Food and Agriculture Organization of the United Nations

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CROP PROSPECTS and FOOD SITUATION

Quarterly Global Report

Countries in need of external assistance for food

44

COUNTRIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD

FAO assesses that globally 44 countries, of which 34 are in Africa, continue to be in need of external assistance for food. Agricultural droughts have aggravated food insecurity conditions, due to reduced harvests that also caused price hikes. Conflict driven crises continued to be the primary cause of the high levels of severe food insecurity.

Asia	1.3
Africa	-4.6
Central America and the Caribbean	-3.3
South America	15.3
North America	-2.9
Europe	8.6
Oceania	-6.5
World	**2.3**

WORLD

Cereal production 2019 over 2018

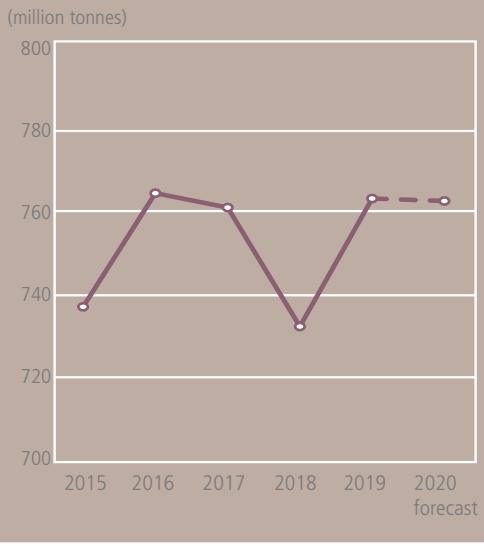
(yearly percentage change)

+2.3%

WORLD

Wheat production 2020 over 2019

-0.1%



REGIONAL HIGHLIGHTS

AFRICA The outbreak of desert locusts, with swarms reported across several countries of East Africa, has raised serious concerns for crops and pasture resources in 2020. Improved rains lifted 2020 crop prospects in Southern Africa, while drought conditions affected crops in North Africa. Planting of the 2020 crops will begin in West and Central Africa in the next months.

ASIA Outlook for 2020 wheat production is favourable in the Far East, resting on conducive weather and increased acreage. Improved rainfall boosted yield prospects in several Near East countries, but conflicts or the aftermath of conflicts continue to undermine productive capacities in Iraq, the Syrian Arab Republic and Yemen, while an economic crisis has curbed prospects in Lebanon.

LATIN AMERICA AND THE CARIBBEAN Coarse grain outputs are expected to remain at an above-average level in South America in 2020, underpinned by large plantings and mostly beneficial weather. In Central America and the Caribbean, dry conditions reduced harvests in 2019, while prospects are more favourable for the 2020 crops in Mexico.

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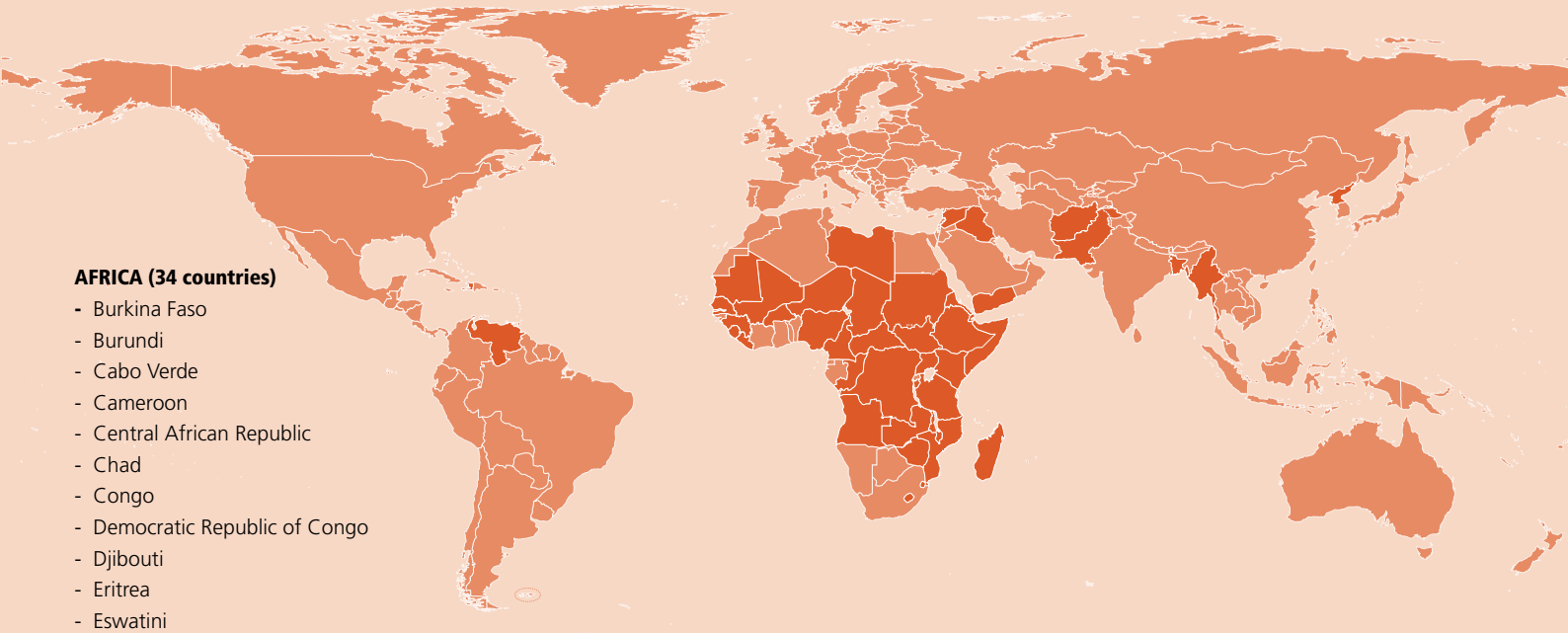


AFRICA (34 countries)
- Burkina Faso
- Burundi
- Cabo Verde
- Cameroon
- Central African Republic
- Chad
- Congo
- Democratic Republic of Congo
- Djibouti
- Eritrea
- Eswatini
- Ethiopia
- Guinea
- Kenya
- Lesotho
- Liberia
- Libya
- Madagascar
- Malawi
- Mali
- Mauritania
- Mozambique
- Namibia ✚
- Niger
- Nigeria
- Senegal
- Sierra Leone
- Somalia
- South Sudan
- Sudan
- Uganda
- United Republic of Tanzania ✚
- Zambia
- 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

✚ *New Entry*

Source: GIEWS (disputed territories and boundaries in conformity with UN maps)**
** See Terminology (**page 6**)

AFRICA (34 COUNTRIES)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/ SUPPLIES

Central African Republic

Conflict, displacements and food supply constraints

- According to the latest Integrated Food Security Phase Classification (IPC) analysis, the number of severely food insecure people (IPC Phase 3: "Crisis" and above) is estimated at 1.6 million. The caseload is projected to increase to 2.1 million, during the lean season (May-August 2020).

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.
- As of January, about 393 000 individuals had been affected by floods, which were triggered by torrential rains since October.

Somalia

Conflict, civil insecurity and consecutive unfavourable rainy seasons

- About 1.15 million people are estimated to be in need of emergency assistance, mainly in central pastoral areas, where herds have not recovered from the cumulative impact of consecutive poor rainy seasons, and southern riverine crop producing areas, where floods in late 2019 resulted in significant cereal production losses.
- As of January, floods affected about 570 000 people.

Zimbabwe

Reduced cereal availability, extremely high food prices and a sharp economic downturn

- The number of food insecure people has risen significantly in 2019/20 and is estimated at almost 5.5 million in the January-March 2020 period; an IPC assessment took place in February and is likely to provide an updated figure.
- The deterioration in food insecurity mostly resulted from a sharply reduced cereal harvest in 2019, significantly high staple food prices and the economic environment with diminished income-generating opportunities. In consideration that cereal production in 2020 is expected at a below-average level and economic conditions are anticipated to remain extremely challenging, it is unlikely to see a significant improvement in the food security situation in the next year.

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.
- About 1.72 million people were estimated to be severely food insecure in late 2018 (latest available information).
- As of January, floods, which were triggered by torrential rains since October, affected about 12 700 people.

Chad

Civil insecurity

- According to the last "Cadre Harmonisé" analysis, about 564 000 people were estimated to be food insecure between October and December 2019.
- Nearly 170 280 people remained internally displaced, almost entirely on account of the insurgency in the northeast. In addition, the country hosts about 443 000 refugees.

Democratic Republic of the Congo

Persisting civil insecurity and food access constraints in eastern and southern areas

- About 13.6 million people are estimated to be severely food insecure, mostly residing in the provinces of Ituri, Kasai, Kasai Central, North Kivu, South Kivu and Tanganika, where the security situation remains precarious and households face serious food access constraints.
- As of 17 February 2020, the World Health Organization (WHO) reported that a total of 3 433 people have been affected by the Ebola Virus Disease (EVD), of which 2 249 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.
- As of January, floods, which were triggered by torrential rains since October, affected about 250 000 people.

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 are estimated to be severely food insecure in early 2020, mainly in eastern agricultural areas and in northern and southeastern agro-pastoral areas due to poor 2019 "Karan/Belg/Gu/Genna" seasonal rains between early and mid-2019.
- As of January, about 512 000 people have been affected by floods triggered by torrential rains since October.

Niger

Civil conflict

- According to the last "Cadre Harmonisé" analysis, about 1.4 million people in the October-December 2019 period are assessed to be in need of immediate humanitarian assistance.
- Due to the civil conflict in neighbouring states, the country hosts 219 339 refugees, of which 162 437 are from Nigeria and 56 000 are from Mali, while an estimated 190 026 people are internally displaced.

Nigeria

Persisting conflict in northern areas

- According to the last "Cadre Harmonisé" analysis, about 4 million people were assessed to be in need of humanitarian assistance between October and December 2019.
- Due to persisting civil insecurity, over 2.5 million people are internally displaced. The areas inaccessible to humanitarian interventions are facing the worst 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, driven by insufficient food supplies, an economic downturn, high food prices and livelihood losses due to widespread floods in late 2019, which affected about 900 000 individuals.
- About 6.01 million people (51 percent of the total population) are estimated to be severely food insecure. The highest prevalence of food insecurity is reported in Jonglei State, the area worst affected by the floods, where close to 70 percent of the population is severely food insecure and 20 000 people are estimated to face IPC Phase 5: "Catastrophe" levels of food insecurity. In January 2020 the number of internally displaced people was estimated at 1.67 million.

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 humanitarian assistance was estimated at 1.2 million for the October-December 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 560 000 individuals are internally displaced.

Cabo Verde

Poor performance of the 2019 agro-pastoral cropping season

- Based on the latest "Cadre Harmonisé" analysis, about 10 000 people (approximately 2 percent of the total population) were estimated to be in Phase 3: "Crisis" and above in the October-December 2019 period.

Cameroon

Civil insecurity

- According to the last "Cadre Harmonisé" analysis, the number of people in need of humanitarian assistance was estimated at 1.3 million for the October-December 2019 period, mainly due to civil insecurity in the Northwest and Southwest regions. In these areas, about 680 000 people were internally displaced as of January 2020, 25 percent more than in October 2019.
- In the Far North Region, the number of IDPs rose from 271 000 in October 2019 to 297 000 in January 2020.
- The country also hosts about 112 000 refugees from Nigeria and 293 000 refugees from the Central African Republic, as at the end of January.

Congo

Influx of refugees straining the limited resources of host communities

- The country is estimated to host about 20 000 refugees from the Democratic Republic of the Congo and about 22 000 refugees from the Central African Republic.

- Host communities, mainly in the northern and eastern areas of the country, face food shortages and limited livelihood opportunities and refugees' food security is essentially guaranteed by continued humanitarian assistance.

Eswatini

Localized production shortfalls

- An estimated 232 000 people are in need of humanitarian assistance until March 2020, higher than the previous year's estimate.
- The lower 2019 cereal harvest, on account of adverse weather conditions, is the main cause of the aggravated food security situation.

Guinea

Localized shortfalls of cereal production

- About 72 000 people are estimated to be in need of food assistance during October-December 2019.

Lesotho

Reduced cereal production

- An estimated 433 000 people (about 30 percent of the rural population) are estimated 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 0.9 million (13 percent of the population), of which 0.34 million persons require food assistance. Refugees, asylum seekers and internally displaced are among the most vulnerable.

Madagascar

Constrained access to food

- Approximately 730 000 people are assessed to be food insecure, mostly located in the vulnerable southern regions. This number is below the estimated figure from the previous year, reflecting a larger cereal harvest in 2019 and consequently improved food availability.

Malawi

Localized production shortfalls and rising prices of staple foods

- The number of people assessed to be food insecure was recently revised upwards due to a sustained increase in staple food prices, which has constrained access to food, and tighter than previously expected grain supplies.
- In total, an estimated 1.9 million people require assistance until March 2020, a figure which is still lower than the estimate of the corresponding period in 2019.

Mali

Persistent civil insecurity

- The country is hosting approximately 27 000 refugees, while 208 000 internally displaced people and 76 000 returnees rely on humanitarian assistance.
- About 648 000 people are estimated to be in need of food assistance between October and December 2019, according to the most recent "Cadre Harmonisé" analysis, as a result of the persisting civil conflict.

Mauritania

Reduced availability of pasture

- According to the last "Cadre Harmonisé" analysis, about 299 000 people were assessed to be in need of assistance between October and December 2019.
- About 59 000 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 1.7 million people are assessed to be food insecure.

Namibia ✚

Drought-reduced agricultural output

- Extreme rainfall deficits resulted in a sharp cereal production decline in 2019 and an increased rate of livestock mortality, adversely affecting food availability and constraining incomes of farming households.
- As a result, an estimated 430 000 people are facing IPC Phase 3: "Crisis" and are in need of humanitarian assistance.

Senegal

Localized shortfalls in cereal production

- According to the last "Cadre Harmonisé" analysis, about 359 000 people are estimated to be in need of assistance between October and December 2019.
- An estimated 14 500 refugees, mostly from Mauritania, are residing in the country.

Sierra Leone

High food prices

- About 348 000 people were estimated to be severely food insecure during the October-December 2019 period.

Sudan

Conflict, civil insecurity and soaring food prices

- The number of severely food insecure people was estimated at 5.8 million for the June-August 2019 period, mainly IDPs and host communities in conflict-affected areas. Vulnerable households, affected by soaring food prices, are also of concern.
- As of January, about 426 000 individuals have been affected by floods.

Uganda

Localized crop production shortfalls and refugee influx

- About 500 000 people are estimated to be severely food insecure in eastern Teso Region and northeastern Karamoja Region in early 2019 (latest available information).
- About 867 000 refugees from South Sudan and about 398 000 refugees from the Democratic Republic of the Congo are hosted in camps and rely on humanitarian assistance.
- As of January, about 312 000 people have been affected by floods triggered by torrential rains since October.

United Republic of Tanzania ✚

Localized crop production shortfalls

- About 1 million people are estimated to be in need of emergency assistance, mainly in northeastern Manyara and Kilimanjaro regions and in central Dodoma and Singida regions, where 2019 first/main season harvests have

been affected by prolonged dry spells which resulted in significant cereal production losses.

Zambia

Reduced agricultural production and high food prices

- An estimated 2.3 million people are food insecure and in need of assistance, mainly as a result of the reduced 2019 cereal harvest and higher food prices.
- Southern and western parts are facing the highest prevalence of food insecurity, corresponding to areas that suffered prolonged periods of dry weather conditions and consequently sharply reduced harvests.

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

Low food consumption levels and poor dietary diversity

- According to a joint FAO/WFP rapid Food Security Assessment Mission, conducted in April 2019, about 10.1 million people (40 percent of the total population) were estimated to be food insecure. This population suffer from low levels of food consumption and very poor dietary diversity.

Yemen

Conflict, poverty and high food and fuel prices

- The 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: "Crisis" and 4: "Emergency" combined), down from an estimated 1.55 million people reported in December 2018 for those districts only. About 20 million people would be food insecure in the absence of sustained food assistance.

SEVERE LOCALIZED FOOD INSECURITY

Afghanistan

Civil conflict and population displacement

- Between August and October 2019, 10.23 million people (one-third of the total population) were in severe acute food insecurity situation, including 7.8 million in IPC Phase 3: "Crisis" and 2.4 million in IPC Phase 4: "Emergency". 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 (Janaury 2020), about 915 000 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. The large number of refugees have also put a strain on the local community as well as existing facilities and services.

Iraq

Civil conflict

- An estimated 1.8 million people remain internally displaced.
- About 1.77 million people, mostly IDPs and returnees, are in need of food security and livelihood assistance.

Myanmar

Conflict in parts of Chin, Kachin, Shan, Kayin and Rakhine states

- Persistent conflicts in Rakhine, Chin, Kachin, Kayin and Shan states have triggered large-scale population displacement particularly since 2017. As of December 2019, an estimated 273 000 people, mostly women and children, are internally displaced, with the largest share of these IDPs sheltering in Rakhine and Kachin states.
- Most IDPs are affected by high levels of food insecurity as conflicts have hampered the free movement of people and their engagement in livelihood activities, as well as restrict their access to essential services such as education and healthcare.

Pakistan

Population displacement

- 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 4.8 million people. They have settled in neighbouring countries, including Colombia (1.6 million) and Peru (863 000). Humanitarian needs to assist residents in Venezuela and refugees and migrants in host countries are significant.
- According to WFP's Food Security Assessment, conducted in the third quarter of 2019, about 2.3 million people (8 percent of the total population) are severely food insecure in the country, mainly as a result of high food prices.

SEVERE LOCALIZED FOOD INSECURITY

Haiti

Prolonged dry spells and high inflation

- About 3.67 million people were estimated to be facing severe acute food insecurity and thus in need of urgent food assistance as of October 2019, due to the adverse impact of dry spells on cereal production (especially maize), coupled with high food prices, including mostly imported 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 12 (Africa)
page 23 (Asia)
page 30 (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 markets generally well supplied

FAO's 2019 world cereal **production** estimate is currently pegged at 2 719 million tonnes, almost 62 million tonnes (2.3 percent) above production in 2018 and 4.7 million tonnes higher than reported in February. The estimate of global production of coarse grains has been raised by 5 million tonnes to 1 444 million tonnes since the previous report in February, up by 2.4 percent from 2018. The latest revision incorporates recently released official figures with higher-than-previously projected yields in West Africa and Ukraine. The estimate of wheat production in 2019 has been kept nearly unchanged from the previous month at 763 million tonnes, 4.2 percent higher than in 2018 and the second highest on record. Global rice production in 2019 is largely unchanged, month on month, at 512 million tonnes (milled basis), down 0.5 percent from the 2018 all-time record high.

World cereal **utilization** in 2019/20 is forecast to reach a record of 2 721 million tonnes, up around 7 million tonnes (0.3 percent) from the February forecast. Following an upward revision of 2.4 million tonnes, mostly in India and Canada, wheat consumption in 2019/20 is anticipated to exceed the 2018/19 level by 12 million tonnes (1.6 percent). Greater feed use is the main driver behind the projected year-on-year growth in total utilization of coarse grains, which is now pegged at 1 445 million tonnes, almost 16 million tonnes (1.1 percent) higher than in 2018/19. Despite a 1.3-million-tonne downward revision made this month in anticipated non-food use, the forecast for world rice utilization in 2019/20 still points to a likely 1.0 percent year-on-year expansion, reaching an all-time high of 514 million tonnes.

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

	2017	2018	2019 estimate	Change: 2019 over 2018 (%)
Asia	***1 201.2***	***1 198.5***	***1 214.4***	***1.3***
Far East	*1 097.7*	*1 099.7*	*1 107.1*	*0.7*
Near East	*68.8*	*65.1*	*73.1*	*12.2*
CIS in Asia	*34.7*	*33.7*	*34.2*	*1.7*
Africa	***191.4***	***196.7***	***187.6***	***-4.6***
North Africa	*37.8*	*38.0*	*36.2*	*-4.7*
West Africa	*59.5*	*65.5*	*65.9*	*0.6*
Central Africa	*5.1*	*4.8*	*4.9*	*2.3*
East Africa	*50.8*	*56.6*	*52.0*	*-8.2*
Southern Africa	*38.4*	*31.8*	*28.7*	*-9.9*
Central America and the Caribbean	***44.1***	***42.4***	***41.0***	***-3.3***
South America	***215.9***	***197.4***	***227.6***	***15.3***
North America	***494.6***	***495.2***	***480.6***	***-2.9***
Europe	***523.7***	***497.4***	***540.1***	***8.6***
European Union*	*309.7*	*294.4*	*322.3*	*9.5*
CIS in Europe	*202.6*	*188.0*	*203.3*	*8.1*
Oceania	***34.6***	***29.9***	***28.0***	***-6.5***
World	***2 705.5***	***2 657.5***	***2 719.4***	***2.3***
Developing countries	*1 643.8*	*1 626.4*	*1 661.9*	*2.2*
Developed countries	*1 061.7*	*1 031.1*	*1 057.5*	*2.6*
- wheat	*761.4*	*732.4*	*763.1*	*4.2*
- coarse grains	*1 436.4*	*1 410.4*	*1 444.1*	*2.4*
- rice (milled)	*507.6*	*514.7*	*512.2*	*-0.5*

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 6 February 2020.

