities have resulted in elevated food prices.

Continued civil insecurity increased displacement and food assistance needs

The start of the early harvests in August and the stable or declining staple food prices are expected to lead to improvements in food security conditions. However, despite two bumper cereal harvests in 2017 and 2018, and an expected third consecutive above-average output in 2019, the humanitarian situation remains a serious concern in the Lake Chad Basin Region, including northern **Nigeria**, **Niger**, **Chad** and northern **Cameroon**, due to persisting civil conflict and the consequent large population displacements. According to the United Nations Office for the Coordination of Humanitarian Affairs (UN-OCHA), as of August 2019, about 2.2 million people were estimated to be internally displaced in the Lake Chad Basin Region, with an additional 228 000 people residing in the area as refugees. In northeast **Nigeria**, the persisting high levels of violence and recent attacks have led to further displacements, affecting people's livelihoods and compounding the already dire humanitarian situation. In addition, humanitarian organizations are facing severe access constraints to the food insecure population, which are compromising mitigation measures and life-saving assistance. In addition, tension between farmers and herders in the centre and south of the country remains high with risks of significant animal losses during the seasonal migration of livestock in November/December. In **Chad**, households have also been affected by the civil conflict in **the Sudan**, **the Central African Republic** and **Libya**, which has resulted in a substantial increase in the number of refugees to about 460 000 people, which have put a strain on the limited resources of host communities. In addition, conflict and inter-communal violence have also been frequent in several regions of **Mali** (Mopti and Gao), **Burkina Faso** (Sahel, North, North-Centre and East) and Western **Niger** (Tillabery and Tahoua), disrupting livelihood activities and resulting in a deterioration of the food security situation. In **Burkina Faso**, it is reported that the increasing number of IDPs and the limited population movements have had a negative impact on income-earning opportunities and agricultural activities, especially in some northern areas of the country. In addition, the conflict is hampering access to grassland for agro-pastoral households with a consequent reduction in the production of small ruminants. According to UN-OCHA, about 460 000 people are internally displaced in Liptako-Gourma Region (**Burkina Faso**, **Mali**, **Niger**), while about 105 000 people reside as refugees as of August 2019. Most of the displaced households are highly dependent on humanitarian assistance to meet their basic food needs as the persisting conflict has significantly lessened their coping mechanisms.

According to the March 2019 "Cadre Harmonisé" analyses, the aggregate subregional number of people in Phase 3: "Crisis" and above was estimated at about 9.6 million people in the June-August 2019 period, down from the estimated 10.6 million people in the June-August 2018 period.

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



Source: Afrique Verte.

CENTRAL AFRICA

Despite adequate rains, widespread conflict continues to diminish crop prospects

Harvesting of the 2019 main maize crop is underway in central and southern bi-modal rainfall areas in **Cameroon** and **the Central African Republic**, while harvesting of millet and sorghum started in August in northern uni-modal rainfall areas of **the Central African Republic**.

In **Cameroon**, crop conditions have been generally favourable in most central and southern cropping areas following adequate precipitation since the onset of the cropping season in March. In the Far North Region, however, civil unrest continues to affect agricultural livelihoods, especially in the departments of Logone-et-Chari, Mayo-Sava and Mayo-Tsanaga. Precipitation in the region was well distributed and cumulative amounts were slightly above the average levels as of August. As a result, and in spite of the impact of the conflict, cereal production is expected to be close to the average at the regional level, although poor harvests are foreseen in the crisis-affected areas. Similarly, in the Northwest and Southwest Anglophone regions, insecurity continues to limit households' access to agricultural land and inputs, while labour costs have also risen. Notwithstanding the generally conducive weather conditions for crop development, the impact of civil insecurity is expected to result in a below-average cereal harvest in the Northwest and most of the Southwest Anglophone regions in 2019.

In **the Central African Republic**, rains between June and August have been generally erratic in most cropped areas, but seasonal rainfall distribution in 2019 has been more conducive for crop growth compared to the previous year. In addition, access to agricultural inputs and humanitarian assistance is reported to be better than in 2018. As a result, the 2019 cereal production is expected to increase relative to the previous year's level, but still remain well below the pre-crisis average.

In **the Democratic Republic of the Congo**, the 2019 main season maize crop was sown in June/July in northern (Equatorial and Oriental) provinces and the harvest is expected to take place in October and November. In the uni-modal south (former Katanga Province), where there is only one main cropping season which concluded in June, seasonal rains were generally beneficial for maize crops. In northern and eastern (North and South Kivu) provinces, where the second season maize harvest concluded in July, crops benefited from adequate and well-distributed precipitation during most of the growing season. However, localized heavy rains, particularly in the agro-pastoral mountains of South Kivu Province, resulted in flooding and damage to crops. Across the country, widespread crop losses were reported due to FAW infestations. Furthermore, the ongoing conflicts in Kasai, North Kivu, South Kivu, Ituri and Tanganyika provinces disrupted agricultural activities.

Overall, despite generally favourable seasonal rains, the 2019 cereal output is expected to be at an average to slightly below-average level due to the impact of floods, pests and conflict.

In **the Republic of the Congo** and **Gabon**, agriculture only contributes a small portion to the GDPs and the bulk of the national cereal supplies are imported. In these countries, weather conditions have been generally favourable for the 2019 second season maize crops, which were harvested between May and June.

Inflation rates slow in 2019, except in Cameroon and the Republic of the Congo

In **the Central African Republic**, the average annual inflation rate declined in recent years and is expected to decrease slightly again in 2019, as a result of small improvements in security and increasing domestic food supplies. In **the Democratic Republic of the Congo**, the annual inflation rate has also declined sharply in recent years and in 2019 it is forecast to decline to about 8 percent, about 20 percentage points below the level registered in 2018 and about one-sixth of the rate recorded in 2017.

In **Cameroon**, the inflation rate is forecast to increase slightly in 2019, although it is set to remain at a low level of 1.2 percent, as tight monetary policy and price regulations have helped to contain inflation.

Similarly, in **the Republic of the Congo**, the annual inflation rate is expected to increase slightly in 2019 compared to 2018 as a result of increased domestic demand and a weakening of the CFA franc against the US dollar; the inflation rate is nevertheless expected to remain below

Table 8. Central Africa cereal production
(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals [1]			
	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	Change: 2019/2018 (%)
Central Africa	***4.3***	***4.1***	***4.2***	***0.6***	***0.7***	***0.7***	***5.0***	***4.8***	***4.9***	***2.4***
Cameroon	*2.9*	*2.7*	*2.8*	*0.3*	*0.4*	*0.4*	*3.2*	*3.1*	*3.2*	*3.5*
Central African Republic	*0.1*	*0.1*	*0.1*	*0.0*	*0.0*	*0.0*	*0.1*	*0.1*	*0.2*	*1.1*
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. The five-year average refers to the 2014-2018 period.

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

1.5 percent. The annual inflation in 2019 in **Gabon** is forecast well below the previous year's rate, at 3 percent, partly driven by lower global oil prices.

Conflicts continue to severely affect food security

Civil insecurity in **the Central African Republic**, **the Democratic Republic of the Congo** and **Cameroon** continues to result in the widespread disruption of agricultural and marketing activities, as well as cause massive population displacements. These factors have hindered access to food and also reduced food availability.

In **the Democratic Republic of the Congo**, civil conflict has continued to severely damage livelihoods and caused massive population displacements in eastern and southern areas. The latest Integrated Food Security Phase Classification (IPC), valid for the period from July to December 2019 and covering 109 (75 percent) of the 145 territories of the country, estimated that 15.9 million people (26 percent of the analyzed population) are severely food insecure (IPC Phase 3: "Crisis" and IPC Phase 4: "Emergency"). The provinces with the largest number of severely food insecure people are Ituri, Kasai, Kasai Central, North Kivu, South Kivu and Tanganika. As of 31 May, the country hosted about 537 000 refugees, more than 30 percent of which are located in the region of North Kivu. In addition, the Ebola virus disease continues to be a growing and serious concern. As of August 2019, WHO reported that a total of 3 000 people have been affected, of which nearly 2 000 have died.

In **the Central African Republic**, the conflict that began in December 2012 intensified in 2018, when the number of security incidents was about 30 percent higher year on year. Following the signing of the peace agreement between the Government and several armed groups in February 2019, the security situation improved significantly and, according to the UNHCR, the number of internally displaced persons (IDPs) declined from 641 000 in December 2018 to 613 000 in May 2019. Based on the latest IPC analysis, the number of severely food insecure people decreased by 10 percent between April and August 2018 and the same period in 2019, to 1.81 million (40 percent of the analyzed population). This is mainly the result of localized security improvements which allowed some IDPs to return to their place of origin. However, the country continues to experience a precarious humanitarian situation and persistent insecurity is still affecting households' access to food and livelihoods, significantly disrupting livestock, fishing and agricultural activities in eastern and southeastern areas, particularly in the prefectures of Basse-Kotto, Haut-Mbomou, Mbomou and Haute-Kotto. Furthermore, in these areas, heavy rainfall since July damaged road infrastructure and this, combined with the ongoing conflict, has reduced trade flows.

In **Cameroon**, the ten-year-long Boko Haram insurgency in the Far North Region and the crisis caused by the outbreak of violence linked to the secessionist movement in the Northwest and Southwest regions are ongoing. Although the security situation is reported to be improving in the Far North Region, the number of people in Crisis ("Cadre Harmonisé" Phase 3) has almost doubled to 316 000 people between June-August 2018 and the same period in 2019. Between January and July 2019, incursions of Boko Haram increased by about 25 percent compared to the same period in 2018 and triggered new population displacements. The number of IDPs in the Far North Region was estimated at 263 000 at the end of March 2019, a 7 percent increase compared to the 246 000 estimated in November 2018. In the Northwest and Southwest regions, the security situation remains unstable as fighting continues between security forces and separatist armed groups. According to UN-OCHA, 1.3 million people (about 35 percent of the local population) were estimated to be in need of assistance in June 2019 and 531 000 people were internally displaced. The country also hosts about 108 000 refugees from Nigeria and nearly 288 000 refugees from the Central African Republic, as at the end of July.

EAST AFRICA

Crop production in 2019 affected by erratic rainfall and pest infestations

In central and southern parts of the subregion, namely southeastern **Kenya**, southern **South Sudan**, central and southern **Somalia**, **the United Republic of Tanzania**, **Uganda**, **Burundi** and **Rwanda**, harvesting of 2019 first season cereal crops was completed in August, one month later than normal. The March-May rainy season has been characterized by exceptional dryness in March and most of April, which resulted in widespread germination failures and crop wilting, reducing the extent of plantings and negatively impacting yields. Above-average precipitation in late April and May reduced moisture deficits and improved vegetation conditions, but damage to crops was largely irreversible in several areas as the growing season was too advanced to allow for the maturation of replanted crops. In addition, the area planted declined to a below-average level as a large number of farmers lacked seeds for replanting. As a result, cereal production from the first season was significantly below average in several cropping areas in 2019. The sharpest output contractions were recorded in **Somalia** and in southeastern **Kenya**, where rainfall deficits were more severe and the rainy season is normally shorter compared to other countries of the subregion, with seasonally dry conditions already established by early June. By contrast, in **Uganda** and in western key-growing areas of **Kenya**, where the rainy season normally extends to June and August, respectively, improved rains from May onwards allowed crops to partially recover. In **Somalia**, the output of the 2019 "Gu" harvest was the lowest since 1995 and about 60 percent below the average of the previous five years. Similarly, in agro-pastoral and marginal agricultural areas of central, southeastern and coastal **Kenya**, the "long-rains" maize production is estimated at about 50-60 percent below the average, with a near failure of the harvest reported in most southeastern areas. In bi-modal rainfall areas of **Uganda**, planting and germination of 2019 "first season" crops were also severely affected by the severe dryness during March and most of April. However, above-average rains in May and June allowed a partial crop recovery, and the "first season" cereal output is estimated to be about 30 percent below average. In uni-modal rainfall areas of central and southern **United Republic of Tanzania**, cereal production of the 2019 major "Msimu" harvest, completed in June, was above average as adequate and well-distributed precipitation benefited yields in key-cropping areas of the southern highlands. By contrast, in northeastern bi-modal rainfall areas, the output of the "Masika" harvest, gathered in July and August, was estimated to be below average due to inadequate and erratic rains, with significant crop production shortfalls recorded in Arusha, Kilimanjaro and Tanga regions. In southern bi-modal rainfall areas of South Sudan, planting operations started in April, one month later than normal due to a late onset of seasonal rains. Above-average rainfall during the remainder of the growing period benefited crop establishment and development, boosting yield prospects. Improvements of the security situation resulted in better access to fields and in some voluntary returns of displaced farmers, thus leading to increased plantings. However, the planted area remained below the pre-conflict levels due to the lingering impact of the prolonged conflict, including damage and destruction of productive assets, and the large numbers of farming households still displaced and unable to farm. As a result, crop production in these areas is expected to be near or above the average of the previous five years, but still below the pre-conflict levels. In **Rwanda** and **Burundi**, after below-average seasonal rains in February and March, precipitation improved in April and May benefiting the "2019B season" crops. The harvests in these two countries are, therefore, estimated at above-average levels.

In central and northern parts of the subregion, including **Ethiopia**, **Eritrea**, **the Sudan**, western **Kenya**, the northeastern Karamoja Region in **Uganda**, and central and northern **South Sudan**, the main season cereal crops are at vegetative or maturing stages, and production prospects are mixed. In key-growing areas of the Rift Valley and Western provinces of **Kenya**, the "long-rains" season, which normally extends from March to August, was characterized by severe early season dryness during March and most of April, which resulted in widespread germination failures and crop wilting. Improved rains from May onwards mostly offset rainfall deficits and resulted in a partial recovery of water stressed and late planted crops,

Table 9. East Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Total cereals [1]			
	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	Change: 2019/2018 (%)
East Africa	***5.6***	***6.0***	***5.8***	***43.8***	***47.5***	***44.6***	***53.0***	***57.4***	***54.1***	***-5.6***
Ethiopia	*4.6*	*4.8*	*4.8*	*21.1*	*22.8*	*22.6*	*25.8*	*27.8*	*27.5*	*-0.8*
Kenya	*0.2*	*0.4*	*0.3*	*3.9*	*4.4*	*3.5*	*4.3*	*4.9*	*3.9*	*-20.4*
Sudan	*0.6*	*0.6*	*0.6*	*6.2*	*7.6*	*6.0*	*6.9*	*8.3*	*6.7*	*-19.4*
Uganda	*0.0*	*0.0*	*0.0*	*3.3*	*3.5*	*3.1*	*3.6*	*3.7*	*3.4*	*-9.3*
United Republic of Tanzania	*0.1*	*0.1*	*0.1*	*7.3*	*7.3*	*7.4*	*10.3*	*10.4*	*10.5*	*0.2*

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2014-2018 period.

