Food and Agriculture Organization of the United Nations

#1
MARCH 2019

CROP PROSPECTS and FOOD SITUATION

Quarterly Global Report

COUNTRIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD

FAO assesses that globally 41 countries, of which 31 are in Africa, continue to be in need of external assistance for food. Conflict remains the main driver of high levels of severe food insecurity. Weather-induced production declines and economic instability have also adversely impacted on food availability and access.

Asia	-0.1
Africa	+1.2
Central America and the Caribbean	-3.6
South America	-8.9
North America	+0.5
Europe	-5.3
Oceania	-12.7
World	**-1.9**

WORLD

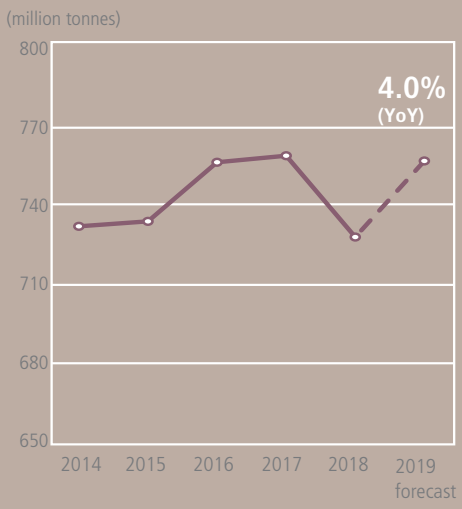
Cereal production 2018 over 2017
(rice in milled terms)

-1.9%

WORLD

Wheat production 2019 over 2018

+4.0%



REGIONAL HIGHLIGHTS

AFRICA Mostly reflecting beneficial weather conditions, production upturns were estimated in East, West and North Africa in 2018, while rainfall deficits cut outputs in Southern Africa. Continued poor rains have also affected the development of the 2019 crops in parts of Southern Africa, while conflicts in several other countries continue to curtail production prospects this year.

ASIA Cereal production in 2018 in Far East Asia is estimated at a record high. By contrast, outputs fell in the Near East and CIS Asia on account of rainfall deficits and the impact of conflicts in parts of the Near East. Production prospects for the soon-to-be harvested 2019 wheat crop are generally favourable across the region.

LATIN AMERICA AND THE CARIBBEAN Cereal production is expected to increase in South America in 2019, recovering from last year's reduced output. In Central America and the Caribbean, despite localized dry weather conditions, cereal outputs in 2018 were close to the average. The 2019 wheat crop in Mexico is likely to remain below average.

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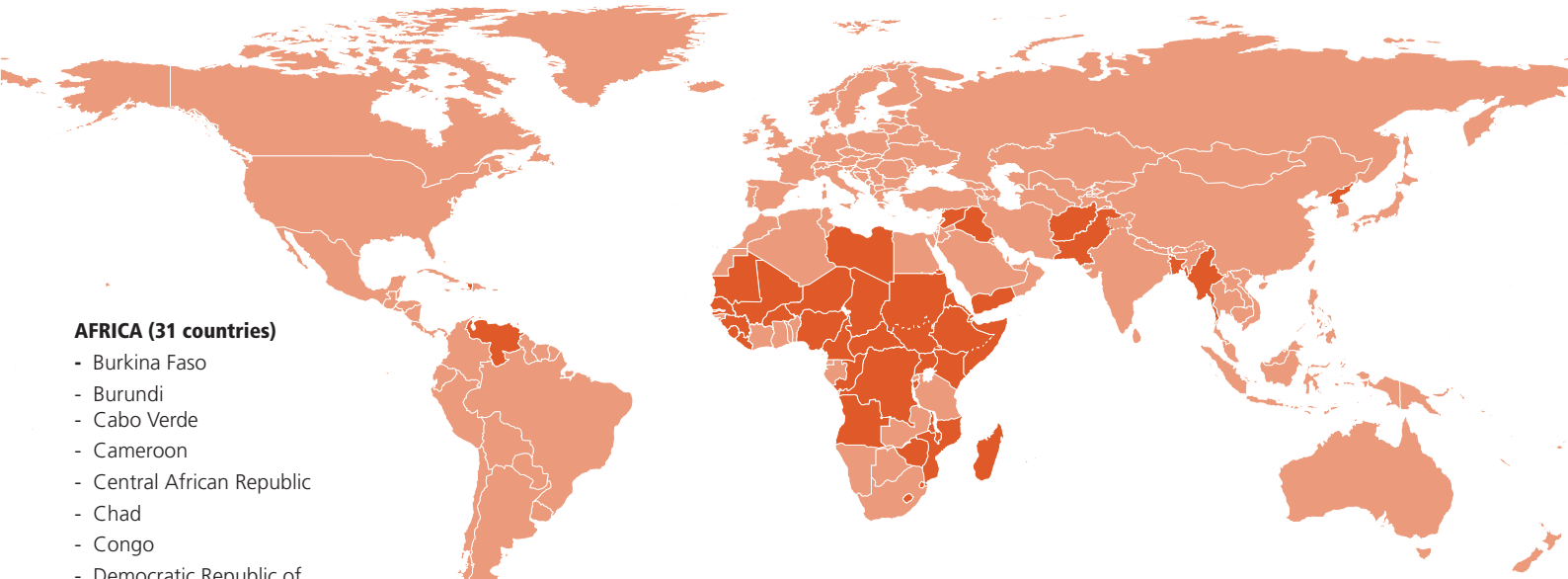
COUNTRIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD



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

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

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

✚ *New Entry*

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

AFRICA (31 COUNTRIES)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/ SUPPLIES

Central African Republic

Conflict, displacements and food supply constraints

- The Internally Displaced People (IDP) caseload in December 2018 was estimated at about 641 000, a slight decrease since October 2018. About 1.9 million people (31 percent of the total population) are estimated to be in need of urgent assistance for food due to widespread insecurity, several consecutive years of reduced agricultural production and poorly functioning markets, especially for displaced persons, host families and returnees.
- Violent clashes and inter-communal tensions persist, fueling the massive displacements, with severe negative impacts on food security.

WIDESPREAD LACK OF ACCESS

Burundi

Civil insecurity, economic downturn and localized crop production shortfalls

- Disruptions to markets, farming activities and livelihoods, coupled with limited humanitarian assistance and declining food import capacity, continue to seriously affect food security conditions. The areas most affected by food insecurity are westernmost parts of Makama, Rutana, Ruygi and Cankuzo provinces bordering the United Republic of Tanzania.
- About 1.72 million people are estimated to be severely food insecure.

Chad

Civil insecurity, internal displacements and dry spells in localized areas

- According to the "Cadre Harmonisé", about 519 000 people are projected to be food insecure during June-August 2019.
- Nearly 165 300 people remained internally displaced, almost entirely on account of the insurgency in the northeast and, in addition, the country hosts about 456 000 refugees.

Democratic Republic of the Congo

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

- The total IDP caseload is estimated at 4.5 million. In addition, the country hosts 172 000 refugees from the Central African Republic, 96 000 from South Sudan and 43 000 from Burundi.
- An outbreak of the Ebola Virus Disease (EVD) has resulted in the loss of 548 lives. In addition, the EVD outbreak has disrupted market functions, adversely impacting households access to food in the affected areas.

Djibouti

Impact of consecutive unfavourable rainy seasons on pastoral livelihoods

- About 197 000 people are severely food insecure, mainly concentrated in pastoral areas north of

Obock City and in southeastern areas, which were affected by consecutive unfavourable rainy seasons.

Eritrea

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

Ethiopia

Impact of drought on local livelihood systems

- An estimated 7.95 million people were affected by food insecurity, mainly in southeastern agro-pastoral areas, due to the lingering effects of severe drought conditions between mid-2016 and late 2017.
- About 1 million people have been displaced in 2018 and early 2019 in Somali, Oromia, SNNP and Benishangul Gumuz regions, as result of inter-communal conflict.

Malawi

Reduced cereal supplies and higher prices

- The number of people assessed to be food insecure in the period from October 2018 to March 2019 is estimated at 3.3 million, double the level compared to the corresponding period in 2017/18.
- The higher number is mostly a result of the production decline in 2018, while higher prices are also restraining access to food.

Niger

Civil conflict and production shortfalls

- According to the latest "Cadre Harmonisé" analysis, about 1 222 000 people in the June-August 2019 period are expected to be in need of immediate assistance.
- Due to the civil conflict in neighbouring countries, more than 158 000 people are internally displaced, about 175 000 reside as refugees, of which 119 000 are from Nigeria and 56 000 are from Mali.

Nigeria

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

- According to the "Cadre Harmonisé" analysis, about 4.5 million people are projected to be in need of assistance between June and August 2019.
- Due to persisting civil insecurity, more than 2 million people are internally displaced. The areas inaccessible to humanitarian interventions are facing the worse food security conditions.

South Sudan

Conflict, civil insecurity and severe economic downturn

- Despite sustained humanitarian assistance, food insecurity still affects large segments of the population. The number of severely food insecure people for the February-April 2019 period is estimated at 6.45 million. The significantly high number is a result of persisting insecurity, tight supplies, economic constraints, trade disruptions and high food prices.

Zimbabwe

Severe food access constraints

- Nearly 3 million people were assessed to be food insecure at the start of 2019, up from a preliminary forecast of 2.4 million people. The main driver of the deepening food insecurity situation is the significant spike in staple food prices, that has occured since October 2018, while the poor economic environment has diminished income-generating opportunities, further aggravating conditions.

SEVERE LOCALIZED FOOD INSECURITY

Burkina Faso

Civil insecurity in the north

- According to the last "Cadre Harmonisé" analysis, the number of people in need of food assistance is projected to reach 676 000 for the June-August 2019, mainly due to localized production shortfalls.
- An estimated 25 000 refugees, most of them from Mali, are living in the country, while 40 000 inviduals are internally displaced.

Cabo Verde

Poor performance of the 2018 agro-pastoral cropping season

- According to the last "Cadre Harmonisé" analysis, about 11 000 people (approximately 2 percent of the total population) are projected to be in Phase 3: "Crisis" and above in the June-August 2019 period.

Cameroon

Influx of refugees putting strain on host communities and displacements

- The number of refugees from the Central African Republic was estimated at 276 000 at the end of January 2019.
- Persisting civil strife since October 2016 has led to the displacement of about 432 000 people in the northwest and southwest Anglophone regions.

Congo

Influx of refugees straining the already limited resources of host communities

- An estimated 16 000 refugees from the Democratic Republic of Congo are sheltering in the country.

Eswatini

Localized production shortfalls

- An estimated 247 000 people are in need of humanitarian assistance until March 2019, mostly located in Lubombo and Shiselwenti, on account of production shortfalls in 2018.

Guinea

Localized production shortfalls

- About 178 000 people are projected to be in need of food assistance during June-August 2019.

Kenya

Consecutive unfavourable rainy seasons

- About 0.7 million people are severely food insecure, mainly located in northern and eastern areas as a result of the lingering effects of the severe drought conditions between mid-2016 and late 2017.

Lesotho

Reduced cereal production

- Approximately 273 000 people were estimated to be affected by food insecurity between December 2018 and February 2019, higher than the previous year's level reflecting the decline in the 2018 cereal output.
- Conditions are foreseen to intensify later in the year, based on poor production prospects for the 2019 crop.

Liberia

Localized production shortfalls and influx of refugees

- About 39 000 people are estimated to be in need of food assistance.

Libya

Civil insecurity

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

Madagascar

Sharply reduced cereal harvest in southern regions

- The number of people affected by food insecurity is estimated at 1.3 million in southern regions, due to unfavourable weather conditions that kept cereal production in 2018 at below-average levels. High food prices are impinging on food access, further aggravating food insecurity.

Mali

Persistent residual insecurity in the centre and north of the country (affecting livelihoods and displacing people)

- The country is hosting approximately 27 000 refugees, while 120 000 internally displaced people and 69 000 returnees also mainly depend on humanitarian assistance.
- About 416 000 people are projected to be in need of food assistance between June to August 2019, according to the last "Cadre Harmonisé" analysis, as a result of the persisting civil conflict.

Mauritania

Low cereal production

- According to the November 2018 "Cadre Harmonisé" analysis, about 576 000 people are assessed to be in need of assistance from June to August 2019, given their below-average cereal supplies and reduced purchasing power.
- About 59 000 refugees, mostly from Mali, reside in the country.