FAO's forecast for world cereal **stocks** by the close of the 2020 seasons has been raised this month by 2.4 million tonnes to nearly 866 million tonnes, keeping the global cereals stocks-to-use ratio at a comfortable level of 30.9 percent. At 277 million tonnes, 2019/20 global wheat inventories are raised by 2.6 million tonnes (1.0 percent) this month, reflecting an upward revision for the Islamic Republic of Iran corresponding to production estimate adjustments for recent years. Compared to their opening levels, global wheat stocks are forecast to rise by almost 2 million tonnes (0.7 percent), as anticipated large buildups in the European Union, China (Mainland), and India are expected to more than offset drawdowns in several countries, including the United States of America, the Russian Federation and Australia. By contrast, coarse grain stocks are forecast to fall by 8 million tonnes from their opening levels, reflecting large anticipated decreases in maize inventories. World rice stocks at the close of 2019/20 have been raised by 1.0 million tonnes since February to 182 million tonnes, marginally (0.4 percent) below their record opening levels. Expected lower closing stocks in Thailand this month are outweighed by higher anticipated reserves in India, where record-breaking public sector carry-ins and local procurement may lead the country to account for much of the foreseen rise in major rice exporters' inventories in 2019/20.

FAO's latest forecast for world **trade** in cereals in 2019/20 stands at roughly 420 million tonnes, representing a rebound of 9.5 million tonnes (2.3 percent) from 2018/19 and the second highest level on record. Among the major cereals, the biggest year-on-year growth in trade is seen in wheat with an expected increase of 5.5 million tonnes from 2018/19 levels to almost 174 million tonnes in 2019/20 (July/June). Regarding importers, while forecasts of wheat purchases by Indonesia and Kazakhstan have been lowered, those for Turkey have been lifted to a record 8.0 million tonnes due to tightening domestic supplies. The FAO forecast of world trade in coarse grains in 2019/20 (July/June) has been raised slightly, to almost 201 million tonnes, up 2.4 million tonnes (1.2 percent) from 2018/19. Barley trade makes up the bulk of this expansion, rising by 1.7 million tonnes (6.9 percent). World maize trade in 2019/20 is now forecast to reach nearly 167 million tonnes, almost unchanged from the previous season. World rice trade in 2020 (January-December) is still foreseen to recover by 3.6 percent from the 2019 decreased level and could reach 46 million tonnes, with predicted higher exports by India and China (Mainland) underpinning much of the anticipated recovery.

Early indications point to a near-record wheat production in 2020

With the bulk of the winter wheat crop in the Northern Hemisphere still in dormancy, FAO's preliminary production forecast points to a global wheat output of 763 million tonnes in 2020, nearly unchanged compared to the 2019 high level.

In Europe, total wheat production is forecast to fall in 2020, on account of an expected contraction in the European Union (EU27 plus the United Kingdom), where excessive rainfall led to a cutback in plantings, underpinning the lower prospects. Temperatures have also been warmer than normal during the winter period, weakening the crop's tolerance to frost and raising the potential for yield losses. Wheat production in the Russian Federation is projected to rise to an above-average 80 million tonnes, which would mark a second consecutive annual increase. The buoyant outlook is supported by an expansion in plantings, estimated at an all-time high of 28.7 million hectares, while good moisture reserves and sufficient snow coverage augur well for yields. In Ukraine, as result of a reduction in the planted area, wheat production in 2020 is expected to decline by nearly 3 million tonnes, but still to remain at a comparable level to the past five-year average.

In North America, winter wheat sowings have fallen in the United States of America by an estimated 1 percent compared to the previous year and are at historically low levels, as reduced prices curbed incentives to plant. With yields foreseen to decline moderately due to suboptimal weather in some parts, total wheat production could decrease by between 1 million and 2 million tonnes in 2020. In Canada, a price induced expansion in winter plantings and a likely enlargement of spring sowings are foreseen to push up production to an above-average level of 34 million tonnes, assuming yields remain unchanged year on year. In Asia, a strong upturn in wheat production is foreseen in India, where the output is officially forecast at an all-time high of 106.2 million tonnes. The favourable outlook is largely due to increased acreage, with wheat plantings covering a record area in 2020 driven by high support prices. In Pakistan, conducive weather conditions and adequate supplies of agricultural inputs are expected to lead to a near-average harvest of just over 25 million tonnes. Similarly, in Turkey and the Islamic Republic of Iran, wheat outputs are likely to remain at near-average levels. In North Africa, reduced moisture levels in early 2020, coupled with above-average temperatures, brought up drought concerns in Tunisia, Algeria and Morocco and weighed on production prospects. In the Southern Hemisphere, although wheat plantings will only commence in May, production in Australia is expected to recover from the sharply reduced output in 2019 under the assumption that drought conditions will subside.

For coarse grains, the main harvest period for the 2020 crops in the Southern Hemisphere countries will start in the second quarter of the year, while in the Northern Hemisphere sowings will commence during the same period. In South America, sustained by strong export demand and high domestic prices of grains, maize sowings are estimated at an above-average level in Argentina. With beneficial weather conditions lifting yield prospects, maize production in 2020 is likely to reach a level close to the record high of 2019. In Brazil, the official forecast puts the 2020 maize production at about 100 million tonnes, comparable to the high outturn of 2019, as a slight increase in the area sown is expected to be offset by some reduction of yields due to localized dry weather conditions. In South Africa, a rebound in maize plantings, driven by high prices, tight supplies and conducive rainfall in 2020, is expected to result in a strong production increase, with the output foreseen to exceed 14 million tonnes, putting it at a well above-average level. In neighbouring countries, although weather conditions improved as the season has progressed, harvests are likely to remain below or near-average in several countries due to the effects of earlier rainfall deficits on yield prospects.

Table 2. Wheat production: leading producers
(million tonnes)

	Average 5yrs	2018	2019 estimate	2020 forecast
European Union*	150.4	138.3	156.3	145
China (Mainland)	133.1	131.4	133.6	134
India	95.9	99.9	103.6	106
Russian Federation	73.5	72.1	74.3	80
United States of America	54.0	51.3	52.3	50
Canada	30.9	32.2	32.3	34
Ukraine	26.4	24.6	28.3	26
Pakistan	25.5	25.1	25.2	25
Australia	21.6	17.3	15.2	21
Turkey	20.7	20.0	19.0	20
Argentina	17.4	19.5	19.5	19
Kazakhstan	13.8	13.9	11.5	13
Iran Islamic Rep. of	12.6	14.5	14.5	13
Egypt	9.0	8.8	9.0	9
Uzbekistan	6.4	5.4	6.8	6
Other countries	59.2	58.0	62.3	62
World	**750.6**	**732.4**	**763.6**	**763**

[1] Countries ranked according to the 5 years average production.
*EU27 and the United Kingdom.

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]	***464.8***	***476.0***	***480.6***	***1.0***
excluding India	*247.4*	*252.8*	*255.8*	*1.2*
Utilization	***504.9***	***515.4***	***525.4***	***1.9***
Food use	*382.1*	*390.2*	*397.2*	*1.8*
excluding India	*215.2*	*221.0*	*225.8*	*2.2*
Per caput cereal food use *(kg per year)*	*149.4*	*150.1*	*150.4*	*0.2*
excluding India	*152.1*	*152.9*	*152.9*	*0.0*
Feed	*56.0*	*55.9*	*57.9*	*3.7*
excluding India	*40.8*	*40.7*	*41.4*	*1.8*
End of season stocks[2]	***99.1***	***105.1***	***108.5***	***3.2***
excluding India	*62.1*	*57.7*	*54.9*	*-4.9*

[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	2019 estimate	Change: 2019 over 2018 (%)
Africa *(37 countries)*	***101.1***	***110.8***	***105.8***	***-4.5***
East Africa	*52.0*	*56.6*	*52.0*	*-8.2*
Southern Africa	*10.0*	*10.8*	*10.2*	*-5.4*
West Africa	*34.3*	*38.7*	*38.7*	*0.1*
Central Africa	*4.8*	*4.8*	*4.9*	*2.3*
Asia *(11 countries)*	***351.9***	***364.0***	***373.7***	***2.7***
CIS in Asia	*10.5*	*8.9*	*10.7*	*19.5*
Far East	*332.7*	*348.6*	*352.5*	*1.1*
- India	*248.1*	*262.3*	*264.5*	*0.8*
Near East	*8.8*	*6.5*	*10.6*	*63.9*
Central America and the Caribbean *(2 countries)*	***1.1***	***1.1***	***1.1***	***-3.8***
Oceania *(1 country)*	***0.0***	***0.0***	***0.0***	***0.0***
LIFDCs *(51 countries)*	***454.1***	***476.0***	***480.6***	***1.0***

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.

Early 2020 production prospects diminished by adverse weather conditions and pest outbreaks

In Low-Income Food-Deficit Countries (LIFDCs), harvesting of the 2020 cereal crops will begin from March and production prospects have been dented by conflicts, adverse weather conditions and, in several African countries, by outbreaks of desert locusts.

In *Southern Africa*, with the 2020 harvest to commence in the next month, improved rains since the start of the year have lifted production prospects in several countries following early-seasonal precipitation deficits. As a result, production in 2020 could rise compared to the reduced output of last year, although some crop losses are reported in localized areas due to floods and continued dryness in southern **Mozambique** and southern **Madagascar** is likely to limit production gains. Of particular concern is, however, the 2020 cereal output in **Zimbabwe** that is expected to remain below average for a second consecutive year, due to poor rains as well as economic difficulties that have hindered farmers' access to agricultural inputs. In *East Africa*, where planting of the main 2020 cereal crop will only begin in March/April, the widespread outbreak of desert locusts poses a serious risk to crops and pasture resources in the coming months. Forecasts of above-average precipitation for the March-May rainy season, whilst boosting yield

[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

prospects, are likely to create conducive breeding conditions for desert locusts which could facilitate further outbreaks. In *West Africa*, pasture availability is at a low level for a third consecutive year, which has affected body conditions of livestock. Sowing of the 2020 cereal crops will begin in March. Persisting conflicts in *Central Africa* continue to undermine agricultural productive capacities and harvests are likely to be affected in 2020.

In *Asia*, the 2020 wheat production in India, the largest cereal producer among LIFDCs, is forecast at an all-time high of 106.2 million tonnes, reflecting record plantings. In **Afghanistan** and **the Syrian Arab Republic**, the conflict or the aftermath of conflict continues to affect input availability and this is expected to restrain any cereal production growth in 2020.

Cereal production in 2019 rises, mostly concentrated in Asian LIFDCs

FAO's estimate for the aggregate cereal production of LIFDCs in 2019 stands at 480.6 million tonnes, 26.5 million tonnes above the five-year average and 1 percent higher on a yearly basis. The larger output in 2019 is mostly associated with production upturns in *Asia*, notably in **India** and **the Syrian Arab Republic**, and in *West Africa*, where well above-average harvests were gathered in **Ghana** and **Mali**. These increases more than outweighed production downturns in countries of *East Africa* and *Southern Africa*.

Moderate growth in import requirements, mostly associated with African LIFDCs

Despite the increase in the 2019 aggregate output, the cereal import requirement for LIFDCs is estimated at an above-average level of 71.9 million tonnes in the 2019/20 marketing year, 4.2 million tonnes above the previous year's volume. The increased needs mostly reflect shortfalls in production in *African* LIFDCs on account of the weather-reduced harvests. Notable increases in import requirements are estimated in **Zimbabwe** and **Kenya**, where the 2019 harvests were below the five-year average and national stocks were also low, lessening the countries' internal capacity to compensate for the reduced outputs. By contrast, import needs fell in several *Asian* countries, notably **Afghanistan** and **the Syrian Arab Republic**, where domestic harvests bolstered domestic supplies.

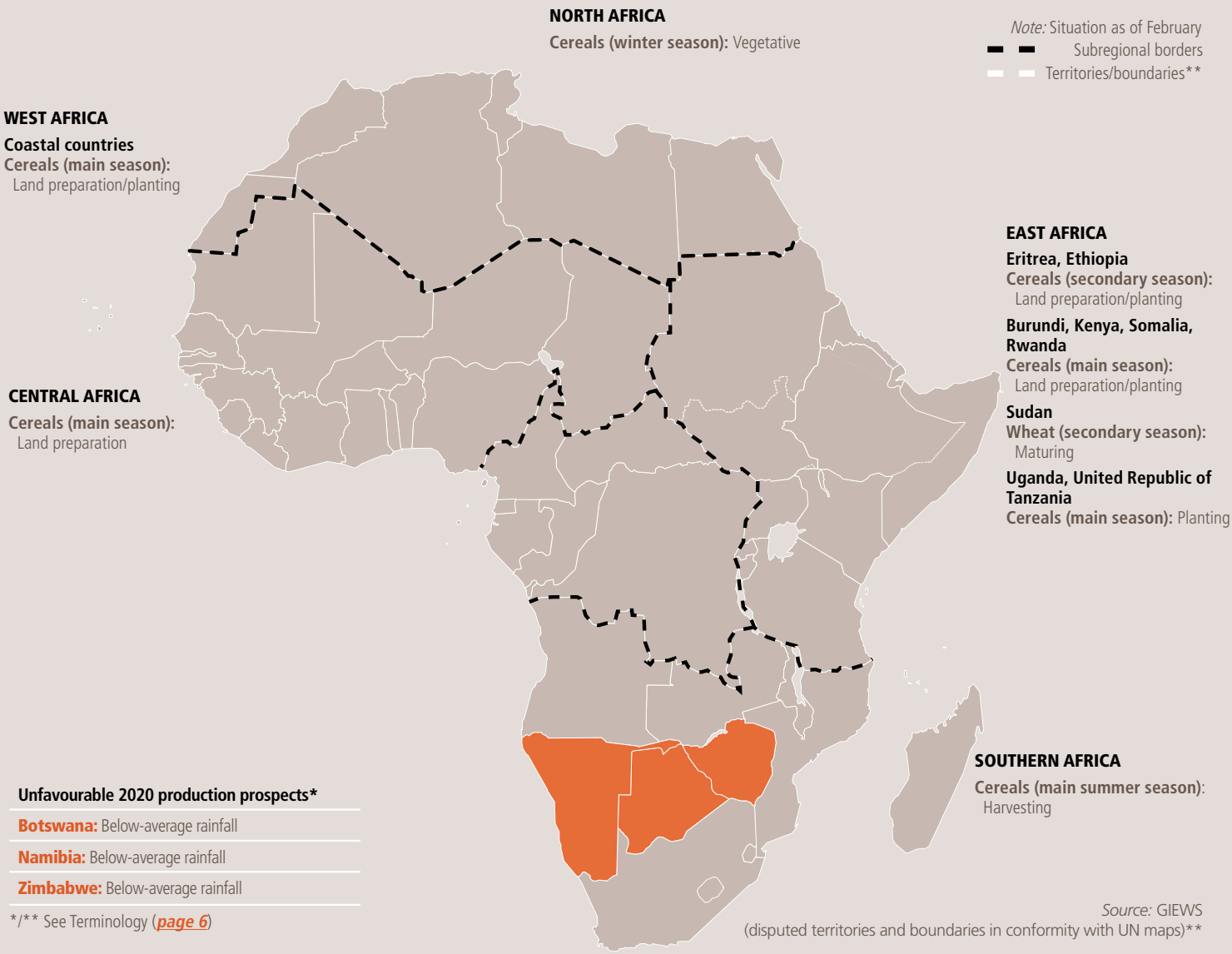
Table 5. Cereal imports of LIFDCs
(thousand tonnes)

	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)*	***29 495***	***27 439***	***1 008***	***30 229***	***1 163***
East Africa	*12 207*	*11 034*	*698*	*12 005*	*818*
Southern Africa	*3 140*	*2 770*	*15*	*3 514*	*19*
West Africa	*11 561*	*10 976*	*139*	*12 029*	*170*
Central Africa	*2 587*	*2 658*	*156*	*2 681*	*156*
Asia *(11 countries)*	***44 835***	***40 874***	***1 181***	***40 165***	***1 038***
CIS in Asia	*4 834*	*4 919*	*0*	*4 820*	*0*
Far East	*29 469*	*24 533*	*366*	*25 834*	*218*
Near East	*10 532*	*11 422*	*815*	*9 512*	*820*
Central America and the Caribbean *(2 countries)*	***1 401***	***1 394***	***10***	***1 495***	***10***
Oceania *(1 country)*	***64***	***62***	***0***	***62***	***0***
LIFDC *(51 countries)*	***75 794***	***69 768***	***2 199***	***71 952***	***2 211***

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

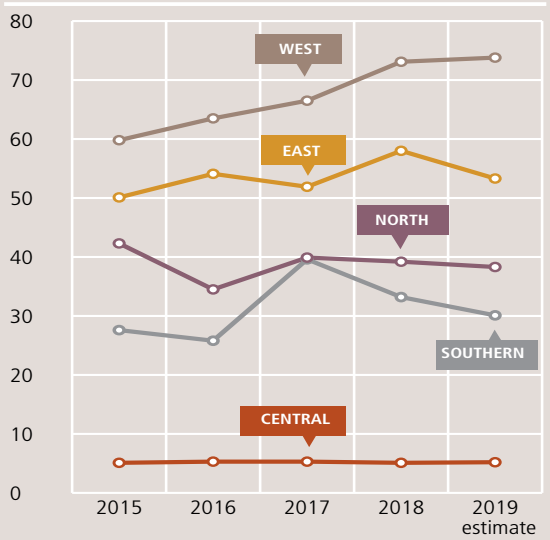


Africa Production Overview

Aggregate cereal production in Africa is forecast at an above-average level of 201 million tonnes in 2019, but declined by 8 million tonnes on a yearly basis. The decrease in 2019 is associated with production declines in North Africa, East Africa and Southern Africa, driven by adverse weather. By contrast, cereal production in Central Africa increased to a slightly above-average level, on favourable weather, while production gains in Côte d'Ivoire, Ghana, Guinea and Nigeria maintained the aggregate cereal output in West Africa at an above-average level.

Regarding the 2020 main season cereal crop, in West Africa, East Africa and Central Africa, the planting period will begin from April. The outbreak of desert locusts in East Africa, which started in late 2019, has raised serious concerns regarding the potential impact on crops and pasture resources in 2020. In Southern Africa, harvest prospects have been curbed by adverse weather, but a rebound in production from the low level of 2019 is still expected. In North Africa, the production outlook is mixed, reflecting concerns about the impact of rainfall deficits.

Cereal production
(million tonnes)



NORTH AFRICA

Mixed planting conditions for 2020 winter crops

Planting of the 2019/20 winter cereals, for harvest from May 2020, was finished in January. Cereal production, reflecting seasonal rainfall distributions, varies from year to year in **Morocco**, **Algeria** and **Tunisia** given that most cereal crops are produced under rainfed conditions. In north and central **Algeria**, **Tunisia** and coastal parts of **Libya**, the timely onset of autumn rains provided favourable conditions for planting. By contrast, in southwestern **Algeria** and **Morocco**, limited rains in October and November delayed planting. In southwestern **Algeria**, improved precipitation in December partially offset rainfall deficits. However, lack of moisture in January 2020, coupled with above-average temperatures, brought up drought concerns in **Tunisia**, **Algeria** and **Morocco**, with the central part of Morocco being the worst affected. Abundant precipitation in late February and early March could prevent a reduction in yields.

Continued conflict on the most fertile lands in **Libya** has had a negative impact on agricultural activities and affected the availability of inputs. Most of the cereal crops in **Egypt** are irrigated and current reports indicate average conditions for wheat, resulting in a preliminary production forecast of 9 million tonnes, similar to last year's average level.