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

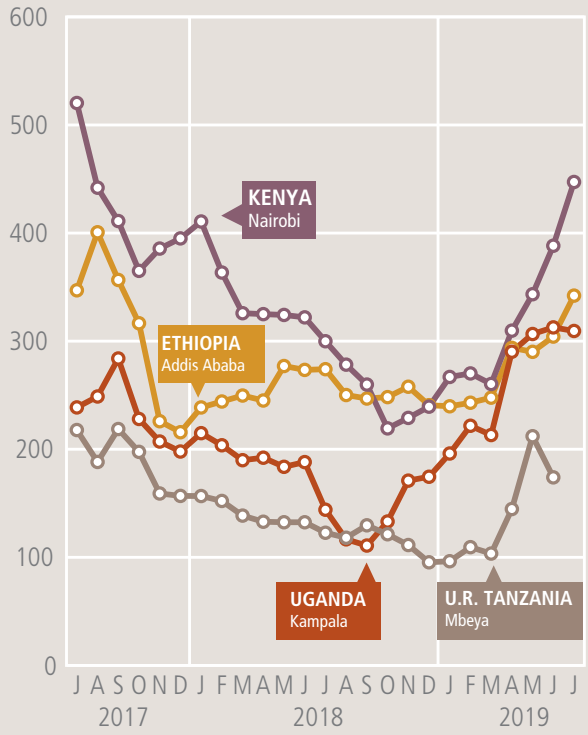
but some crop damage was irreversible. As a result, the maize harvest will begin in November, about one month later than normal, and is forecast to decline by about 25 percent compared to the average. In **Ethiopia**, **the Sudan** and central and northern uni-modal rainfall areas of **South Sudan**, above-average seasonal rains have benefited vegetation conditions and are expected to boost yields, but triggered widespread floods that resulted in localized losses of standing crops and livestock. In the Sudan, the area planted has been negatively impacted by shortages and high prices of fuel and agricultural inputs, while in South Sudan agricultural operations continue to be affected by the lingering impact of the prolonged conflict. In **Eritrea**, the 2019 "Kiremti" rainy season, which normally extends from late June to September, has been characterized by an early onset at the beginning of June, which benefited land preparation and planting operations. Rains continued at average to above-average levels over most cropping areas, resulting in favourable vegetation conditions. In agro-pastoral areas of the Karamoja Region of **Uganda**, the cereal harvest started in September, one month later than normal , and the output of sorghum, the main cereal grown in the area, is estimated to be about 30 percent below average due to erratic rains and seed shortages.

Fall Armyworm infestations have been reported in **Kenya**, **Ethiopia**, **South Sudan**, **Uganda** and **the United Republic of Tanzania**. Infestation intensity has declined, instigated by increased precipitation received since May. However, the damage suffered by crops during the early stages of the cropping season is expected to result in significantly reduced yields in the affected areas.

Pastoral areas have been severely affected by the cumulative impact of below-average 2018 October-December "Deyr/short-rains", followed by a harsh January-March 2019 dry season and by a very poor performance of the March-May "Gu/Genna/long-rains". The exceptionally dry conditions in March and April, especially in central and northern **Somalia**, southeastern **Ethiopia** and most of **Kenya**, have caused a deterioration of rangeland resources to extremely poor levels. The severe pasture and water deficits resulted in livestock emaciation and increased mortality rates as well as a sharp decline in milk production. Heavy showers received in May had some localized positive impacts on rangeland and livestock conditions, but these improvements were short-lived as grazing resources entered the ongoing dry season with already poor conditions. Rangeland conditions are very poor also over the Afar Region in northern **Ethiopia**, where the July-September "Karma" seasonal rains have been below average.

According to the latest Greater Horn of Africa Climate Outlook Forum (GHACOF) weather forecast, the October-December rains are likely to be above average over most of the subregion, with likely positive effects on the 2019 second season crops and pastoral livelihoods. However, delayed and erratic seasonal rains are expected over eastern **Kenya**, **Somalia** and southeastern **Ethiopia**, prolonging the pastoral lean season and affecting crop production.

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



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

Prices of cereals increase to very high levels

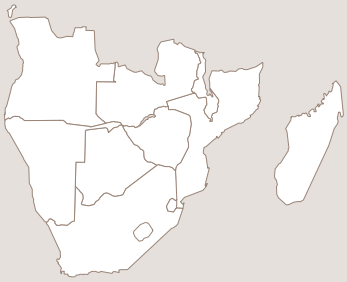
In several countries, prices of cereals increased sharply to very high levels in recent months as seasonal trends were exacerbated by unfavourable prospects for the first season harvests. In **Kenya**, prices of maize rose by 60-90 percent between March and July, when they were about 50-80 percent higher than in the same month of the previous year. In **Somalia**, prices of maize and sorghum surged between May and July, increasing by 50-100 percent in some key markets of the south, as the highly unfavourable prospects for the "Gu" harvest became apparent. Prices of coarse grains in July were generally at high levels, up to nearly twice their year-earlier levels in some markets. In **Ethiopia**, prices of maize increased by 5-20 percent between May and July as seasonal upward trends were amplified by concerns over the performance of the secondary "Belg" harvest and by July prices were 20-30 percent above their year-earlier levels. In **the Sudan**, prices of sorghum increased by 20-80 percent between January and July, while prices of millet remained firm over the same period in several markets due to ample supplies from the bumper 2018 harvest. Prices of coarse grains in July were at near-record to record highs, driven by a significant depreciation of local currency, fuel shortages, political uncertainty and soaring prices of agricultural inputs, which raised production and transportation costs. In **South Sudan**, prices of sorghum and maize increased by about 15 percent in July after remaining mostly stable during the previous months, largely as a result of a further depreciation of the local currency. Prices in July were generally down from a year earlier, but still at exceptionally high levels, more than ten times higher than in July 2015, when they started surging as the country's currency began to rapidly depreciate. The high price levels are the result of insufficient cereal supplies, the lingering impact of the conflict on trade flows and agricultural activities, coupled with high transportation costs and a weak local currency. In **Uganda**, prices of maize, having surged by almost 50 percent between March and May due to crop production concerns of the 2019 first season harvest, levelled off in June and July as improved late season rains lifted crop prospects. However, following the sharp increases during the

previous months, prices in July were more than twice their year-earlier levels. In **the United Republic of Tanzania**, prices of maize sharply increased between March and May, mainly driven by the sustained export demand from Kenya and some Southern African countries. Subsequently, they declined by about 20 percent in June as the major "Msimu" harvest increased market availabilities, but remained about 30 percent higher than one year earlier.

Alarming food insecurity situation in South Sudan, Somalia and Kenya

The aggregate number of people in need of humanitarian assistance is estimated at about 28.2 million, with the largest caseload recorded in Ethiopia, South Sudan and the Sudan. In **South Sudan**, 6.35 million people (54 percent of the total population) were estimated to be severely food insecure in August 2019, at the peak of the lean season. The food insecure caseload is about 5 percent lower on a yearly basis, on account of an improvement of the security situation after the signing of the Revitalized Agreement on the Resolution of the Conflict in South Sudan in September 2018, which has led to a partial recovery of livelihood activities and market functionality, and resulted in an improved humanitarian access. However, the lingering impact of the prolonged conflict is still resulting in severe constraints to food availability and access as well as in a major economic crisis critically affecting income earning opportunities for large segments of the population. The areas of major concern are the former Western Bahr el Ghazal, Jonglei, and Upper Nile states, where 62-68 percent of the population faces IPC Phases 3: "Crisis", 4: "Emergency", of and Yirol East county in former Lakes State, where 10 000 individuals are estimated to face IPC Phase 5: "Catastrophe" food insecurity levels. In **Kenya** and **Somalia**, the food security situation has steadily deteriorated since early 2019 due to the cumulative impact of two consecutive poor rainy seasons on livelihoods in pastoral, agro-pastoral and marginal agricultural areas, reaching alarming levels. In pastoral areas, the decline in terms of trade and shortages of livestock products (mainly milk) are severely affecting food availability and access, while in subsistence farming livelihood zones, poor cropping conditions have caused food shortages and a significant decline in agricultural labour opportunities and households' incomes. In **Somalia**, 2.1 million people are expected to be severely food insecure between October and December, about 35 percent higher than the estimated caseload in early 2019. The areas with the highest levels of food insecurity are southern Bay and Bakool regions and northern Awdal and Woqooyi Galbeed regions, where IPC Phase 4: "Emergency" levels are also reported. In **Kenya**, about 3.1 million people are expected to be food insecure between October and December, nearly four times the number estimated at the beginning of 2019. IPC Phase 3: "Crisis" levels of food insecurity are expected to prevail in northern and eastern pastoral areas of Turkana, Marsabit, Samburu, Mandera, Wajir, Garissa and Isiolo plus Kitui County, located in the southeastern marginal agriculture livelihood zone.

SOUTHERN AFRICA



Extreme weather events cause a sharp drop in cereal production in 2019

The aggregate cereal output in 2019, including a production forecast for the winter wheat crops, to be harvested from October, is estimated at 29.6 million tonnes. At this level, the output is about 2.7 million tonnes lower than the previous five-average and nearly 7 percent below the 2018 outturn. The decline is predominantly the result of extreme weather events (including two intense tropical cyclones and significant rainfall deficits), which led to widespread crop losses and a reduction in yields. The largest yearly decreases were registered in Mozambique, South Africa, Zambia and Zimbabwe, with outputs in the latter three countries falling to below-average levels.

Production of maize, the main food staple in the subregion, is estimated at 22.1 million tonnes, nearly 10 percent below the previous five-year average. Most of the reduction is associated with a lower output in **South Africa**, the subregion's main producer, where production is estimated at 11.5 million tonnes, about 1.1 million tonnes below the average. Reduced yields, on account of poorly distributed seasonal rains, were the main cause of the production decline, with the area planted remaining mostly unchanged. Similarly, in neighbouring **Botswana** and **Namibia**, rainfall deficits instigated sharp contractions in cereal outputs, which were estimated at well below-average levels in 2019. In **Eswatini** and **Lesotho**, both structurally cereal-deficit countries, maize production was also estimated at below-average levels. Cereal production fell sharply in **Zimbabwe**, where the maize output is estimated at 777 000 tonnes, about 540 000 tonnes below the five-year average and nearly 1 million tonnes down from the bumper outturn in 2018. Both a contraction in the area planted and reduced yields caused mainly by the severe rainfall deficits contributed to the low output. In **Zambia**, reduced cumulative seasonal precipitation, particularly in Southern and Western provinces that contribute to about 20 percent to the national maize output, pushed the national average maize yield down by nearly 30 percent compared to the mean yield for the previous five years and resulted in a second consecutive below-average maize output. Estimated at 2 million tonnes, maize production in 2019 is the lowest since 2009. In **Mozambique**, the landfall of Cyclone Idai in March in central regions and Cyclone Kenneth in northern regions in April caused significant damage to the agriculture sector in some of the most productive regions of the country. Consequently, cereal production decreased by about 13 percent on a yearly basis to 2.8 million tonnes in 2019, but still remained higher than the average. The year-on-year decline is mostly related to losses of standing crops and secondarily to a decrease in yields, according to the results from a jointly fielded *FAO/WFP Crop and Food Security Assessment Mission*. In **Angola**, the total cereal harvest is estimated to have remained above average despite severe dry conditions in southern provinces, as weather conditions were more conducive for crop development in the productive central regions, which helped avert a larger production decline in 2019.

Despite localized crop losses in southern districts due to heavy rains and localized floods in March, maize production recovered in **Malawi** to an above-average level of 3.3 million tonnes, owing to well-distributed seasonal rains. Similarly, in **Madagascar**, paddy (rice) production, the national food staple, is estimated to have risen in 2019 due to favourable weather conditions, but is expected to remain near average as structural challenges continue to impede agricultural productivity.

Planting of the 2020 cereal crops, which will be harvested from March next year, is expected to begin in October. Weather forecasts indicate a higher probability of normal to above-normal rainfall between October and December 2019 in most areas of the subregion, which is expected to help reverse the prevailing low moisture content of soils, particularly in western areas, and benefit crop establishment and early growth. In the January-March 2020 period, forecasts indicate an increased chance of normal to below-normal precipitation in southern **Malawi**, **Mozambique** and **Zambia**, most of **Zimbabwe** and **Eswatini**, and the main cropping zones of **South Africa**. Although this does not imply insufficient precipitation for crop growth, extended periods of rainfall deficits could restrain crop yields in the aforementioned areas. The remaining areas of the subregion are predicted to receive heavier rains in the first quarter of 2020.