Mozambique

Localized production shortfalls

- Dry conditions caused production shortfalls in southern provinces and some areas of the centre. As a result, nearly 2 million people are estimated to be food insecure between January and March 2019.

Senegal

Rainfall deficit in some localized areas

- According to the last "Cadre Harmonisé" analysis, about 376 000 people are projected to be in need of assistance between June and August 2019.
- In addition, an estimated 15 000 refugees, mostly from Mauritania, are residing in the country.

Sierra Leone

High food prices

- About 146 000 people are projected to be severely food insecure during June to August 2019.

Somalia

Conflict, civil insecurity and widespread drought conditions

- About 1.55 million people are estimated to be in need of emergency assistance, mainly IDPs and agro-pastoral communities affected by poor October-December 2018 "deyr" rains and the lingering effects of the severe drought conditions between mid-2016 and late 2017.

Sudan

Conflict, civil insecurity and soaring food prices

- The number of severely food insecure people for the period May-July 2018 is estimated at 5.76 million, mainly IDPs and host communities in conflict affected areas. Vulnerable households affected by soaring food prices are also of concern.

Uganda

Localized crop production shortfalls and refugee influx

- In the northeastern Karamoja Region, 2018 crop production was well below average and households depleted their food stocks from own production in late 2018, thus facing an early start of the next lean season.
- About 795 000 refugees from South Sudan and about 313 000 refugees from the Democratic Republic of the Congo are hosted in camps and depend on humanitarian assistance.

ASIA (8 COUNTRIES)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/SUPPLIES

Syrian Arab Republic

Civil conflict and decreased crop production

- About 5.5 million Syrians are food insecure and require some form of food assistance. In addition, between 500 000 and 800 000 people may be food insecure in Idleb Governorate.
- 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

Localized production shortfalls for 2018 main crop and economic downturn

- The 2018 main season cereal output is officially estimated to have decreased compared with last year's below-average level due to high temperatures and poor rains between July and August. As a result, most households are anticipated to continue to experience borderline or poor food consumption rates.

Yemen

Conflict, poverty and high food and fuel prices

- In the December 2018-January 2019 period, some 15.9 million people (corresponding to 53 percent of the population) faced severe acute food insecurity (IPC Phase 3: "Crisis" and above), including 63 500 in Phase 5: "Catastrophe".

SEVERE LOCALIZED FOOD INSECURITY

Afghanistan

Conflict, population displacement and drought-induced decline in production

- As of September 2018, some 9.8 million people (almost 44 percent of the rural population) were estimated to be in the IPC Phase 3: "Crisis" and IPC Phase 4: "Emergency". Continuing conflict, natural hazards and limited economic opportunities have increased the vulnerability of the poorest households, including subsistence farmers.

Bangladesh

Influx of refugees putting strain on host communities

- According to the latest figures from the International Organization for Migration (IOM), as of January 2019, about 925 000 Rohingya refugees from Myanmar were sheltering in Bangladesh,

mainly in the Cox's Bazar District. Most refugees fled to Bangladesh following the resurgence of violence in Rakhine State in Myanmar in late August 2017.

Iraq

Civil conflict

- An estimated 2.6 million people remained internally displaced.
- About 800 000 people were in need of food security assistance in 2017.

Myanmar

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

- According to the latest data from the IOM (October 2018) more than 700 000 Rohingya refugees fled to Bangladesh, following the resurgence of violence in Rakhine State in late August 2017. In addition, 241 000 people were internally displaced in Kachin, Kayin, Shan and Rakhine states due to ongoing conflict. These IDPs reside in temporary settlements, where they suffer from high levels of food insecurity and require humanitarian assistance to cover their basic needs.

Pakistan

Population displacement and localized cereal production shortfalls

- In Tharparkar District and the surrounding areas of Sindh Province, the drought-affected cereal production in 2018 and significant losses of livestock have aggravated food insecurity and caused acute malnutrition.
- The country hosts close to 1.4 million registered and unregistered Afghan refugees. Most of these people are in need of humanitarian assistance and have strained on the already limited resources of the host communities.

LATIN AMERICA AND THE CARIBBEAN (2 COUNTRIES)

SEVERE LOCALIZED FOOD INSECURITY

Haiti

Impact of prolonged dry spells and high inflationary pressure

- About 2.6 million people are forecast to be in need of assistance between March and June 2019, due to the adverse impact of dry spells on cereal production (especially maize), coupled with high prices of imported food, including rice, the staple food.

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 3.4 million persons. They have settled in neighbouring countries in South America and the Caribbean. Humanitarian needs to assist refugees and migrants in host countries are significant.
- In the country, on account of the hyperinflation, purchasing power has been severely eroded, resulting in acute constraints on households' access to food. In addition, cereal production in 2018 was estimated at a well below-average level, mostly reflecting the lack of agricultural inputs.

Terminology

Countries requiring external assistance for food are expected to lack the resources to deal with reported critical problems of food insecurity. Food crises are nearly always due to a combination of factors but for the purpose of response planning, it is important to establish whether the nature of food crises is **predominantly** related to lack of food availability, limited access to food, or severe but localized problems. Accordingly, the list of countries requiring external assistance is organized into three broad, not mutually exclusive, categories:

- Countries facing an **exceptional shortfall in aggregate food production/supplies** as a result of crop failure, natural disasters, interruption of imports, disruption of distribution, excessive post-harvest losses, or other supply bottlenecks.
- Countries with **widespread lack of access**, where a majority of the population is considered to be unable to procure food from local markets, due to very low incomes, exceptionally high food prices, or the inability to circulate within the country.
- Countries with **severe localized food insecurity** due to the influx of refugees, a concentration of internally displaced persons, or areas with combinations of crop failure and deep poverty.

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

****** 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 in 2018/19

FAO's latest estimate for **world cereal production in 2018** stands at 2 609 million tonnes (including rice in milled terms), down 2.8 million tonnes from the previous estimate of February[1]. The downward revision rests almost entirely on a lower estimate for the United States of America's maize output and reinforces an overall year-on-year decrease in global cereal production, currently estimated at 1.9 percent. Global rice production in 2018 is forecast to reach 515 million tonnes, up 1.6 percent from 2017 and representing an all-time high. The latest forecast is up 800 000 tonnes from the estimate made in February, with much of the upward adjustment stemming from revisions to historical production estimates in Nigeria. Rice production was also raised for Colombia and the United States of America, mostly on higher reported yields.

Following this month's downward revision of the 2018 world cereal production, the forecast of **global cereal utilization** in 2018/19 has also been lowered to 2 652 million tonnes, with most of the revision driven by expected cuts in the feed use of major coarse grains, especially in the United States of America. However, world utilization of coarse grains in 2018/19 is still set at 2.0 percent above the previous season's level, while global utilization of rice is seen to expand by 0.9 percent and that of wheat by 0.5 percent.

FAO's forecast of **global cereal stocks** for crop years ending in 2019 has been lowered since February to 766.5 million tonnes. At these forecast

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

	2016	2017	2018 estimate	Change: 2018 over 2017 (%)
Asia	***1 132.3***	***1 155.9***	***1 154.6***	***-0.1***
Far East	*1 028.8*	*1 053.4*	*1 056.1*	*0.3*
Near East	*66.6*	*68.0*	*64.6*	*-5.0*
CIS in Asia	*37.0*	*34.6*	*34.0*	*-1.8*
Africa	***170.0***	***189.8***	***192.1***	***1.2***
North Africa	*31.1*	*36.3*	*38.6*	*6.5*
West Africa	*56.5*	*60.6*	*63.6*	*4.9*
Central Africa	*5.0*	*4.5*	*4.6*	*0.8*
East Africa	*52.7*	*50.0*	*54.4*	*8.7*
Southern Africa	*24.7*	*38.4*	*30.9*	*-19.4*
Central America and the Caribbean	***45.2***	***44.1***	***42.6***	***-3.5***
South America	***173.8***	***215.4***	***196.3***	***-8.9***
North America	***531.8***	***494.2***	***496.7***	***0.5***
Europe	***508.2***	***524.0***	***496.2***	***-5.3***
European Union	*299.4*	*310.1*	*291.5*	*-6.0*
CIS in Europe	*192.9*	*202.4*	*189.3*	*-6.5*
Oceania	***51.4***	***34.5***	***30.1***	***-12.7***
World	***2 612.6***	***2 657.8***	***2 608.6***	***-1.9***
Developing countries	*1 464.7*	*1 542.2*	*1 527.9*	*-0.9*
Developed countries	*1 147.9*	*1 115.6*	*1 080.7*	*-3.1*
- wheat	*756.9*	*759.4*	*728.3*	*-4.1*
- coarse grains	*1 353.7*	*1 391.6*	*1 365.4*	*-1.9*
- rice (milled)	*502.0*	*506.8*	*514.9*	*1.6*

Note: Totals and percentage change computed from unrounded data.
[1] Includes rice in milled terms.

[1] Based on the FAO Cereal Supply and Demand Brief released on 7 February 2019.

levels, the ratio of global cereal carryovers to utilization (stock-to-use) in 2018/19 would fall from 30.5 percent in 2017/18 to 28.3 percent in 2018/19, which, nevertheless, still represents a relatively high level. The latest downward adjustment mostly concerns the inventories of wheat and maize, while forecasts for end-of-season stocks of barley and rice have been raised since the previous report. Larger than earlier anticipated drawdowns of maize stocks in the Southern Hemisphere countries and the United States of America are also seen to push down total coarse grains stocks in 2018/19 by almost 11 percent. Following further downward revisions to wheat stocks in several *Asian* countries and Argentina, total wheat inventories are expected to decline by almost 4 percent from their opening levels. By contrast, global rice stocks are set to reach a new record high, up 3 percent from their opening level, with India and China (Mainland) leading the season's stock expansion.

FAO's forecast for **world trade in cereals** in 2018/19 has been lowered by 2 million tonnes since last month to just over 413 tonnes. At almost 171 million tonnes, the forecast of global wheat trade has been trimmed by around 800 000 tonnes since last month, largely on account of lower-than-earlier anticipated purchases by several *Asian* and *South American* countries. At this level, world wheat trade would be down 3.3 percent from the 2017/18 record level. Total trade in coarse grains is also seen heading to a contraction, falling by 0.7 percent from 2017/18 to around 195 million tonnes in 2018/19. The latest forecast points to a 1.1 million tonnes drop from February, as a downward adjustment to global trade in barley (reflecting further cuts in China's imports) should more than offset an expected increase in maize trade (reflecting scaling up of imports by China and the European Union). The forecast of international trade in rice in 2019 has been revised down marginally, by 200 000 tonnes, and now points to a 2.1 percent year-on-year contraction to 47 million tonnes. Deteriorating export prospects for Brazil, Argentina and Uruguay owing to expected harvest reductions account for most of this month's slight, downward trade revision.

Wheat output is seen rebounding in 2019

For the 2019 cereal crops, while the bulk of the winter wheat crop in the Northern Hemisphere is still in dormancy phase, FAO's first forecast for world wheat production in 2019 is pegged at 757 million tonnes. At this level, this year's output would be 4 percent above the level attained in 2018 but still short of the record high registered in 2017.

Most of the foreseen yearly increase in 2019 is associated with expected production gains in *Europe*. In the *European Union*, the planted area to wheat is estimated to expand by 3 percent and, under generally mild and favourable weather conditions that limited frost damage, production is projected to rise by 11 percent in 2019. Similarly, in the Russian Federation, a projected increase in total wheat plantings, in combination with beneficial weather, is anticipated to foster a 7-million-tonne increase in production, with the national harvest pegged at 79 million tonnes. Comparably favourable crop conditions were observed in Ukraine, where wheat production is foreseen to rise by 8 percent to 26.5 million tonnes. In *North America*, winter wheat sowings in the United States of America are estimated to have contracted by 4 percent reflecting excessively wet conditions at planting time and, despite a foreseen increase in spring sowings, the total area sown to wheat in 2019 is expected to be slightly lower year on year. However, assuming a small rebound in yields and an average abandonment rate, production is likely to remain close to last year's level. In Canada, a decrease in winter wheat sowings is forecast to be more than offset by an enlarged area sown to the major spring wheat crop. Given an expected year-on-year rise in yields, overall production is forecast to increase to 33 million tonnes. In *Asia*, notwithstanding delays to planting operations in India due to the late withdrawal of the monsoon rains, the area planted to wheat is estimated to be unchanged year on year, sustained by remunerative producer prices. As a result, wheat production in India is forecast at 99 million tonnes, just below the record of 2018. By contrast, in Pakistan, reduced water availability curtailed plantings and diminished yield prospects, with the

national output foreseen to decline to 24.5 million tonnes. In the Southern Hemisphere, although plantings will only commence in May, wheat production in Australia is projected to rebound from the previous year's drought-reduced level, further bolstering global prospects.