Average cereal production in 2019

The 2019 subregional aggregate cereal production declined slightly to a below-average level of 38.3 million tonnes, which includes 18.9 million tonnes of wheat and 4.1 million tonnes of barley. The small decline reflects a drought-induced production decrease in **Morocco**, which was mostly offset by a bumper outturn in **Tunisia** and an average harvest in **Egypt**, helping to maintain an overall average subregional output.

The subregion's aggregate cereal import requirements (of which wheat accounts for about 60 percent) for the 2019/20 marketing year (July/June) are estimated at approximately 49.5 million tonnes, 1.4 million more than the previous five-year average, reflecting decreased domestic availabilities (particularly in **Morocco**) and steady population growth across the subregion.

Food inflation rates eased or remained stable in the third quarter of 2019

Year-on-year food inflation rates in the fourth quarter of 2019 (latest information available) eased or remained at low levels, supported by generally lower international food and fuel prices. Prices of basic foods remain subsidized by the governments across the subregion, buffering the transmission of any eventual price changes to final consumers. In **Egypt**, **Morocco** and **Algeria**, the annual food price inflation rates increased from negative levels, but in all three countries remained below 2 percent year on year. A weak currency continued to underpin inflation in **Tunisia** where the food price inflation in December reached about 6 percent year on year, down from over 8 percent recorded in spring 2019. The food inflation rate remained stable in **Libya**, down from between 10 percent and 20 percent in 2018 to a negative 8 percent in September 2019 (latest available data). The decrease was supported by improved hard currency distribution and lower import costs.

The 2020 Libya Humanitarian Needs Overview estimated the total number of people in need of humanitarian assistance at 0.9 million (about 13 percent of the population), a slight increase from 11 percent of the population in 2020. Half of the people in need of humanitarian assistance are internally displaced and migrants in or transiting through the country.

Table 6. North Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2018	2019 estim	5-yr Avg.	2018	2019 estim	5-yr Avg.	2018	2019 estim	5-yr Avg.	2018	2019 estim	Change: 2019/2018 (%)
North Africa	***19.2***	***21.3***	***18.9***	***13.0***	***13.9***	***12.6***	***6.6***	***4.1***	***6.7***	***38.9***	***39.2***	***38.3***	***-2.4***
Algeria	*2.8*	*3.9*	*4.0*	*1.2*	*2.1*	*2.1*	*0.0*	*0.0*	*0.0*	*4.0*	*6.0*	*6.1*	*1.0*
Egypt	*9.1*	*8.8*	*9.0*	*8.9*	*8.4*	*8.5*	*6.6*	*4.0*	*6.7*	*24.5*	*21.2*	*24.1*	*14.1*
Morocco	*6.1*	*7.3*	*4.1*	*2.4*	*3.0*	*1.2*	*0.0*	*0.1*	*0.1*	*8.5*	*10.4*	*5.4*	*-48.1*
Tunisia	*1.1*	*1.1*	*1.7*	*0.5*	*0.4*	*0.8*	*0.0*	*0.0*	*0.0*	*1.6*	*1.4*	*2.5*	*72.2*

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

WEST AFRICA

Land preparation for the 2020 crops is underway

Land preparation for the 2020 cereal crops is underway in the major growing areas in the coastal countries along the Gulf of Guinea. Planting will begin with the arrival of rains, usually from March-April. Seasonal dry weather conditions prevail in the Sahel, where planting of the 2020 crops is expected to begin in May-June with the normal onset of seasonal rains. Adequate soil moisture availability across the subregion during the off-season February to March period has supported dry season production of cereals and vegetables. However, in the Liptako Gourma and Northeast **Nigeria** regions, the ongoing conflict, which led to massive population displacements, is likely to continue to negatively affect agricultural activities and farmers' access to crop growing areas.

For the third consecutive year, low availability of pasture is reported in parts of **Burkina Faso** (Sahel Region), **Chad** (West and Northeast regions), **Mali** (Kayes Region), **Mauritania** (Western Region), **Niger** (Tillabery and Diffa regions) and **Senegal** (Northern Region) due to dryness in August and September. Field reports indicate forage deficits of 30 million tonnes of dry matter in **Chad**, 11.3 million tonnes in **Niger**, 5.7 million tonnes in **Mauritania** and 5.6 million tonnes in **Burkina Faso**. The situation has been aggravated by armed and community conflicts, theft and banditry, disrupting the movement of animals, limiting access and causing rapid degradation of fodder and water resources in accessible areas. As a result, pasture resources are expected to be depleted earlier than usual until the onset of the next rainy season in May-June, with an increasing financial burden for pastoralists who need to buy livestock feed. Consequently, an early onset of the pastoralists' lean season is expected in the areas that recorded a poor performance of seasonal rains. In the most affected countries, (**Senegal** and **Mauritania**), there are already early departures of transhumance herds, leading to a concentration of animals in some more secure areas in Burkina Faso, Côte d'Ivoire and Mali, with the risk of aggravating farmer-pastoralist conflicts. Livestock prices remain relatively stable throughout the subregion in early 2020. The terms of trade for livestock/cereals are generally favourable to pastoralists due to stable cereal prices. However, the market value of the animals is expected to decrease between March and June in the areas affected by fodder deficits or limited access to fodder resources due to insecurity, as body conditions will deteriorate, reducing the purchasing power of pastoral households. In addition, the closure of the border by the **Nigerian** Government is affecting trade flows of livestock to Nigeria, which is the biggest outlet (**Niger**, **Chad** and **Burkina Faso**). Furthermore, the pastoral deficits in most Sahelian countries and the high cost of livestock feed are reducing animal production and trade, driving lower livestock prices in **Burkina Faso**, **Chad** and **Niger**.

Cereal output in 2019 estimated at record level

Harvesting of the 2019 crops of coarse grains was completed in December in the Sahel, while harvesting of the second season cereal crops continued until early January 2020 in the coastal countries along the Gulf of Guinea. The 2019 subregional aggregate cereal output is estimated at an above-average level of 73.8 million tonnes, also slightly above the previous year's bumper output. The aggregate cereal import requirement for the subregion in the 2019/20 marketing year (November/October) is estimated at 19.3 million tonnes, 0.8 million tonnes more than the average, and 0.6 million tonnes above the previous year.

Prices of coarse grains generally low and stable, except in conflict-affected areas

In most countries of the subregion, adequate market supplies from the 2019 good output and substantial carryover stocks from the 2018 record production, contributed to keep prices relatively stable

Table 7. West Africa cereal production
(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals [1]			
	5-yr Avg.	2018	2019 estim	5-yr Avg.	2018	2019 estim	5-yr Avg.	2018	2019 estim	Change: 2019/2018 (%)
West Africa	***46.2***	***52.4***	***52.4***	***18.2***	***20.6***	***21.3***	***64.5***	***73.1***	***73.8***	***0.9***
Burkina Faso	*4.1*	*4.8*	*4.7*	*0.3*	*0.4*	*0.4*	*4.5*	*5.2*	*5.0*	*-2.9*
Chad	*2.5*	*2.8*	*2.7*	*0.3*	*0.3*	*0.3*	*2.8*	*3.0*	*3.0*	*-1.8*
Ghana	*2.3*	*2.8*	*3.3*	*0.7*	*0.8*	*0.9*	*3.0*	*3.6*	*4.2*	*17.3*
Mali	*6.1*	*7.0*	*7.1*	*2.6*	*3.2*	*2.9*	*8.8*	*10.2*	*10.0*	*-1.7*
Niger	*5.5*	*6.0*	*5.5*	*0.1*	*0.1*	*0.1*	*5.7*	*6.1*	*5.7*	*-6.9*
Nigeria	*18.7*	*21.4*	*21.4*	*7.8*	*8.9*	*9.6*	*26.6*	*30.4*	*31.0*	*1.9*

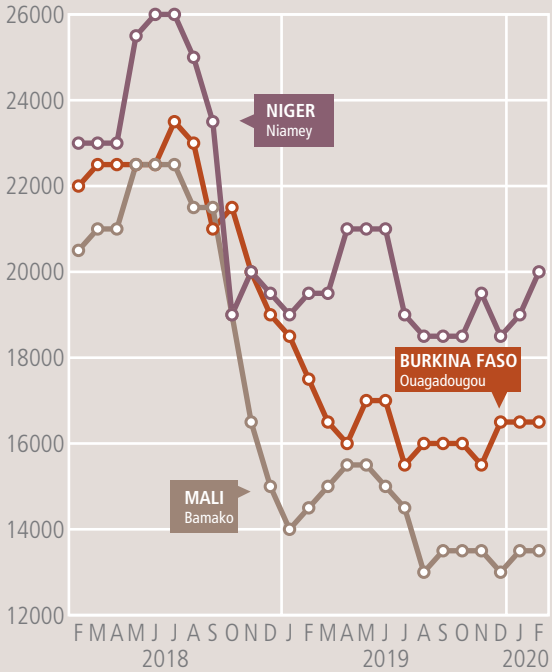
Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2014-2018 period.
[1] Total cereals includes wheat, coarse grains and rice (paddy).

between October 2019 and January 2020, and down from a year earlier. However, in conflict-affected areas of the Lake Chad Basin, the Liptako-Gourma Region and the Tibesti Region, persisting civil insecurity continued to hamper market activities and to keep food prices at relatively high levels. In addition, the closure of the **Nigeria's** land border continued to have a significant impact on regional trade flows, causing high commodity prices in bordering areas in Benin, Chad and Niger. In the Sahel Belt (**Burkina Faso**, **Chad**, **Mali**, **Niger** and **Senegal**), prices of coarse grains held steady or increased between December 2019 and January 2020, but remained lower than their year-earlier values as a consequence of the good output obtained in 2019. The seasonal increase in **Burkina Faso** and **Niger** reflects the high demand from the influx of the less assisted internally-displaced populations and traders to replenish their stocks. In the Lake Chad Region, the Tibesti Region of **Chad**, northern and central **Mali** and the Liptako-Gourma Region, the conflict continued to affect trade flows, limiting market availabilities and putting upward pressure on food prices. In the coastal countries along the Gulf of Guinea, in **Benin**, **Ghana** and **Togo**, prices of maize remained relatively stable or increased seasonally in January 2020, after some declines between October and December 2019, but were generally below their year-earlier values mostly on account of the good supplies from the 2019 harvests. In **Nigeria**, prices of coarse grains were stable or declined between October and December, reflecting improved supplies from the 2019 main harvest and subdued export demand. By contrast, prices of imported rice continued to increase, reaching levels well above those of a year earlier, due to reduced supplies following the land border closure with neighbouring countries. In the northeast region, widespread insecurity and tight supplies continued to sustain high food prices.

Food insecurity forecast to rise in 2020 as conflicts impinge on food access

According to the November 2019 "Cadre Harmonisé" analyses, the aggregate number of severely food insecure people (CH Phase 3: "Crisis" and above) is estimated at about 9.4 million, up from the 4.5 million estimated in November 2018. If appropriate measures and responses are not implemented, this number is projected to increase to nearly 14.4 million people during the next lean season between June and August 2020, well above the 11.1 million food insecure people that were estimated for the June-August 2019 period. Urgent food assistance is needed for 4 million people in **Nigeria**, 1.5 million people in **Niger**, 1.2 million people in **Burkina Faso**, 600 000 people in **Chad** and 700 000 people in **Mali**.

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



Source: Afrique Verte.

The alarming deterioration in the food security situation and the expected increase in the number of people in need of assistance is due to the impact of weather shocks (drought and floods) on localized cereal and fodder production, as well as the escalation of armed and community conflicts. The repeated attacks by armed groups have contributed to an increase in population displacements, the deterioration of basic social services as health and education, and the disruption of household livelihoods and marketing activities. The northeast **Nigeria**, central and northern **Mali**, eastern **Niger**, northern **Burkina Faso**, Liptako-Gourma Region that traverses **Mali**, **Niger** and **Burkina Faso**, and the Lake Chad Basin and Tibesti Region in **Chad**, are the areas most affected by conflicts. According to the United Nations Office for the Coordination of Humanitarian Affairs (UNOCHA), the number of internally displaced people in the Lake Chad Basin is estimated at about 2.6 million as of January 2020, of which about 2 million IDPs are in **Nigeria**, with the rest in **Cameroon**, **Chad** and **Niger**. In addition, about 442 000 people are displaced in **Chad**, mainly refugees and returnees, as a result of the ongoing civil insecurity in **the Sudan**, **the Central African Republic** and **Libya**. According to the International Organization for Migration (IOM), as of January 2020, the crisis in Liptako Gourma region has provoked the displacement of over 912 000 people in **Burkina Faso**, **Mali** and **Niger**. Internally displaced people and hosting communities report the highest levels of food insecurity due to large food consumption deficits, limited availability of coping strategies and the low level of humanitarian assistance provided.

CENTRAL AFRICA

Uncertain 2020 production prospects due to persisting conflict

Planting of the 2020 main season maize crop will begin in March in **Cameroon** and in **the Central African Republic** and the harvest is expected to take place from July. Sowing of the 2020 secondary season maize crop, to be harvested from May, is underway in **the Republic of the Congo** and **Gabon**. Similarly, in the northern provinces of **the Democratic Republic of the Congo** harvesting of the secondary season crop will take place in the next months and weather conditions have so far been beneficial. In the northeast of the country, a small group of locusts was detected in late February and requires close monitoring. In the southernmost uni-modal rainfall areas of **the Democratic Republic of the Congo**, planting of the 2020 maize crops, to be harvested from May, finalized in January under generally favourable weather conditions. Ongoing conflicts and displacements in **the Central African Republic**, **the Democratic Republic of the Congo** and **Cameroon** are expected to continue to affect agricultural activities and limit farmers' access to crop growing areas. As a result, the 2020 production outlook remains uncertain.

Above-average 2019 cereal output, but production decreased in conflict-affected areas

Harvesting of the 2019 cereal crops was concluded in January 2020 and the aggregate 2019 subregional output is estimated at about 5 million tonnes, close to the previous five-year average. The result is on account of slightly above-average outputs obtained in **Cameroon** and **the Central African Republic**, following generally favourable weather conditions and a moderate increase in plantings, although the harvests remained below the pre-crisis levels. These results offset the average production obtained in **the Democratic Republic of the Congo**.

In **Cameroon** and **the Central African Republic**, despite favourable cereal outputs at the national level, conflicts and civil unrest disrupted agricultural activities and hampered access to land, resulting in localized shortfalls in production. In areas of the Central African Republic where armed groups remained active, including in Basse-Kotto, Mbomou, Haut Kotto and Ouaka prefectures, less than half of all households were able to access their fields in 2019 and crop production is, therefore, estimated at a well below-average level in 2019. Reduced harvests were also obtained in some southwestern flood-affected areas. Similarly, the 2019 cereal output is estimated well below-average in Northwest and Southwest regions of Cameroon, amid the protracted civil unrest. In **the Democratic Republic of the Congo**, although weather conditions were overall conducive for crop growth, the 2019 cereal production is estimated at an average level due to Fall Armyworm infestations, as well as conflict in eastern areas of the country, particularly in Kasai, North Kivu, South Kivu, Ituri and Tanganyika provinces, which continued to disrupt agricultural activities. In **the Republic of the Congo** and **Gabon**, domestic production of cereals, mainly maize, accounts for a small proportion of the national supplies, while the main food crop grown is cassava. The cropping season was characterized by mostly adequate and well-distributed rainfall and the 2019 outputs are estimated at near-average levels.

Prices of maize at high levels amid low supply

In **the Central African Republic**, despite the favourable national agricultural production, prices of maize and cassava, in January 2020, were reported to be about 50 percent higher than a year before in areas affected by floods and conflict, as both factors limited trade flows and resulted in shortage of commodities in most markets. In **the Democratic Republic of the Congo**, prices of maize flour and cassava flour recorded sharp increases between October and November 2019, particularly in eastern provinces of the country. Seasonal trends were exacerbated by reduced local production, high import costs and reduced imports from Zambia, where the 2019 harvest was well below average. In **Cameroon**, in the Far-North Region, food prices followed a decreasing trend in the last quarter of 2019 as demand declined seasonally during the harvest period. Furthermore, in January 2020, prices of maize and sorghum were about 10 percent and 20 percent, respectively, lower than their five-year average levels, amid the favourable outputs obtained. By contrast, in the Northwest and Southwest regions, between November 2019 and

Table 8. Central Africa cereal production
(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals [1]			
	5-yr Avg.	2018	2019 estim	5-yr Avg.	2018	2019 estim	5-yr Avg.	2018	2019 estim	Change: 2019/2018 (%)
Central Africa	***4.5***	***4.4***	***4.5***	***0.6***	***0.7***	***0.7***	***5.1***	***5.1***	***5.2***	***2.1***
Cameroon	*3.1*	*2.9*	*3.1*	*0.3*	*0.4*	*0.4*	*3.4*	*3.3*	*3.4*	*2.8*
Central African Republic	*0.1*	*0.1*	*0.1*	*0.0*	*0.0*	*0.0*	*0.1*	*0.2*	*0.2*	*4.2*
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).

January 2020, prices of maize rose by about 20 percent in urban centres, due to low supply and high demand following the reduced harvests.

Civil unrest and conflicts continued to affect food security

The latest IPC analyses put the number of severely food insecure people in the subregion at about 16.5 million (excluding the Republic of the Congo, Gabon and Equatorial Guinea) in the first quarter of 2020. The largest food insecure population is located **in the Democratic Republic of the Congo**, where about 10 million people (20 percent of the analysed population) are estimated to be in IPC Phase 3: "Crisis" and 3.6 million (7 percent of the analysed population) were classified in IPC Phase 4: "Emergency". The majority of the severely food insecure people (IPC Phases 3 and 4) are located in the provinces of Ituri, Kasai, Kasai Central, North Kivu, South Kivu and Tanganika, where the civil security situation remains precarious and most households face serious constraints to food access. In **the Central African Republic**, 1.6 million people (35 percent of the analysed population) are estimated to be severely food insecure (IPC Phases 3 and 4) and this number is projected to increase to 2.1 million (47 percent of the analysed population) during the lean season between May and August 2020. The areas of major concern are those with the highest concentrations of IDPs, including the eastern and southeastern prefectures of Haute-Kotto, Nana-Gribizi, Haut-Mbomou and Mbomou. In **Cameroon**, 1.3 million people are estimated to be severely food insecure ("Cadre Harmonisé" Phase 3 or higher), mainly located in the Northwest and Southwest regions, where fighting is still ongoing between the security forces and separatist armed groups. The security situation is also precarious in the Far North Region, where incursions of Boko Haram increased between November 2019 and January 2020 and triggered new population displacements. At the end of January, about 680 000 people were estimated to be internally displaced in the Northwest and Southwest regions and 297 000 in the Far North Region, about 25 and 10 percent, respectively, above the number estimated in October 2019.

EAST AFRICA

Exceptionally abundant October-December seasonal rains benefited crops and rangelands but fostered a severe outbreak of desert locusts

Harvesting of the 2019 secondary season cereal crops was recently concluded. The October-December rainy season was characterized by exceptionally heavy precipitation, with cumulative rainfall amounts which ranged from 200 to 400 percent of the long-term average, ranked as among the highest in the last 40 years. The heavy rains benefited crop yields and cereal outputs are estimated at above-average levels. However, the abundant rainfall also triggered widespread floods that affected about 3.4 million people across the subregion and resulted in localized crop and livestock losses. The above-average biomass fostered by the unusually wet conditions created a conducive environment for a severe desert locust outbreak, the worst in 25 years, which has so far mainly affected Somalia, Ethiopia and Kenya. Damages to 2019 crops have been minimal as the infested areas were mainly pastoral and harvests had been largely concluded. Substantial crop losses can be expected in 2020, especially in Ethiopia (secondary "Belg" crops) and Somalia (main "Gu" crops), if control measures are not scaled up.

In southeastern and coastal areas of **Kenya**, where the "short-rains" harvest accounts for about 70 percent of the total annual crop output, the abundant rains benefited yields and their timely onset induced farmers to expand the area planted. Despite some localized flood-induced losses in Embu, Nyeri, Meru North, Kitui, Kwale and Kilifi counties, cereal production is estimated at an above-average level. The second season harvest in bi-modal rainfall areas of central and southern **Uganda** and the "Vuli" harvest in northeastern bi-modal rainfall areas of **the United Republic of Tanzania** are also estimated at above-average levels. However, local harvests were affected by flooding in Mount Elgon subregion and in Ntoroko, Bundibugyo, Kisoro and Kalungu districts of **Uganda** and in Tanga and Mara regions in **the United Republic of Tanzania**. Similarly, in **Somalia**, the abundant seasonal rains benefited crops and, despite substantial flood-induced crop losses in riverine main maize-growing areas along the Shabelle and Juba rivers, the national cereal output is estimated to be 35 percent above the average. In **South Sudan**, harvesting of 2019 crops was completed in January. According to the preliminary findings of the 2019 FAO/WFP Crop and Food Security Assessment Mission, the 2019 aggregate cereal production is estimated at about 820 000 tonnes, 10 percent above the record low output in 2018 and 4 percent below the average of the previous five years. Cereal production benefited from an expansion of the harvested area compared to the previous year due to security improvements and from abundant seasonal precipitation that increased crop yields. The torrential rains also triggered widespread flooding, especially in former Northern Bahr el Ghazal, Jonglei, Warrap, Unity and Upper Nile states, which caused significant crop losses.