Table 10. Southern Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	Change: 2019/2018 (%)
Southern Africa	***2.0***	***2.1***	***2.1***	***25.8***	***25.4***	***23.5***	***4.2***	***4.1***	***4.0***	***32.0***	***31.6***	***29.6***	***-6.5***
- excl. South Africa	*0.3*	*0.3*	*0.2*	*12.7*	*13.2*	*11.4*	*4.2*	*4.1*	*4.0*	*17.2*	*17.6*	*15.6*	*-11.2*
Madagascar	*0.0*	*0.0*	*0.0*	*0.3*	*0.2*	*0.3*	*3.6*	*3.3*	*3.4*	*3.9*	*3.5*	*3.7*	*3.9*
Malawi	*0.0*	*0.0*	*0.0*	*3.2*	*2.9*	*3.4*	*0.1*	*0.1*	*0.1*	*3.3*	*3.0*	*3.5*	*17.3*
Mozambique	*0.0*	*0.0*	*0.0*	*2.1*	*2.8*	*2.5*	*0.4*	*0.5*	*0.3*	*2.5*	*3.4*	*2.8*	*-15.8*
South Africa	*1.7*	*1.9*	*1.9*	*13.1*	*12.2*	*12.1*	*0.0*	*0.0*	*0.0*	*14.8*	*14.1*	*14.0*	*-0.7*
Zambia	*0.2*	*0.1*	*0.2*	*3.0*	*2.4*	*2.0*	*0.0*	*0.0*	*0.0*	*3.3*	*2.6*	*2.2*	*-14.6*
Zimbabwe	*0.0*	*0.1*	*0.1*	*1.5*	*1.9*	*0.9*	*0.0*	*0.0*	*0.0*	*1.6*	*2.0*	*0.9*	*-52.7*

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2014-2018 period.

Import requirements to grow in 2019/20

Reflecting the reduced cereal harvests and lower stocks following a drawdown in the previous year, domestic cereal supplies have tightened in most countries. This has led to an estimated increase in import requirements for the 2019/20 marketing year (generally April/March). Estimated at 9.9 million tonnes, aggregate cereal imports are expected to exceed the five-year average by nearly 1 million tonnes. As in previous years, wheat and rice (in milled terms) account for the largest proportions of the anticipated import volume in 2019/20, estimated at 3.9 million tonnes and 3.3 million tonnes, respectively. Maize imports are forecast at an average level of 2.4 million tonnes, increasing compared to the low level of 1.1 million tonnes in 2018/19. By country, the largest increases in import needs are forecast in Mozambique and Zimbabwe on account of the weather-reduced harvests, with both countries foreseen to import above-average quantities.

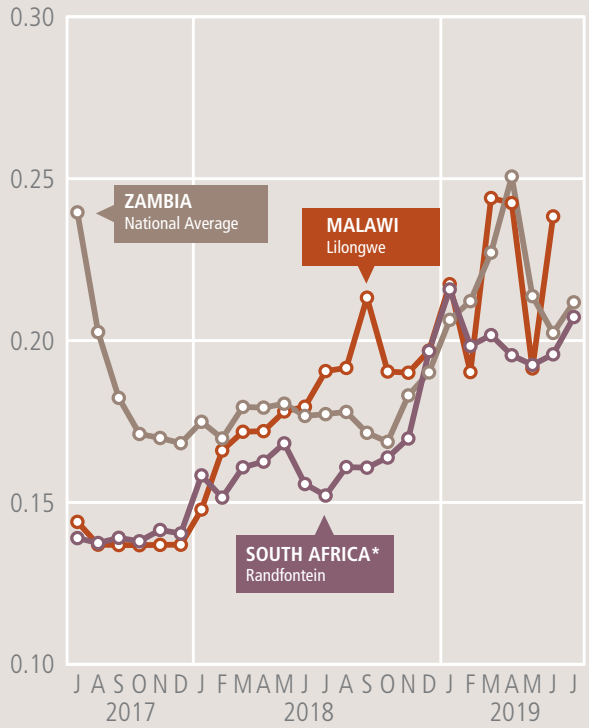
Cereal exports in the subregion mostly originate from South Africa and consist mainly of maize. In recent years, Zambia has also exported significant quantities. However, following a second consecutive below-average harvest, exports from Zambia in 2019/20 are forecast to be minimal. Exports from South Africa are expected to decline from the previous year to a below-average level of about 1.2 million tonnes in 2019/20.

Prices of cereals rose steeply on supply pressure

After falling seasonally between March and May, prices of maize rose in June and July, reinforcing the higher year-on-year levels, with some prices hitting record highs. The elevated levels mostly resulted from reduced domestic harvests and currency depreciations. The largest price increases were recorded in **Zimbabwe**, where prices of cereals rose significantly during most of 2019 and reached levels well above those a year earlier as of July, particularly prices of wheat flour and bread that were around three times higher. The rapid depreciation of the country's currency was the main driving factor underlying the sharp price increases, while the weather-reduced cereal harvest and increased fuel prices provided further upward support. Prices of maize grain in **Zambia** have also risen in recent months and were significantly higher year on year reflecting the drought-reduced 2019 harvest. To curtail further price increases, the Government introduced a price ceiling of ZWK 2 600 per tonne of maize grain in August, with the national average price estimated at approximately ZWK 3 000 during the same month. In **South Africa**, prices of maize firmed up in recent months largely because of higher price quotations in the international market, while a moderate weakening of the currency provided additional support. The lifting of the national maize production forecast in both July and August countered some of this upward pressure and contained price increase. In **Mozambique**, prices of maize grain showed mixed trends in May and June, having spiked immediately after the landfall of the cyclones. As of June, prices were overall higher on a yearly basis, reflecting the widespread crop losses and reduced national supplies. Retail prices of rice in **Madagascar** decreased in the first six months of the year on account of an estimated upturn in the 2019 paddy production.

White maize prices in selected Southern African markets

(USD/kg)



* Wholesale prices, all others retail prices

Sources: Central Statistical Office, Zambia; Ministry of Agriculture and Food Security, Malawi; SAFEX Agricultural Products Division, South Africa.

Food insecurity projected to rise sharply in early 2020

The number of food insecure in *Southern Africa*[3] is projected to peak at 12.5 million people in 2019/20 (April/March), rising by 15 percent on a yearly basis and marking the second highest number on record after 2015/16, when the El Niño weather phenomenon affected the subregion. The significant deterioration in food security conditions is mainly the result of the reduced harvests that cut households' food supplies. In addition, the higher food prices are impinging on households' access to food, a situation further exacerbated by diminished casual labour opportunities due to the poor agricultural season, which has consequently limited incomes for many rural households.

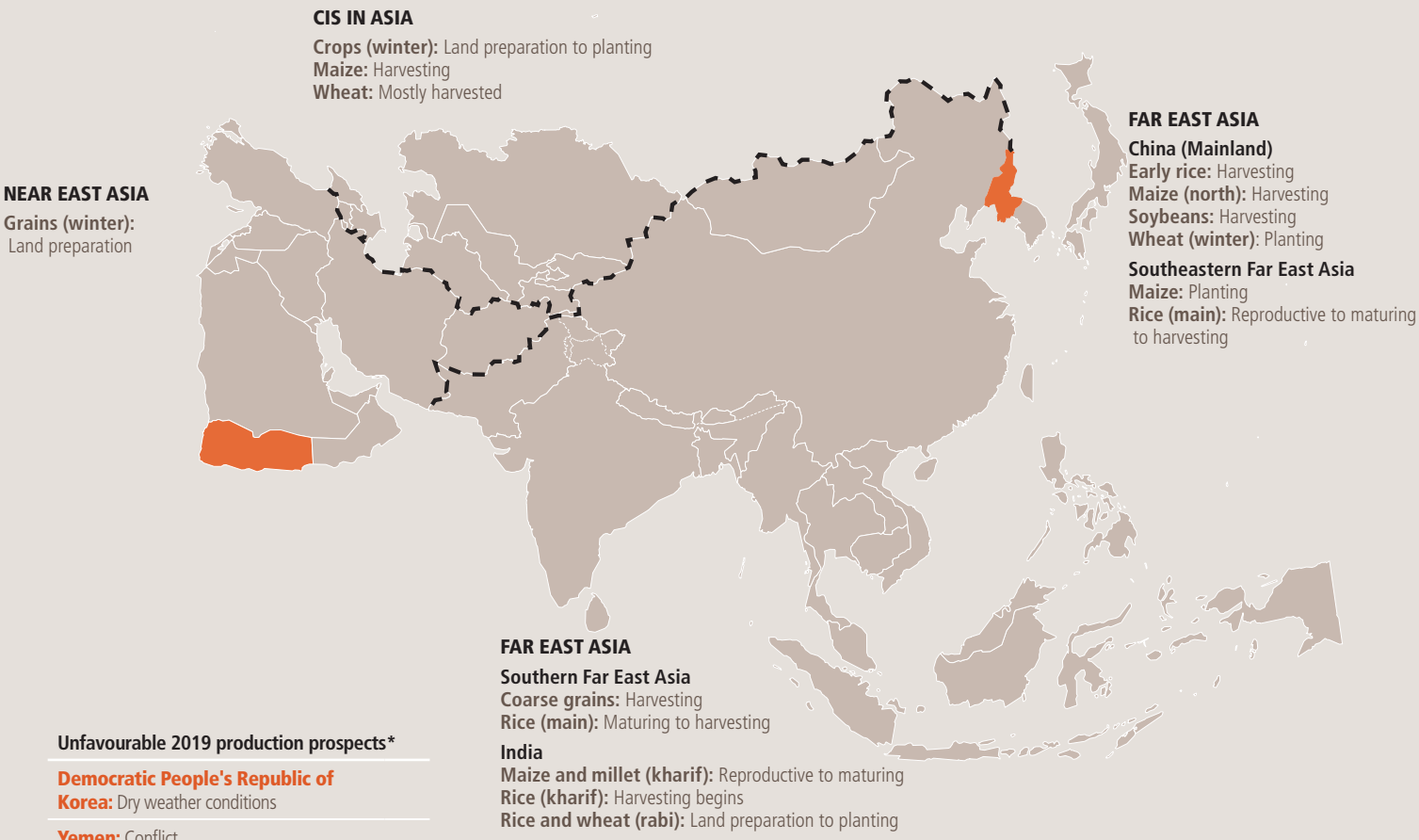
The largest increases in the food insecure caseload are estimated in **Zambia** and **Zimbabwe**, where the number of people in need of assistance for food is projected to more than double on a yearly basis to 2.3 million and 5.5 million, respectively, during the lean season from January to March 2020. Food insecurity also worsened significantly in **Mozambique**, primarily on account of the cyclones, where the number of food insecure people rose by 85 percent to 1.65 million people. In **Madagascar** and **Malawi**, which registered larger harvests in 2019, food security improved, reflected in a reduced caseload of people in need of assistance. As only limited areas of the subregion harvest a secondary season crop in September/October, notably parts of central **Mozambique**, widespread improvements in food security conditions are not expected to occur earlier than March 2020, when the main season harvest begins.

[3] Excluding Angola, Mauritius and South Africa.

REGIONAL REVIEWS

ASIA

Note: Situation as of August
Subregional borders
Territories/boundaries**



Unfavourable 2019 production prospects*

Democratic People's Republic of Korea: Dry weather conditions

Yemen: Conflict

*/** See Terminology (*page 5*)

Source: GIEWS
(disputed territories and boundaries in conformity with UN maps)**

Asia Production Overview

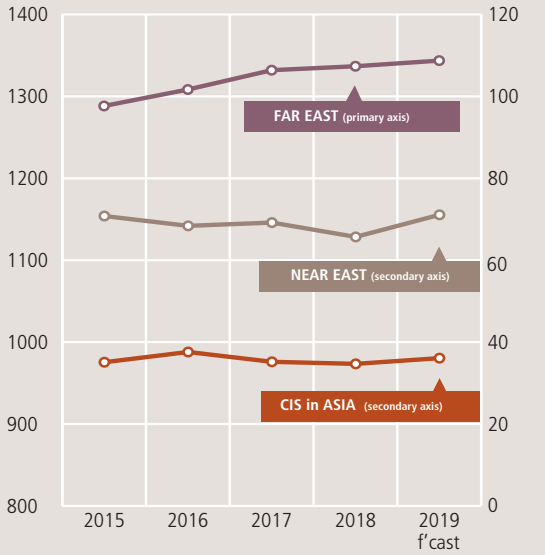
The aggregate 2019 cereal output is forecast at 1 451 million tonnes, well above the previous five-year average and 2018's level, reflecting production upturns in all subregions.

In the Far East, larger wheat and paddy outputs in 2019 are expected to more than offset a reduced coarse grain output, putting this year's aggregate output at a well above-average level.

In the Near East, the aggregate cereal production is also forecast to increase in 2019, despite damaging floods in parts. In addition, improvements in the security situation and generally well-distributed rainfall led to a larger harvest in the Syrian Arab Republic, nevertheless the national output still remained well below the pre-crisis level.

Total cereal production in CIS Asia is forecast to recover to an above-average level in 2019, reflecting generally conducive weather conditions and area expansions.

Cereal production
(million tonnes)



FAR EAST

Overall favourable prospects for 2019 cereal crops

In most Northern Hemisphere countries, harvesting of the 2019 main season crops, mostly rice and coarse grains, started in September and will continue until end of the year.

The June-to-September rainy season was characterized by an erratic distribution of precipitation in parts of the subregion. Rains since June have been erratic and below average in some key cereal producing areas of northwestern **Cambodia**, northeastern **Thailand** and northern parts of **Viet Nam**. In **Lao People's Democratic Republic**, abnormal dryness between May and July affected crops in the key northern cereal-producing areas and, despite abundant rains received in the first two dekads of August, cumulative seasonal amounts as of mid-August were still about 50 percent below average in many areas. In the central and southern parts of the country (locally referred to as the Mekong River Corridor, and Central and Southern Highland), shortages of irrigation water due to poor precipitations in the Upper Mekong River Basin is expected to have a negative impact on yields. In **India**, planting of the 2019 main season cereal crops has been delayed due to unfavourable weather conditions and floods. If the planing progress has not recuperated this is likely to warrant a downward revision of the current production forecast. In **the Democratic People's Republic of Korea**, below-average rains and low irrigation availability between mid-April and mid-July, a critical period for crop development, mainly affected the main season rice and maize crops. In **Myanmar**, record rainfall in July and August triggered floods and landslides, hampering planting operations in some areas, particularly in the southern coastal and Mekong River Delta regions. Similarly, in **Bangladesh**, heavy monsoon rains in late June and early July caused floods, which were mainly concentrated in the northern and eastern parts of the country, affecting standing crops and forcing farmers to replant. In the areas most affected by these weather anomalies, production decreases are expected. However, above-average plantings, often sustained by state incentives, are likely to ensure an above-average or near-average main season output in most countries.