For coarse grains, harvesting of the 2019 crops in the Southern Hemisphere countries is expected to begin in the coming months, while planting operations will commence from May in the Northern Hemisphere. In *South America*, resting on larger plantings and good weather conditions, a larger 2019 maize harvest is expected to be gathered in Argentina, estimated at nearly 50 million tonnes. In Brazil, a foreseen expansion in plantings for the main season maize crop, which is anticipated to more than compensate for the smaller area sown in the first season, have lifted overall production prospects. Accordingly, the 2019 maize output is forecast to rebound to nearly 92 million tonnes. By contrast, in South Africa, persistent dry weather conditions have lowered yield prospects and had earlier curtailed plantings. Consequently, aggregate production is forecast to decline to 11 million tonnes. Rainfall deficits have also diminished production prospects in neighbouring Zimbabwe, while in Malawi, Zambia and Mozambique average to above-average maize harvests are forecast, supported by more favourable weather conditions.

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

	Average 5yrs	2017	2018 estimate	2019 forecast	Change: 2019 over 2018 (%)
European Union	*150.3*	*152.0*	*137.5*	*149.0*	*8.4*
China (Mainland)	*129.2*	*133.0*	*128.0*	*129.0*	*0.8*
India	*94.6*	*98.5*	*99.7*	*99.0*	*-0.7*
Russian Federation	*70.5*	*85.9*	*72.1*	*79.0*	*9.6*
United States of America	*54.6*	*47.4*	*51.3*	*52.0*	*1.4*
Canada	*30.2*	*30.0*	*31.8*	*33.0*	*3.9*
Pakistan	*25.8*	*26.7*	*25.5*	*24.5*	*-3.9*
Ukraine	*25.5*	*26.2*	*24.6*	*26.5*	*7.8*
Australia	*23.3*	*21.2*	*17.3*	*24.0*	*38.7*
Turkey	*20.7*	*21.5*	*20.0*	*21.0*	*5.0*
Argentina	*16.3*	*18.5*	*19.5*	*19.0*	*-2.4*
Kazakhstan	*14.1*	*14.8*	*13.9*	*14.5*	*4.0*
Iran Islamic Rep. of	*11.8*	*12.5*	*13.4*	*13.4*	*0.0*
Egypt	*9.2*	*8.8*	*8.8*	*9.0*	*2.3*
Uzbekistan	*6.6*	*6.1*	*6.0*	*6.5*	*8.3*
Other countries	*59.6*	*56.4*	*59.0*	*58.0*	*-1.7*
World	***742.3***	***759.4***	***728.3***	***757.4***	***4.0***

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)

	2016/17	2017/18 estimate	2018/19 forecast	Change: 2018/19 over 2017/18 (%)
Cereal production[1]	***478.3***	***495.7***	***502.3***	***1.3***
excluding India	*234.5*	*237.6*	*240.5*	*1.2*
Utilization	***527.8***	***530.2***	***540.5***	***1.9***
Food use	*411.5*	*420.0*	*429.2*	*2.2*
excluding India	*216.6*	*222.7*	*228.8*	*2.7*
Per caput cereal food use *(kg per year)*	*146.8*	*147.3*	*147.9*	*0.4*
excluding India	*146.4*	*147.2*	*147.8*	*0.4*
Feed	*43.6*	*46.4*	*45.6*	*-1.8*
excluding India	*27.5*	*28.7*	*27.4*	*-4.6*
End of season stocks[2]	***89.7***	***99.4***	***101.6***	***2.2***
excluding India	*55.2*	*57.6*	*55.5*	*-3.8*

[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	2017 estimate	2018 forecast	Change: 2018 over 2017 (%)
Africa *(37 countries)*	***119.3***	***126.8***	***133.1***	***5.0***
East Africa	*49.8*	*50.0*	*54.4*	*8.7*
Southern Africa	*9.9*	*11.7*	*10.6*	*-8.9*
West Africa	*54.9*	*60.6*	*63.6*	*4.9*
Central Africa	*4.6*	*4.4*	*4.5*	*0.8*
Asia *(11 countries)*	***353.1***	***367.7***	***368.1***	***0.1***
CIS in Asia	*10.7*	*10.2*	*9.6*	*-6.2*
Far East	*332.6*	*349.4*	*352.1*	*0.8*
- India	*244.1*	*258.0*	*261.8*	*1.5*
Near East	*9.8*	*8.2*	*6.5*	*-20.6*
Central America and the Caribbean *(2 countries)*	***1.1***	***1.1***	***1.1***	***-2.3***
Oceania *(2 countries)*	***0.0***	***0.0***	***0.0***	***0.0***
LIFDC *(52 countries)*	***473.5***	***495.7***	***502.3***	***1.3***

Note: Totals and percentage change computed from unrounded data.
The five-year average refers to the 2013-2017 period.
[1] Includes rice in milled terms.

Production prospects in 2019 mixed for Low-Income Food-Deficit Countries (LIFDCs)

In LIFDCs, harvesting of the 2019 cereal crops will begin from March and production prospects differ significantly across regions, mostly reflecting diverging weather conditions and the impact of conflicts.

In *Southern Africa*, erratic seasonal rainfall, which curtailed plantings and has lowered yield prospects, is likely to result in reduced 2019 cereal outputs in **Lesotho** and **Zimbabwe**. However, more beneficial rains were observed in **Madagascar**, **Malawi** and **Mozambique** and this is expected to foster average harvests. In *East*, *Central* and *West Africa*, plantings of the main 2019 cereal crops are expected to commence from March/April. Weather forecasts point to a higher probability of average to above-average rainfall in most parts of *East Africa* during the main cropping season, while in *West Africa* rains are expected to be near average. In *Central Africa*, persistent insecurity has continued to undermine agricultural productive capacities, curtailing expectations for the 2019 harvests. In *Asia*, the production outlook for the 2019 wheat crop in the *Far East* subregion is mixed. In **India**, wheat production is anticipated to be close to the previous year's record high, reflecting beneficial weather conditions and a comparably sized planted area. By contrast, in **Pakistan**, below-average irrigation water supplies and reduced precipitation between October and December 2018 are expected to result in a production decline. In the *Near East*, despite mostly favourable weather

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

conditions, the ongoing conflict and lack of inputs in **the Syrian Arab Republic** and **Yemen** continued to severely debilitate the agriculture sector, acutely diminishing prospects in 2019.

LIDFC production rises in 2018, chiefly related to production upturns in Africa

With most of the 2018 cereal crops harvested, FAO's forecast for the aggregate cereal production of LIFDCs stands at 502.3 million tonnes, which incorporates recent upward revisions to production estimates in *West* and *East Africa*. At its current level, aggregate LIFDC production in 2018 is 6.6 million tonnes (1.3 percent) higher than 2018's already above-average outturn. The bulk of the yearly increase is mainly associated with production increases in *East* and *West Africa*, while there was also a notable production upturn in India, the largest cereal producing country among LIFDCs. These year-on-year production gains more than offset output contractions in *Southern Africa*, *Asian CIS* countries and in the *Near East*.

Import requirements forecast to fall driven by lower needs in Far East Asia

FAO's estimate for cereal import requirements by LIFDCs in the 2018/19 marketing year stands at approximately 65 million tonnes, 5 percent less than the previous year's well above average level. Most of the decrease is associated with reduced requirements for external supplies in **Bangladesh** and **India**. Similarly, the import forecast was cut for **Madagascar**, on the back of a rebound in paddy production. In addition, in *East* and *West Africa*, the larger domestic outputs in 2018 resulted in moderate declines for import needs.

Table 5. Cereal imports of LIFDCs
(thousand tonnes)

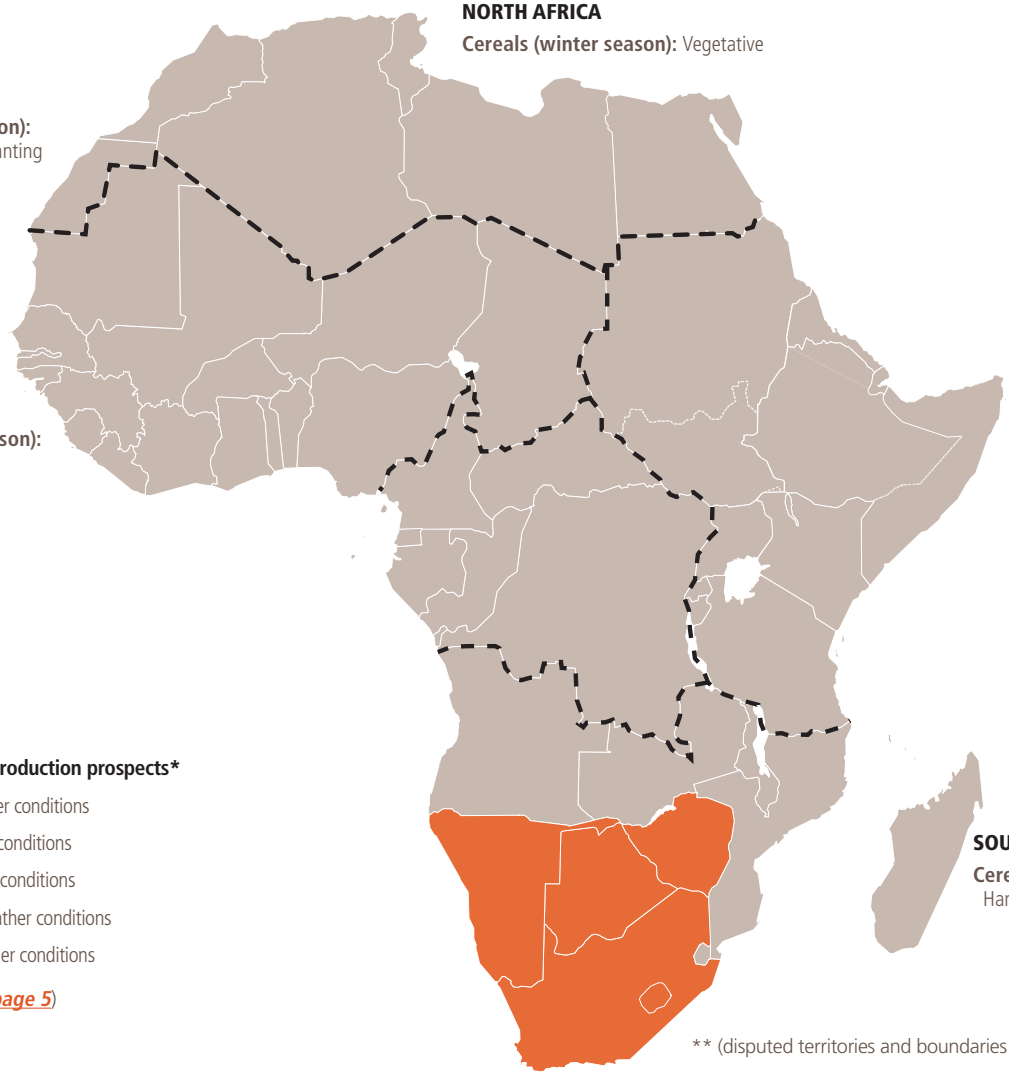
	2016/17 or 2017	2017/18 or 2018		2018/19 or 2019	
	Actual imports	Import forecast	*of which food aid*	Import requirement [1]	*of which food aid*
Africa *(37 countries)*	***35 883***	***36 298***	***1 043***	***35 256***	***999***
East Africa	*11 211*	*12 066*	*733*	*11 185*	*698*
Southern Africa	*3 861*	*2 964*	*15*	*2 733*	*13*
West Africa	*18 475*	*19 100*	*134*	*19 002*	*134*
Central Africa	*2 337*	*2 169*	*161*	*2 336*	*154*
Asia *(11 countries)*	***29 320***	***30 114***	***826***	***27 111***	***804***
CIS in Asia	*4 579*	*4 634*	*0*	*5 168*	*0*
Far East	*14 549*	*14 858*	*199*	*10 361*	*177*
Near East	*10 192*	*10 622*	*627*	*11 582*	*627*
Central America and the Caribbean *(2 countries)*	***1 486***	***1 402***	***10***	***1 412***	***10***
Oceania *(2 countries)*	***483***	***504***	***0***	***534***	***0***
LIFDC *(52 countries)*	***67 173***	***68 319***	***1 878***	***64 312***	***1 813***