The 2019 aggregate cereal output for the subregion is estimated at an average level of 53.3 million tonnes. Compared to the previous year, the 2019 aggregate cereal production declined by about 8 percent due to reduced first season harvests in Uganda, Kenya and United Republic of Tanzania on account of severe early season dryness, and a significant cereal production decline in the Sudan caused by erratic weather and pest attacks.

Land preparation is underway for the 2020 main season crops

Land preparation for the 2020 main season cereal crops has started in the major growing areas of Central, Rift Valley and Western provinces in **Kenya** ("long-rains" season), in southern and central **Somalia** ("Gu" season) and in southern bimodal rainfall areas of **South Sudan** and **Uganda**. In **Ethiopia**, planting of secondary "Belg" season crops, for harvest from May, is currently underway in central and eastern areas in eastern Amhara, eastern Oromia, southern Tigray and northeastern SNNP regions. In central and southern uni-modal rainfall areas of **the United Republic of Tanzania**, planting of the 2020 "Msimu" crops, to be harvested in May/June, was completed in December 2019. Abundant precipitation, with cumulative rains between November and January estimated to be 50-80 percent above average over most cropping areas, benefited crop

Table 9. East Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Total cereals [1]			
	5-yr Avg.	2018	2019 estim	5-yr Avg.	2018	2019 estim	5-yr Avg.	2018	2019 estim	Change: 2019/2018 (%)
East Africa	***5.6***	***6.0***	***5.9***	***44.0***	***47.8***	***43.6***	***53.3***	***58.0***	***53.3***	***-8.2***
Ethiopia	*4.6*	*4.8*	*4.8*	*21.1*	*22.8*	*22.6*	*25.8*	*27.8*	*27.6*	*-0.7*
Kenya	*0.2*	*0.4*	*0.3*	*3.9*	*4.4*	*3.6*	*4.3*	*4.9*	*4.0*	*-19.3*
Sudan	*0.6*	*0.7*	*0.7*	*6.3*	*8.1*	*5.2*	*7.0*	*8.9*	*6.0*	*-32.9*
Uganda	*0.0*	*0.0*	*0.0*	*3.3*	*3.3*	*3.2*	*3.5*	*3.5*	*3.5*	*-2.0*
United Republic of Tanzania	*0.1*	*0.1*	*0.1*	*7.4*	*7.3*	*6.9*	*10.5*	*10.7*	*10.1*	*-6.0*

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).

development. However, the heavy rains triggered floods, particularly in Lindi, Morogoro and Manyara regions, which are likely to result in localized shortfalls in cereal production. Land preparation for the "2020B" season crops is underway in **Rwanda** and **Burundi**, while the harvest of the "2020A" season crops was concluded in January and production is estimated at an above-average level in both countries on account of abundant September-December rains. Similar to other countries, the torrential rains also triggered floods and landslides in Musanze and Ngororero districts in **Rwanda** and in Cibitoke, Bubanza, Bujumbura Rural and Bujumbura Mairie provinces in **Burundi**, which resulted in localized crop losses.

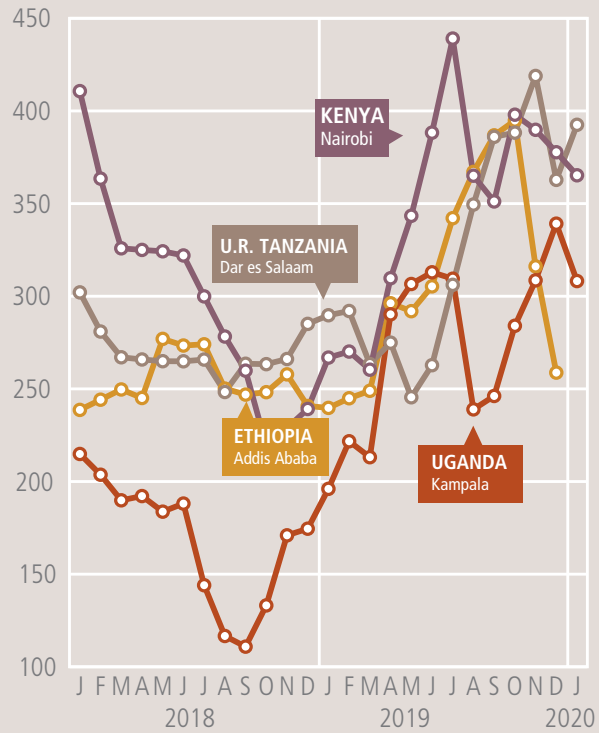
According to the latest weather forecast by the Greater Horn of Africa Climate Outlook Forum (GHACOF), the 2020 March-to-May rainy season will be characterized by above-average rainfall over most of the subregion, with the exception of southernmost **United Republic of Tanzania** and northeastern **Ethiopia**, where seasonal rains are expect at below-average levels.

In pastoral areas, the abundant October-December rains prompted a substantial regeneration of range-land resources. In northern and eastern **Kenya**, southeastern **Ethiopia**, central and northern **Somalia**, which experienced severe rainfall deficits during the previous two rainy seasons, the heavy "Deyr/shortrains" resulted in a marked improvement of vegetation conditions. As a result, grazing resources, which entered the January-March dry season in exceptionally good condition, are still plentiful. Livestock body conditions, which declined to very low levels after two consecutive poor rainy seasons, have improved, leading to an increase in milk production. However, widespread floods resulted in an increase in the prevalence of water-borne animal diseases and caused a significant number of livestock deaths in southeastern **Ethiopia** and **South Sudan**. In particular, in the flood-affected areas of eastern and northern **South Sudan**, widespread livestock mortality is reported, with pastoralist households having lost up to 80 percent of their herds. In addition, locust outbreaks in pastoral and agro-pastoral areas of eastern **Ethiopia**, central **Somalia** and northern **Kenya** resulted in localized damage to pastures.

Prices of cereals declined moderately in some countries, but were still at high levels

Prices of cereals declined in some countries in recent months as second season harvests increased market availabilities. However, they still remained above their year-earlier levels due to low first/main season harvests in several cropping areas and as a result of a difficult macro-economic situation in **the Sudan** and **South Sudan**. Additionally, the torrential rains disrupted transport and marketing activities in several countries, helping to sustain the high prices. In **Uganda**, prices of maize surged by 30-60 percent between September and December, with seasonal patterns compounded by increased transportation costs and trade disruptions caused by the heavy rainfall. Subsequently, prices declined by about 10 percent in January as newly harvested second season crops increased market availabilities. Nevertheless, prices remained at high levels, up to 80 percent higher on a yearly basis, mainly due to a tight domestic supply situation following a below-average first season harvest, and further pressured by sustained export demand from Kenya and South Sudan. Maize prices followed a similar pattern in **Burundi** and **Rwanda**, where they increased by 40-50 percent between September and December, subsequently declining by 5-10 percent in January as "2020A" season crops increased market supplies. Despite the recent declines, prices remained at high levels in both countries. In **Burundi**, prices were underpinned by sustained demand from eastern **Democratic Republic of the Congo**, where an upsurge in violence disrupted agricultural operations and resulted in significant production shortfalls, while in **Rwanda** prices were supported by reduced imports from **Uganda** following the closure of border custom posts in February 2019. In **Somalia**, prices of sorghum declined in December by 5-15 percent in anticipation of the "Deyr" harvest, while prices of maize followed mixed trends, increasing in some markets due to expected crop losses in main maize growing areas. Prices of coarse grains in December were about 30 percent higher than in the same month last year, mainly due to a tight supply situation owing to a drought-reduced 2019 "Gu" main season harvest. In **Kenya**, prices of maize decreased by about 10 percent between October 2019 and January 2020 in Nairobi and Mombasa markets as the main "long-rains" harvest, recently concluded in southwestern key cropping areas, increased market supplies. However, prices remained about 40 percent higher than one year earlier, primarily on account of tight domestic availabilities following poor harvests in 2019. In **South Sudan**, prices of maize and sorghum remained mostly stable in the capital, Juba, between October 2019 and January 2020, as the exchange rate of the local currency held steady. In January, prices of coarse grains were 50 percent higher year on year and more than 20 times above their levels of July 2015, when they started to surge as a result of the rapidly depreciating currency. The high prices also reflect the limited cereal supplies and the lingering impact of the conflict. In **the Sudan**, prices of sorghum and millet surged by 30-60 percent between October 2019 and January 2020, reaching new record highs. The exceptionally high prices were mainly driven by the reduced 2019 cereal output and currency weakness,

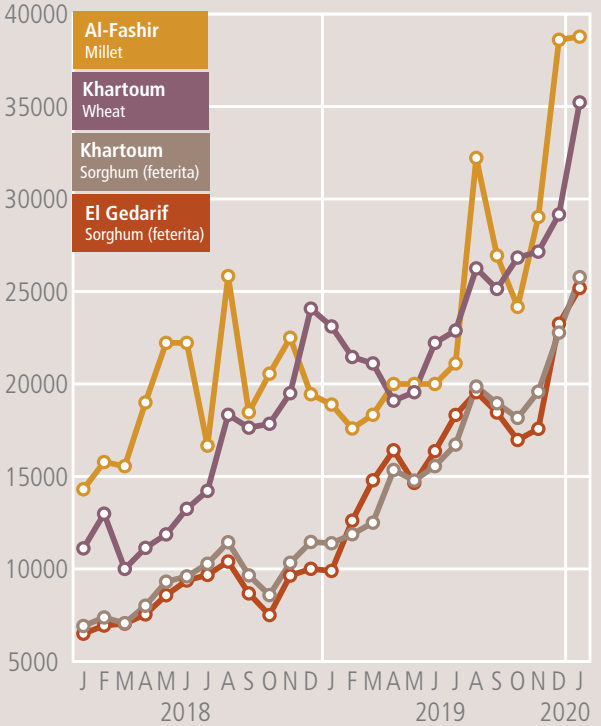
Maize prices in selected East African markets
(USD/tonne)



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

coupled with fuel shortages and high prices of agricultural inputs that inflated production and transportation costs. In **the United Republic of Tanzania**, prices of maize in January were up to twice their year-earlier levels, driven by sustained export demand from **Kenya**, **Rwanda** and Southern African countries. The slightly below-average 2019 cereal production and, more recently, trade disruptions caused by heavy rains, provided further support to prices.

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

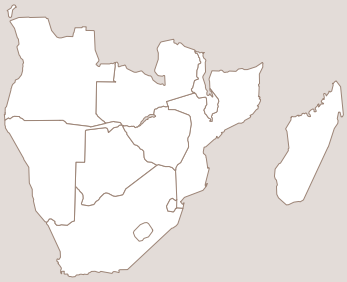


Source: Food Security information for Action (SIFSIA).

In South Sudan widespread floods exacerbate already alarming levels of food insecurity

The aggregate number of people in need of humanitarian assistance is estimated at about 28 million, mainly located in **Ethiopia**, **South Sudan** and **the Sudan**. In **South Sudan**, the seasonal deterioration of the food security has been compounded by severe livelihood losses in northern and eastern areas affected by floods in late 2019, the lingering impact of the prolonged conflict, and the ongoing economic crisis. The number of people facing Crisis or worse (IPC Phase 3 or above) levels of acute food insecurity increased from 5.3 million in January 2020 to 6 million in the February-April 2020 period. While the current number of severely food insecure people is slightly lower on a yearly basis due to an improved security situation and a year-on-year increase in cereal production in 2019, the overall food security situation remains dire, with more than half of the total population facing acute food insecurity. The highest prevalence of food insecurity is reported in Jonglei State, the area worst affected by the floods, where close to 70 percent of the population is severely food insecure. In **Somalia**, 1.15 million people are estimated to be severely food insecure between January and March, about 45 percent less than in late 2019, due to the favourable impact of the abundant October-December "Deyr" rains on crop and livestock production. However, severe food insecurity (IPC level 3: "Crisis") still prevails in some central pastoral areas (Mudug and Galgaduud regions), where herds have not recovered from the cumulative impact of consecutive poor rainy seasons, and in riverine crop producing areas along the Juba and Shabelle rivers in Middle and Lower Juba regions, where floods in late 2019 resulted in significant cereal production losses. In **Ethiopia**, the estimated number of food insecure people was projected to increase seasonally from 6.7 million in the October 2019 to January 2020 period to 8.5 million in the February to June 2020 period, due to the depletion of stocks from the 2019 harvests. The highest prevalence of food insecurity is expected in pastoral Afar and Somali regions, due to the lingering impact of consecutive poor rainy seasons that resulted in significant livestock losses, and in agro-pastoral areas of eastern Oromiya Region, due to below-average herd sizes and substantial crop losses during the 2019 "Belg" season. In **the United Republic of Tanzania**, about 1 million people are estimated to be severely food insecure during the November 2019 to April 2020 period, mainly in northeastern Manyara and Kilimanjaro regions and in central Dodoma and Singida regions, where the output of the 2019 first/main season harvests was significantly reduced as a result of prolonged dry spells and Fall Armyworm infestations.

SOUTHERN AFRICA



Production upturn expected in 2020, but increases will be limited by adverse weather in some countries

Harvesting of the main 2020 cereal crops is expected to begin in late March. Prolonged periods of below-average rainfall were recorded between October and December 2019, which was followed by abundant rains in late January and February 2020 that triggered localized flooding and caused crop losses. The heavier rainfall, however, also resulted in significant improvements in seasonal rainfall totals and improving crop conditions, particularly benefiting production prospects in South Africa. Overall, the aggregate production in 2020 is expected to increase from the low cereal outturn in 2019, however, the poor start of the season and continued dryness in parts will limit production growth, while several countries are expected to register a second consecutive below-average annual harvest.

The erratic distribution and below-average rainfall volumes have particularly affected **Botswana**, **Namibia**, **Zimbabwe** and southern parts of **Mozambique** and **Madagascar**. In the three northeastern Mashonaland provinces of **Zimbabwe**, which produce about 50 percent of the national maize output, seasonal rainfall totals between October 2019 and January 2020 were approximately 20 percent below the average. This has resulted in stressed vegetation conditions and curbed yield expectations of the 2020 maize crop. In addition, early rainfall deficits have also caused permanent wilting of crops in localized areas, while the economic downturn hindered farmers' access to agricultural inputs and has likely caused an overall contraction of the area planted to cereals. Consequently, the 2020 harvest is anticipated to remain below the five-year average. Poor rainfall in **Botswana** and **Namibia** has also lowered production expectations and outputs in 2020 are foreseen at average to below-average levels. Almost analogous weather conditions have been experienced during the 2019/20 cropping seasons in **Madagascar** and **Mozambique**, with an uneven distribution of rains in central and northern areas, followed by excessive precipitation that caused some localized floods and significant rainfall deficits in the minor cereal-producing southern regions. Overall, vegetation conditions in the highly productive agricultural areas were mostly favourable in both countries, inferring good yield prospects. The national cereal harvests are therefore forecast to remain close to the average, but shortfalls in production are expected in the south and some central parts. The production outlook in **Malawi** and **Zambia** is mostly favourable, based on the generally conducive distribution of seasonal rains in the main producing regions. However, reduced harvests are likely in southern parts of both countries, evidenced by stressed vegetation conditions due to low amounts of rainfall. Production of maize in **South Africa**, the main producer in the subregion, is forecast to recover strongly from the previous year is drought-affected output and the harvest is likely to exceed 14 million tonnes in 2020, which would place the 2020 harvest at an above-average level. The favourable outlook reflects a price-driven expansion in plantings, up 10 percent year on year, and generally good yield prospects on account of beneficial rainfall. In the landlocked countries of **Eswatini** and **Lesotho**, production is also expected to exceed the five-year average, which would mark a recovery in **Lesotho** but means a stable production in **Eswatini**.

In the areas affected by rainfall deficits, pasture productivity and quality has been impacted, as has water resources for livestock (e.g. drinking and servicing), notably in **Botswana** and **Namibia**. Although the overall situation is better than the previous year, the conditions are expected to slow down a recover, in livestock production in 2020.

Upturn in import needs, following reduced outputs in 2019

The subregional cereal import requirement is estimated at 9.7 million tonnes in the 2019/20 marketing year (generally April/March), slightly above average. Most of this quantity is wheat grain, which is produced in limited volumes in the subregion and mostly in South Africa, while the remaining amount is comprised of rice (milled) and maize grain. In general, the change in import needs from year to year mostly reflects variations in maize imports, the primary food staple, due to the larger fluctuations in production compared to rice and wheat.

Table 10. Southern Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2018	2019 estim	5-yr Avg.	2018	2019 estim	5-yr Avg.	2018	2019 estim	5-yr Avg.	2018	2019 estim	Change: 2019/2018 (%)
Southern Africa	***2.0***	***2.1***	***1.8***	***26.2***	***27.0***	***23.8***	***4.2***	***4.1***	***4.5***	***32.3***	***33.2***	***30.1***	***-9.1***
- excl. South Africa	*0.3*	*0.3*	*0.2*	*12.7*	*13.3*	*11.5*	*4.2*	*4.1*	*4.5*	*17.2*	*17.6*	*16.2*	*-7.8*
Madagascar	*0.0*	*0.0*	*0.0*	*0.3*	*0.2*	*0.2*	*3.6*	*3.3*	*3.9*	*3.9*	*3.5*	*4.1*	*16.8*
Malawi	*0.0*	*0.0*	*0.0*	*3.2*	*2.9*	*3.6*	*0.1*	*0.1*	*0.1*	*3.3*	*3.0*	*3.7*	*22.6*
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*	*1.6*	*13.4*	*13.7*	*12.3*	*0.0*	*0.0*	*0.0*	*15.1*	*15.6*	*13.9*	*-10.6*
Zambia	*0.2*	*0.1*	*0.2*	*3.0*	*2.5*	*2.1*	*0.0*	*0.0*	*0.0*	*3.3*	*2.7*	*2.3*	*-14.5*
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.

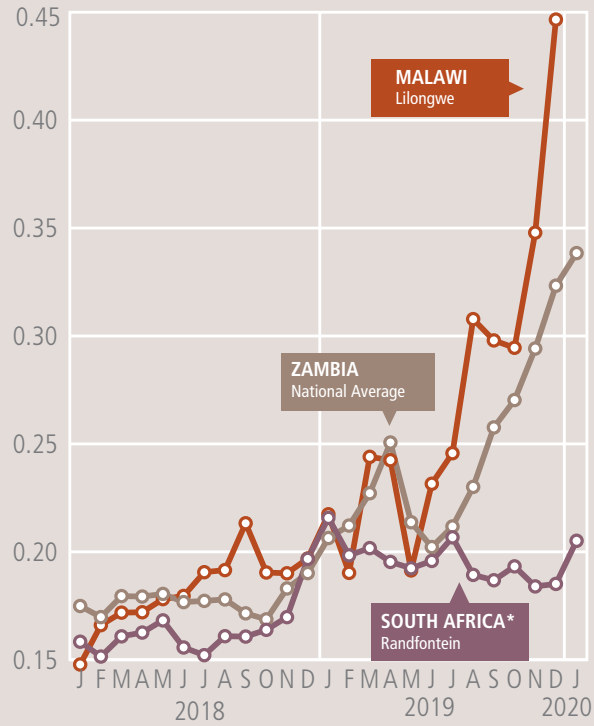
In 2019/20, the subregional import requirement for maize was estimated at 2.4 million tonnes, virtually double compared to the previous year. The larger volume reflects the impact of extreme weather events on crop production in 2019 and the generally lower-than-average national stocks, which limited countries' capacities to compensate for shortfalls in production. The main recipient of maize imports in 2019/20 was forecast to be **Zimbabwe**, reflecting the well below-average harvest in 2019. However, on account of the country's foreign currency deficits and sustained currency weakness, actual import volumes have been lower than expected and domestic supplies remained tight. Notable increases in import requirements were also estimated in **Mozambique** and **South Africa**.