The main 2019 season concluded earlier in the year in countries along or south of the equator, namely **Indonesia**, **Sri Lanka** and **Timor-Leste**, and main season cereal outputs were estimated at above-average levels. These countries are currently harvesting the 2019 secondary season crops.

The aggregate 2019 paddy output, the major staple of the subregion, is preliminary forecast at a bumper 703 million tonnes. Near-average or above-average outputs are expected in Bangladesh, Cambodia, India, Indonesia, Myanmar, Pakistan and the Philippines. By contrast, below-average outputs are forecast in **the Republic of Korea** and **China (Mainland)**, mostly owing to a contraction in the area planted. Similarly, in **the Democratic People's Republic of Korea**, rice production is forecast at a below-average level due to poor rains and limited irrigation supplies during the first half of the cropping season.

The 2019 subregional maize production is forecast at 346.5 million tonnes, close to the previous year's high level. Bumper outputs are expected in most countries supported by both a larger planted area, due to strong demand from the feed industry, and above-average yields, following the increased use of high-yielding crop varieties. The below-average output is forecast in **China (Mainland)**, reflecting a slight contraction in plantings and a year-on-year decrease in yields, partly due

Table 11. Far East cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	Change: 2019/2018 (%)
Far East	***257.0***	***260.9***	***266.3***	***371.6***	***378.1***	***374.5***	***681.0***	***697.9***	***703.0***	***1 309.6***	***1 336.8***	***1 343.7***	***0.5***
Bangladesh	*1.3*	*1.1*	*1.3*	*2.6*	*3.2*	*3.3*	*52.6*	*54.5*	*54.6*	*56.5*	*58.8*	*59.2*	*0.6*
Cambodia	*0.0*	*0.0*	*0.0*	*0.8*	*1.2*	*1.2*	*10.0*	*10.9*	*11.0*	*10.8*	*12.1*	*12.2*	*0.7*
China (Mainland)	*132.1*	*131.4*	*134.0*	*268.6*	*267.3*	*264.3*	*211.5*	*212.1*	*210.6*	*612.3*	*610.9*	*608.9*	*-0.3*
India	*94.6*	*99.9*	*102.2*	*43.6*	*45.4*	*43.7*	*164.4*	*173.4*	*176.3*	*302.6*	*318.7*	*322.2*	*1.1*
Japan	*0.9*	*0.8*	*0.8*	*0.2*	*0.2*	*0.2*	*10.9*	*10.8*	*11.0*	*12.0*	*11.8*	*12.0*	*1.8*
Myanmar	*0.1*	*0.1*	*0.1*	*2.5*	*2.8*	*2.9*	*28.9*	*30.4*	*30.5*	*31.5*	*33.3*	*33.5*	*0.6*
Nepal	*1.9*	*2.0*	*2.2*	*2.7*	*3.0*	*3.0*	*5.0*	*5.3*	*5.4*	*9.6*	*10.3*	*10.6*	*2.5*
Pakistan	*25.7*	*25.1*	*25.2*	*6.2*	*6.8*	*6.8*	*10.6*	*10.8*	*10.9*	*42.5*	*42.7*	*42.9*	*0.6*
Philippines	*0.0*	*0.0*	*0.0*	*7.6*	*7.8*	*8.0*	*18.7*	*19.0*	*19.4*	*26.3*	*26.8*	*27.4*	*2.4*
Republic of Korea	*0.0*	*0.0*	*0.0*	*0.2*	*0.2*	*0.2*	*5.5*	*5.2*	*5.2*	*5.7*	*5.4*	*5.4*	*0.2*
Sri Lanka	*0.0*	*0.0*	*0.0*	*0.3*	*0.3*	*0.3*	*3.8*	*3.9*	*4.5*	*4.0*	*4.2*	*4.8*	*14.3*
Thailand	*0.0*	*0.0*	*0.0*	*4.9*	*5.2*	*5.2*	*31.2*	*32.0*	*33.3*	*36.1*	*37.2*	*38.5*	*3.4*
Viet Nam	*0.0*	*0.0*	*0.0*	*5.2*	*4.9*	*4.9*	*44.0*	*44.0*	*43.8*	*49.2*	*48.9*	*48.7*	*-0.4*

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2014-2018 period.

to damage caused by FAW infestations. In **Viet Nam**, the maize output is also expected at a below-average level, driven by a reduction in the area sown as farmers shifted from producing maize to more profitable cash crops, including vegetables.

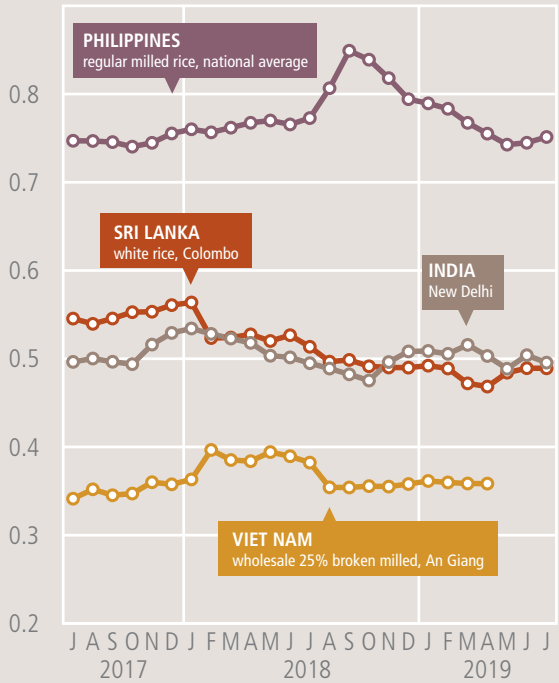
The 2019 wheat harvest was finalized in June 2019 and, based on the latest official data, the subregion's 2019 output is estimated at a record of 266.3 million tonnes. This mostly reflects bumper outputs in **India** and **China (Mainland)**.

Aggregate cereal imports in 2019/20 forecast slightly below average

In the 2019/20 marketing year, aggregate wheat import requirements are estimated at a high level of 51 million tonnes, reflecting continuing strong demand from the main importers, including **Bangladesh**, **Thailand**, **the Philippines** and **the Republic of Korea**. By contrast, the subregional import requirement for coarse grains, which mostly consists of maize, is estimated at a below-average level. This lower quantity is mainly driven by a decline in demand from **China (Mainland)**, following the implementation of a government programme that aims to reduce the country's large maize stocks through an increase in sales from the State reserves. In **the Republic of Korea** and **Viet Nam**, import requirements of maize for feed use are, by contrast, forecast to remain at high levels. Imports of rice, which account for a small share of the subregion's total imports, are forecast well below the five-year average, reflecting expectations of above-average harvests in the subregion's importing countries, including **Bangladesh**, **the Philippines** and **Indonesia**. Overall, the aggregate cereal import requirement in the 2019/20 marketing year is forecast at 125 million tonnes, close to the previous five-year average.

Exports of rice, accounting for the bulk of subregional exports, are forecast at an above-average level of 40.6 million tonnes in 2020, reflecting expectations increased shipments from **India**, **China (Mainland)** and **Viet Nam**.

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; Agroinfo, Viet Nam.

Prices of rice and wheat followed mixed trends between March and July

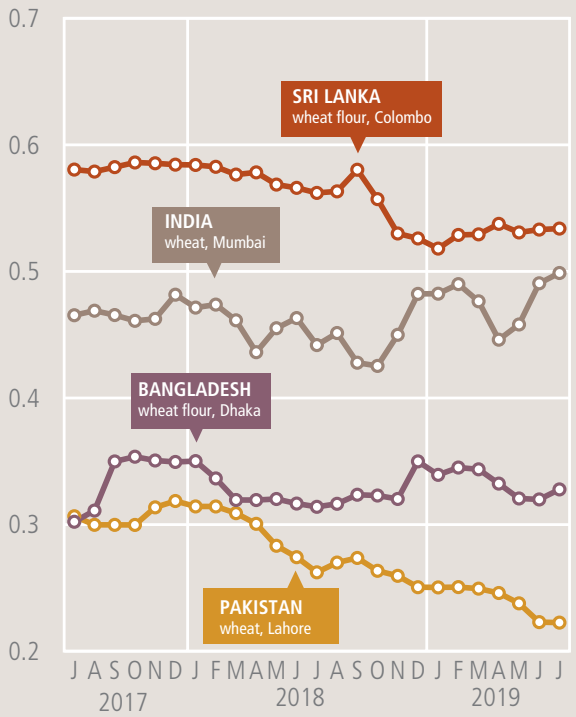
Domestic prices of rice followed mixed trends between March and July in most countries and were generally below their year-earlier levels. In **India**, prices remained generally stable as the Government's procurement purchases offset the downward supply pressure that emanates from the record output of 2018. In **Thailand**, after a slight increase in March related to seasonally tight supplies, prices decreased from April to July, weighed by improved market availabilities from the recent harvests and weak international demand. Similarly, in **Viet Nam**, after a pickup in export demand that led to an increase in prices in April, started to decline in May driven by improved supplies from the newly harvest crops. In **China (Mainland)**, domestic prices of rice were generally stable during the March-July period, reflecting ample market availabilities from the 2019

Table 12. Far East cereal production and anticipated trade in 2019/20 [1]
(thousand tonnes)

	Avg 5-yrs (2014/15 to 2018/19)	2018/19	2019/20	2019/20 over 2018/19 (%)	2019/20 over 5-yr avg (%)
Coarse grains					
Exports	3 612	4 035	3 595	-10.9	-0.5
Imports	66 352	63 765	61 590	-3.4	-7.2
Production	371 765	378 664	374 451	-1.1	0.7
Rice (millled)					
Exports	38 128	39 309	40 598	3.3	6.5
Imports	14 460	12 491	12 340	-1.2	-14.7
Production	451 862	462 887	466 198	0.7	3.2
Wheat					
Exports	3 057	2 717	2 412	-11.2	-21.1
Imports	48 681	47 846	50 989	6.6	4.7
Production	257 033	260 851	266 286	2.1	3.6

[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; Department of Census and Statistics, Sri Lanka, Management Information System and Monitoring, Bangladesh.

output and large carryover stocks. In **the Philippines**, prices decreased for the tenth consecutive month in July due to well supplied markets. Similarly, adequate market availabilities from the 2019 main harvest resulted in a decrease of prices in **Indonesia**. In **Bangladesh**, prices firmed up between May and July, but were well below average, following steady decreases registered since August 2018.

Prices of wheat and wheat flour also showed mixed trends between March and July. They remained generally stable in **India**, despite the record 2019 harvest, as large Government purchases offset the pressure emanating from the abundant supplies. In **China (Mainland)**, prices of wheat were stable between March and May, but declined seasonally in June and July during the main 2019 winter harvest, which was forecast at a bumper level. By contrast, price increases were registered in **Pakistan** since March, mostly reflecting robust demand for exports in the previous months and a slightly below-average output. Among the wheat importing countries of the subregion, prices remained relatively stable in **Bangladesh**, **Indonesia** and **Sri Lanka**, amid adequate supplies.

Food security concerns remain in countries affected by floods

Overall, food security conditions are stable in the subregion, but pockets of severe food insecurity persist in some countries, especially in the areas affected by the floods. In **Bangladesh**, the severe floods in July affected about 5.3 million people, mostly in northern and eastern parts of the country. Floods have affected the already precarious living conditions and the food security situation of about 910 000 Rohingya refugees from Myanmar in the Cox Bazar District. Most refugees reside in temporary settlements with high levels of food insecurity and require humanitarian assistance to cover their basic needs. In **Myanmar**, persistent conflicts since the resurgence of violence in Rakhine State in late August 2017 triggered large-scale population displacement. According to the latest data from UN-OCHA (May 2019), an estimated 160 000 people were internally displaced in Rakhine State and 106 500 in Kachin and Shan states. In Rakhine State, livelihood activities have been severely disrupted by the limitations placed on the movement of people. Excessive precipitations in July and August triggered localized floods in the northern and southern states, affecting large numbers of people, displacing about 100 000 individuals and resulting in losses of stored crops and seeds as well as small livestock. In **Pakistan**, food security conditions remain of concern in rural communities in the Balochistan and Sindh districts as persisting dry conditions are expected to result in cereal production shortfalls and losses of livestock. This may cause the loss of income and purchasing power among the most affected households. In addition, 1.4 million Afghan refugees are based in Pakistan, which are straining the already limited resources of the host communities.

NEAR EAST

An above-average cereal output gathered in 2019 despite flooding and dry conditions

Harvesting of the 2019 winter cereal crops was completed in August. Across most of the subregion, rainfall amounts between October 2018 and early April 2019 were abundant, followed by unseasonably dry weather conditions between late April and June which had an adverse effect on wheat yields.

At the subregional level, the 2019 wheat production is estimated at 45 million tonnes, 4 percent above the five-year average and about 8 percent above the 2018 weather-stricken output. Total cereal production in 2019 is forecast at 71 million tonnes, about 8 percent above the 2018 harvest and 3 percent above the five-year average.

In **Turkey**, the subregion's main cereal producer, favourable weather conditions prevailed until March, but subsequent dry weather conditions had a negative impact on grain formation and filling. The 2019 cereal harvest is estimated at 34.2 million tonnes, of which 19 million tonnes are wheat, 7.5 million tonnes are barley and 6 million tonnes are maize. The total cereal output in 2019 is similar to the 2018's level and slightly below the five-year average.

In **Iran (Islamic Republic of)** and **Iraq**, countries which were the most affected by heavy rains that resulted in widespread flash flooding from mid-March to April 2019, production losses in the flooded areas were more than offset by the production gains in areas where increased precipitation was conducive for crop development. As a result, the cereal output in **Iran (Islamic Republic of)** is officially estimated by the country at 21.6 million tonnes, about 15 percent above the five-year average and 8 percent higher than last year. Abundant precipitation particularly benefited wheat crops, contributing to a production of 14.5 million tonnes, almost 22.8 percent above the average. In **Iraq**, cereal production is estimated at 5.6 million tonnes, more than 80 percent above the 2018 harvest and 30 percent above the five-year average. The significant increase is almost entirely due to a surge in wheat production which increased from the drought-affected output of 2.2 million tonnes in 2018 to 4.3 million tonnes in 2019 (about one-third above the five-year average).