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



Unfavourable 2019 production prospects*

Botswana: Dry weather conditions

Lesotho: Dry weather conditions

Namibia: Dry weather conditions

South Africa: Dry weather conditions

Zimbabwe: Dry weather conditions

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

Source: GIEWS

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

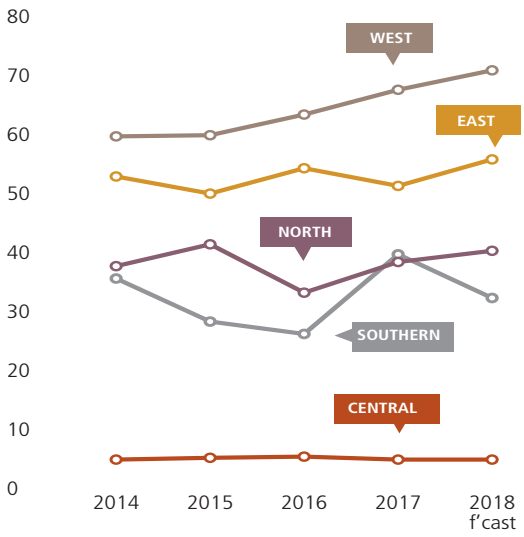
Africa Production Overview

With the 2018 cereal harvest almost complete, aggregate cereal production in Africa is forecast at 203.8 million tonnes, slightly above 2017's outturn and well above the five-year average. The yearly increase is mainly associated with production upturns in East, North and West Africa, driven by favourable weather conditions during the first semester of 2018. Production gains more than compensated for the drought-reduced output in Southern Africa, while cereal harvests in Central Africa remained nearly unchanged as productive capacities continued to be debilitated by conflicts in parts.

For 2019, crops are yet to be planted in Central, East and West Africa. In Southern Africa, with the harvest to begin from April, the production outlook has been marred by rainfall deficits in western areas of the subregion, while more favourable weather conditions boosted prospects in eastern areas. In North Africa, the production outlook is mostly favourable reflecting generally beneficial weather.

Cereal production

(million tonnes)



NORTH AFRICA

Prospects for 2019 winter crops remain generally favourable but spring rains needed in the west

Planting of 2019 winter wheat crop, for harvest from May, was completed in January. Normal availability of inputs was reported across the subregion, except in **Libya** where a shortage of inputs, due to the conflict-related constraints, has limited farmers' capacity to produce. Abundant precipitation in autumn 2018 in the main growing areas of the subregion replenished soil moisture in time for planting. After a dry period in December 2018, rainfall increased again in January 2019. While in eastern parts of **Algeria** and **Tunisia** production prospects are very favourable, parts of **Morocco** and western **Algeria** have been affected by moisture deficits since mid-January and spring rains before the crop enters the reproductive stage, are needed to ameliorate crop conditions. In **Egypt**, reports indicate average conditions of the mostly irrigated wheat crop, resulting in a preliminary wheat production forecast of 9 million tonnes, similar to last year's average level.

For 2018, the subregion's aggregate cereal output was estimated at 40.2 million tonnes, about 5 percent above both the previous year's harvest and the average. The aggregate cereal import requirement for the subregion (of which wheat accounts for about 60 percent) for the 2018/19 marketing year (July/June) is estimated at approximately 48 million tonnes, 0.5 million tonnes more than the previous five-year average, but almost 2 million tonnes below the previous year reflecting larger domestic harvests.

Decreases in food price inflation in many countries

Food inflation rates across the subregion in December 2018 or January 2019 (depending on data availability) were generally stable on a monthly base, but in some countries declined significantly compared to values recorded earlier in 2018, supported by lower international food prices. Negative food inflation rates were recorded in **Morocco** (-2.8 percent in December 2018, down from the already low levels of around 3 percent in spring 2018) and **Algeria** (-0.7 percent in December 2018, down from 3 percent a month earlier and 7 percent in June 2018). The most dramatic decrease was recorded in **Libya** where the annual food price inflation in December 2018 was recorded at -10 percent, down from -6 percent a month earlier, but significantly down from over 40 percent registered in January 2018. This decrease mostly reflects a strengthening of the national currency, the Libyan Dinar. In **Egypt**, annual food price inflation remained at around 12 percent in December 2018 and January 2019, down from over 20 percent recorded in October 2018 when increased prices of energy and transportation pushed food inflation up. In **Tunisia**, the food inflation rate remained stable at 7 percent in January 2019.

Table 6. North Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2017	2018 estim	5-yr Avg.	2017	2018 estim	5-yr Avg.	2017	2018 estim	5-yr Avg.	2017	2018 estim	Change: 2018/2017 (%)
North Africa	***19.2***	***19.5***	***21.3***	***12.8***	***12.3***	***13.9***	***6.2***	***6.4***	***5.0***	***38.2***	***38.3***	***40.2***	***5.0***
Algeria	*2.6*	*2.4*	*3.9*	*1.1*	*1.0*	*2.1*	*0.0*	*0.0*	*0.0*	*3.8*	*3.4*	*6.1*	*78.2*
Egypt	*9.3*	*8.8*	*8.8*	*8.7*	*8.1*	*8.3*	*6.2*	*6.4*	*4.9*	*24.2*	*23.2*	*22.0*	*-5.5*
Morocco	*6.0*	*7.1*	*7.3*	*2.3*	*2.7*	*3.1*	*0.0*	*0.1*	*0.1*	*8.4*	*9.8*	*10.5*	*6.9*
Tunisia	*1.1*	*1.1*	*1.1*	*0.5*	*0.5*	*0.4*	*0.0*	*0.0*	*0.0*	*1.6*	*1.6*	*1.4*	*-10.1*

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2013-2017 period.

WEST AFRICA

Land preparation of 2019 crops underway in coastal countries

Land preparation for the 2019 first season maize crop is underway in the coastal countries along the Gulf of Guinea. Seasonal dry conditions prevailed in the Sahel, where planting of the 2019 crops is expected to begin in April-May with the normal onset of the rainy season.

Above-average cereal outputs gathered in 2018

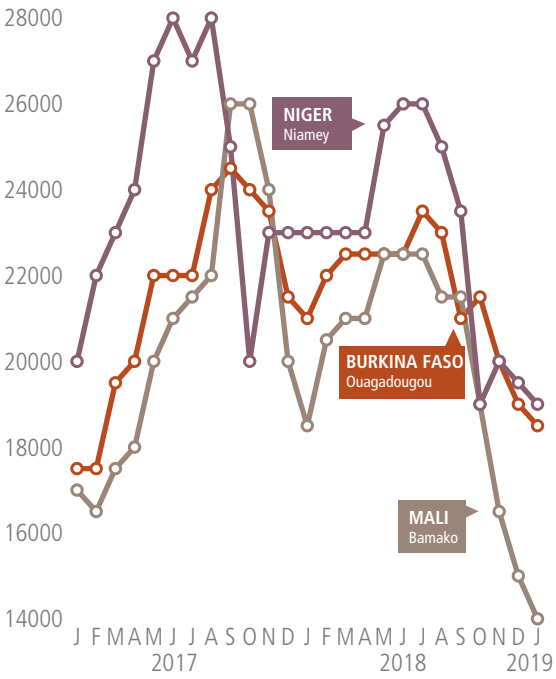
Harvesting of the 2018 coarse grains crop was completed in December in the Sahel, while in the coastal countries along the Gulf of Guinea harvesting of the second season cereal crops continued until early January 2019. The subregion's aggregate cereal output in 2018 is estimated at 70.8 million tonnes, 4.9 percent higher than the previous year's bumper output and 16 percent above average.

Prices of coarse grains generally declined as a result of good availabilities

Market supplies remained at adequate levels, supported by the above-average harvests, regular trade flows across the subregion, particularly between the surplus areas of **Benin**, **Nigeria**, **Côte d'Ivoire** and the structurally deficit areas of the Sahel, as well as imports from outside *West Africa*. In combination with seasonally stable demand, food prices at the start of 2019 were lower in most Sahelian countries (**Burkina Faso**, **Mali**, **Niger** and **Chad**) compared to previous months and last year. By contrast, atypically high price levels were recorded in the Lake Chad Region, the Tibesti Region of Chad, northern and central Mali and the Liptako-Gourma Region due to conflict-related market disruptions.

In coastal countries along the Gulf of Guinea, prices of coarse grains generally increased, with the exception of Nigeria. In **Ghana**, prices of maize increased seasonally in January 2019 due to strong demand from traders and restocking activities by several institutions. Prices of mostly imported rice remained relatively stable. In **Togo** and **Benin**, prices of maize and sorghum increased seasonally or remained stable in December on account of adequate supplies from the 2018 harvests. In **Nigeria**, the above-average 2018 cereal harvest put downward pressure on prices in late 2018, with prices of coarse grains declining or remaining relatively stable in December. In the northeast of the country, however, the conflict continued to hamper agricultural activities and kept food prices relatively higher than in the rest of the country.

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



Source: Afrique Verte.

Food security generally set to improve, due to increased 2018 crop production, except in conflict-affected areas

The current number of food insecure in need of urgent assistance is below the levels estimated in 2017 and early 2018, as a result of improved food availabilities at household and market levels that reflect the average to above-average cereal outputs in 2018. According to the November 2018 "Cadre Harmonisé" analyses, the aggregate number of severely food insecure people (CH Phase 3: "Crisis" and above) is estimated at about 4.5 million people. This

Table 7. West Africa cereal production
(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals [1]			
	5-yr Avg.	2017	2018 estim	5-yr Avg.	2017	2018 estim	5-yr Avg.	2017	2018 estim	Change: 2018/2017 (%)
West Africa	***44.1***	***48.8***	***51.2***	***17.0***	***18.7***	***19.5***	***61.2***	***67.5***	***70.8***	***4.9***
Burkina Faso	*4.1*	*3.7*	*4.6*	*0.3*	*0.3*	*0.3*	*4.4*	*4.1*	*5.0*	*22.0*
Chad	*2.4*	*2.5*	*2.7*	*0.3*	*0.3*	*0.3*	*2.7*	*2.7*	*3.1*	*12.3*
Ghana	*2.2*	*2.4*	*2.1*	*0.6*	*0.7*	*0.8*	*2.8*	*3.1*	*2.9*	*-7.2*
Mali	*5.6*	*6.6*	*7.2*	*2.4*	*2.7*	*2.6*	*8.1*	*9.3*	*9.8*	*5.7*
Niger	*5.2*	*5.8*	*5.8*	*0.1*	*0.1*	*0.1*	*5.3*	*5.9*	*6.0*	*1.1*
Nigeria	*18.2*	*20.3*	*21.4*	*7.1*	*7.8*	*8.4*	*25.4*	*28.2*	*29.9*	*6.1*

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2013-2017 period.
[1] Total cereals includes wheat, coarse grains and rice (paddy).

number is projected to increase to nearly 8.9 million people in the next lean season (June-August 2019), however, the number of food insecure persons would still be below the estimated 10.6 million people in June-August 2018, if appropriate measures and responses are not implemented. Although there is an expected overall improvement this year, the food security situation remains precarious in several countries due to persisting civil insecurity and the presence of armed groups, which have continued to disrupt households' livelihoods. The most affected areas include northeastern **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**. According to the United Nations Office for the Coordination of Humanitarian Affairs (UN-OCHA), the number of internally displaced people in the Lake Chad Basin is estimated at about 2.5 million as of November 2018, of which about 2 million IDPs are in **Nigeria**, with the rest in **Cameroon**, **Chad** and **Niger**. In addition, as a result of the ongoing civil insecurity in the Sudan, the Central African Republic and Libya, about 500 000 people remained displaced in **Chad**, mainly refugees and returnees.

CENTRAL AFRICA

Conflicts curtail production prospects

Planting of the 2019 main season maize crop will begin in March and the harvest is expected to start from July. In the southernmost uni-modal rainfall areas of **the Democratic Republic of the Congo**, planting of the secondary season maize crop, to be harvested from May, started in January under generally favourable weather conditions and a relative improvement in the security situation. In **the Central African Republic**, **the Democratic Republic of the Congo** and **Cameroon**, the ongoing conflict and massive displacements will continue to have a negative impact on agricultural activities and limit farmers' access to crop-growing areas.