Prices of maize continued to strengthen

Underpinned by tighter supplies and weak currencies, prices of maize in the subregion continually increased throughout 2019 and the first months of 2020. In **Zimbabwe**, where food inflation rates were significantly high throughout 2019, prices of maize meal were more than 12 times higher on a yearly basis by December. This was mainly the result of sustained currency weakness and low domestic cereal supplies, caused by the drought-reduced 2019 harvest and shortages of foreign exchange that stifled the country's capacity to import grains. In **Zambia**, despite an easing of monthly increases in early 2020, prices of maize grain and maize products were nearly twice their year-earlier levels in February following steep hikes since mid-2019 driven by a drought-induced shortage of cereals. Comparably, prices of maize grain in **Mozambique** were up to twice their year-earlier levels as of January 2020 as the reduced 2019 harvest, caused by extensive cyclone damage, continued to exert upward pressure. In **Malawi**, prices of maize grain increased sharply in southern markets and reinforced the higher year-on-year levels, with the national average price of maize grain almost double its year-earlier value. In order to incentivize producers to release stocks onto the market and ease supply pressure, the farm gate price of maize was raised at the start of the year. In **South Africa**, prices had remained mostly stable in recent months, as downward pressure from favourable production prospects offset the upward pressure stemming from tight supplies from the previous year's crop. Until the start of the harvest in April, prices are expected to be influenced primarily by weather conditions. Prices of maize in import dependent **Eswatini**, broadly mirror trends in South Africa, the country's main supplier of cereals, and as of December, they were at similar levels compared to the previous year. In **Namibia**, which is also reliant on South African grain supplies to fulfill national import requirements, prices of maize meal were at lower levels on a yearly basis at the end of 2019. In **Madagascar**, retail prices of rice held steady in December as a result of adequate supplies from the first season harvest and were down from a year earlier, reflecting the recovery in crop production in 2019 that bolstered national availabilities.

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 worsened, increasing humanitarian needs

During the peak of the lean season between January and March 2020, the number of food insecure people is estimated at 13.8 million[3], more than 20 percent above the figure in the corresponding period in 2019. This figure includes a recent upward revision of a previous estimate and reflects a worsening food security situation in Malawi and the inclusion of a food insecure estimate for Angola. The current number of food insecure people is the second highest on record and results from the sharply reduced harvests in 2019, higher prices of staple foods and limited incomegenerating opportunities,reflecting a decrease in crop sales and demand for seasonal agricultural labour.

The largest food insecure populations are located in **Zambia** and **Zimbabwe**, where an estimated 2.3 million and 5.5 million people, respectively, are in need of urgent assistance. In **Malawi**, the number of food insecure people was revised upward to nearly 1.9 million, from an earlier projection of 1.1 million, reflecting the sustained increase in maize prices and tightening cereal supplies.

While the 2020 harvest is expected to provide immediate relief, food security conditions are likely to remain poor in the areas affected by seasonal rainfall deficits and where harvests are expected to remain below average for a second consecutive year. This outlook is most relatable to Zimbabwe, southern Mozambique and parts of southern Zambia.

[3] Excluding Mauritius and South Africa.

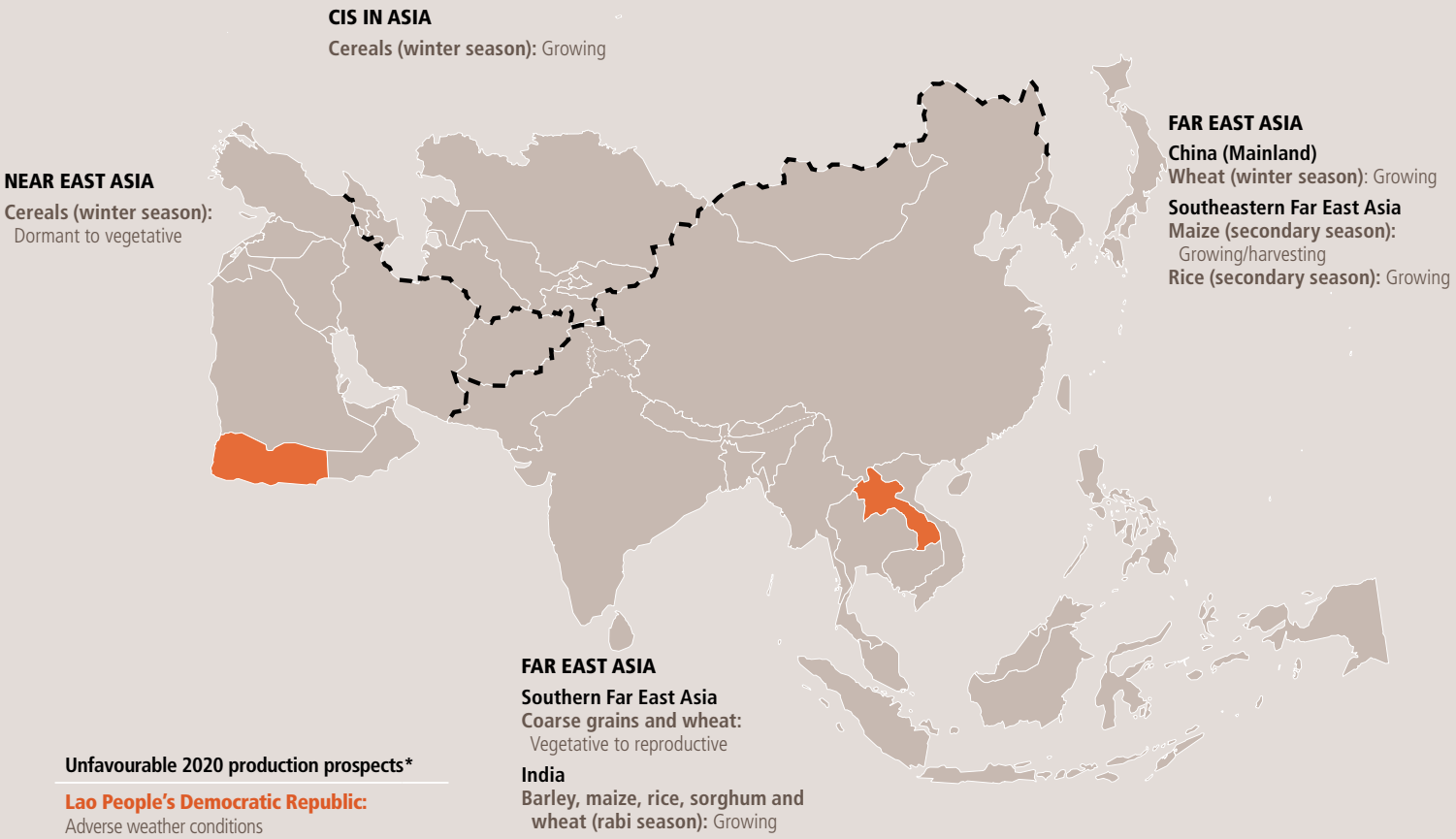
SPECIAL FEATURE - The worst desert locust outbreak in decades threatens food security

The worst desert locust outbreak in 25 years is spreading across East Africa, threatening the livelihoods and food security of millions of people. The desert locust (Schistocerca gregaria Forskål) is a species of grasshopper, but differs in its ability to change from a solitary living form into gregarious, highly mobile swarms as their numbers and densities increase. If several months of favourable conditions support a sharp increase in the population, the desert locust may become one of the most dangerous insect pests in the world and the affected areas could experience total losses of crops and fodder. The current outbreak began after successive cyclones brought heavy rains in the Arabian Peninsula in 2018, facilitating sustained locust breeding that was not detected or treated. In early 2019, numerous swarms started moving to **Yemen**, where only limited control operations were possible due to the ongoing conflict. The outbreak reached the Horn of Africa in June 2019, when swarms from **Yemen** crossed the sea and reached northern **Somalia**, southern **Eritrea** and northern and eastern **Ethiopia**. From mid-2019 onwards, and especially between October and December, exceptionally heavy rainfall across East Africa created conducive conditions for reproduction, while additional swarms reached the region from **Yemen**. Despite the start of control operations, the number of insects increased significantly and rapidly in East Africa, supported by tropical cyclone Pawan, which made landfall in northeastern **Somalia** in December 2019, bringing additional precipitation to an area that was already one of the main breeding zones. The outbreak, which by late 2019 had affected northern **Somalia**, eastern and northern **Ethiopia** and coastal areas of **the Sudan** and **Eritrea**, spread to central and southern **Somalia**, to southern **Ethiopia** and to **Kenya** in early 2020. By late February, swarms were reported in northern **United Republic of Tanzania** and eastern **Uganda**, and small groups were detected in southeastern **South Sudan** and northeastern **Democratic Republic of the Congo**. With the current biomass conditions at well above-average levels and weather forecasts pointing to above-average March-May rains, favourable breeding conditions are expected at least until June 2020, raising the risk of outbreaks in other areas. Since the main cropping areas were largely outside of the infested areas in late 2019 and early 2020, and most crops had already been harvested, losses of 2019 crops due to locusts have been limited and recorded mainly in **Ethiopia** and **Somalia**. In **Ethiopia**, localized damages to the 2019 "Meher" crops were reported in November and December in northern and southeastern Tigray, northeastern Amhara and Eastern Oromiya regions, but control measures have contained losses. In **Somalia**, locusts reached key southern cropping areas when most of "Deyr" crops had already been harvested, and losses were limited. In 2020, the cropping areas most likely to be affected are located in central and eastern **Ethiopia** (secondary "Belg" season crops) and in southern **Somalia** (main "Gu" season crops). In these areas of **Ethiopia**, the "Belg" crops are critical for local food security as they provide the bulk of the annual food supplies. In eastern areas of Oromiya Region, already affected by a high prevalence of food insecurity due to a poor 2019 "Belg" harvest, crop losses due to locusts would worsen the already fragile food security situation. In **Somalia**, locusts are already present in the main sorghum producing areas of Bay and Bakool regions, and in close proximity of the main maize producing areas in the Lower Shabelle Region. With "Gu" crops accounting for about 60 percent of the country's total annual cereal output, potential losses due to locusts may cause a substantial decline of the aggregate cereal production. In pastoral and agro-pastoral areas of northern **Kenya**, eastern **Ethiopia** and **Somalia**, rangelands entered the January-March dry season with well above-normal biomass conditions and damages to pastures have been mostly localized. However, in these areas, where high food insecurity levels prevail following consecutive poor rainy seasons, the persistence of the outbreak could result in substantial pasture losses, if control measures are not up-scaled, and a marked increase in food insecurity prevalence and severity may result.

For more information and updates please FAO's Locust Watch: **http://www.fao.org/ag/locusts/en/info/info/index.html**.

REGIONAL REVIEWS
ASIA

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



Unfavourable 2020 production prospects*

Lao People's Democratic Republic: Adverse weather conditions

Yemen: Conflict

*/** See Terminology (*page 6*)

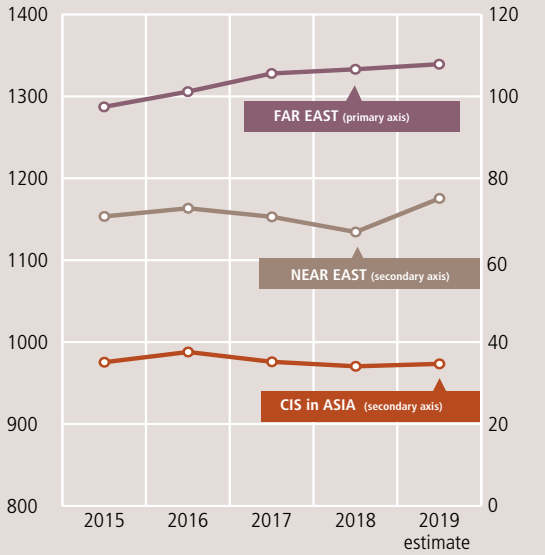
Source: GIEWS
(disputed territories and boundaries in conformity with UN maps)**

Asia Production Overview

The aggregate 2019 cereal output is estimated at 1 449 million tonnes, a yearly increase of 15 million tonnes from the already above-average outturn in 2018. The increase is mainly associated with bumper wheat and maize harvests in the Near East and Far East subregions, which more than compensated for a decline in paddy production in main producing countries of China (Mainland), Thailand and Viet Nam.

Wheat production prospects in 2020 are mostly favourable in the Far East, with the main producers of the subregion reporting higher plantings and conducive weather conditions that have boosted yield expectations. The 2020 production outlook is also positive in the CIS countries of Asia, due to mostly favourable weather conditions.

Cereal production
(million tonnes)



FAR EAST

Above-average wheat production forecast for 2020

The 2020 predominantly irrigated winter wheat crop is at the maturity stage, with harvest operations due to start from April. Overall, wheat crops are reported to be in good condition throughout the subregion, supported by well-distributed and adequate amounts of precipitation, as well as sufficient water supplies for irrigation. In **China (Mainland)**, the subregion's major wheat producer, according to field assessments, the area planted with winter wheat is estimated at 23.1 million hectares, close to the average, and yield prospects are favourable. In **India**, official estimates put the 2020 wheat output at an all-time high of 106.2 million tonnes, supported by record plantings as the Government intends to purchase increased quantities through its procurement programme at remunerative producer prices. Similarly, in **Pakistan,** conducive weather conditions and adequate supplies of agricultural inputs are expected to lead to a near-average output of 25.2 million tonnes. The recent outbreak of desert locusts, however, raises concerns for the wheat crops in parts of the main producing provinces of Punjab and Sindh.

Aggregate cereal production in 2019 close to last year's high level

In Northern Hemisphere countries, the bulk of the 2019 main paddy and coarse grain crops was harvested at the end of last year, while harvesting of the secondary season crops recently started. In Southern Hemisphere countries and those located on the Equator, the start of the main 2020 season harvest is imminent.

Overall, the 2019 subregional aggregate cereal output is forecast at a record high of 1 339 million tonnes (rice in paddy equivalent) as a decrease in paddy production is expected to be more than compensated by higher wheat and maize production.

The aggregate production of paddy rice, the major staple in the subregion, is forecast at an above-average level of 690.5 million tonnes, in 2019, slightly below the outturn in 2018. This is the first time that the subregional output does not register an increase since 2016. The yearly decrease is attributed to a decline in paddy harvests in several of the main producing countries of the subregion, notably in **China (Mainland)**. The 2019 aggregate paddy output in **China (Mainland)** is estimated at 209.6 million tonnes, 1 percent below the previous year's near-average level, as farmers switched from paddy to more profitable crops, including soybeans. Paddy output in 2019 is also expected to decrease in **Thailand** to 28.4 million tonnes, 10 percent below the five-year average, primarily reflecting a reduced main season harvest owing to dry weather conditions. Additionally, unfavourable prospects for the 2019/20 secondary crop, currently being planted but with some significant delays due to critically low water supplies for irrigation, dragged down the production forecast. Similarly, in **Viet Nam**, the 2019 paddy output decreased to a below-average level. This is mostly the result of a contraction in the area planted after the Ministry of Agricultural Rural Development encouraged farmers to switch to more drought-resistant crops amid dry weather conditions in the central parts of the country. Rainfall deficits in the north and floods in the south were also behind a below-average 2019 main season output in **Lao People's Democratic Republic**. According to a joint FAO/WFP Crop and Food Security Assessment Mission, which visited the country from 16 November to 5 December, the 2019 aggregate paddy production is forecast at 3.4 million tonnes, 10 percent below the five-year average.

Table 11. Far East cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2018	2019 estim	5-yr Avg.	2018	2019 estim	5-yr Avg.	2018	2019 estim	5-yr Avg.	2018	2019 estim	Change: 2019/2018 (%)
Far East	***257.0***	***260.9***	***267.3***	***371.6***	***378.2***	***381.5***	***678.4***	***694.0***	***690.5***	***1 307.1***	***1 333.1***	***1 339.3***	***0.5***
Bangladesh	*1.3*	*1.1*	*1.0*	*2.6*	*3.3*	*3.5*	*52.6*	*54.6*	*55.4*	*56.5*	*59.0*	*59.9*	*1.5*
Cambodia	*0.0*	*0.0*	*0.0*	*0.8*	*1.2*	*1.2*	*10.0*	*10.9*	*10.8*	*10.8*	*12.1*	*12.0*	*-0.7*
China (Mainland)	*132.1*	*131.4*	*133.6*	*268.6*	*267.1*	*271.2*	*211.5*	*212.1*	*209.6*	*612.2*	*610.7*	*614.4*	*0.6*
India	*94.6*	*99.9*	*103.6*	*43.7*	*45.9*	*43.4*	*164.6*	*174.7*	*176.2*	*303.0*	*320.5*	*323.2*	*0.8*
Japan	*0.9*	*0.8*	*1.0*	*0.2*	*0.2*	*0.2*	*10.9*	*10.6*	*10.5*	*12.0*	*11.6*	*11.8*	*1.6*
Myanmar	*0.1*	*0.1*	*0.1*	*2.3*	*2.5*	*2.7*	*26.3*	*26.1*	*25.6*	*28.8*	*28.7*	*28.5*	*-1.0*
Nepal	*1.9*	*2.0*	*2.2*	*2.7*	*3.0*	*3.0*	*5.0*	*5.6*	*5.6*	*9.6*	*10.6*	*10.8*	*1.8*
Pakistan	*25.7*	*25.1*	*25.2*	*6.2*	*6.8*	*6.8*	*10.6*	*10.8*	*11.5*	*42.5*	*42.7*	*43.6*	*2.0*
Philippines	*0.0*	*0.0*	*0.0*	*7.6*	*7.8*	*8.0*	*18.6*	*18.6*	*18.8*	*26.2*	*26.4*	*26.8*	*1.7*
Republic of Korea	*0.0*	*0.0*	*0.0*	*0.2*	*0.2*	*0.2*	*5.5*	*5.2*	*5.0*	*5.7*	*5.4*	*5.3*	*-3.3*
Sri Lanka	*0.0*	*0.0*	*0.0*	*0.2*	*0.3*	*0.3*	*3.8*	*3.9*	*4.6*	*4.0*	*4.2*	*4.9*	*16.7*
Thailand	*0.0*	*0.0*	*0.0*	*4.9*	*5.2*	*4.9*	*31.2*	*32.3*	*28.4*	*36.2*	*37.6*	*33.3*	*-11.3*
Viet Nam	*0.0*	*0.0*	*0.0*	*5.1*	*4.9*	*4.8*	*44.0*	*44.0*	*43.4*	*49.1*	*48.9*	*48.2*	*-1.3*

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

Reduced outputs are also estimated in **Japan** and **the Republic of Korea** due to area contractions that are associated with a decreases in domestic rice consumption. In **India**, the 2019 paddy output is officially forecast to reach a record high of 176.2 million tonnes, mostly reflecting an expansion in sowings supported by large official purchases at remunerative prices. A record output was recorded in **Bangladesh**, reflecting an increase in plantings and yields. Similarly, bumper outputs are forecast in **Pakistan**, **Sri Lanka**, **the Philippines** and **Indonesia**.

Aggregate maize production is forecast at 354 million tonnes in 2019, slightly above last year's high level. Most countries are estimated to have harvested record or near-record outputs, as a result of area expansions supported by strong demand for feed. The largest year-on-year production gains were registered in **China (Mainland)** and **India**, following above-average plantings and near-record yields. Similarly, bumper harvests were estimated in **Bangladesh**, **Indonesia**, **Myanmar** and **the Philippines**. By contrast, the 2019 maize output is estimated to decrease in **Thailand**, due to drought conditions in the north, and in **Viet Nam**, where farmers planted less for the second consecutive year owing to relatively lower prices compared to competing crops.

The subregional 2019 aggregate wheat production, harvested in the first half of 2019, is estimated at a record level of 267.3 million tonnes.

Aggregate cereal imports in 2019/20 forecast close to average

In the 2019/20 marketing year, aggregate wheat import requirements are forecast at an above-average level of 51 million tonnes, reflecting strong demand from most wheat-importing countries, namely **Bangladesh**, **Indonesia**, **Thailand**, **Viet Nam** and **the Republic of Korea**. Import requirements for coarse grains, mostly for feed use, are forecast at average levels. A below-average import requirements in **China (Mainland)**, previously the main coarse grain importer, is expected to be offset by increased demand from other big importers, including **Japan**, **Republic of Korea**, **Malaysia** and **Viet Nam**. Imports of coarse grains by **China (Mainland)** decreased sharply since 2015/16, as the Government sought to cut maize stocks through increased sales from state reserves. Import forecasts of rice in 2020, which account for a small share of total imports, are forecast at a well below-average level of 11.6 million tonnes, on expectations of reduced purchases by **Bangladesh**, **China (Mainland)** and **Indonesia**. Exports of rice, accounting for the bulk of the subregional export volume, are forecast at 38.1 million tonnes in 2020, owing to higher expected exports by **Cambodia**, **China (Mainland)**, **India**, **Pakistan** and **Viet Nam**.