In **the Syrian Arab Republic**, abundant and well-distributed rainfall, coupled with improved security conditions, which facilitated the return of internally displaced people, resulted in a significant expansion of the area sown with cereals. The 2019 harvested wheat area (1.26 million hectares) was almost double the level estimated in 2018, but still 25 percent below the pre-crisis (2002-2011) average. The 2019 harvested barley area (1.34 million hectares) increased by over 70 percent compared to the previous year and was similar to the pre-crisis average. The high temperatures in May mainly impacted the grain filling stage for wheat, as the barley harvest was already ongoing. The FAO/WFP Crop and Food Security Assessment Mission, fielded in June and July 2019, estimated the 2019 wheat production at 2.2 million tonnes, up from 1.2 million tonnes in 2018, but still below the pre-crisis level of 4.1 million tonnes (2002-2011). At 2 million tonnes, the 2019 barley production is more than five times that of 2018 and over 150 percent higher than the pre-crisis levels.

In **Afghanistan**, owing to favourable rainfall, cereal production recovered from last year's drought-stricken harvest. The 2019 cereal harvest is estimated at 5 million tonnes, about 11 percent above the outturn in 2018, but still 12 percent below the five-year average. Severe challenges persist in Yemen, where the conflict continues to debilitate agricultural livelihoods.

At subregional level, wheat imports in the 2019/20 (July/ June) marketing year are forecast at an average level of 29 million tonnes. Total cereal imports are forecast at a level close to the average of 73.4 million tonnes.

Table 13. Near East cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	Change: 2019/2018 (%)
Near East	***43.0***	***41.4***	***44.8***	***21.2***	***19.6***	***21.4***	***4.4***	***4.6***	***4.8***	***68.6***	***65.6***	***71.0***	***8.1***
Afghanistan	*4.5*	*3.6*	*4.0*	*0.6*	*0.4*	*0.4*	*0.6*	*0.5*	*0.6*	*5.7*	*4.5*	*5.0*	*10.5*
Iran (Islamic Republic of)	*11.8*	*13.4*	*14.5*	*4.2*	*3.7*	*4.1*	*2.7*	*3.0*	*3.0*	*18.8*	*20.1*	*21.6*	*7.5*
Iraq	*3.2*	*2.2*	*4.3*	*0.9*	*0.7*	*1.1*	*0.2*	*0.1*	*0.2*	*4.3*	*3.0*	*5.6*	*83.4*
Turkey	*20.7*	*20.0*	*19.0*	*13.8*	*13.4*	*14.2*	*0.9*	*0.9*	*1.0*	*35.4*	*34.4*	*34.2*	*-0.5*

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2014-2018 period.

Food insecurity of large numbers of people continues to worsen due to persisting conflicts

In **Yemen**, after four years of escalating conflict, the food security situation remains dire. In December 2018, over 1.5 million people were estimated to be severely food insecure in 29 out of the 45 most food insecure districts. This included 658 000 people in IPC Phase 4: "Emergency", 44 000 in IPC Phase 5: "Catastrophe" and the remaining falling under IPC Phase 3: "Crisis". An updated analysis carried out in April 2019, reported no cases of IPC Phase 5, but still about 1.25 million people are severely food insecure (IPC Phases 3 and 4 combined).

In **the Syrian Arab Republic**, about 6.5 million people are estimated to be food insecure and in need of food and livelihood support. An additional 2.5 million people are at risk of food insecurity and need livelihood support to strengthen their resilience.

In **Afghanistan**, the December 2018 Humanitarian Needs Overview estimated that 13.5 million people faced severe acute food insecurity (IPC Phase 3: "Crisis" and above), about 6 million people above the level estimated in the corresponding period of 2017. Continuing conflict, natural hazards and limited economic opportunities have increased the vulnerability of the poorest households, including subsistence farmers.

CIS IN ASIA[4]

Cereal production forecast slightly above average in 2019

Harvesting of the 2019 winter cereal crops was completed at the end of August, while the spring cereal crops, which account for the majority of production, are currently being harvested under favourable weather conditions. The total subregional cereal output is expected to reach 35.6 million tonnes, slightly above the average level. This result mainly rests on expectations of an above-average output of barley that is forecast to reach 6.3 million tonnes, mostly due to estimated record plantings in Kazakhstan, the subregion's main producer. The aggregate wheat output, accounting for about 70 percent of subregion's cereal production, is forecast at a near-average level of 25.4 million tonnes.

In **Kazakhstan**, harvesting of the spring wheat crop, which accounts for more than 90 percent of the total annual wheat production, is almost complete and the 2019 aggregate output (including the minor season winter crop) is estimated to be slightly below average at 13.5 million tonnes, due to reduced plantings and dryness between June and mid-August in parts of the key producing Kostanay Province. By contrast, well above-average wheat outputs are estimated in **Azerbaijan** and **Turkmenistan**, at 2 million tonnes and 1.6 million tonnes, respectively. In **Armenia** and **Kyrgyzstan**, the 2019 wheat outputs are estimated at 180 000 and 590 000 tonnes, respectively, well below the five-year average on account of below-average

Table 14. CIS in Asia cereal production

(million tonnes)

	Wheat			Coarse grains			Total cereals [1]			
	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	Change: 2019/2018 (%)
CIS in Asia	***25.6***	***24.6***	***25.4***	***8.2***	***9.0***	***9.5***	***34.8***	***34.6***	***36.0***	***4.0***
Armenia	*0.3*	*0.2*	*0.2*	*0.2*	*0.1*	*0.1*	*0.5*	*0.3*	*0.3*	*-4.0*
Azerbaijan	*1.8*	*2.0*	*2.1*	*1.1*	*1.2*	*1.1*	*2.9*	*3.3*	*3.2*	*-2.8*
Georgia	*0.1*	*0.1*	*0.1*	*0.3*	*0.3*	*0.2*	*0.4*	*0.4*	*0.3*	*-14.2*
Kazakhstan	*14.1*	*13.9*	*13.5*	*4.3*	*5.3*	*5.9*	*18.9*	*19.7*	*19.9*	*0.6*
Kyrgyzstan	*0.6*	*0.6*	*0.6*	*1.0*	*1.1*	*1.1*	*1.7*	*1.8*	*1.8*	*-0.9*
Tajikistan	*0.9*	*0.7*	*0.8*	*0.3*	*0.3*	*0.3*	*1.3*	*1.1*	*1.3*	*15.0*
Turkmenistan	*1.2*	*1.0*	*1.6*	*0.1*	*0.1*	*0.1*	*1.4*	*1.2*	*1.8*	*50.4*
Uzbekistan	*6.6*	*6.0*	*6.6*	*0.9*	*0.6*	*0.6*	*7.8*	*6.8*	*7.5*	*9.9*

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2014-2018 period.

[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.

areas planted. In **Uzbekistan** and **Tajikistan**, wheat production is estimated at a near-average 6.6 million tonnes and 830 000 tonnes, respectively. Planting of the 2020 winter cereal crops started at the end of August under generally favourable weather conditions.

Above-average cereal trade forecast in 2019/20

In the 2019/20 marketing year (July/June), total subregional imports of cereals, mainly wheat, are forecast at 7.6 million tonnes, slightly above the five-year average, mostly owing to high import demand for wheat from **Armenia**, **Kyrgyzstan**, **Tajikistan** and **Turkmenistan**. Total cereal exports in 2019/20 are forecast at 10.2 million tonnes, almost 8 percent higher than the average volume, mainly due to slightly above-average shipments of wheat grain and wheat flour (in grain equivalent) from **Kazakhstan**, the main exporter in the subregion.

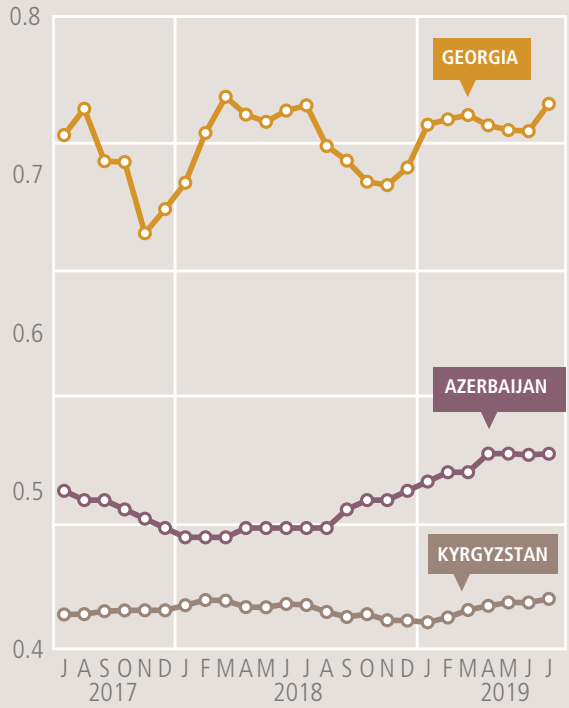
Export and domestic prices of wheat flour remained stable or increased slightly

In **Kazakhstan**, export prices of milling wheat remained mostly stable between March and August, due to generally low demand from neighbouring importing countries. Retail prices of wheat flour have generally increased in the country over the last months, in line with seasonal trends.

In the importing countries of the subregion, domestic prices of wheat flour remained mostly stable during the last months. In **Uzbekistan**, prices were virtually unchanged between March and July 2019, but started to increase in August. Similarly, in **Kyrgyzstan** and **Azerbaijan**, prices remained mostly stable. By contrast, wheat prices in **Georgia** have been increasing since February and were more than 15 percent higher on a yearly basis in July. This is mainly due to the depreciation of the country's currency and higher transportation costs.

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

(USD/kg)



Source: State Statistical Committee of the Republic of Azerbaijan; National Statistical Committee of the Kyrgyz Republic; National Statistics Office of Georgia.

REGIONAL REVIEWS

LATIN AMERICA AND THE CARIBBEAN

Note: Situation as of August
Subregional borders
Territories/boundaries**

CENTRAL AMERICA AND THE CARIBBEAN

Mexico
Coarse grains (summer): Vegetative to maturing
Paddy (summer): Harvesting
Wheat (winter): Land preparation

Central America
Maize (first season): Harvesting

SOUTH AMERICA

Brazil
Maize (main season): Planting

Centresouthern states
Wheat (winter): Harvesting

Uruguay
Barley: Vegetative
Maize (main season): Planting
Wheat (winter): Vegetative

Argentina
Wheat (winter): Vegetative
Maize (main season): Planting

Unfavourable 2019 production prospects*

Honduras: Dry weather conditions

*/** See Terminology (*page 5*)

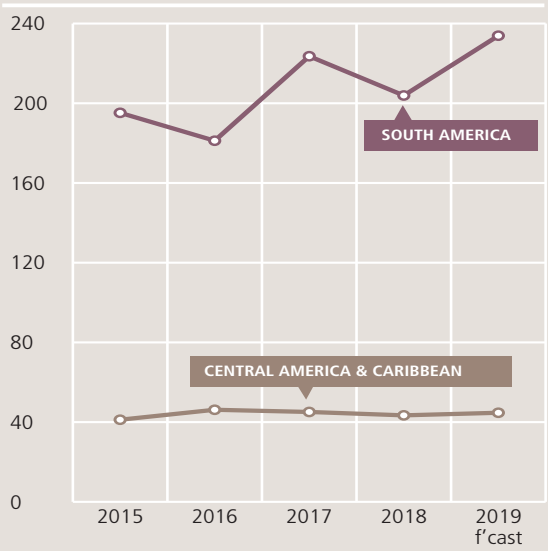
Source: GIEWS
(disputed territories and boundaries in conformity with UN maps)**

Latin America and the Caribbean Production Overview

Cereal production in Latin America and the Caribbean in 2019 is expected to reach a new record high of 278.5 million tonnes. The production increase is primarily on account of record maize harvests in Argentina and Brazil, resting on area expansions and improved yields, supported by favourable weather conditions.

In Central America, an above-average cereal output is forecast, which is expected to mostly result from an area-driven production increase in Mexico. Elsewhere in the subregion, with the harvest of the main season crops about to begin, production prospects point to average harvests in most countries reflecting the generally irregular rainfall distribution.

Cereal production
(million tonnes)



CENTRAL AMERICA AND THE CARIBBEAN

Wheat production forecast below average in 2019 owing to a contraction in plantings

In **Mexico**, virtually the only wheat producer in the subregion, harvesting of the 2019 main winter wheat crop, which accounts for 95 percent of the annual output, finalized in July. Although yields of the harvested crops are reported to be above average, the area sown is estimated to be 14 percent lower than the five-year average as a result of a continuous shift to the more remunerative maize crop. Based on official survey data, a modest increase in plantings of the minor summer wheat crop, to be harvested in November, is expected. Overall, the aggregate wheat production in 2019 is forecast at a below-average level of 3.2 million tonnes.

Maize production set to remain above average, supported by larger plantings in Mexico

The aggregate subregional maize output is forecast at 31.8 million tonnes in 2019, slightly above the five-year average, mainly reflecting an above-average production in **Mexico**, which accounts for more than 85 percent of the subregion's maize output.

In **Mexico**, harvesting of the minor season crop was completed in July and production is estimated at an above-average level due to good yields and larger plantings. For the main season maize crop, to be harvested in October, larger plantings were estimated due to high prices but some uncertainties remain as dry conditions prevailed during the planting and early development stages. Rainfall improved from late July in major producing Jalisco, Mexico and Michoacán departments, resulting in mostly favourable vegetation conditions. Mexico's 2019 overall cereal output, including an above-average harvest from the minor season, is preliminarily anticipated at an above-average level of 37 million tonnes in 2019.

Elsewhere in the subregion, harvesting of the 2019 main season maize crop will start in mid-September. Despite initial expectations of a price-drive expansion in plantings in most countries, the area sown and production are anticipated at an average level due to an irregular distribution of seasonal rains. In **Guatemala**, based on official estimates, the maize output is expected at an average level, as dry weather conditions during the vegetative and maturation stages affected mainly the marginal producing areas of subsistence farming. By contrast, a reduced output is expected in **Honduras** on account of dryness in the main maize-producing southeastern region. In **Nicaragua**, the Pacific coastal and northern areas experienced moderate precipitation deficits in the June-July period, lowering yield prospects. Similarly, in **El Salvador**, crop conditions are moderately unfavourable in the eastern region owing to rainfall deficits.