Cereal production in 2018 is slightly below average due to persisting conflict

Civil unrest continues to impact most countries of the subregion resulting in mass displacement, thus limiting access to land and disrupting agricultural activities and livelihoods. The 2018 subregional cereal output is estimated at 4.8 million tonnes, similar to the 2017's slightly below average level. In **the Central African Republic**, harvesting of the 2018 main season cereal crops was completed in October and according to the preliminary findings of a joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM), the 2018 aggregate production of food crops was estimated to be 3 percent below the good output registered in 2017. The yearly decline mainly resulted from a reduction in area planted, as an increase in the intensity of the conflict forced a substantial number of farmers to abandon their land. Production in recent years (2016-2018) has been above average owing to good weather conditions as well as a significant increase in cassava production as its cultivation has comparatively less operational requirements, which is of a benefit during episodes of conflict. In **the Democratic Republic of the Congo**, harvesting of the main 2018

Table 8. Central Africa cereal production
(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals [1]			
	5-yr Avg.	2017	2018 estim	5-yr Avg.	2017	2018 estim	5-yr Avg.	2017	2018 estim	Change: 2018/2017 (%)
Central Africa	***4.3***	***4.1***	***4.1***	***0.6***	***0.7***	***0.7***	***4.9***	***4.8***	***4.8***	***0.8***
Cameroon	*2.9*	*2.7*	*2.7*	*0.3*	*0.4*	*0.4*	*3.1*	*3.0*	*3.1*	*1.0*
Central African Republic	*0.1*	*0.1*	*0.1*	*0.0*	*0.0*	*0.0*	*0.1*	*0.1*	*0.1*	*9.0*
Democratic Republic of the Congo	*1.2*	*1.2*	*1.2*	*0.3*	*0.3*	*0.3*	*1.6*	*1.5*	*1.5*	*-0.2*

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2013-2017 period.
[1] Total cereals includes wheat, coarse grains and rice (paddy).

maize crop was completed in the north in November while in central parts of the country it was concluded in January 2019. Although crops benefitted from adequate rains during the season in the main producing areas, total production was below average due to conflict as well as Fall Armyworm infestations that caused significant losses, particularly in maize-growing regions.

Similarly, in **Cameroon**, total cereal production in 2018 is estimated to be below the five-year average. The reduced output reflects the significant decline in production the English-speaking Northwest and Southwest regions, which was caused by intensified conflict at planting time. A larger decline at the national level was prevented by an increased outturn in the Far North Region, as a result of an expansion in the area planted owing to improved security conditions in the region. In **the Congo** and **Gabon**, where the main season harvests were concluded at the end of January 2019, the 2018 cereal production is estimated to be near average as crops benefited from the timely onset of seasonal rains in October 2018, followed by adequate rainfall in most regions.

High food prices constraining access to food

In **the Central African Republic**, the average annual inflation rate in 2018 increased to 6 percent from 4.1 percent in 2017 due to the deterioration of the security that caused disruptions in supply and trade. This is reflected in higher staple food prices in December 2018 compared to their year-earlier levels. For example, prices of rice were 10 percent higher on a yearly basis, which was caused by a sharp reduction in imports due to the persisting conflict. Similarly, in **the Democratic Republic of the Congo**, limited market supplies exerted upward pressure on prices. The low availabilities in several local markets is due to import restrictions that were imposed in **Zambia** and **the United Republic of Tanzania**, as well as the impact of a below-average maize harvest. Moreover, the ongoing political strife has resulted in the local currency depreciating by more than 100 percent since 2015, which has exerted additional upward pressure on domestic food prices. In the Far North Region of **Cameroon**, reduced seasonal demand for market supplies, as households consume their recently harvested 2018 crops, triggered a decline in food prices at the end of 2018. In addition, the ongoing conflict in neighbouring Nigeria (northeastern parts of the country) has caused an overall decline in cross-border trade, and this diminished external demand for agricultural produce from the region, further contributing to generally subdued price levels. By contrast, due to poor supplies, market prices in the northwest and southwest Anglophone regions have risen significantly since January last year. In **Gabon**, **the Congo** and **Equatorial Guinea**, the inflation rates have been at generally low levels (less than 3 percent), in part reflecting stability of the CFA Franc currency, which has helped limit import inflationary pressure.

Acute food insecurity persists

Continued civil insecurity in **the Central African Republic**, **the Democratic Republic of the Congo** and **Cameroon** has resulted in massive population displacements and hindered access to food for the affected population. In **the Central African Republic** about 641 000 people were internally displaced, according to the latest estimates from December 2018, slightly higher than the figure earlier in the year, as a result of new outbreaks of violence. Moreover, the widespread civil insecurity, hinders humanitarian assistance in many areas. According to the latest Integrated Food Security Phase Classification (IPC), conducted in September 2018, about 1.9 million people (about 100 000 less than in March 2018) are estimated to be in need of urgent assistance (IPC Phase 3: "Crisis" and IPC Phase 4: "Emergency") of which more than 550 000 people face IPC Phase 4: "Emergency". In **the Democratic Republic of the Congo**, since December 2018, there has been an improvement in the security situation, allowing for a significant proportion of the displaced population to return to their homes, particularly in the Kasai Region and Tanganyika Province. Nevertheless, the total IDP caseload in the country is estimated at a significant 4.5 million people. Most IDPs live with host communities, whose limited resources are put under additional stress, heightening the likelihood that these households would adopt unsustainable coping mechanisms and livelihood strategies. According to the latest IPC, valid for the period from August 2018 to June 2019, about 13.1 million people are estimated to be in need of urgent assistance (IPC Phase 3: "Crisis" and IPC Phase 4: "Emergency").

Despite the comparative improvement in security since December 2018, the number of people in crisis is 70 percent more than in the previous IPC analysis due to the lingering effects of the protracted conflict. The most severely food insecure people continue to be located in Ituri, North Kivu, Kasai and Tanganyika regions due to the lingering effects of persisting conflict. In **Cameroon**, the ongoing conflict in the North and Southwest regions continues to displace people and exacerbate the already alarming food security situation. Currently, the number of displaced people in the country is estimated at about 438 000, about 10 percent of the total population. The lean season (normally occurring between March and April) began earlier than normal in February, as households' food stocks were quickly depleted due to reduced 2018 harvests, and is expected to be prolonged until May.

EAST AFRICA

Erratic rains affect secondary season crops in Somalia, Kenya, South Sudan and parts of Uganda

Harvesting of the 2018 secondary season cereal crops was recently concluded and outputs are estimated at below-average levels in several countries. Production declines are primarily due to lower-than-average precipitation as well as erratic spatial and temporal distribution of rains during the October-December 2018 period in several cropping areas. In **Somalia**, the "deyr" rainy season in key maize producing areas of Lower Shabelle Region was characterized by significant rainfall deficits in October and November, followed by heavy precipitations in December, which only instigated a partial crop recovery. Although better growing conditions prevailed in sorghum producing areas in Bay Galgaduud and Mudug regions, the aggregate 2018 "deyr" cereal production is estimated to be similar to the poor 2017 output. A similar rainfall pattern was observed in southeastern and coastal areas of **Kenya**, where the "short-rains" harvest is forecast at a well below-average level. In bi-modal rainfall areas of central and southern **Uganda**, suppressed rainfall in October delayed planting and affected crop establishment in several cropping areas, while torrential rains triggered flash floods and landslides in some eastern parts. Improved rainfall since mid-November lifted crop prospects but localized crop losses occurred in some eastern, central and southwestern districts where the early season dryness was most severe. Overall, the aggregate cereal output is estimated to be slightly below average. By contrast, in northeastern bi-modal rainfall areas of **the United Republic of Tanzania**, the "vuli" harvest had a favourable outcome, reflecting generally adequate rains. In **South Sudan**, harvesting of 2018 crops was completed in January. According to the preliminary findings of the 2018 FAO/WFP Crop and Food Security Assessment Mission, the 2018 aggregate cereal harvest is estimated at about 745 000 tonnes, the smallest recorded output since the start of the conflict in 2013. A slight increase in plantings compared to 2017, on account of improved security in some areas, was more than offset by significant yield reductions following poor and erratic rains, especially between July and September 2018.

The 2018 aggregate cereal output for the subregion is estimated at 55.8 million tonnes, about 10 percent above last year's average output, mainly on account of above-average first/main season harvests resulting from abundant and well-distributed precipitations.

Land preparation is underway for 2019 main season crops

Land preparation for the 2019 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 bi-modal rainfall areas of **South Sudan** and **Uganda**. In central and southern uni-modal rainfall areas of **the United Republic of Tanzania**, planting of the 2019 ("long-rains" season) "msimu" crops, to be harvested in May/June, was completed in December 2018. Slightly below-average early seasonal rains in November were followed by adequate rainfall amounts in subsequent months, and current vegetation conditions are average to above average in most cropping areas. Land preparation for the "2019B" season crops is underway in **Rwanda** and **Burundi**, while the harvest of the "2019A" season crops concluded in January and production is estimated at average levels. However, reduced harvests where gathered in Rwamagana and Kayonza districts in eastern Rwanda, as well as in western Bubanza, northeastern Kirundo and Muyinga provinces in Burundi, due to early-season dryness affecting planting and crop establishment. According to the latest weather forecast by the Greater Horn of Africa Climate Outlook Forum (GHACOF), the 2019 March-to-May rainy season will be characterized by average to above-average rainfall over most of the subregion, except over southernmost United Republic of Tanzania and coastal parts of central Somalia.

Below-average October-December rains curb recovery in drought-affected pastoral areas

In pastoral areas of central and northern **Somalia**, southeastern **Ethiopia** and northern and eastern **Kenya**, exceptionally abundant April-June rains

Table 9. East Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Total cereals [1]			
	5-yr Avg.	2017	2018 estim	5-yr Avg.	2017	2018 estim	5-yr Avg.	2017	2018 estim	Change: 2018/2017 (%)
East Africa	***5.4***	***5.6***	***5.7***	***42.1***	***42.3***	***46.1***	***51.0***	***51.2***	***55.7***	***8.9***
Ethiopia	*4.4*	*4.6*	*4.6*	*20.0*	*22.0*	*21.9*	*24.6*	*26.8*	*26.7*	*-0.4*
Kenya	*0.3*	*0.3*	*0.3*	*3.8*	*3.3*	*4.1*	*4.2*	*3.7*	*4.5*	*22.6*
Sudan	*0.5*	*0.5*	*0.6*	*5.8*	*4.8*	*7.6*	*6.4*	*5.3*	*8.3*	*57.3*
Uganda	*0.0*	*0.0*	*0.0*	*3.3*	*3.4*	*3.3*	*3.5*	*3.6*	*3.5*	*-2.8*
United Republic of Tanzania	*0.1*	*0.1*	*0.1*	*7.1*	*7.1*	*7.3*	*9.9*	*9.6*	*10.5*	*8.7*

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2013-2017 period.

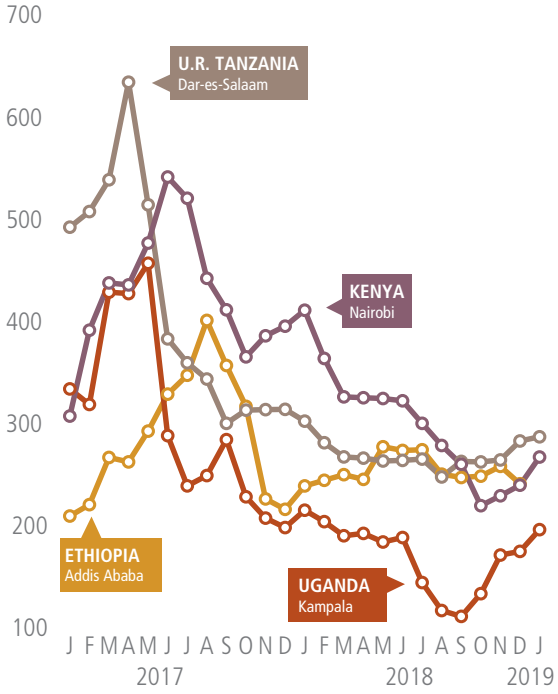
[1] Total cereals includes wheat, coarse grains and rice (paddy).

offset the moisture deficits accumulated during the severe 2106/17 drought and resulted in marked improvements in livestock conditions. Subsequently, a poor performance of the October-December 2018 rains resulted in an incomplete regeneration of rangeland resources. These conditions, coupled with a faster-than-normal depletion of rangeland resources and above-average temperatures during the current dry season, curbed the recovery from the severe drought-induced losses incurred in 2017. Improvements are not expected earlier than end-March or early April with the onset of the next rainy season.