Prices of rice followed mixed trends; those of wheat stable between November 2019 and January 2020

Prices of rice in **Thailand** have increased since December 2019, reflecting a reduced 2019 main harvest and concerns over the 2019/20 secondary crop. Similarly, prices strengthened since December in **Viet Nam** amid seasonally tight market availabilities ahead of the 2020 main "winter/spring" harvest. Prices of rice were generally stable in **India**, despite improved supplies from the above-average 2019 main "Kharif" season harvest, mainly due to large ongoing purchases by the Government.

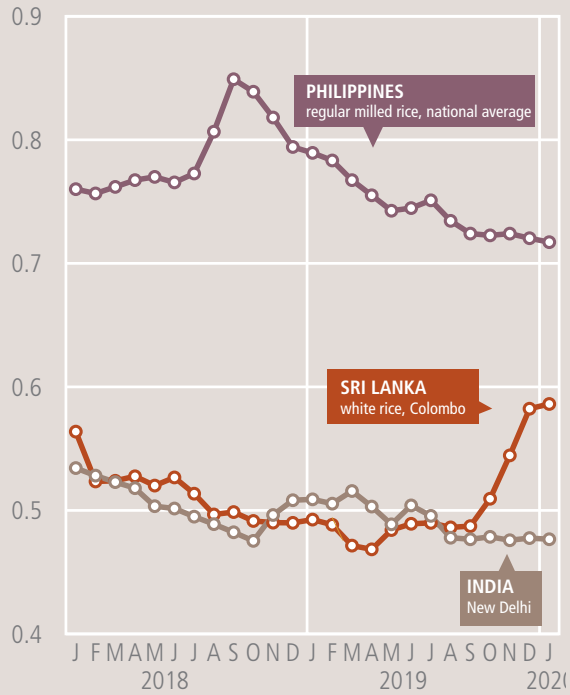
Table 12. Far East cereal production and anticipated trade in 2019/20 [1]
(thousand tonnes)

	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	*3 609*	*3 944*	*3 519*	*-10.8*	*-2.5*
Imports	*66 091*	*62 257*	*66 224*	*6.4*	*0.2*
Production	*371 616*	*378 189*	*381 459*	*0.9*	*2.6*
Rice (millled)					
Exports	*37 499*	*36 249*	*38 105*	*5.1*	*1.6*
Imports	*14 369*	*11 412*	*11 597*	*1.6*	*-19.3*
Production	*450 366*	*460 671*	*458 316*	*-0.5*	*1.8*
Wheat					
Exports	*3 043*	*2 623*	*2 303*	*-12.2*	*-24.3*
Imports	*48 826*	*48 355*	*50 923*	*5.3*	*4.3*
Production	*257 038*	*260 869*	*267 339*	*2.5*	*4.0*

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

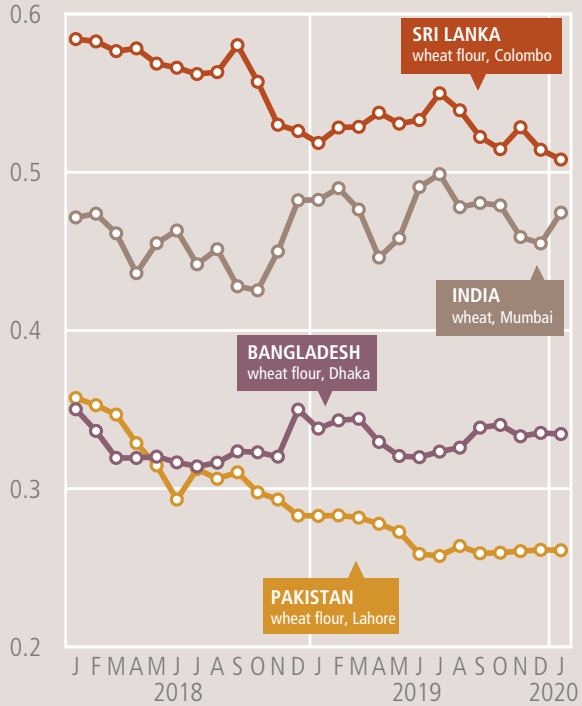
In **Myanmar**, after remaining generally stable throughout 2019, retail prices of rice started to decrease seasonally in December with the beginning of the 2019 main season harvest. In **China (Mainland)** and **the Philippines**, prices were generally stable and, in January 2020, were below their year-earlier levels reflecting adequate market availabilities. In **Bangladesh**, prices of rice decreased in December and January with the 2019 "Aman" harvest. In **Sri Lanka**, prices of rice have been increasing since late 2019, reaching record levels in January, as seasonal pressure was compounded by a decline in imports and a reduced 2019 secondary "Yala" crop. Prices of wheat and wheat flour were generally stable. The notable exception was for prices in **Pakistan**, where wheat prices reached record or near-record highs in most markets by January 2020, underpinned by tight market supplies. Furthermore, increased costs of transportation provided further support. In an effort to ease the supply pressure and curb prices, the Government approved the importation of 300 000 tonnes of wheat in January. Prices were generally stable in **India**, ahead of the 2020 main wheat harvest, estimated at a record level, while they remained stable in **China (Mainland)**, reflecting adequate market availabilities from the near-record harvest in 2019. Prices of wheat were unchanged between November 2019 and January 2020 in **Bangladesh** and **Indonesia**, while they decreased marginally in **Sri Lanka** on account of adequate imports.

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.

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.

Food security conditions are generally stable, but concerns remain in some countries

Overall, food security conditions are stable in the subregion, but pockets of severe food insecurity persist in several countries. In **Myanmar**, the protracted conflict in Rakhine, Chin, Kachin, Kayin and northern Shan states have triggered large-scale population displacements. Most IDPs are affected by high levels of food insecurity as conflicts continue to hinder their movement and engagement in livelihood activities. A large number of refugees are putting strain on local resources in both **Pakistan**, where about 1.4 million Afghan refugees are sheltered, and **Bangladesh**, where nearly 1 million refugees from Myanmar are in temporary settlements in Cox's Bazar District. In **the Democratic People's Republic of Korea**, according to the FAO/WFP rapid Food Security Assessment Mission conducted in April 2019, about 10.1 million people (about 40 percent of the total population) are estimated to be food insecure.

NEAR EAST

After autumn dryness, favourable conditions for 2020 winter crops prevailed

Planting of the 2020 winter grains crops, for harvest from May 2020, finished in January. Although some early season dryness was reported in parts of **Iran (Islamic Republic of)** and **Iraq** up to December, rains in January replenished soil moisture across the subregion. As of mid-February, generally favourable conditions with sufficient soil moisture for crop development prevailed. In **Turkey**, the main regional producer, the lingering effects of dryness remained a concern, particularly for crops in the Anatolian Plateau.

The preliminary forecast for wheat production in **Turkey** points to an average output of 20 million tonnes in 2020, assuming favourable weather conditions continue for the remainder of the season, and a close to average production of 13 million tonnes is foreseen in **Iran (Islamic Republic of)**.

Conflict or the aftermath of conflict continues to affect input availability in **the Syrian Arab Republic** and **Iraq**. The ongoing economic and financial crisis in **Lebanon** is restricting farmers' ability to purchase inputs. In the past, Lebanese farmers would purchase inputs on credit extended by retailers. However, following restrictions placed on US dollar withdrawals, cash payments are now required by sellers, affecting the cash flow of farming households. In **Yemen**, the conflict continues to debilitate agricultural livelihoods, by limiting the availability of inputs and constraining access to fields.

Above-average cereal output gathered in 2019

At the subregional level, total cereal production in 2019 is estimated at 75 million tonnes, about 12.3 percent above the 2018 harvest and 7 percent higher than the five-year average. Most of this quantity is comprised of wheat, and production of wheat in 2019 is estimated at 46.2 million tonnes, 5 percent more than the five-year average and about 9 percent higher than the 2018 weather-stricken output. The production upturn reflects larger harvests in **Afghanistan**, **Iran (Islamic Republic of)**, **Iraq** and **the Syria Arab Republic**, mostly on account of favourable weather conditions, which more than offset a weather-induced production decrease in **Turkey**.

At subregional level, wheat imports in the 2019/20 (July/June) marketing year are forecast at an average level of 29.4 million tonnes. Total cereal imports are forecast at a level close to the average of 72 million tonnes.

Large number of people remain food insecure

The food insecurity of a large number of people in the subregion continued to worsen due to persisting conflicts and reduced livelihood opportunities.
In **Yemen**, four years of escalating conflict has severely disrupted livelihoods. About 80 percent of the population remains in need of humanitarian assistance. Over half of the population is acutely food insecure and a large share have lost their primary income. Any disruptions to port operations caused by the conflict limits food imports that the country relies on.

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**, between August and October 2019, it was estimated that a total of 10.23 million people (one-third of the total population) were in severe acute food insecurity and required urgent humanitarian assistance. These included around 7.79 million people in IPC Phase 3: "Crisis" and 2.44 million people in IPC Phase 4: "Emergency". Around 10.37 million people were also in IPC Phase 2: "Stressed" and required livelihood support.

Table 13. Near East cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2018	2019 estim	5-yr Avg.	2018	2019 estim	5-yr Avg.	2018	2019 estim	5-yr Avg.	2018	2019 estim	Change: 2019/2018 (%)
Near East	***44.2***	***42.4***	***46.2***	***21.3***	***19.8***	***23.7***	***4.4***	***4.5***	***5.1***	***70.0***	***66.8***	***75.0***	***12.3***
Afghanistan	*4.5*	*3.6*	*5.1*	*0.6*	*0.4*	*0.4*	*0.6*	*0.5*	*0.6*	*5.7*	*4.5*	*6.1*	*35.9*
Iran (Islamic Republic of)	*13.0*	*14.5*	*14.5*	*4.5*	*4.2*	*4.1*	*2.7*	*3.0*	*3.0*	*20.3*	*21.7*	*21.6*	*-0.2*
Iraq	*3.2*	*2.2*	*4.3*	*0.8*	*0.5*	*1.9*	*0.2*	*0.0*	*0.5*	*4.2*	*2.7*	*6.8*	*145.7*
Turkey	*20.7*	*20.0*	*19.0*	*13.8*	*13.4*	*14.3*	*0.9*	*0.9*	*1.0*	*35.4*	*34.4*	*34.3*	*-0.2*

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

CIS IN ASIA[4]

Favourable weather conditions for dormant 2020 winter cereals crops

Planting of the 2020 winter cereal crops, to be harvested between June and September, finalized in November 2019 and the total area planted in the subregion is estimated to be slightly above the five-year average level. Weather conditions were reported to be mostly favourable for the dormancy of cereal crops, mainly wheat and barley. In some western parts of the subregion, between October and December 2019, temperatures were generally warmer than average and precipitation was scarce, resulting in below-average vegetation conditions, particularly in southern **Azerbaijan**. However, increased precipitation since January 2020 improved soil moisture levels and benefited winter crops. As the cropping season is still in its early stages, the rainfall performance in the coming months is crucial to determine the production of the 2020 winter cereal crops.

In the eastern part of the subregion, precipitation in November and December brought adequate snow volumes in mountainous areas of **Kyrgyzstan** and **Tajikistan**. The snow is crucial to ensure moisture reserves for crop development and as a source of water for the Amu Darya River, which is used to irrigate fields in Tajikistan, Uzbekistan and Turkmenistan during the summer period (June-August). As of mid-February, a thick snow coverage was also present in the southern and southeastern areas of **Kazakhstan**, where most of the winter wheat is cultivated, protecting crops from winterkill.

In **Kazakhstan**, planting of the 2020 spring cereals, which account for over 90 percent of the annual domestic cereal output, is expected to take place between May and June.

Reduced wheat production obtained in Kazakhstan in 2019

The aggregate 2019 subregional cereal output is estimated at a near-average 34.6 million tonnes. Production of wheat, which accounts for more than 70 percent of the total cereal output, is estimated at 23.7 million tonnes, 7 percent below the average level, as a reduced harvest in **Kazakhstan**, the main wheat producer in the subregion, offset the large outputs in **Azerbaijan** and **Turkmenistan**. In **Kazakhstan**, adverse weather conditions in the key wheat producing northern province of Kostanay affected yields and quality of grains. As a result, the 2019 domestic wheat output is estimated at a well below-average level of 11.5 million tonnes and wheat exports in the 2019/20 marketing year (July/June) are forecast at 6.5 million tonnes, nearly 14 percent below average.

The 2019 subregional coarse grain production is estimated well above the five-year average at 9.7 million tonnes, mainly due to bumper outputs of coarse grains in **Kazakhstan**, **Kyrgyzstan** and **Azerbaijan**, which more than offset

Table 14. CIS in Asia cereal production
(million tonnes)

	Wheat			Coarse grains			Total cereals [1]			
	5-yr Avg.	2018	2019 estim	5-yr Avg.	2018	2019 estim	5-yr Avg.	2018	2019 estim	Change: 2019/2018 (%)
CIS in Asia	***25.4***	***24.0***	***23.7***	***8.2***	***9.0***	***9.7***	***34.7***	***34.0***	***34.6***	***1.8***
Armenia	*0.3*	*0.2*	*0.2*	*0.2*	*0.1*	*0.1*	*0.5*	*0.3*	*0.3*	*-0.9*
Azerbaijan	*1.8*	*2.0*	*2.2*	*1.1*	*1.2*	*1.3*	*2.9*	*3.3*	*3.5*	*5.7*
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*	*11.5*	*4.3*	*5.3*	*5.9*	*18.9*	*19.7*	*17.8*	*-9.7*
Kyrgyzstan	*0.6*	*0.6*	*0.6*	*1.0*	*1.1*	*1.2*	*1.7*	*1.8*	*1.8*	*2.4*
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	*6.5*	*5.4*	*6.8*	*0.8*	*0.5*	*0.6*	*7.7*	*6.2*	*7.8*	*25.5*

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).

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

reduced cereal outturns in the other countries of the subregion.

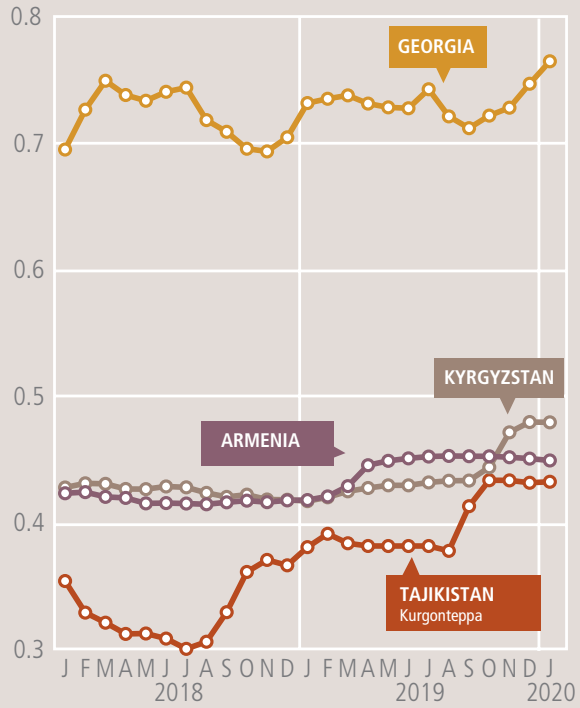
Export and domestic prices of wheat flour above year-earlier levels

In **Kazakhstan**, export prices of wheat flour began to increase again in February 2020, following a two-month decline, and were about 20 percent higher than a year earlier. The higher year-on-year prices are mainly due to a reduced availability of high quality grains. Domestic retail prices of wheat flour rose slightly between October and December 2019 and remained stable in January 2020, at levels well above those a year earlier.

In the importing countries of the subregion, domestic retail prices of wheat flour remained stable or increased in the last quarter of 2019. In **Kyrgyzstan** and **Tajikistan**, prices increased between September and November 2019 and remained generally stable afterwards. By January 2020, prices were well above their year-earlier values, mainly due to higher export quotations from Kazakhstan, the countries' main supplier of wheat. In **Armenia**, prices of wheat flour have been virtually unchanged since May 2019 and, in January 2020, were only slightly higher than a year earlier. Prices strengthened in **Georgia** since October 2019, reflecting the upward trend in the Russian Federation's export market and, in January 2020, were higher on a yearly basis amid the effects of the country's currency depreciation.

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

(USD/kg)



Source: National Statistical Service of the Republic of Armenia; National Statistical Committee of the Kyrgyz Republic; National Statistics Office of Georgia; Statistical Agency under President of the Republic of Tajikistan.

REGIONAL REVIEWS
LATIN AMERICA AND THE CARIBBEAN

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

CENTRAL AMERICA AND THE CARIBBEAN

Mexico
Coarse grains (winter season): Planting
Wheat (winter season): Vegetative

SOUTH AMERICA

Northern Brazil
Rice (paddy season): Planting

Northeastern Brazil
Maize (main season): Planting
Rice (paddy season): Planting

Centresouthern Brazil
Maize (main season): Vegetative
Rice (paddy season): Harvesting

Argentina, Uruguay
Coarse grains: Vegetative
Rice (paddy season): Vegetative

Unfavourable 2020 production prospects*

Honduras: Limited rainfall

*/** See Terminology (*page 6*)

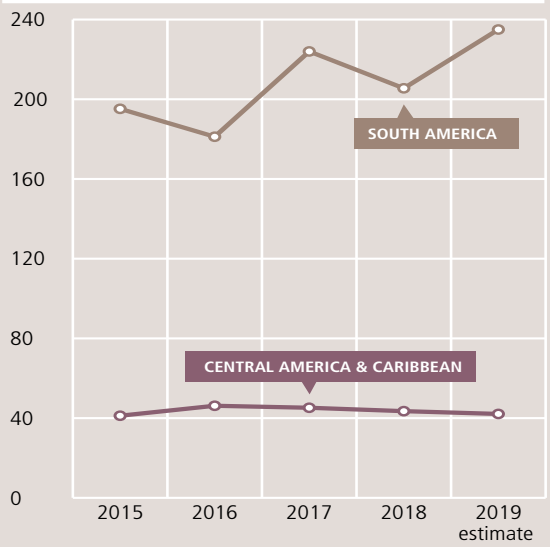
Source: GIEWS
(disputed territories and boundaries in conformity with UN maps)**

Latin America and the Caribbean Production Overview

Cereal production in Latin America and the Caribbean is estimated at a record high of 277 million tonnes in 2019, 14 percent above the five-year average. The large outturn mainly reflects a bumper maize output and a near-record wheat production in South America, which more than offset harvest reductions in Central America and the Caribbean, due to unfavourable weather.

Prospects for the 2020 maize crop in South America are mostly favourable, with the two major producing countries, Argentina and Brazil, reporting above-average acreage, spurred by high domestic prices and strong export demand.

Cereal production
(million tonnes)



CENTRAL AMERICA AND THE CARIBBEAN

Wheat area expected at a below-average level in 2020

In **Mexico**, virtually the only wheat producer in the subregion, planting of the 2020 main wheat crop was nearing completion by the end of February under generally favourable weather conditions. The planted area is officially estimated at a below-average level, as farmers continued to shift production to more remunerative crops.

With regard to the 2020 maize crop, planting of the first minor season crop is ongoing under generally favourable rainfall conditions in the major producing states of Sinloa, Vercruz and Chiapas. The official survey of planting intentions suggests a near-average area, which mostly reflects stable market prices. Despite the Mexican Government's continued policy to purchase maize crops from smallholder farmers at a fixed price, some farmers have turned to sorghum production, a more drought-resistant crop, following the unfavourable experience of the 2019 main season, which was affected by extreme rainfall deficits.

The 2019 maize output estimated to be near-average

Harvesting of the 2019 maize crop is almost complete, except in northern **Guatemala** and **Nicaragua** where the "Apante" season harvest, which accounts for about 10 percent of the domestic outputs, are expected to last until April. The subregional 2019 maize output is forecast at an average level of 30 million tonnes. In the largest cereal-producing country, **Mexico**, the 2019 maize output is officially estimated at 26 million tonnes, slightly short of the five-year average. This reflects a good output from the minor season but a below-average harvest from the main season, caused by seasonal rainfall deficits and a reduction in the area planted.