Production prospects for the minor season crop, currently being planted, are also uncertain as precipitation for the August-October period are forecast to be normal to above average in **Guatemala** and **El Salvador**, and below average in **Honduras** and **Nicaragua**.

In **Haiti**, the main season maize crop was harvested in July and limited precipitation in the southern and northern regions adversely affected production. With the dry conditions still affecting planting activities of the second season maize crop, the production outlook for the second season is also unfavourable. The rapid weakening of the local currency against the US dollar between late 2018 and mid-2019, worsened farmers' access to agricultural inputs that are mostly imported, contributing further to lowering yields. By contrast, production of the 2019 main paddy crop, with the harvest currently ongoing, is anticipated at an average level. This mainly reflects near-average yields as a result of overall favourable weather conditions in the main producing Artibonite Department, which compensated for the negative effects of the low application of agricultural inputs.

Cereal imports forecast at a record high in 2019/20

Cereal import requirements in the 2019/20 marketing year (September/August) are forecast at a record high of 37.5 million tonnes, and maize imports account for 70 percent of this volume. The high level of anticipated imports mainly reflects the strong demand for yellow maize by the feed industry. Imports of wheat are also expected at an above-average level as the demand for wheat-based products for human consumption have been rising.

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

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	Change: 2019/2018 (%)
Central America & Caribbean	***3.5***	***2.9***	***3.2***	***37.6***	***37.5***	***38.4***	***2.9***	***3.0***	***3.1***	***44.0***	***43.4***	***44.7***	***2.9***
El Salvador	*0.0*	*0.0*	*0.0*	*1.0*	*1.0*	*1.0*	*0.0*	*0.0*	*0.0*	*1.0*	*1.0*	*1.1*	*3.2*
Guatemala	*0.0*	*0.0*	*0.0*	*1.9*	*1.9*	*1.9*	*0.0*	*0.0*	*0.0*	*1.9*	*1.9*	*1.9*	*-0.8*
Honduras	*0.0*	*0.0*	*0.0*	*0.6*	*0.6*	*0.6*	*0.1*	*0.1*	*0.1*	*0.6*	*0.6*	*0.6*	*-1.6*
Mexico	*3.5*	*2.9*	*3.2*	*32.8*	*32.6*	*33.5*	*0.3*	*0.3*	*0.3*	*36.6*	*35.8*	*37.0*	*3.4*
Nicaragua	*0.0*	*0.0*	*0.0*	*0.5*	*0.5*	*0.5*	*0.3*	*0.4*	*0.4*	*0.8*	*0.9*	*0.9*	*0.0*
South America	***25.9***	***28.8***	***29.2***	***147.8***	***150.2***	***182.2***	***24.7***	***24.9***	***22.5***	***198.4***	***203.9***	***233.9***	***14.7***
Argentina	*16.3*	*19.5*	*20.0*	*47.3*	*50.8*	*64.3*	*1.4*	*1.4*	*1.2*	*65.1*	*71.6*	*85.5*	*19.4*
Brazil	*5.7*	*5.4*	*5.4*	*84.3*	*84.1*	*102.7*	*11.9*	*12.1*	*10.4*	*101.9*	*101.5*	*118.6*	*16.8*

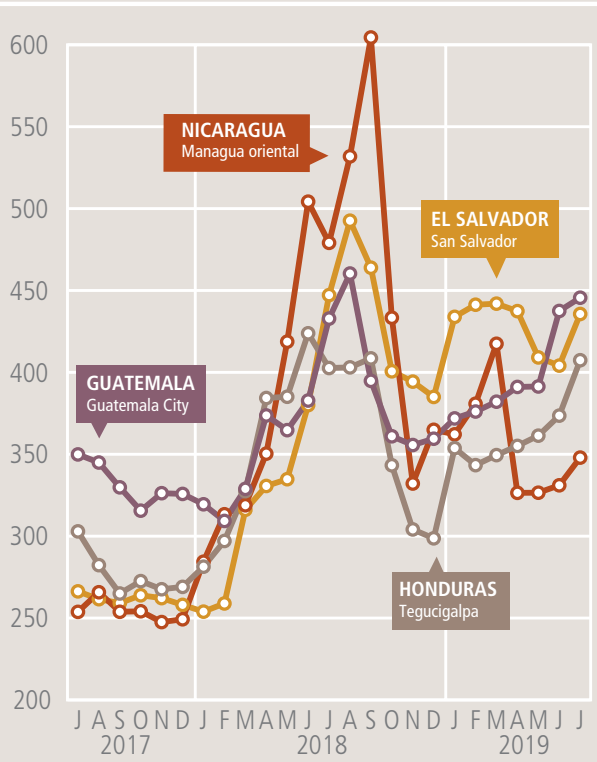
Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2014-2018 period.

Prices of maize rose seasonally in the June-July period

In most countries of the subregion, prices of white maize increased seasonally in the June-July period. While prices were higher year on year in **El Salvador** and **Guatemala** due to concerns over production affected by localized dryness, they were below year-earlier levels in **Nicaragua**, reflecting adequate supplies from the 2018 average harvests. In **Honduras**, prices of white maize in the June-July period were similar to the levels a year earlier. In **Mexico**, prices of white maize were stable during the same period, reflecting adequate domestic supplies from the ongoing minor season harvest. Prices of black and red beans were stable or strengthened seasonally since June and were slightly lower than the levels of the previous year, owing to ample supplies from the 2018 harvests. With regard to rice, prices were generally stable on account of adequate quantities of imports as most countries in the subregion cover a considerable share of domestic needs through imports. However, in **Haiti**, prices of imported rice increased in June, despite the Government's decision to suspend the value added tax on imported rice, mainly in response to the weakness of the national currency.

Wholesale white maize prices in selected countries in Central America

(USD/tonne)



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

SOUTH AMERICA

Cereal production expected at a record high in 2019

In *South America*, harvesting of the maize crop is complete in the major producing countries of Argentina and Brazil, and the aggregate output is expected to reach a new peak of 169 million tonnes in 2019, 25 percent above the previous five year average. The record high production mainly reflects larger sowings and good weather conditions that raised yields. In **Argentina**, the 2019 maize output is officially estimated at a record high of 57 million tonnes, as a slight contraction in plantings was more than offset by excellent yields due to favourable weather conditions during the flowering and grain-filling stages. Similarly, in **Brazil**, official production estimates point to a record high of 99 million tonnes, on account of excellent yields. In addition, the total area sown in 2019 is estimated at a peak, mainly due to a sharp increase in plantings during the second season that more than offset a contraction in the area planted in the first season reflecting farmers' preference to plant the more profitable soybean crop. Similarly, in **Uruguay**, production is officially estimated at a record level of 816 000 tonnes. This higher output mainly rests on larger plantings, as farmers opted to plant maize over soybeans due to excessive rainfalls during the planting period for soybeans. By contrast, in **Chile**, the 2019 maize production is officially estimated at 973 000 tonnes, 20 percent below the five-year average, driven by reduced plantings, which were the lowest in the last decade. Elsewhere in the subregion, the minor season maize harvest will take place in the last quarter of 2019. In **Peru**, production is anticipated to be similar to average, as a slight contraction in plantings is expected to be offset by improved yields. In **Bolivia (Plurinational State of)**, **Colombia** and **Ecuador**, the outputs harvested are estimated at below-average levels due to lower plantings and adverse weather conditions, lowering prospects for the overall production in 2019. In **Venezuela (Bolivarian Republic of)**, where harvesting of the main maize crop is ongoing, production is expected at a well below-average level due to a significant contraction in the area sown as increasing production costs, lack of agricultural inputs and the introduction of a price ceiling discouraged farmers from planting.

The 2019 wheat crop is at different development stages in the subregion. In **Argentina**, the major producer of the subregion, planting is nearing completion. The area sown is officially estimated to reach a new peak of 6.6 million hectares, a 5 percent increase from last year's record high, supported by high domestic prices, as the significant depreciation of the country's currency boosted demand for exports. Despite some current dry weather conditions in the main producing Buenos Aires and Córdoba departments, the 2019 output is still forecast at a record high. As a result, the subregional wheat output is forecast at 29 million tonnes in 2019, similar to last year's record level. In **Chile** and **Uruguay**, despite a year-on-year rebound in plantings, the area planted is officially estimated to remain below average. In Brazil, where the harvest in the main producing Paraná Department started by mid-September, the 2019 output is expected to be slightly lower than the five-year average owing to reduced plantings and cold snaps during the maturation stage that adversely affected yields. Similarly, in Paraguay, delayed planting due to excessive rainfall and cold weather at the maturation stage lowered prospects for the 2019 output, which is anticipated at a below-average level.

The paddy harvest was completed in May and the 2019 outputs are estimated at below-average levels in **Brazil** and

Uruguay, due to a significant contraction in plantings. The low level of sowings is the result of the high production costs and farmers' decision to shift away from rice cultivation to more profitable soybean or maize crops. Elsewhere in the subregion, where harvesting of the 2019 minor season crop will take place during the last quarter of 2019, the area sown is estimated to have contracted in **Ecuador** and **Peru**, while larger plantings are expected in **Colombia**. Current crop conditions are reportedly favourable in the major rice-producing regions of these countries.

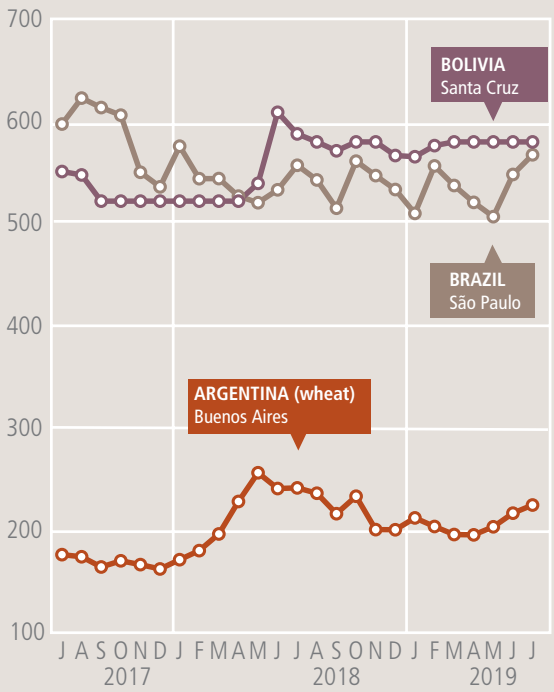
Cereal exports forecast at a record high in 2019/20

Aggregate cereal exports in the 2019/20 marketing year (March/February) are forecast at a record high of 93.6 million tonnes, with maize accounting for more than 75 percent of this quantity. The large volume of exports mainly reflects the anticipated record outputs and the weak local currencies in **Argentina** and **Brazil**, which strengthened the countries' competitiveness in the international markets. Maize exports from the subregion are forecast at a record 72 million tonnes, 50 percent higher than the five-year average. Subregional wheat exports are forecast at an above average level of about 15 million tonnes, mainly reflecting the anticipated bumper harvest in Argentina.

Strong export demand sustains high maize and wheat prices in Argentina

Prices of yellow maize in the June-July period were generally lower than a year earlier due to the good 2019 harvests, with the exception of **Argentina** where prices were higher year on year during this period, despite a record high output. The elevated price levels result from the strong demand for exports, underpinned by the weakness of the national currency. Prices of yellow maize strengthened and were lower on a yearly basis in **Brazil** and **Uruguay**, reflecting ample domestic supplies from the recently-completed harvest. By contrast, in **Ecuador**, prices were well above the levels of the same period last year, owing to the anticipated low production in 2019. In **Chile**, a net maize importer, despite the above-average imports of maize during the first half of 2019, prices increased since June due to the depreciation of the local currency, which made imports more expensive. In **Colombia**, prices in the June-July period were higher on a yearly basis, mainly reflecting a decrease in maize imports in the first half of 2019.

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.

With regards to wheat, prices remained stable or increased seasonally. In **Argentina**, prices of wheat grain increased in the June-July period and were higher year on year, supported by robust demand for exports. In **Uruguay**, prices of wheat grain were stable in this period as the seasonal upward trend was abated by ample availabilities from last year's good harvests, which had contributed to keeping prices below their year-earlier levels. In **Brazil**, prices of wheat grain were lower year on year due to an increase in imports during the first half of 2019. In **Colombia**, **Ecuador** and **Peru**, prices of wheat flour were stable, reflecting adequate imports.

For rice, prices were higher year on year in **Brazil** and in **Uruguay**, underpinned by the reduced outputs in 2019. By contrast, in **Peru** and **Ecuador**, prices of rice were stable during June and July with the harvest underway.

REGIONAL REVIEWS

NORTH AMERICA, EUROPE AND OCEANIA

Note: Situation as of August
Territories/boundaries**

NORTH AMERICA

Canada
Maize: Reproductive
Small grains: Maturing to harvesting

United States of America
Maize: Maturing to harvesting
Grains (winter): Planting

EUROPE

Northern Europe
Grains (winter): Planting to early development

Centre-Southern Europe
Maize: Harvesting
Grains (winter): Land preparation to planting

CIS in Europe:
Maize: Mostly harvested
Small grains: Mostly harvested
Grains (winter): Land preparation

OCEANIA

Australia
Cereals (winter): Vegetative to reproductive

Source: GIEWS
(disputed territories and boundaries in conformity with UN maps)**

** See Terminology (page 5)

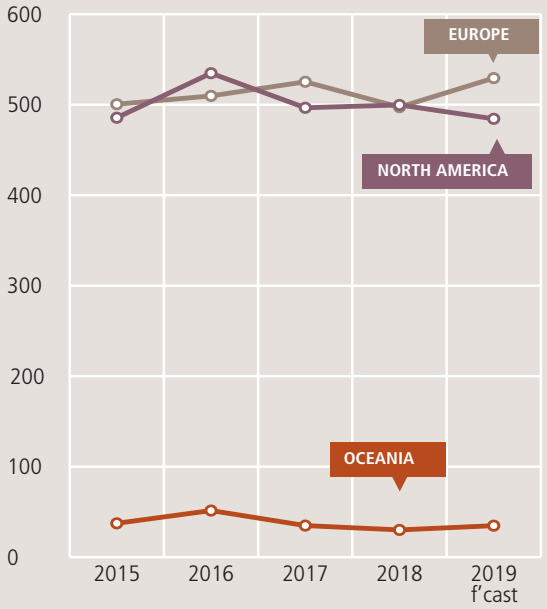
North America, Europe and Oceania Production Overview

In the United States of America, despite a recent upgrade to the production forecast, the maize output is forecast to fall in 2019 due to a sharp cut in the area sown, while wheat production is estimated to have risen. In Canada, driven by improved yield prospects, wheat production is seen to increase, maintaining the output at an above-average output in 2019.