Food prices at high levels in the Sudan and South Sudan

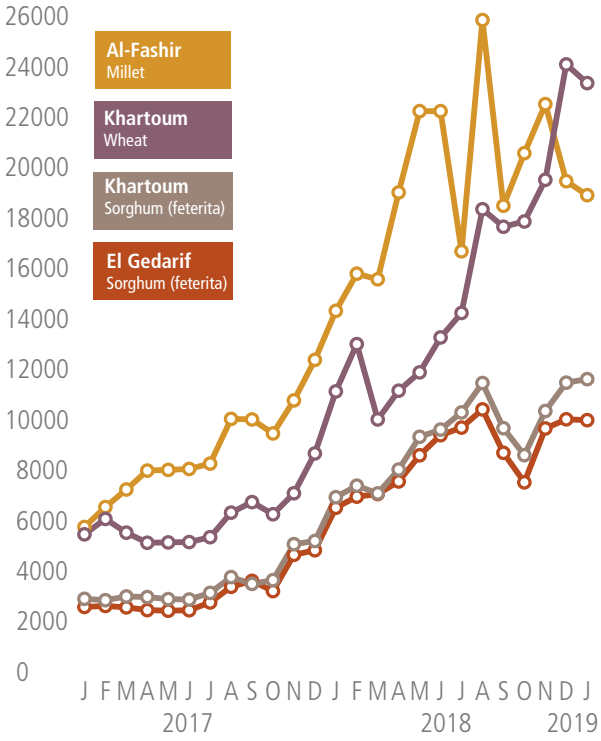
In **the Sudan**, following monthly declines in September and October 2018 for the first time in several months, prices of sorghum and millet unseasonably surged by 15-50 percent between November 2018 and January 2019, following a sharp devaluation of the local currency in October. Prices of coarse grains in January were at near record to record levels and two to three times higher than their year-earlier levels. In **South Sudan**, prices of maize, sorghum, wheat and cassava, declined by 20 to 45 percent in the second semester of 2018 in the capital, Juba, due to a substantial appreciation of the local currency on the parallel market reflecting renewed investor confidence following the signing of a peace agreement in June. Subsequently, prices surged by 15-30 percent in January 2019 as the South Sudanese pound depreciated again. Prices in January were generally down from a year earlier but still at very high levels, with prices of maize and sorghum almost 50 percent above the already exceptional highs of the corresponding month two years earlier. The high price levels are the result of widespread insecurity hindering market functioning, trade flows and agricultural activities, high transport costs and a weak local currency. In **Somalia**, prices of locally-produced maize and sorghum increased seasonally by 10-15 percent in December in several key markets, including the capital, Mogadishu. However, they remained about 20 percent below the levels of a year earlier, mainly due to the above-average 2018 main season "gu" harvest and sustained food assistance operations. In **Ethiopia**, prices of maize, after having declined in November with the main "meher" harvest, levelled off in December, when they were around their levels of one year earlier. In **Uganda**, prices of maize unseasonally increased in January by 10-20 percent as the second season harvest was delayed in several cropping areas. In **Kenya** and t**he United Republic of Tanzania**, prices of maize remained stable or increased in January following seasonal patterns. Overall, in these countries, prices of maize in January were around or below their year-earlier levels as a result of adequate domestic availabilities from the above-average 2018 main/first season harvests. In **Burundi**, prices of maize declined in January by 10 percent to levels close to the corresponding month of the previous year, while in **Rwanda** they increased by 6 percent but remained 40 percent below their year-earlier levels.

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



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

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



Source: Food Security information for Action (SIFSIA).

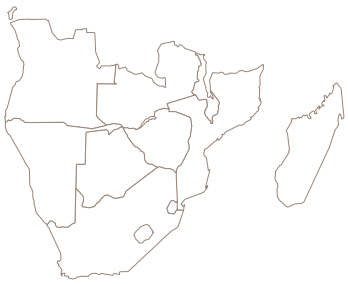
Food insecurity seasonally improving except in South Sudan, Somalia and the Sudan

Food security conditions generally improved in late 2018 and early 2019 as newly-harvested main season crops became available for consumption. However, improvements in **South Sudan** and **Somalia** have been limited and short-lived, reflecting reduced harvests that did not allow an adequate replenishment of stocks and resulted in an early onset of the lean season. In **the Sudan**, despite adequate availabilities from the above-average 2018 harvest, food security is severely affected by the macroeconomic crisis, which is constraining food access for large segments of the population.

In **South Sudan**, an early start of the lean season, due to a reduced 2018 crop production, resulted in an increase of the food insecure caseload from 4.4 million people at the end of 2018 to 6.45 million (almost 60 percent of the total population) for the January-March 2019 period. The

current alarming food insecurity levels are mainly driven by the prolonged conflict, resulting in severe food availability and access constraints, and in a severe economic crisis critically affecting income-earning opportunities for large segments of the population. The areas of major concern are former Jonglei, Lakes and Unity states, where 60-70 percent of the population faces IPC Phases 3: "Crisis", 4:"Emergency" and 5: "Catastrophe" levels of food insecurity. In **Somalia**, according to the latest multi-agency assessment, about 1.55 million people are estimated to be severely food insecure (IPC Phase 3: "Crisis" and IPC Phase 4: "Emergency"). The current caseload is similar to the estimate in late 2018, reflecting the reduced "deyr" season agricultural production, but about 42 percent lower on a yearly basis, mainly due to the favourable impact of the abundant April-June "gu" rains and the sustained provision of large-scale humanitarian assistance. The areas of major concern are the central region of Bay and the northern regions of Awdal, Sanag and Sool, where 20-30 percent of the population faces IPC Phase 3: "Crisis" and IPC Phase 4:"Emergency" levels of food insecurity. In **the Sudan**, 5.76 million people are estimated to be severely food insecure. The caseload is similar to the estimate in late 2018 despite the recent completion of the above-average 2018 harvest as critical macroeconomic challenges, including soaring food prices, are resulting in severe access constraints for vulnerable households.

SOUTHERN AFRICA



Persisting rainfall deficits reduce 2019 production prospects

Harvesting of the main 2019 season cereal crops is expected to start in April in most areas. However, in western parts of the subregion, reflecting a late onset of seasonal rains, the harvest period is likely to be delayed by up to a month. The production outlook for the 2019 cereal crops is mixed; in western and southern countries are likely to attain average to below-average outputs, while in the east and north prospects are more favourable. These outlooks largely reflect variations in seasonal rainfall patterns.

Between October 2018, historically marking the onset of the rainy season, and February 2019 precipitation was generally below average in **Angola**, **Botswana**, **Namibia**, **Lesotho** as well as western parts of **South Africa**, **Zambia** and **Zimbabwe**. Despite periods of increased precipitation in early 2019, the long-term seasonal rainfall deficits resulted in poor vegetation conditions in cropped areas and infer likely reductions in yields for the 2019 cereal crops. The poor rains at the start of the season had also instigated contractions in the area sown, although the generally higher grain prices in 2018 curtailed larger reductions in the planted area. Based on the prevailing conditions, the aggregate maize output in **South Africa** is forecast at 11 million tonnes, just below the five-year average. In **Zimbabwe**, although official production forecasts are not yet available, the maize output is foreseen to decline for a second consecutive year to a near-average outturn of 1 million tonnes. Notwithstanding the poor rains in western parts of **Zambia**, national maize production is expected to increase but remain below the average level of 3 million tonnes. In **Namibia** and **Botswana**, where the most significant rainfall deficits have been observed, cereal outputs are forecast at well below-average levels in 2019. By contrast, in **Madagascar** and **Malawi**, precipitation has been generally beneficial and, despite heavy downpours in January that caused localized flooding and crop losses, staple cereal production is forecast to increase in 2019 to near-average levels. In **Eswatini** and **Mozambique**, crop conditions are generally favourable, indicating a second consecutive annual increase in cereal production, although reduced harvests reflecting drier weather conditions are likely to be registered in some central parts of Mozambique.

Table 10. Southern Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2017	2018 estim	5-yr Avg.	2017	2018 estim	5-yr Avg.	2017	2018 estim	5-yr Avg.	2017	2018 estim	Change: 2018/2017 (%)
Southern Africa	***2.0***	***1.8***	***2.1***	***25.8***	***34.1***	***26.2***	***4.2***	***3.7***	***4.0***	***32.0***	***39.6***	***32.2***	***-18.6***
- excl. South Africa	*0.3*	*0.3*	*0.3*	*12.5*	*16.0*	*13.1*	*4.2*	*3.7*	*4.0*	*17.0*	*20.0*	*17.3*	*-13.4*
Madagascar	*0.0*	*0.0*	*0.0*	*0.3*	*0.3*	*0.3*	*3.6*	*3.1*	*3.3*	*4.0*	*3.4*	*3.6*	*7.3*
Malawi	*0.0*	*0.0*	*0.0*	*3.4*	*3.6*	*2.9*	*0.1*	*0.1*	*0.1*	*3.5*	*3.7*	*3.0*	*-18.5*
Mozambique	*0.0*	*0.0*	*0.0*	*2.0*	*2.6*	*2.7*	*0.4*	*0.4*	*0.4*	*2.4*	*3.0*	*3.2*	*4.0*
South Africa	*1.7*	*1.5*	*1.8*	*13.3*	*18.0*	*13.1*	*0.0*	*0.0*	*0.0*	*15.0*	*19.6*	*14.9*	*-23.9*
Zambia	*0.2*	*0.2*	*0.1*	*3.1*	*3.7*	*2.4*	*0.0*	*0.0*	*0.0*	*3.3*	*3.9*	*2.6*	*-33.8*
Zimbabwe	*0.0*	*0.0*	*0.1*	*1.3*	*2.5*	*1.9*	*0.0*	*0.0*	*0.0*	*1.3*	*2.5*	*2.0*	*-20.3*

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2013-2017 period.

The rainfall deficits have also adversely impacted pasture productivity and quality as well as diminishing water resources for livestock (e.g. drinking and servicing) in western parts of the subregion, mostly notably in Botswana and Namibia. As a result, livestock production is expected to decline in 2019, while reports have already indicated an increase in mortality rates.

Import requirements set to grow in 2019/20

In the nearly-closed 2018/19 marketing year (generally April/March), domestic supplies of maize, the primary staple food in the subregion, were estimated to be mostly sufficient to cover national consumption needs. This reflects the large inventories that mitigated the impact of below-average harvests in 2018 and shored up domestic availabilities. Consequently, although increasing slightly on a yearly basis, imports in 2018/19 are forecast at a well below-average level of 1.2 million tonnes, with the largest needs estimated in the structurally deficit countries of Botswana, Namibia and Lesotho. In the 2019/20 marketing year, based on the forecast of reduced cereal production and lower national stocks, import requirements are set to increase. However, at the aggregate level the import volume is likely to remain below average.

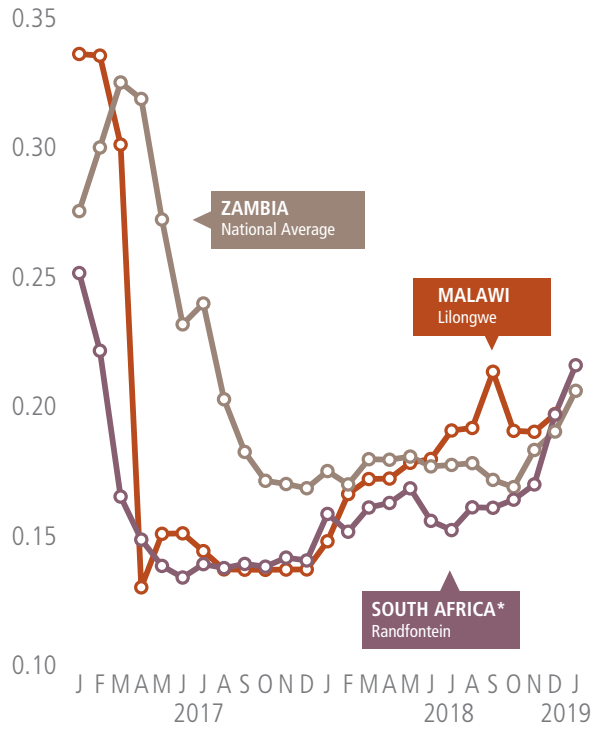
Subregional cereal exports are almost entirely comprised of maize shipments from South Africa and, to a lesser extent, from Zambia where export restrictions introduced in 2018 have significantly lowered deliveries. For the 2018/19 marketing year, **South Africa** is forecast to export about 2.2 million tonnes, approximately 0.2 million tonnes below the previous year's volume, but still higher than the five-year average. So far, the bulk of maize exports, mostly yellow maize varieties, has already been delivered to Asian countries, while about 0.5 million tonnes of white maize are forecast to be exported, mostly destined for countries within the subregion.