Dry spells also affected the 2019 main season crops in other Central American countries, which resulted in a slightly below-average aggregate production in 2019. While dryness had an impact on crops in localized areas of **Guatemala** and **Nicaragua**, it widely affected crops in **Honduras**, including the main producing eastern and southern regions, resulting in a below-average 2019 main season output. In an effort to compensate for the shortfall and boost production of the minor season crop, harvested in October, the Honduran Government distributed maize seeds and fertilizers. In **El Salvador**, despite some dryness, cereal production from the main season was estimated at an average level.

In **Haiti**, total maize production is forecast at a low level of 245 000 tonnes in 2019. Despite favourable production expectations from the third season maize harvest, currently ongoing in the southern and northeastern regions, outputs from the first and second maize seasons were estimated at low levels. The poor outturns from the earlier harvests were a result of below-average yields, reflecting limited and erratically distributed rains, and a below-average area planted due to rising prices of agricultural inputs following a depreciation of the currency. The social unrest that has hampered trade flows in 2019 also negatively affected farmers' decision to sow. Similarly, there was a small decrease in paddy production, underpinned both by a contraction in plantings and lower yields, driven by rainfall shortages in key producing Artibonite and Sud departments and a limited application of fertilizers due to increasing prices. In **the Dominican Republic**, the 2019 paddy output (mainly irrigated) is estimated at an above-average level of about 1.1 million tonnes, mainly reflecting increased plantings.

According to the latest forecasts by the International Research Institute for Climate and Society (IRI), the likelihood that El Niño conditions occur in the Northern Hemisphere in the April-September period is limited (lower than 30 percent), which suggests that climate conditions would be normal during the planting, development and maturation stages of the 2020 main crops, raising yield prospects.

Cereal imports forecast to rise to an above-average level in 2019/20

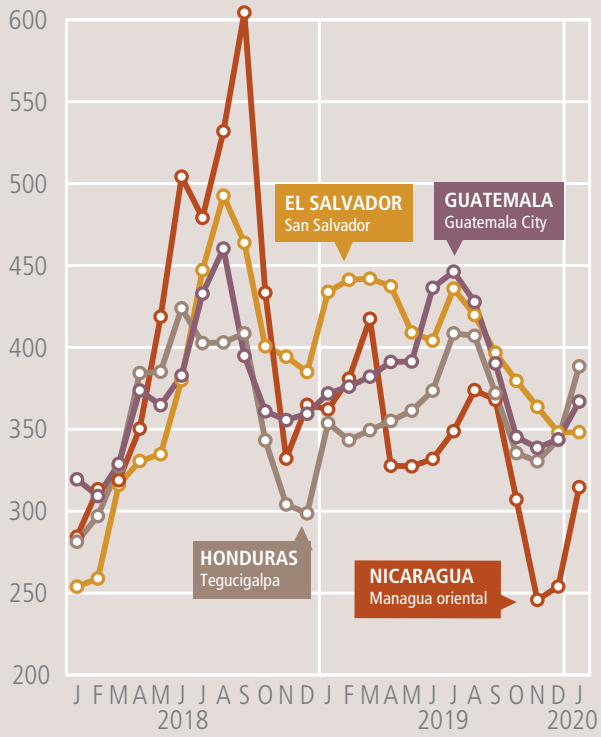
Cereal imports have been increasing in the subregion for more than five consecutive

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

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2018	2019 estim	5-yr Avg.	2018	2019 estim	5-yr Avg.	2018	2019 estim	5-yr Avg.	2018	2019 estim	Change: 2019/2018 (%)
Central America & Caribbean	***3.5***	***2.9***	***3.3***	***37.6***	***37.5***	***35.7***	***2.9***	***3.0***	***3.1***	***44.0***	***43.5***	***42.1***	***-3.2***
El Salvador	*0.0*	*0.0*	*0.0*	*0.9*	*0.9*	*0.9*	*0.0*	*0.0*	*0.0*	*1.0*	*0.9*	*1.0*	*5.7*
Guatemala	*0.0*	*0.0*	*0.0*	*1.9*	*1.9*	*1.8*	*0.0*	*0.0*	*0.0*	*1.9*	*1.9*	*1.9*	*-2.6*
Honduras	*0.0*	*0.0*	*0.0*	*0.6*	*0.6*	*0.4*	*0.1*	*0.1*	*0.1*	*0.6*	*0.6*	*0.5*	*-20.2*
Mexico	*3.5*	*2.9*	*3.3*	*32.8*	*32.8*	*31.2*	*0.3*	*0.3*	*0.3*	*36.6*	*36.0*	*34.8*	*-3.5*
Nicaragua	*0.0*	*0.0*	*0.0*	*0.5*	*0.5*	*0.4*	*0.3*	*0.4*	*0.4*	*0.8*	*0.8*	*0.8*	*-1.5*
South America	***25.9***	***28.8***	***28.5***	***148.1***	***151.7***	***183.6***	***24.7***	***25.0***	***23.0***	***198.8***	***205.5***	***235.0***	***14.4***
Argentina	*16.3*	*19.5*	*19.5*	*47.3*	*50.8*	*63.2*	*1.4*	*1.4*	*1.2*	*65.1*	*71.6*	*83.8*	*17.1*
Brazil	*5.7*	*5.4*	*5.2*	*84.3*	*84.1*	*103.6*	*11.9*	*12.1*	*10.4*	*101.9*	*101.5*	*119.2*	*17.4*

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

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.

years, mainly due to growing demand for yellow maize, which is used as animal feed, and wheat, used for food. In the 2019/20 marketing year (September/August), cereal imports are forecast at 37.3 million tonnes, more than 10 percent above the previous five-year average. Maize imports, which account for about two-thirds of the total cereal import quantity, are expected at an above-average level of 25 million tonnes, reflecting the strong import demand for yellow maize and white maize for human consumption in response to the domestic shortfall in cereal production.

Prices of maize strengthened, but bean prices declined

In **Guatemala**, **Honduras** and **Nicaragua**, prices of white maize rose from November 2019 to January 2020, after declining in the previous months with improved supplies from the 2019 main season harvests. In January 2020, while prices were more than 10 percent higher year on year in Honduras, due to the effects of the drought-reduced 2019 harvest, prices were lower than their year-earlier levels in Guatemala and Nicaragua. In **El Salvador**, prices have continued to fall since August 2019 and, in January 2020, were lower year on year mainly reflecting the larger maize output. In **Mexico**, where the main season harvest is virtually complete, prices weakened for the third consecutive month in January 2020.

Prices of red and black beans declined seasonally in **El Salvador, Guatemala, Honduras** and **Nicaragua**, after a sharp increase in the October-November period, when concerns over the impact of torrential rains on the main harvest exacerbated seasonal trends. In Guatemala and Nicaragua, prices were nearly 10 percent higher year on year, reflecting tight supplies on account of low harvests. In **Mexico**, prices of black beans were generally stable in the November-January period as the downward pressure from the main harvest was limited due to a lower-than-average bean output.

In **Haiti**, prices of locally-produced maize meal remained stable in December 2019, due to easing supply pressure, as domestic availabilities were bolstered by imports and newly harvested crops from the minor season. An improvement in the country's socio-political situation since November also allowed for a normalization of economic activities and the removal of barricades, contributing to a regular supply of food on markets. However, prices still remained higher year on year. Prices of rice, mostly imported, had declined due to increased import quantities, but were higher on a yearly basis due to the sustained weakness of the currency. Prices of black beans declined across the country, with the exception of markets in southern areas, where crops were affected by below-average precipitations.

SOUTH AMERICA

Maize production in 2020 forecast to remain well above average

Planting of the 2020 maize crop was finalized in December 2019 in Chile and Uruguay, and is expected to be completed by late February in Argentina, Brazil and Paraguay. In **Argentina**, plantings are officially forecast at 9 million hectares, marking a third consecutive year of above-average sowings, underpinned by strong export demand and high domestic prices of grains. Vegetation conditions are reported to be favourable in the main producing provinces of Buenos Aires and Córdoba, due to favourable rainfall since mid-December 2019. Reflecting the above-average plantings and good yield prospects, the early forecast for the 2020 maize output is set at a similar level to the record high of 2019. In **Brazil**, harvesting of the first (minor) season maize crop is underway and the crops harvested in the key producing state of Rio Grande do Sul reportedly showed poor yields as a result of dry weather conditions and high temperatures. Planting of the 2020 main season maize crop started with some delays due to a slow harvest of soybean crops, which precedes the main maize season, and are ongoing under slightly dry weather conditions. As of early February, the official forecast puts the 2020 maize production at about 100 million tonnes, similar to 2019 record outturn, as the expected decrease in yields is likely to be compensated by the slight increase in area sown. Similarly, in **Paraguay**, a slow harvest pace of the soybean crop delayed planting of the 2020 main season maize crop. Increased precipitation in

December and January benefited early crop development, but uncertainty about yields remain as infestations of pests were reported due to high temperatures and wet conditions. In **Chile**, the area planted with maize continued to shrink, as farmers' increased production of more remunerative horticulture crops, and in 2020 maize sowings were estimated at an historic low. In addition, soil moisture deficits in the major producing O'Higgins Region also provoked farmers to cut back on maize plantings this year. By contrast, the area sown in **Uruguay** is officially estimated at a well above-average level, as farmers switched from soybean to maize production to capture the benefits of the relatively higher grain prices.

In the northern parts of the subregion, planting of the 2020 first maize crop is nearing completion in **Bolivia (Plurinational State of)** and **Ecuador** and is expected to be finalized in April in **Colombia** and **Peru**. Production prospects are mixed, with lower plantings in Bolivia (Plurinational State of) and dry weather conditions in the key producing regions of Guayas and Manabí in Ecuador, while larger sowings are reported in Colombia and Peru, spurred by high domestic prices and strong demand from the feed industry.

Cereal production in 2019 estimated at a record high

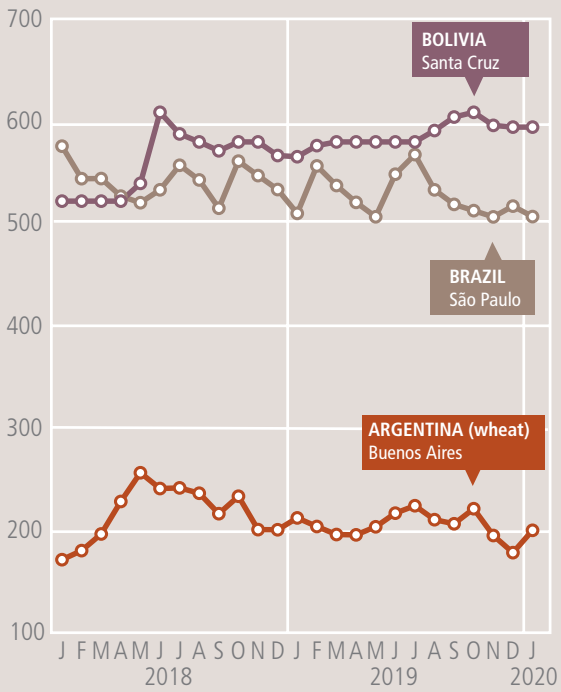
The 2019 subregional cereal output is estimated at a record-high level of 235 million tonnes, approximately 14.4 percent above the five-year average. The bumper production stems from a record aggregate maize output, estimated at 171 million tonnes, driven by large plantings and excellent yields in **Argentina**, **Brazil** and **Uruguay**, which more than offset the below-average outputs obtained in **Bolivia (Plurinational State of)** and **Chile**. In **Colombia** and **Peru**, production of maize was estimated at average levels.

The aggregate wheat production in 2019 is estimated at an above average 29 million tonnes. The good outturn is mostly on account of a near-record harvest, for a second consecutive year, in **Argentina**, the major wheat producing country of the subregion. By contrast, the 2019 rice (paddy) production in the subregion is estimated at a below-average level of 23 million tonnes, following a continuous contraction in plantings in **Brazil** and **Uruguay**.

Cereal exports estimated at record highs in 2019/20

Aggregate cereal exports in the 2019/20 marketing year (March/February) are estimated at a new record high of 99.9 million tonnes. This estimate is underpinned by significant quantities of maize exports from **Argentina** and **Brazil**, reflecting record maize harvests and weak currencies that increased their competitiveness on the international grain market. In total, subregional maize exports are estimated at 78.8 million tonnes, more than about 65 percent above the five-year average. Wheat exports from the subregion are estimated 17 percent higher than the five-year average on account of plentiful supplies and the sustained depreciation of the local currency of Argentina, the main wheat producer. By contrast, exports of rice (milled) are estimated at a below-average level of 3.4 million tonnes, mainly due to a decline in outputs in Brazil.

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.

Maize and wheat prices increased

In line with seasonal trends, prices of yellow maize have generally increased between November 2019 and January 2020 in the key maize producing countries. In **Argentina** and **Brazil**, despite the record outputs in 2019, prices of yellow maize were 65 percent and 23 percent higher year on year, respectively. The high prices reflect strong export demand, spurred by weak local currencies and inflationary pressures, particularly in Argentina. In the same period, prices also increased seasonally in **Bolivia (Plurinational State of)** and **Ecuador**. Prices of yellow maize declined in **Chile** and **Colombia**, mainly reflecting increased imports in the last quarter of 2019 and improved market availabilities from the second season harvest.

Prices of wheat grain in **Argentina** increased in January and were higher than a year earlier, supported by strong export demand. Prices also increased in **Brazil** in the November-January period, mainly reflecting a decline in the 2019 harvest. By contrast, in **Uruguay**, prices of wheat dropped seasonally in January following the harvest of the 2019 crop, but remained higher year on year, sustained by strong export demand. Similarly, in **Chile**, after a moderate increase in the last couple of months of 2019, prices declined seasonally in January, supported by new supplies from the 2019 harvest and increased import volumes. In **Bolivia (Plurinational State of)**, **Colombia**, **Ecuador** and **Peru**, prices were overall stable and near their year-earlier values.

Prices of rice in **Brazil** strengthened seasonally at the beginning of 2020 in the key producing Rio Grande do Sul State. In **Colombia**, prices rose significantly for the third consecutive month in January after unfavourable weather conditions affected the minor season crops, currently being harvested. Compounded by the increased production costs, prices in January 2020 reached values above those of a year earlier. Similarly, prices of rice were higher year on year in **Bolivia (Plurinational State of)**, **Peru** and **Uruguay** mostly due to the reduced outputs in 2019.

REGIONAL REVIEWS
NORTH AMERICA, EUROPE AND OCEANIA

Note: Situation as of November
Territories/boundaries**

NORTH AMERICA

Canada
Cereals (winter season): Dormant to vegetative

United States of America
Cereals (winter season): Vegetative

EUROPE

Northern Europe
Cereals (winter season): Dormant to vegetative

Centresouthern Europe
Cereals (summer season): Planting
Cereals (winter season): Vegetative

CIS in Europe:
Cereals (winter season): Dormant to vegetative

OCEANIA

Australia
Cereals (summer season): Harvesting

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

** See Terminology (*page 6*)

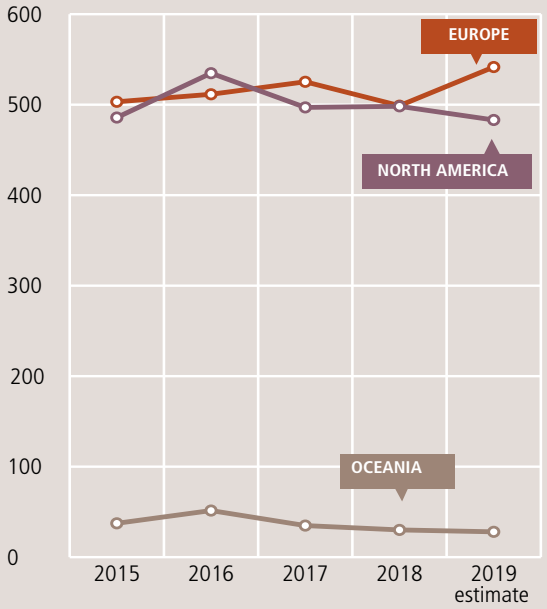
North America, Europe and Oceania Production Overview

In the United States of America, total wheat production is likely to decrease in 2020 from the below-average level gathered in 2019, based on a reduction in the area planted. By contrast, in Canada, with yields anticipated to return to average levels and a foreseen expansion in plantings, wheat production is expected to be above average.

A cutback in wheat plantings, following excessive rainfall, has underpinned expectations that the aggregate wheat output in the European Union will decline in 2020 from last year's bumper outturn. In CIS Europe, large wheat plantings in the Russian Federation are expected to result in an output increase in 2020, following the already above-average harvest in 2019. By contrast, in Ukraine, the area sown is estimated to be below average, thus weighing on the overall production outlook.

In Australia, drought conditions resulted in a sharp cut in the 2019 wheat output, and have also led to a fall in the sown area of the 2020 summer season crops, mainly maize and barley.

Cereal production
(million tonnes)



NORTH AMERICA

Winter wheat acreage falls in 2020 in the United States of America

Compared to the previous year winter wheat sowings have fallen in the United States of America by an estimated 1 percent and are at a historically low level as lower prices curbed incentives to plant the crop. With winter wheat yields foreseen to decline moderately, the total 2020 wheat production, including the minor spring crop to be harvested from August/September, could decline by between 1 million and 2 million tonnes. In the previous year, wheat production in the United States of America was estimated at 52.3 million tonnes. In Canada, a price induced-expansion in winter plantings and an expected enlargement of spring sowings is foreseen to push up wheat production to 34 million tonnes, assuming yields remain unchanged.

EUROPE

EUROPEAN UNION

Wheat plantings and production forecast to decline in 2020

In the *European Union*, (EU27 and the United Kingdom), the 2020 winter wheat crop is dormant and the area planted is estimated to have decreased slightly compared to the previous year's above-average level. The contraction in sowings is mainly due to excessive rainfall that hindered planting operations, particularly in France. Following warmer than normal temperatures during the January-February 2020 period, large areas of cropped land are devoid of snow in central and northern countries, weakening the crop's resilience to possible frost damage.

In addition, in eastern and southern areas, rainfall deficits have been observed in first two months of 2020, weighing on yield prospects. Overall, the 2020 wheat production is forecast at about 145 million tonnes, compared to the 2019 above-average level of 156 million tonnes.

CIS IN EUROPE

Early prospects for the 2020 winter crops are favourable

Planting of the 2020 winter cereal crops was completed in November 2019 and the area is estimated to be slightly above average. Harvesting will take place between July and August 2020 and production prospects are generally favourable.

Overall, weather conditions were drier and warmer than average between October and December 2019, which caused a reduction in soil moisture levels. However, starting from January 2020, adequate rains and snowfall were received, benefiting the winter crops. In the main winter

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

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2018	2019 estim	5-yr Avg.	2018	2019 estim	5-yr Avg.	2018	2019 estim	5-yr Avg.	2018	2019 estim	Change: 2019/2018 (%)
North America	***84.9***	***83.5***	***84.6***	***407.7***	***404.5***	***390.2***	***9.4***	***10.2***	***8.4***	***502.1***	***498.2***	***483.1***	***-3.0***
Canada	*30.4*	*32.2*	*32.3*	*25.5*	*26.3*	*28.6*	*0.0*	*0.0*	*0.0*	*55.9*	*58.5*	*61.0*	*4.2*
United States of America	*54.6*	*51.3*	*52.3*	*382.2*	*378.2*	*361.5*	*9.4*	*10.2*	*8.4*	*446.2*	*439.7*	*422.2*	*-4.0*
Europe	***254.6***	***242.5***	***267.0***	***254.7***	***252.5***	***270.6***	***4.0***	***3.9***	***4.0***	***513.3***	***498.9***	***541.6***	***8.6***
Belarus	*2.5*	*1.8*	*2.8*	*5.0*	*4.0*	*5.4*	*0.0*	*0.0*	*0.0*	*7.5*	*5.8*	*8.2*	*41.0*
European Union*	*150.6*	*138.3*	*156.3*	*158.5*	*154.4*	*164.4*	*2.9*	*2.8*	*2.9*	*312.0*	*295.5*	*323.5*	*9.5*
Russian Federation	*70.6*	*72.1*	*74.3*	*41.2*	*36.6*	*41.9*	*1.1*	*1.0*	*1.1*	*112.9*	*109.8*	*117.3*	*6.8*
Serbia	*2.6*	*2.9*	*2.5*	*6.8*	*7.6*	*7.3*	*0.0*	*0.0*	*0.0*	*9.4*	*10.5*	*9.8*	*-6.8*
Ukraine	*25.5*	*24.6*	*28.3*	*38.3*	*44.6*	*46.3*	*0.1*	*0.1*	*0.1*	*63.9*	*69.3*	*74.7*	*7.8*
Oceania	***23.6***	***17.7***	***15.6***	***14.0***	***11.8***	***12.3***	***0.7***	***0.6***	***0.1***	***38.3***	***30.1***	***28.0***	***-7.1***
Australia	*23.2*	*17.3*	*15.2*	*13.3*	*11.1*	*11.7*	*0.6*	*0.6*	*0.1*	*37.2*	*29.0*	*26.9*	*-7.3*

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2014-2018 period.
*EU27 and the United Kingdom.