In Europe, total cereal production in the European Union in 2019 is foreseen to rebound mostly on account of larger outputs of wheat and barley. Similarly, buoyed by larger wheat outputs in the Russian Federation and Ukraine, aggregate cereal production in the CIS countries of Europe is seen to increase, putting this year's outturn at a well above-average level.

In Oceania, wheat production in Australia is expected to recover compared to the previous year's drought-reduced output, although poor rains constrained yields limiting the production increase in 2019.

Cereal production
(million tonnes)



NORTH AMERICA

Wheat production up in the United States of America, but maize forecast to fall

In **the United States of America**, the maize production forecast was revised upward in recent months reflecting improved yield prospects compared to earlier expectations. Forecasts now indicate an output of 346 million tonnes in 2019, which would still be below the average outturn of 2018, mostly reflecting a decline in the area sown due to excessively wet weather during the planting period.

For wheat, harvesting of the 2019 main winter crop concluded in July, while the harvest of the minor spring crop is expected to be completed by the end of September. The 2019 aggregate wheat output is pegged at 53.9 million tonnes, 5 percent higher than the previous year and slightly below the average. The expected year-on-year production upturn reflects an increase in the area harvested and higher yields, supported by generally conducive winter weather conditions.

In **Canada**, the winter wheat harvest was concluded in August 2019, while the spring wheat harvest is still underway. Aggregate wheat production is officially forecast at 32.5 million tonnes, 2 percent higher on a yearly basis and an above-average level. The expected production growth mainly rests on an upturn in yields, which is foreseen to outweigh the effects of a decrease in the area harvested.

EUROPE

EUROPEAN UNION

Cereal production set to rebound in 2019

In the *European Union*, the production of wheat (which is mainly produced during the winter months) is estimated at 152 million tonnes, about 10 percent above the harvest of 2018 and an above-average level. The increase is mainly driven by larger plantings, while good yields are also expected, despite adverse weather conditions during the spring. Barley production, another predominantly winter-grown crop, is also estimated to have increased to an above-average level of 61 million tonnes in 2019.

The 2019 maize crop is currently being harvested and production is forecast at an above-average 69 million tonnes, similar to the previous year's outturn. The stable year-on-year harvest mainly stems from an increase in the planted area that is foreseen to compensate for reduced yields, owing to rainfall deficits in western areas and excessive rains in eastern parts. In total, cereal production in the *European Union* is forecast to rebound to 315.7 million tonnes, surpassing the five-year average by 6.5 million tonnes.

CIS IN EUROPE

Above-average cereal production forecast in 2019

Harvesting of winter cereals (mainly wheat) was completed in August, while harvesting of the spring crops is ongoing and is expected to finalize in November. The aggregate 2019 subregional cereal output is forecast at 197.6 million tonnes, about 6 percent above the previous year's average level. This result mostly rests on a projected increase in wheat production, forecast at 106.3 million tonnes, 7 percent higher than the five-year average. Similarly, maize production is forecast at an above-average 49.3 million tonnes, while barley output is expected at 29 million tonnes, which would be a near-average level.

In **the Russian Federation**, the total 2019 cereal output, mostly wheat, is forecast at 116.3 million tonnes, slightly above the average of the previous five years. The aggregate wheat output is forecast at 75.5 million tonnes, 7 percent above the average, as a result of an expansion in plantings. In addition, wheat yields are forecast at an above-average level, despite drier and warmer weather conditions in May and June in the key producing Volga and Central federal districts, which have

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

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	Change: 2019/2018 (%)
North America	***84.7***	***83.1***	***86.4***	***408.0***	***406.5***	***388.7***	***9.5***	***10.2***	***9.3***	***502.2***	***499.7***	***484.4***	***-3.1***
Canada	*30.2*	*31.8*	*32.5*	*25.4*	*26.3*	*28.5*	*0.0*	*0.0*	*0.0*	*55.6*	*58.0*	*61.0*	*5.1*
United States of America	*54.6*	*51.3*	*53.9*	*382.6*	*380.3*	*360.2*	*9.5*	*10.2*	*9.3*	*446.6*	*441.7*	*423.4*	*-4.1*
Europe	***254.3***	***241.8***	***262.6***	***253.2***	***251.5***	***262.8***	***4.1***	***4.0***	***4.0***	***511.6***	***497.3***	***529.4***	***6.5***
Belarus	*2.5*	*1.8*	*2.5*	*4.9*	*3.3*	*4.6*	*0.0*	*0.0*	*0.0*	*7.4*	*5.2*	*7.1*	*36.7*
European Union	*150.3*	*137.5*	*152.0*	*157.1*	*154.0*	*162.0*	*2.9*	*2.8*	*2.9*	*310.4*	*294.3*	*316.9*	*7.7*
Russian Federation	*70.6*	*72.1*	*75.5*	*41.2*	*36.6*	*40.1*	*1.1*	*1.0*	*1.1*	*112.9*	*109.8*	*116.6*	*6.2*
Serbia	*2.6*	*2.9*	*2.7*	*6.8*	*7.6*	*7.2*	*0.0*	*0.0*	*0.0*	*9.4*	*10.5*	*9.8*	*-6.5*
Ukraine	*25.5*	*24.6*	*27.0*	*38.3*	*44.6*	*44.1*	*0.1*	*0.1*	*0.1*	*63.9*	*69.3*	*71.1*	*2.6*
Oceania	***23.6***	***17.7***	***21.6***	***14.0***	***11.7***	***13.1***	***0.7***	***0.6***	***0.1***	***38.3***	***30.1***	***34.8***	***15.4***
Australia	*23.2*	*17.3*	*21.2*	*13.3*	*11.1*	*12.4*	*0.6*	*0.6*	*0.1*	*37.2*	*29.0*	*33.7*	*16.0*

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2014-2018 period.

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

Source: International Grains Council.

lowered yield prospects compared to earlier expectations. Barley and maize harvests are forecast at 19 million and 13 million tonnes, respectively, close to average levels. Planting of the 2020 winter crops started in early August and planting intentions are estimated at an above-average 17.76 million hectares.

Similarly, in **Ukraine**, cereal production is forecast at 71.1 million tonnes, 11 percent above the average, mainly driven by larger plantings of maize. The 2019 maize output is preliminarily set at 34 million tonnes, 21 percent above the five-year average on account of a record area planted, officially estimated at almost 5 million hectares; the maize harvest is expected to be complete in November. Wheat production is also forecast at an above-average level of 27 million tonnes. Sowing of the 2020 winter cereals started in late August under generally drier and warmer weather conditions.

In **Belarus**, the 2019 aggregate cereal output is forecast at about 7 million tonnes, indicating a rebound from last year's low level, but remaining slightly below the average. Although weather conditions during the winter and spring seasons were generally favourable, localized rainfall deficits and warmer-than-average temperatures were recorded in July in the key cereal-producing regions of Grodno and Brest, which negatively affected yields of the spring crops, with the harvest expected to be completed by end-September.

In most crop-producing regions of **the Republic of Moldova**, precipitation has been adequate since November 2018, except for short periods of rainfall deficits. Heavy rains and hail occurred in some wheat growing areas in late May and early June, but the damage is reported to be minimal and the 2019 wheat output is officially forecast at a well above-average level of 1.3 million tonnes. Similarly, the official early forecast for maize production is set at 1.7 million tonnes, an above-average level, mainly reflecting an expansion in the sown area, which is officially estimated at 492 000 hectares.

Bumper cereal exports forecast in 2019/20

Aggregate cereal exports in the 2019/20 marketing year (July/June) are forecast at 91.5 million tonnes, a slight decrease from the previous year's record level, but still well above the average. The main exported cereal is wheat, and shipments of this commodity are forecast at 50.6 million tonnes, about 8 percent above the average level. This high level is sustained by an expected above-average level of exports from the Russian Federation, forecast at 32.5 million tonnes, on account of the country's competitive prices and the extension of the zero duty policy on wheat exports until July 2021 (see *FPMA Price Policy*). Subregional exports of maize are forecast at almost 31 million tonnes, more than 20 percent above average, mainly driven by anticipated large quantity of exports from **Ukraine**, forecast at 26 million tonnes.

Export and domestic prices of wheat decreased in recent months

In **the Russian Federation** and **Ukraine**, the main wheat exporting countries of the subregion, export prices of milling wheat, after reaching a peak in February, decreased between March and August 2019. The monthly declines are the result of a combination of factors, including harvest pressure, strong competition with other exporting countries and weak demand from importers. Similarly, domestic wholesale prices of wheat grain and wheat flour generally increased in the first months of 2019 and decreased slightly between March and August.

OCEANIA

Wheat production set to recover in Australia

In **Australia**, harvesting of the winter wheat crop is expected to begin in October and stretch into the following year. Driven by an expansion in the area planted, wheat production in 2019 is forecast at 21.2 million tonnes, 22 percent above the drought-reduced output of 2018. However, at this level, production would still remain below average as unfavourable winter weather conditions inhibited early crop development and constrained yields. Barley production is forecast to rise slightly to 9.6 million tonnes, although also remaining below the five-year average. Planting of the 2020 summer cereal crops will take place from late September and the early production outlook points to a likely decline on account of low soil moisture and weather forecasts indicating unfavourable rains between late September and December, which are expected to trigger a contraction in the area planted.

STATISTICAL APPENDIX

Table A1. Global cereal supply and demand indicators

	Average 2014/15 - 2018/19	2015/16	2016/17	2017/18	2018/19	2019/20
Ratio of world stocks to utilization (%)						
Wheat	*34.7*	*33.0*	*35.7*	*37.9*	*35.2*	*35.5*
Coarse grains	*28.4*	*27.6*	*28.6*	*29.6*	*28.9*	*26.4*
Rice	*34.1*	*33.7*	*33.6*	*33.9*	*34.8*	*34.0*
Total cereals	*31.3*	*30.3*	*31.5*	*32.8*	*31.8*	*30.3*
Ratio of major grain exporters' supplies to market requirements (%) [1]	*122.2*	*124.2*	*123.3*	*122.8*	*116.5*	*118.5*
Ratio of major exporters' stocks to their total disappearance (%) [2]						
Wheat	*18.9*	*18.0*	*19.8*	*20.8*	*17.1*	*16.4*
Coarse grains	*14.7*	*12.9*	*14.5*	*15.6*	*16.3*	*15.6*
Rice	*20.4*	*19.7*	*18.8*	*18.1*	*20.6*	*21.1*
Total cereals	*18.0*	*16.9*	*17.7*	*18.2*	*18.0*	*17.7*

	Annual trend growth rate 2009-2018	Change from previous year 2015	2016	2017	2018	2019
Changes in world cereal production (%)	*1.7*	*-0.9*	*3.0*	*1.5*	*-1.8*	*2.1*
Changes in cereal production in the LIFDCs (%)	*2.6*	*-3.4*	*4.1*	*3.0*	*1.9*	*-0.2*
Changes in cereal production in the LIFDCs excluding India (%)	*2.5*	*-1.6*	*3.0*	*-0.4*	*2.6*	*-0.5*

	2016	2017	2018	2019*	Change 2019* over 2018*
Selected cereal price indices[3]					
Wheat	*125.2*	*133.4*	*148.5*	*143.7*	*-1.3%*
Maize	*151.0*	*146.3*	*155.9*	*163.6*	*3.9%*
Rice	*193.5*	*206.4*	*224.4*	*223.0*	*-2.1%*

Source: FAO

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-August average.