Sharp increases in maize prices, as tighter supplies exacerbate seasonal rises

Tighter supplies, reduced prospects for the 2019 crops and economic difficulties have magnified seasonal price increases in several countries and, by January 2019, prices of cereal staples were mostly above their year-earlier levels. The most prominent price rises were recorded in **Zimbabwe**, where severe fiscal challenges and a significant hike in fuel prices at the start of the year resulted in the prices of bread, wheat flour and rice more than doubling their levels on a yearly basis as of January 2019. Despite the generally satisfactory supply situation, maize meal prices also increased steeply since October 2018 and were significantly above their year-earlier levels in January. In **South Africa**, prices of maize grain increased sharply between November 2018 and January 2019, due to the rainfall deficit that lowered 2019 production prospects. However, in February 2019, prices declined slightly as recent favourable rains partly abated the impact of the previous dry weather conditions, while an appreciation of the currency exerted additional downward pressure on prices. South African wheat prices also increased in preceding months, partly due to the spill over effects from the maize market. In **Malawi** and **Zambia**, mainly in response to the decline in production, prices of maize grain and maize products were at elevated levels at the start of 2019. In the Malawian capital, Lilongwe, the price of maize grain had increased by 30 percent on a yearly basis as of January 2019, while the national average price in Zambia had risen by a similar proportion. In **Eswatini**, prices of maize meal remained broadly unchanged at the end of 2018 and were down from a year earlier as market controls have so far shielded the upward price pressure from the regional markets, given the country's position as a net importer. In Namibia, also a net importer, prices of maize meal were mostly stable and close to their year-earlier values in January 2019. In **Madagascar**, prices of rice declined at the start of the year as new supplies from the minor season harvest, which normally begins in December, eased supply pressure. As of February, prices of both imported and domestic rice varieties were lower year on year.

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 insecure numbers rise in 2019 as higher food prices impinge on access to food

Latest IPC analyses put the number of food insecure people in the subregion at nearly 11 million (excluding Angola, Mauritius and South Africa) during the peak of the 2019 lean season (January-March). At this level, the number of people in need of humanitarian assistance is the second highest estimate in the last ten years and approximately 30 percent higher than the previous year. The largest year-on-year increases were estimated for **Malawi**, **Mozambique** and **Zambia**, while the highest absolute number of food insecure people was estimated in **Malawi**, where approximately 3.3 million people (about 20 percent of the total population) are in need of assistance. In **Zimbabwe**, the latest estimate for the food insecure caseload was recently revised upward from 2.4 million persons to 2.9 million (approximately 15 percent of the total population), reflecting the sharp spike in food prices and consequent constraints to access food.

The likely reductions in cereal harvests in 2019 are expected to result in an increase in the prevalence and severity of food insecurity in western countries, as well as in southern parts of **Zambia** and **Zimbabwe** later in the year. In addition, food prices are likely to continue to rise until the harvest period from April/May, further impinging on food access and aggravating food insecurity.

REGIONAL REVIEWS

ASIA

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

Unfavourable 2019 production prospects*

Yemen: Conflict

Democratic People's Republic of Korea: Dry weather conditions

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

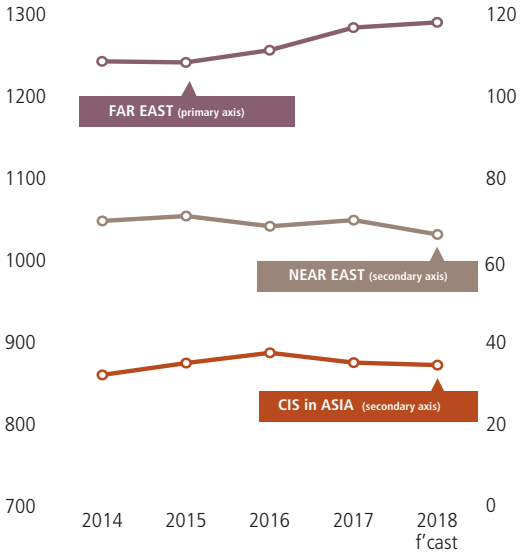
Source: GIEWS
** (disputed territories and boundaries in conformity with UN maps)

Asia Production Overview

The aggregate 2018 cereal output is estimated at an above-average level of 1 391 million tonnes. Most countries in the Far East registered good outputs, with the notable exception of the Democratic People's Republic of Korea where crops were affected by unfavourable weather conditions. Total cereal production in CIS Asia was estimated to be near average, while conflicts continued to affect cereal outputs in parts of the Near East.

In 2019, wheat production prospects are favourable in the Far East, although a decline is expected in Pakistan due to reduced water availability. The production outlook is also generally positive in the Near East, benefitting from good weather conditions, with the exception of the Syrian Arab Republic, Yemen and Iraq, where the ongoing conflicts and lack of inputs continue to hamper agricultural activities and severely impair production prospects.

Cereal production
(million tonnes)



FAR EAST

Above-average wheat production expected in 2019

The 2019 wheat crop is in the late maturing stage, with harvesting operations due to start in April. In **China (Mainland)**, the subregion's major producer, favourable weather conditions since the beginning of the season had supported planting activities and early crop development. The area planted with wheat is estimated at 23.8 million hectares, close to 2018's near-average level. This reflects the still attractive margins earned by wheat producers, in spite of the reduction of the minimum state purchase price for a second consecutive year, an initiative intended to prompt a decline in production and consequently lead to a drawdown in stocks. Assuming average yields, the 2019 wheat production is forecast at a near-average 129 million tonnes. In **India**, despite some delays in planting operations due to the late withdrawal of the monsoon rains, the area planted with the 2019 wheat crop is estimated to be close to last year's high level, mostly supported by remunerative producer prices. Latest official estimates put the 2019 wheat output at 99.1 million tonnes, close to last year's record. In **Pakistan**, below-average irrigation water supplies, coupled with reduced precipitations between October and December 2018, reduced the area planted to wheat by 10 percent compared with average levels and raised concerns for yield prospects. In the remaining countries, which are minor wheat producers, including **Bangladesh**, **Mongolia** and **Nepal**, bumper 2019 outputs are forecast reflecting above-average plantings, sustained by strong local demand and favourable weather conditions, which are also expected to sustain near-record yields.

Aggregate 2018 cereal production estimated at record level

In Northern Hemisphere countries, harvesting of the 2018 main paddy and coarse grain crops was completed at the end of last year, while harvesting of the 2018 secondary season crops has just started. The 2018 subregional cereal output is forecast at a record high of 1 290 million tonnes (rice in paddy equivalent), close to the previous year's high level. Cereal production in the subregion has been steadily increasing since 2015/16, often supported by government initiatives aimed at boosting agricultural production. The 2018 aggregate production of paddy rice, the major staple in the subregion, is forecast at a record high of 695.4 million tonnes, slightly above last year's high level. In most of the large producing countries of the subregion, including **Bangladesh**, **Cambodia**, **India**, **Indonesia**, **Myanmar**, **Thailand**, **the Philippines** and **Viet Nam**, record or near-record harvests are forecast as a result of above-average plantings, sustained by strong local demand and remunerative prices, and high yields due to overall favourable weather conditions. In **China (Mainland)**, the 2018 paddy output is estimated at 208 million tonnes and slightly above the average, as favourable weather resulted in higher yields, which partly offset the impact of a contraction in the sown area. In **Pakistan**, the 2018 paddy output is officially estimated at an average level of 10.6 million tonnes, below the 2017 record. By contrast, a below-average 2018 paddy output is officially estimated in **the Democratic People's Republic of Korea**, due to high temperatures, coupled with below-average rains between mid-July and mid-August, a critical period for the crops. In **the Republic of Korea**, annual rice production continued to decline and the 2018 paddy output is officially estimated at 5.2 million tonnes, putting the 2018 outturn at the lowest level in the last 20 years. The planted area has decreased steadily since 2002, reflecting a gradual decline in rice consumption and government initiatives that aim to encourage farmers to switch from paddy production to more profitable cash crops, while concurrently reducing large carryover stocks of rice.

Table 11. Far East cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2017	2018 estim	5-yr Avg.	2017	2018 estim	5-yr Avg.	2017	2018 estim	5-yr Avg.	2017	2018 estim	Change: 2018/2017 (%)
Far East	***251.5***	***262.7***	***257.5***	***328.4***	***336.3***	***337.5***	***672.7***	***685.0***	***695.4***	***1 252.6***	***1 284.0***	***1 290.4***	***0.5***
Bangladesh	*1.3*	*1.3*	*1.1*	*2.3*	*3.0*	*3.2*	*51.8*	*51.4*	*53.6*	*55.4*	*55.7*	*58.0*	*4.1*
Cambodia	*0.0*	*0.0*	*0.0*	*0.8*	*1.2*	*1.2*	*9.7*	*10.5*	*10.8*	*10.5*	*11.7*	*12.0*	*2.1*
China (Mainland)	*128.0*	*133.0*	*128.0*	*228.4*	*225.9*	*226.2*	*206.8*	*208.6*	*208.0*	*563.2*	*567.5*	*562.2*	*-0.9*
India	*93.3*	*98.5*	*99.7*	*43.0*	*46.6*	*46.8*	*161.7*	*169.4*	*173.0*	*298.0*	*314.5*	*319.5*	*1.6*
Japan	*0.9*	*0.9*	*0.8*	*0.2*	*0.2*	*0.2*	*11.0*	*10.8*	*10.8*	*12.1*	*11.9*	*11.8*	*-1.1*
Myanmar	*0.2*	*0.1*	*0.1*	*2.3*	*2.7*	*2.8*	*28.5*	*29.5*	*30.4*	*30.9*	*32.3*	*33.3*	*3.2*
Nepal	*1.8*	*1.8*	*1.8*	*2.7*	*2.9*	*2.9*	*4.9*	*5.2*	*5.3*	*9.4*	*9.9*	*10.0*	*1.3*
Pakistan	*0.0*	*26.7*	*25.5*	*0.0*	*6.6*	*6.0*	*0.0*	*11.2*	*10.6*	*0.0*	*44.4*	*42.1*	*-5.2*
Philippines	*0.0*	*0.0*	*0.0*	*0.0*	*7.9*	*8.0*	*0.0*	*19.4*	*19.0*	*0.0*	*27.3*	*27.0*	*-1.2*
Republic of Korea	*0.0*	*0.0*	*0.0*	*0.0*	*0.2*	*0.2*	*0.0*	*5.3*	*5.2*	*0.0*	*5.5*	*5.4*	*-1.7*
Sri Lanka	*0.0*	*0.0*	*0.0*	*0.0*	*0.2*	*0.3*	*0.0*	*2.4*	*3.8*	*0.0*	*2.6*	*4.1*	*59.4*
Thailand	*0.0*	*0.0*	*0.0*	*0.0*	*5.0*	*5.2*	*0.0*	*33.7*	*34.5*	*0.0*	*38.7*	*39.6*	*2.5*
Viet Nam	*0.0*	*0.0*	*0.0*	*0.0*	*5.1*	*4.9*	*0.0*	*42.8*	*44.6*	*0.0*	*47.9*	*49.5*	*3.4*

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2013-2017 period.