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

Source: International Grains Council.

wheat producing areas of **the Russian Federation** (Central, Southern and North Caucasian districts) and **Ukraine** (central and southeastern provinces), snow coverage was reported to be sufficient to secure good moisture reserves for early spring (March-April), when plant growth resumes. Temperatures have been higher than average throughout the winter period and, coupled with the adequate snow coverage, prevented crops from freezing. According to satellite-based images and official reports, crop conditions were mostly favourable across the subregion.

In **the Russian Federation**, sowing of the spring cereal crops is expected to begin in March, about one month earlier than usual due to warmer temperatures. Spring wheat plantings in 2020 are officially forecast at 12.2 million hectares, slightly above the average level. Given that the 2020 winter wheat crop was planted over a record area of 16.5 million hectares, total wheat plantings (winter and spring crops) in 2020 are forecast at an all-time high of 28.7 million hectares. Assuming near-average yields, the 2020 aggregate wheat output is preliminarily forecast to be between 78 and 82 million tonnes, higher than the above-average outturn in 2019. In **Ukraine**, the area sown with winter wheat is officially estimated at 6.4 million hectares in 2020, slightly below average due to unfavourable weather conditions between September and October 2019 that hampered planting operations.

Record maize shipments forecast from Ukraine in the 2019/20 marketing year

The 2019 subregional cereal output is estimated at 204 million tonnes, a record high that reflects above-average outputs of wheat, maize and barley. In **the Russian Federation**, the 2019 wheat production, which accounts on average for 70 percent of the total grain output in the subregion, is officially estimated at 74.3 million tonnes, 5 percent above the average level due to large plantings. Following the bumper domestic output and sustained by overall competitive prices, exports of wheat from the Russian Federation are forecast at 33.5 million tonnes in the 2019/20 marketing year (July/June), about 10 percent above the average. In mid-January, the Russian Ministry of Agriculture announced the possible introduction of export quotas on wheat, rye, barley, oats and maize until June 2020, in order to curb further increases of domestic wheat prices. The quotas, however, exclude restrictions on exports to members of the Eurasian Economic Union.

In **Ukraine**, the 2019 wheat output is officially estimated at an above-average level of 28.3 million tonnes and maize production is officially estimated at a record level of 35.8 million tonnes, driven by an increase in the planted area. Amid this ample supply situation, exports of wheat are forecast at an all-time high of 19.5 million tonnes in the 2019/20 marketing year (July/June), while maize exports are expected to reach a new record of 30 million tonnes.

Export and domestic prices of wheat increased but remained lower than a year before, amid abundant supplies

In **the Russian Federation** and **Ukraine**, export prices of milling wheat increased between October 2019 and January 2020 due to robust export demand and spillover effects from the international market. In February, prices stabilized and were about 8 percent lower on a yearly basis due to the ample domestic supplies. In the domestic market, wholesale prices of wheat grain and wheat flour rose seasonally between September 2019 and February 2020 in both countries, but remained below their values a year earlier on account of good domestic availabilities.

OCEANIA

Wheat production in Australia estimated at a well below-average level in 2019

With the wheat crop recently harvested in Australia, the 2019 production is officially estimated at 15.2 million tonnes, 35 percent below the five-year average. The exceptionally low output mainly reflects reduced yields, driven by severe rainfall deficits, notably in the main producing states of New South Wales and Queensland. Barley production in 2019, despite a slight year on year increase, also remained below average and is estimated at 8.9 million tonnes.

Planting of the 2020 summer cereal crops was completed in January and the area sown is estimated at a well below-average level. Sorghum plantings, the main summer cereal crop, is officially estimated at 143 000 hectares, with a 70 percent yearly decline, while sowings of maize are estimated at record low 29 800 hectares. These reductions are the result of significant rainfall shortages in the main cereal-producing states of Queensland and New South Wales. Improved rainfall in January and February benefited early crop growth, but they were too late to allow additional plantings of summer crops. As weather forecasts for the March-May 2020 period indicate a higher probability of below-average rainfall amounts in the main cropping areas the production of the 2020 summer season crops is forecast at a below-average level.

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	*35.2*	*33.0*	*36.2*	*38.6*	*36.2*	*35.9*
Coarse grains	*28.4*	*27.8*	*28.7*	*29.5*	*28.7*	*26.9*
Rice	*34.6*	*34.2*	*34.1*	*34.5*	*35.6*	*35.0*
Total cereals	*31.5*	*30.5*	*31.8*	*33.0*	*32.1*	*30.9*
Ratio of major grain exporters' supplies to market requirements (%) [1]	*122.5*	*124.7*	*123.6*	*122.8*	*116.9*	*118.2*
Ratio of major exporters' stocks to their total disappearance (%) [2]						
Wheat	*19.1*	*18.0*	*19.8*	*21.0*	*17.8*	*16.2*
Coarse grains	*15.0*	*13.4*	*14.7*	*15.7*	*16.0*	*15.4*
Rice	*20.8*	*19.7*	*18.9*	*18.1*	*22.5*	*24.5*
Total cereals	*18.3*	*17.0*	*17.8*	*18.2*	*18.8*	*18.7*

	Annual trend growth rate 2009-2018	Change from previous year 2015	2016	2017	2018	2019
Changes in world cereal production (%)	*1.8*	*-0.9*	*3.1*	*1.4*	*-1.8*	*2.3*
Changes in cereal production in the LIFDCs (%)	*2.7*	*-3.4*	*4.1*	*3.3*	*2.4*	*1.0*
Changes in cereal production in the LIFDCs excluding India (%)	*2.6*	*-1.6*	*3.0*	*0.4*	*3.3*	*1.1*

	2017	2018	2019	2020*	Change 2020* over 2019*
Selected cereal price indices[3]					
Wheat	*133.4*	*148.5*	*142.9*	*150.2*	*-2.6%*
Maize	*146.3*	*155.9*	*161.2*	*161.7*	*1.7%*
Rice	*206.4*	*224.4*	*223.5*	*226.5*	*2.0%*

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-February average.

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

	2015	2016	2017	2018	2019 estimate	2020 forecast
TOTAL CEREALS	***771.0***	***798.9***	***845.3***	***886.7***	***872.7***	***865.7***
Wheat	***228.7***	***243.1***	***267.2***	***289.0***	***275.3***	***277.2***
held by:						
- main exporters[2]	*70.7*	*70.4*	*79.9*	*84.3*	*70.1*	*65.3*
- others	*158.0*	*172.7*	*187.3*	*204.7*	*205.2*	*211.9*
Coarse grains	***369.4***	***384.6***	***405.6***	***422.0***	***414.3***	***406.3***
held by:						
- main exporters[2]	*115.6*	*106.4*	*119.4*	*130.0*	*131.4*	*131.1*
- others	*253.8*	*278.2*	*286.2*	*292.0*	*282.9*	*275.2*
Rice (milled basis)	***172.9***	***171.3***	***172.5***	***175.7***	***183.0***	***182.2***
held by:						
- main exporters[2]	*43.7*	*34.5*	*33.2*	*32.3*	*39.5*	*43.2*
- others	*129.2*	*136.8*	*139.3*	*143.4*	*143.5*	*139.0*
Developed countries	***173.0***	***170.7***	***196.4***	***198.0***	***188.5***	***184.7***
Australia	*8.2*	*7.2*	*9.5*	*7.3*	*7.7*	*7.4*
Canada	*10.6*	*10.0*	*12.5*	*11.1*	*9.4*	*10.2*
European Union*	*43.5*	*40.8*	*35.2*	*45.3*	*44.6*	*52.9*
Japan	*7.1*	*7.3*	*6.6*	*6.7*	*6.5*	*6.5*
Russian Federation	*13.3*	*11.9*	*20.2*	*22.9*	*13.5*	*11.8*
South Africa	*3.2*	*3.7*	*1.8*	*5.1*	*3.6*	*2.6*
Ukraine	*13.1*	*9.7*	*8.0*	*7.6*	*6.8*	*6.1*
United States of America	*69.0*	*76.1*	*95.8*	*88.8*	*91.3*	*78.1*
Developing countries	***597.9***	***628.2***	***648.9***	***688.7***	***684.2***	***681.0***
Asia	***494.4***	***528.0***	***548.8***	***568.5***	***567.6***	***570.9***
China (Mainland)	*332.9*	*379.4*	*411.1*	*426.8*	*425.6*	*424.0*
India	*48.7*	*42.3*	*34.6*	*42.1*	*50.8*	*56.0*
Indonesia	*9.9*	*9.6*	*8.9*	*10.0*	*10.4*	*9.6*
Iran (Islamic Republic of)	*9.5*	*9.9*	*11.6*	*10.5*	*9.1*	*8.7*
Korea, Republic of	*4.6*	*4.9*	*4.5*	*4.2*	*3.2*	*3.2*
Pakistan	*7.0*	*5.8*	*5.8*	*5.1*	*3.4*	*2.4*
Philippines	*4.2*	*4.0*	*3.7*	*4.1*	*4.8*	*4.9*
Syrian Arab Republic	*2.0*	*1.5*	*2.0*	*1.9*	*1.4*	*2.0*
Turkey	*7.4*	*7.4*	*6.0*	*7.1*	*6.7*	*6.7*
Africa	***54.5***	***56.4***	***54.6***	***61.0***	***61.6***	***56.6***
Algeria	*5.0*	*5.7*	*5.6*	*5.3*	*6.6*	*6.2*
Egypt	*6.8*	*7.7*	*7.4*	*6.8*	*5.6*	*5.9*
Ethiopia	*3.1*	*4.2*	*4.8*	*5.6*	*6.3*	*6.5*
Morocco	*5.4*	*8.4*	*5.9*	*6.6*	*7.1*	*5.7*
Nigeria	*4.3*	*2.9*	*2.5*	*2.9*	*3.8*	*3.5*
Tunisia	*1.2*	*1.0*	*1.0*	*1.1*	*1.0*	*1.3*
Central America	***7.6***	***9.0***	***10.9***	***11.5***	***10.7***	***9.7***
Mexico	*3.6*	*4.6*	*6.5*	*7.6*	*7.5*	*6.9*
South America	***41.0***	***34.3***	***34.2***	***47.3***	***43.9***	***43.5***
Argentina	*11.6*	*7.7*	*7.4*	*12.4*	*12.9*	*12.5*
Brazil	*17.5*	*14.2*	*12.7*	*19.9*	*16.8*	*18.5*

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.

*EU27 and the United Kingdom.

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						
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
2019 - September	200	200	228	157	145	149
2019 - October	212	213	229	168	157	164
2019 - November	220	225	198	167	167	162
2019 - December	225	238	203	168	173	165
2020 - January	237	249	226	172	185	167
2020 - February	230	240	240	170	179	165

Sources: International Grains Council and USDA.

[1] Delivered United States f.o.b. Gulf.

[2] Delivered United States Gulf.

[3] Up River f.o.b.

Table A4a. Estimated cereal import requirements of Low-Income Food-Deficit 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		***28 450.5***	***1 044.7***	***29 495.2***	***27 438.5***
East Africa		***11 474.2***	***733.0***	***12 207.2***	***11 034.4***
Burundi	Jan/Dec	*170.1*	*16.0*	*186.1*	*180.1*
Comoros	Jan/Dec	*61.0*	*0.0*	*61.0*	*58.0*
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*	*1 830.0*
Kenya	Oct/Sept	*3 590.0*	*85.0*	*3 675.0*	*3 009.0*
Rwanda	Jan/Dec	*325.0*	*0.0*	*325.0*	*190.0*
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		***3 125.0***	***14.8***	***3 139.8***	***2 769.8***
Lesotho	Apr/Mar	*185.3*	*0.6*	*185.9*	*164.5*
Madagascar	Apr/Mar	*1 077.3*	*8.0*	*1 085.3*	*779.9*
Malawi	Apr/Mar	*211.0*	*2.0*	*213.0*	*187.0*
Mozambique	Apr/Mar	*1 356.0*	*1.0*	*1 357.0*	*1 368.7*
Zimbabwe	Apr/Mar	*295.4*	*3.2*	*298.6*	*269.7*
West Africa		***11 427.0***	***133.9***	***11 560.9***	***10 975.9***
Coastal Countries		***6 525.6***	***44.5***	***6 570.1***	***6 372.5***
Benin	Jan/Dec	*606.0*	*6.0*	*612.0*	*517.0*
Côte d'Ivoire	Jan/Dec	*2 250.0*	*5.5*	*2 255.5*	*2 275.5*
Ghana	Jan/Dec	*1 447.6*	*5.0*	*1 452.6*	*1 595.0*
Guinea	Jan/Dec	*1 102.0*	*5.5*	*1 107.5*	*857.5*
Liberia	Jan/Dec	*475.0*	*12.0*	*487.0*	*507.0*
Sierra Leone	Jan/Dec	*346.0*	*10.0*	*356.0*	*325.0*
Togo	Jan/Dec	*299.0*	*0.5*	*299.5*	*295.5*
Sahelian Countries		***4 901.4***	***89.4***	***4 990.8***	***4 603.4***
Burkina Faso	Nov/Oct	*648.0*	*10.0*	*658.0*	*724.0*
Chad	Nov/Oct	*131.0*	*38.6*	*169.6*	*189.6*
Gambia	Nov/Oct	*266.4*	*1.5*	*267.9*	*202.5*
Guinea-Bissau	Nov/Oct	*138.0*	*6.3*	*144.3*	*134.3*
Mali	Nov/Oct	*451.2*	*0.0*	*451.2*	*461.2*
Mauritania	Nov/Oct	*531.8*	*13.0*	*544.8*	*543.8*
Niger	Nov/Oct	*490.0*	*18.0*	*508.0*	*618.0*
Senegal	Nov/Oct	*2 245.0*	*2.0*	*2 247.0*	*1 730.0*
Central Africa		***2 424.3***	***163.0***	***2 587.3***	***2 658.4***
Cameroon	Jan/Dec	*1 130.0*	*10.0*	*1 140.0*	*1 340.0*
Congo	Jan/Dec	*452.0*	*2.0*	*454.0*	*336.0*
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*	*16.4*

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 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		***43 878.0***	***956.6***	***44 834.6***	***40 874.1***
Cis in Asia		***4 833.9***	***0.1***	***4 834.0***	***4 919.3***
Kyrgyzstan	Jul/Jun	*609.5*	*0.1*	*609.6*	*612.0*
Tajikistan	Jul/Jun	*1 032.5*	*0.0*	*1 032.5*	*1 232.0*
Uzbekistan	Jul/Jun	*3 191.9*	*0.0*	*3 191.9*	*3 075.3*
Far East		***29 242.1***	***226.5***	***29 468.6***	***24 532.8***
Bangladesh	Jul/Jun	*10 771.9*	*101.5*	*10 873.4*	*7 666.0*
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*	*302.7*
Nepal	Jul/Jun	*1 327.7*	*2.0*	*1 329.7*	*1 165.8*
Viet Nam	Jul/Jun	*14 730.7*	*0.0*	*14 730.7*	*13 813.3*
Near East		***9 802.0***	***730.0***	***10 532.0***	***11 422.0***
Afghanistan	Jul/Jun	*2 782.0*	*100.0*	*2 882.0*	*3 312.0*
Syrian Arab Republic	Jul/Jun	*3 040.0*	*290.0*	*3 330.0*	*3 705.0*
Yemen	Jan/Dec	*3 980.0*	*340.0*	*4 320.0*	*4 405.0*
CENTRAL AMERICA AND THE CARIBBEAN		***1 391.7***	***9.1***	***1 400.8***	***1 393.7***
Haiti	Jul/Jun	*766.0*	*9.1*	*775.1*	*795.0*
Nicaragua	Jul/Jun	*625.7*	*0.0*	*625.7*	*598.7*
OCEANIA		***63.8***	***0.0***	***63.8***	***62.0***
Solomon Islands	Jan/Dec	*63.8*	*0.0*	*63.8*	*62.0*
TOTAL		***73 784.0***	***2 010.4***	***75 794.4***	***69 768.3***

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		***14 391.1***	***706.1***	***15 097.2***	***17 437.6***
Eastern Africa		***7 123.0***	***601.0***	***7 724.0***	***8 440.0***
Kenya	Oct/Sep	*2 929.0*	*80.0*	*3 009.0*	*3 670.0*
Somalia	Aug/Jul	*645.0*	*190.0*	*835.0*	*865.0*
South Sudan	Nov/Oct	*590.0*	*90.0*	*680.0*	*680.0*
Sudan	Nov/Oct	*2 005.0*	*230.0*	*2 235.0*	*2 240.0*
United Republic of Tanzania	Jun/May	*954.0*	*11.0*	*965.0*	*985.0*
Southern Africa		***2 755.1***	***14.7***	***2 769.8***	***3 513.7***
Lesotho	Apr/Mar	*163.9*	*0.6*	*164.5*	*182.6*
Madagascar	Apr/Mar	*771.9*	*8.0*	*779.9*	*821.0*
Malawi	Apr/Mar	*185.0*	*2.0*	*187.0*	*197.0*
Mozambique	Apr/Mar	*1 367.7*	*1.0*	*1 368.7*	*1 400.0*
Zimbabwe	Apr/Mar	*266.6*	*3.1*	*269.7*	*913.1*
West Africa		***4 513.0***	***90.4***	***4 603.4***	***5 483.9***
Sahelian Countries		***4 513.0***	***90.4***	***4 603.4***	***5 483.9***
Burkina Faso	Nov/Oct	*713.0*	*11.0*	*724.0*	*752.0*
Chad	Nov/Oct	*151.0*	*38.6*	*189.6*	*201.6*
Gambia	Nov/Oct	*201.0*	*1.5*	*202.5*	*288.0*
Guinea-Bissau	Nov/Oct	*128.0*	*6.3*	*134.3*	*174.3*
Mali	Nov/Oct	*461.2*	*0.0*	*461.2*	*511.2*
Mauritania	Nov/Oct	*530.8*	*13.0*	*543.8*	*545.8*
Niger	Nov/Oct	*600.0*	*18.0*	*618.0*	*726.0*
Senegal	Nov/Oct	*1 728.0*	*2.0*	*1 730.0*	*2 285.0*
ASIA		***34 399.3***	***484.8***	***34 884.1***	***19 341.4***
CIS in Asia		***4 919.2***	***0.1***	***4 919.3***	***4 819.6***
Kyrgyzstan	Jul/Jun	*611.9*	*0.1*	*612.0*	*637.6*
Tajikistan	Jul/Jun	*1 232.0*	*0.0*	*1 232.0*	*1 235.0*
Uzbekistan	Jul/Jun	*3 075.3*	*0.0*	*3 075.3*	*2 947.0*
Far East		***22 853.1***	***94.7***	***22 947.8***	***9 419.8***
Bangladesh	Jul/Jun	*7 573.3*	*92.7*	*7 666.0*	*7 692.0*
India	Apr/Mar	*302.7*	*0.0*	*302.7*	*486.0*
Nepal	Jul/Jun	*1 163.8*	*2.0*	*1 165.8*	*1 080.8*
Vietnam	Jul/Jun	*13 813.3*	*0.0*	*13 813.3*	*161.0*
Near East		***6 627.0***	***390.0***	***7 017.0***	***5 102.0***
Afghanistan	Jul/Jun	*3 212.0*	*100.0*	*3 312.0*	*2 332.0*
Syrian Arab Republic	Jul/Jun	*3 415.0*	*290.0*	*3 705.0*	*2 770.0*
CENTRAL AMERICA AND THE CARIBBEAN		***1 383.6***	***10.1***	***1 393.7***	***1 495.1***
Haiti	Jul/Jun	*784.9*	*10.1*	*795.0*	*850.1*
Nicaragua	Jul/Jun	*598.7*	*0.0*	*598.7*	*645.0*
TOTAL		***50 174.0***	***1 201.0***	***51 375.0***	***38 274.1***

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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This report is based on information available as of **February 2020.**

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