Table A2. World cereal stocks[1]
(million tonnes)

	2015	2016	2017	2018	2019 estimate	2020 forecast
TOTAL CEREALS	***764.5***	***792.1***	***836.1***	***877.8***	***863.1***	***847.4***
Wheat	***228.4***	***242.7***	***263.5***	***283.4***	***267.7***	***273.6***
held by:						
- main exporters[2]	*70.6*	*70.4*	*79.9*	*83.7*	*67.4*	*66.4*
- others	*157.8*	*172.3*	*183.6*	*199.7*	*200.3*	*207.2*
Coarse grains	***364.3***	***380.2***	***402.5***	***420.6***	***415.2***	***395.3***
held by:						
- main exporters[2]	*110.5*	*101.7*	*116.5*	*129.0*	*132.8*	*131.0*
- others	*253.8*	*278.5*	*286.0*	*291.6*	*282.4*	*264.3*
Rice (milled basis)	***171.8***	***169.2***	***170.0***	***173.9***	***180.3***	***178.5***
held by:						
- main exporters[2]	*43.6*	*34.5*	*33.1*	*32.2*	*36.5*	*38.4*
- others	*128.2*	*134.7*	*136.9*	*141.7*	*143.8*	*140.1*
Developed countries	***167.9***	***166.0***	***193.2***	***196.0***	***188.3***	***184.3***
Australia	*7.9*	*6.9*	*9.1*	*7.9*	*7.0*	*7.2*
Canada	*10.5*	*10.0*	*12.5*	*10.5*	*8.7*	*9.5*
European Union	*39.0*	*36.7*	*33.4*	*44.8*	*45.4*	*47.6*
Japan	*7.1*	*7.3*	*6.6*	*6.7*	*6.5*	*6.8*
Russian Federation	*13.2*	*11.8*	*20.1*	*22.8*	*13.7*	*13.2*
South Africa	*3.2*	*3.7*	*1.8*	*5.1*	*3.4*	*2.4*
Ukraine	*12.9*	*9.5*	*7.4*	*6.5*	*4.8*	*6.4*
United States of America	*69.0*	*76.1*	*95.8*	*88.8*	*94.7*	*84.5*
Developing countries	***596.6***	***626.1***	***642.9***	***681.8***	***674.8***	***663.1***
Asia	***493.2***	***525.9***	***543.2***	***561.8***	***559.0***	***549.7***
China (Mainland)	*332.9*	*379.4*	*411.1*	*426.8*	*426.1*	*416.1*
India	*48.7*	*42.3*	*34.6*	*42.1*	*47.1*	*49.7*
Indonesia	*9.9*	*9.6*	*8.9*	*10.0*	*10.4*	*9.6*
Iran (Islamic Republic of)	*9.3*	*9.9*	*8.4*	*6.2*	*5.1*	*4.8*
Korea, Republic of	*4.0*	*4.4*	*4.0*	*3.3*	*2.8*	*2.9*
Pakistan	*7.2*	*6.0*	*6.0*	*5.3*	*3.9*	*2.6*
Philippines	*4.2*	*4.0*	*3.7*	*4.1*	*4.9*	*5.1*
Syrian Arab Republic	*2.0*	*1.5*	*2.0*	*1.9*	*1.4*	*1.5*
Turkey	*7.4*	*7.4*	*6.0*	*7.1*	*6.7*	*5.6*
Africa	***53.9***	***55.9***	***53.5***	***59.8***	***60.6***	***56.3***
Algeria	*5.0*	*5.7*	*5.6*	*5.3*	*6.0*	*6.2*
Egypt	*6.4*	*7.3*	*6.8*	*6.4*	*6.1*	*6.1*
Ethiopia	*3.1*	*4.2*	*4.8*	*5.6*	*6.3*	*6.5*
Morocco	*5.4*	*8.4*	*5.9*	*6.6*	*7.2*	*5.9*
Nigeria	*4.3*	*2.9*	*2.5*	*2.9*	*3.7*	*3.6*
Tunisia	*1.2*	*1.0*	*1.0*	*1.1*	*1.0*	*1.2*
Central America	***7.8***	***9.4***	***11.3***	***11.9***	***11.0***	***10.5***
Mexico	*3.6*	*4.6*	*6.5*	*7.6*	*7.1*	*6.8*
South America	***41.3***	***34.6***	***34.5***	***47.9***	***43.8***	***46.2***
Argentina	*11.6*	*7.7*	*7.4*	*12.4*	*11.8*	*13.4*
Brazil	*17.5*	*14.2*	*12.7*	*19.9*	*16.8*	*18.8*

Source: FAO

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)						
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
2017/18	230	188	203	159	165	174
2018/19	232	210	233	166	166	163
Monthly						
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
2018 - June	241	205	268	166	170	167
2018 - July	235	207	245	157	165	147
2018 - August	250	215	242	162	168	165
2018 - September	242	203	235	156	160	165
2018 - October	240	210	233	160	162	159
2018 - November	232	210	220	160	161	157
2018 - December	240	217	228	167	171	164
2019 - January	238	219	234	166	173	162
2019 - February	234	217	244	170	170	170
2019 - March	223	201	231	167	163	170
2019 - April	213	195	220	161	155	164
2019 - May	212	203	218	172	166	164
2019 - June	227	222	243	196	183	164
2019 - July	216	202	244	188	177	158
2019 - August	203	197	238	162	151	147

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 Countries[1] in 2018/19 or 2019
(thousand tonnes)

		2017/18 or 2018			2018/19 or 2019
	Marketing year	Commercial purchases	Food aid	Total imports *(commercial and aid)*	Total import requirements *(excl. re-exports)*
AFRICA		***27 945.3***	***1 044.7***	***28 990.0***	***27 614.9***
East Africa		***11 478.9***	***733.0***	***12 211.9***	***11 208.3***
Burundi	Jan/Dec	*174.8*	*16.0*	*190.8*	*186.0*
Comoros	Jan/Dec	*61.0*	*0.0*	*61.0*	*66.0*
Djibouti	Jan/Dec	*81.0*	*4.0*	*85.0*	*86.0*
Eritrea	Jan/Dec	*447.7*	*0.0*	*447.7*	*448.3*
Ethiopia	Jan/Dec	*1 892.9*	*54.0*	*1 946.9*	*1 870.0*
Kenya	Oct/Sept	*3 590.0*	*85.0*	*3 675.0*	*3 009.0*
Rwanda	Jan/Dec	*325.0*	*0.0*	*325.0*	*310.0*
Somalia	Aug/Jul	*760.0*	*190.0*	*950.0*	*835.0*
South Sudan	Nov/Oct	*575.0*	*90.0*	*665.0*	*680.0*
Sudan	Nov/Oct	*2 090.0*	*260.0*	*2 350.0*	*2 235.0*
Uganda	Jan/Dec	*537.5*	*23.0*	*560.5*	*518.0*
United Republic of Tanzania	Jun/May	*944.0*	*11.0*	*955.0*	*965.0*
Southern Africa		***2 927.5***	***14.8***	***2 942.3***	***2 505.7***
Lesotho	Apr/Mar	*188.5*	*0.6*	*189.1*	*176.9*
Madagascar	Apr/Mar	*881.1*	*8.0*	*889.1*	*480.0*
Malawi	Apr/Mar	*165.0*	*2.0*	*167.0*	*207.0*
Mozambique	Apr/Mar	*1 356.0*	*1.0*	*1 357.0*	*1 368.7*
Zimbabwe	Apr/Mar	*336.9*	*3.2*	*340.1*	*273.1*
West Africa		***11 186.6***	***133.9***	***11 320.5***	***11 323.9***
Coastal Countries		***6 416.6***	***44.5***	***6 461.1***	***6 299.5***
Benin	Jan/Dec	*606.0*	*6.0*	*612.0*	*477.0*
Côte d'Ivoire	Jan/Dec	*2 245.0*	*5.5*	*2 250.5*	*2 320.5*
Ghana	Jan/Dec	*1 447.6*	*5.0*	*1 452.6*	*1 450.0*
Guinea	Jan/Dec	*1 002.0*	*5.5*	*1 007.5*	*867.5*
Liberia	Jan/Dec	*475.0*	*12.0*	*487.0*	*507.0*
Sierra Leone	Jan/Dec	*346.0*	*10.0*	*356.0*	*400.0*
Togo	Jan/Dec	*295.0*	*0.5*	*295.5*	*277.5*
Sahelian Countries		***4 770.0***	***89.4***	***4 859.4***	***5 024.4***
Burkina Faso	Nov/Oct	*668.0*	*10.0*	*678.0*	*724.0*
Chad	Nov/Oct	*131.0*	*38.6*	*169.6*	*189.6*
Gambia	Nov/Oct	*277.0*	*1.5*	*278.5*	*243.5*
Guinea-Bissau	Nov/Oct	*123.0*	*6.3*	*129.3*	*144.3*
Mali	Nov/Oct	*451.2*	*0.0*	*451.2*	*501.2*
Mauritania	Nov/Oct	*531.8*	*13.0*	*544.8*	*558.8*
Niger	Nov/Oct	*520.0*	*18.0*	*538.0*	*663.0*
Senegal	Nov/Oct	*2 068.0*	*2.0*	*2 070.0*	*2 000.0*
Central Africa		***2 352.3***	***163.0***	***2 515.3***	***2 577.0***
Cameroon	Jan/Dec	*1 130.0*	*10.0*	*1 140.0*	*1 280.0*
Congo	Jan/Dec	*380.0*	*2.0*	*382.0*	*312.0*
Central African Republic	Jan/Dec	*67.0*	*23.0*	*90.0*	*96.0*
Democratic Republic of the Congo	Jan/Dec	*760.0*	*125.0*	*885.0*	*870.0*
Sao Tome and Principe	Jan/Dec	*15.3*	*3.0*	*18.3*	*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 1 905 in 2018); for full details see http://www.fao.org/countryprofiles/lifdc

Table A4b. Estimated cereal import requirements of Low-Income Food-Deficit Countries[1] in 2018/19 or 2019
(thousand tonnes)

		2017/18 or 2018			2018/19 or 2019
	Marketing year	Commercial purchases	Food aid	Total imports *(commercial and aid)*	Total import requirements *(excl. re-exports)*
ASIA		***43 813.0***	***853.6***	***44 666.6***	***42 018.4***
Cis in Asia		***4 856.8***	***0.1***	***4 856.9***	***4 943.5***
Kyrgyzstan	Jul/Jun	*617.4*	*0.1*	*617.5*	*588.5*
Tajikistan	Jul/Jun	*1 032.5*	*0.0*	*1 032.5*	*1 232.0*
Uzbekistan	Jul/Jun	*3 206.9*	*0.0*	*3 206.9*	*3 123.0*
Far East		***29 081.2***	***226.5***	***29 307.7***	***25 527.9***
Bangladesh	Jul/Jun	*10 771.9*	*101.5*	*10 873.4*	*8 109.0*
Democratic People's Republic of Korea	Nov/Oct	*518.0*	*123.0*	*641.0*	*1 585.0*
India	Apr/Mar	*1 893.8*	*0.0*	*1 893.8*	*382.2*
Nepal	Jul/Jun	*1 317.7*	*2.0*	*1 319.7*	*1 285.8*
Viet Nam	Jul/Jun	*14 579.8*	*0.0*	*14 579.8*	*14 165.9*
Near East		***9 875.0***	***627.0***	***10 502.0***	***11 547.0***
Afghanistan	Jul/Jun	*2 782.0*	*100.0*	*2 882.0*	*3 492.0*
Syrian Arab Republic	Jul/Jun	*3 020.0*	*290.0*	*3 310.0*	*3 705.0*
Yemen	Jan/Dec	*4 073.0*	*237.0*	*4 310.0*	*4 350.0*
CENTRAL AMERICA AND THE CARIBBEAN		***1 381.0***	***9.1***	***1 390.1***	***1 395.1***
Haiti	Jul/Jun	*766.0*	*9.1*	*775.1*	*820.1*
Nicaragua	Jul/Jun	*615.0*	*0.0*	*615.0*	*575.0*
OCEANIA		***63.8***	***0.0***	***63.8***	***64.0***
Solomon Islands	Jan/Dec	*63.8*	*0.0*	*63.8*	*64.0*
TOTAL		***73 203.1***	***1 907.4***	***75 110.5***	***71 092.4***

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 1 905 in 2018); for full details see http://www.fao.org/countryprofiles/lifdc

Table A5. Estimated cereal import requirements of Low-Income Food-Deficit Countries[1] in 2019/20*
(thousand tonnes)

		2018/19			2019/20
	Marketing year	Commercial purchases	Food aid	Total imports *(commercial and aid)*	Total import requirements *(excl. re-exports)*
AFRICA		***4 090.0***	***215.7***	***4 305.7***	***5 508.8***
Eastern Africa		***1 599.0***	***201.0***	***1 800.0***	***1 835.0***
Somalia	Aug/Jul	*645.0*	*190.0*	*835.0*	*850.0*
United Republic of Tanzania	Jun/May	*954.0*	*11.0*	*965.0*	*985.0*
Southern Africa		***2 491.0***	***14.7***	***2 505.7***	***3 673.8***
Lesotho	Apr/Mar	*176.3*	*0.6*	*176.9*	*272.1*
Madagascar	Apr/Mar	*472.0*	*8.0*	*480.0*	*876.0*
Malawi	Apr/Mar	*205.0*	*2.0*	*207.0*	*187.0*
Mozambique	Apr/Mar	*1 367.7*	*1.0*	*1 368.7*	*1 380.6*
Zimbabwe	Apr/Mar	*270.0*	*3.1*	*273.1*	*958.1*
ASIA		***35 605.3***	***478.1***	***36 083.4***	***36 145.4***
CIS in Asia		***4 943.4***	***0.1***	***4 943.5***	***4 869.6***
Kyrgyzstan	Jul/Jun	*588.4*	*0.1*	*588.5*	*637.6*
Tajikistan	Jul/Jun	*1 232.0*	*0.0*	*1 232.0*	*1 235.0*
Uzbekistan	Jul/Jun	*3 123.0*	*0.0*	*3 123.0*	*2 997.0*
Far East		***23 854.9***	***88.0***	***23 942.9***	***24 133.8***
Bangladesh	Jul/Jun	*8 023.0*	*86.0*	*8 109.0*	*7 650.0*
India	Apr/Mar	*382.2*	*0.0*	*382.2*	*443.0*
Nepal	Jul/Jun	*1 283.8*	*2.0*	*1 285.8*	*1 190.8*
Vietnam	Jul/Jun	*14 165.9*	*0.0*	*14 165.9*	*14 850.0*
Near East		***6 807.0***	***390.0***	***7 197.0***	***7 142.0***
Afghanistan	Jul/Jun	*3 392.0*	*100.0*	*3 492.0*	*3 422.0*
Syrian Arab Republic	Jul/Jun	*3 415.0*	*290.0*	*3 705.0*	*3 720.0*
CENTRAL AMERICA AND THE CARIBBEAN		***1 385.0***	***10.1***	***1 395.1***	***1 460.1***
Haiti	Jul/Jun	*810.0*	*10.1*	*820.1*	*860.1*
Nicaragua	Jul/Jun	*575.0*	*0.0*	*575.0*	*600.0*
TOTAL		***41 080.3***	***703.9***	***41 784.2***	***43 114.3***

Source: FAO

* Countries included in this table are only those that have entered the new marketing year.

[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 1 905 in 2018); for full details see http://www.fao.org/countryprofiles/lifdc

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Crop Prospects and Food Situation is published by the Trade and Markets Division of FAO under the Global Information and Early Warning System on Food and Agriculture (GIEWS). It is published four times a year and focuses on developments affecting the food situation of developing countries and the Low-Income Food-Deficit Countries (LIFDCs) in particular. The report provides a review of the food situation by geographic region, a section dedicated to the LIFDCs and a list of countries requiring external assistance for food. It also includes a global cereal supply and demand overview to complement the biannual analysis in the **Food Outlook** publication. **Crop Prospects and Food Situation** is available in English, French and Spanish in electronic format.

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