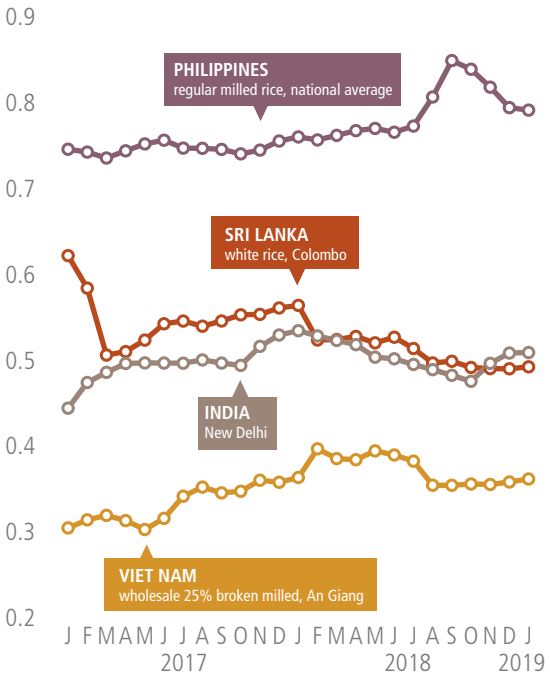
The 2018 aggregate maize production is forecast at 307.6 million tonnes, close to last year's high level. It reflects bumper outputs in most countries of the subregion, due to above-average plantings in response to higher demand for feed and high yields as a result of favourable weather conditions. Record and near-record outputs are estimated in the large maize-producing countries, including **Indonesia**, **India** and **the Philippines**, while in **China (Mainland)**, the largest producer in the subregion, maize production is estimated at a near-average level. The aforementioned production gains more than offset below-average outputs in **the Democratic People's Republic of Korea**, on account of weather-reduced yields, and in **Viet Nam**, due to a reduction in plantings as farmers shifted to more profitable cash crops.

The subregional 2018 aggregate wheat production, harvested in the first half of 2018, is estimated at 257.5 million tonnes, slightly above the five-year average.

Cereal import requirements in 2018/19 close to the five-year average

Aggregate cereal imports in the 2018/19 marketing year are forecast at 126.9 million tonnes, close to the five-year average level. Wheat imports are forecast at an above-average level of 50 million tonnes, reflecting a continuation of significant import requirements in the subregion's biggest importers, including **the Philippines**, **Thailand**, **Bangladesh** and **the Republic of Korea**. Aggregate imports of coarse grains, mostly maize, are forecast at an average level of 63.7 million tonnes, 5 percent below the volume imported in 2017/18. The estimated year-on-year decline is mainly driven by expectations of decreased demand from **China (Mainland)**, as a result of a government directive that aims to reduce the large national maize stocks through increased sales from State reserves. However, import requirements for maize for feed remains high in other importing countries, including **the Republic of Korea**, **the Philippines** and **Viet Nam**. Imports of rice in 2019 are forecast at 13.2 million tonnes, well below the five year average due to reduced demand that reflects the bumper outputs in most countries. Exports of cereals consist mainly of rice, which are forecast at 39.7 million tonnes in 2019, close to the above-average level in 2018.

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



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

Domestic prices of rice and wheat showed mixed trends in recent months

Domestic prices of rice followed mixed trends between November 2018 and January 2019 and were generally higher than their year-earlier levels. In **Viet Nam**, prices of rice decreased for the third consecutive month in January, on good production expectations for the upcoming 2019 main winter-spring crop and subdued international demand. Prices of rice in **Cambodia** fell sharply in January after remaining stable in the last months of 2018, reflecting the ongoing harvest of the 2018 main crop, forecast at a record level. In **Thailand**, prices of rice softened since November 2018 due to ample supplies from the 2018 main crop, harvested between October 2018 and January 2019, with further decreases halted by strong external demand for its exports. In **India**, prices remained generally stable in preceding months and were close to their year-earlier levels. This reflects downward pressure from increased market supplies following the harvest of the record

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

	Avg 5-yrs (2013/14 to 2017/18)	2017/18	2018/19	2018/19 over 2017/18 (%)	2018/19 over 5-yr avg (%)
Coarse grains					
Exports	*4 166*	*3 736*	*4 170*	*11.6*	*0.1*
Imports	*64 940*	*66 913*	*63 717*	*-4.8*	*-1.9*
Production	*328 369*	*336 301*	*337 546*	*0.4*	*2.8*
Rice (millled)					
Exports	*37 708*	*40 160*	*39 677*	*-1.2*	*5.2*
Imports	*15 017*	*16 003*	*13 248*	*-17.2*	*-11.8*
Production	*446 394*	*454 381*	*461 085*	*1.5*	*3.3*
Wheat					
Exports	*4 040*	*2 236*	*2 484*	*11.1*	*-38.5*
Imports	*46 978*	*52 339*	*49 899*	*-4.7*	*6.2*
Production	*251 504*	*262 684*	*257 480*	*-2.0*	*2.4*

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

2018 "kharif" crop, which was offset by strong government purchases and slow progress of plantings of the "rabi" crop. By contrast, in **Myanmar**, prices of rice increased seasonally in the last months, with additional pressure on account of strong demand for its exports. Among importing countries, in **the Philippines**, prices of rice followed a downward trend since October 2018 due to improved supplies from the 2018 main paddy crop and the arrival of increased imports. However, prices of rice in January 2019 remained 7 percent higher than their year-earlier levels. Similarly, prices of rice in **Bangladesh** declined for the sixth consecutive month in January 2019, reflecting ample market availabilities from the 2018 "aus" and "aman" harvests, which, combined, were estimated at a record level. In **China (Mainland)**, prices of rice remained virtually unchanged and were slightly lower than their year-earlier levels. In **Indonesia** and **Sri Lanka**, prices of rice firmed seasonally since the last months of 2018 ahead of the onset of the 2018 main paddy harvests that will commence in February 2019.

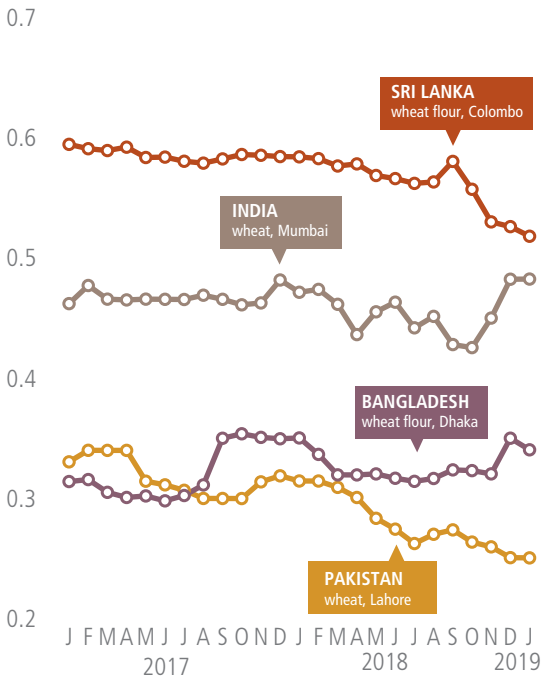
Prices of wheat grain and flour showed mixed trends. Among the subregion's main wheat-producing countries, prices of wheat in **India** increased seasonally in the last three months and in January were above the previous year's levels, mostly supported by tighter supplies. In **Pakistan**, prices of wheat and wheat flour levelled off in January after increasing between July and December 2018, ahead of the 2019 main harvest. Prices of wheat in **China (Mainland)** eased in January in line with seasonal trends, after sustained increases during the second half of 2018, and were slightly below their levels of the previous year. Among importing countries, prices of wheat flour in **Sri Lanka** and **Indonesia** remained stable in the last three months, while in **Bangladesh** they declined in January due to recent large import volumes.

Food security is generally stable, but concerns remain in some countries

Overall, the food security situation in the subregion is stable. However, pockets of severe food insecurity persist in some countries. According to the latest figures from the International Organization for Migration (IOM), in **Bangladesh** about 925 000 Rohingya refugees from Myanmar were sheltering in the Cox's Bazar District as of January 2019. The displaced Rohingya has tripled the population in the Ukhiya and Teknaf Upazilas of Cox's Bazar, putting pressure on the already scarce natural and economic resources, which has consequently triggered higher rates of inflation and reduced daily wages. As a result, the food security situation of about 336 000 Bangladeshis in host communities has deteriorated. The Rohingya refugees together with the affected Bangladeshis, are in need of humanitarian assistance to cover their basic needs. In **Myanmar**, about 241 000 people have been internally displaced in the states of Hachin, Kayin, Shan and Rakhine since a resurgence of the conflict that started in 2011. The IDPs are hosted in temporary camps and are affected by high levels of food insecurity, with the conflict hampering the deployment of adequate humanitarian assistance and impeding the restoration of livelihoods. In **Pakistan**, there are increased concerns about food insecurity, mainly in rural communities in the Balochistan and Sindh districts, as persisting dry conditions in 2018 led to a reduction in cereal output and losses of livestock. In addition, about 1.4 million Afghan refugees are sheltering in Pakistan, which are straining the already limited resources of the host communities. In **the Democratic People's Republic of Korea**, concerns remain about food insecurity, with uncovered food deficits aggravated by tight staple supplies from the 2018 weather-reduced cereal harvests.

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.

NEAR EAST

Favourable production outlook for the 2019 winter cereal crops

Planting of winter wheat and barley crops, for harvest from June 2019, was completed in early January. Unlike the previous season, which was characterized by late and poor rains in many countries, timely rains in autumn 2018 brought adequate to abundant precipitation, which facilitated planting operations. Wet weather conditions in January and February, providing in some areas more than double the average rainfall, continued to improve soil moisture. Rains were also reported in areas that are usually dry, such as **Jordan** and **Saudi Arabia**, where only small amounts of irrigated cereals are grown.

In **Turkey**, the subregion's main cereal producer, current conditions indicate satisfactory moisture reserves across the main growing areas for dormant winter grains. If favourable weather conditions prevail for the remainder of the season, the preliminary forecast for wheat production in Turkey points to a slightly above-average output of 21 million tonnes in 2019.

In **Afghanistan**, precipitation in autumn and winter 2018/19 brought adequate snow volumes in mountainous areas, which are expected to provide adequate moisture reserves for crop development as well as water availability for irrigation of the spring crops.

The ongoing conflict and lack of inputs continued to hamper agricultural activities in **the Syrian Arab Republic**, **Yemen** and **Iraq**, with serious consequences in terms of planted area and yields.

Subregional cereal production in 2018 was estimated at 66.2 million tonnes, out of which wheat constitutes 41.7 million tonnes. Total cereal production recorded a 5 percent decline compared to the previous year's output and the five-year average. Cereal import requirements in the 2018/19 marketing year (July/June) are estimated at 71.5 million tonnes, similar to the previous year's volume and 9.3 percent above the last five-year average.

Persisting conflicts continued to worsen food security

In **Yemen**, according to the latest IPC analysis about 15.9 million people (corresponding to 53 percent of the population) faced severe acute food insecurity (IPC Phase 3: "Crisis" and above), including 63 500 people in Phase 5: "Catastrophe" in the December 2018-January 2019 period. It is estimated that, in the absence of humanitarian food assistance, about 20 million people (or 67 percent of total population) would be in need of urgent action to save lives and livelihoods. This would include about 240 000 people in Phase 5: "Catastrophe".

In **the Syrian Arab Republic**, as of August 2018 (latest figures available), about 5.5 million Syrians are estimated to be food insecure and require some form of food assistance. In addition, as many as 500 000 to 800 000 people are estimated to be food insecure in the Idleb Governorate.

In **Afghanistan**, as of September 2018 (latest information available), about 9.8 million people (almost 44 percent of the rural population) were estimated to be in the IPC Phase 3: "Crisis" and IPC Phase 4: "Emergency". Continuing conflict, natural hazards and limited economic opportunities have increased the vulnerability of the poorest households, including subsistence farmers.

Table 13. Near East cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2017	2018 estim	5-yr Avg.	2017	2018 estim	5-yr Avg.	2017	2018 estim	5-yr Avg.	2017	2018 estim	Change: 2018/2017 (%)
Near East	***43.9***	***44.0***	***41.7***	***22.1***	***21.0***	***19.9***	***4.4***	***4.7***	***4.6***	***70.4***	***69.7***	***66.2***	***-5.0***
Afghanistan	*4.8*	*4.3*	*3.6*	*0.7*	*0.4*	*0.4*	*0.6*	*0.5*	*0.5*	*6.1*	*5.2*	*4.5*	*-13.3*
Iran (Islamic Republic of)	*11.0*	*12.5*	*13.4*	*4.3*	*4.0*	*3.7*	*2.6*	*3.1*	*3.0*	*17.9*	*19.6*	*20.1*	*2.9*
Iraq	*3.7*	*3.5*	*3.0*	*1.2*	*1.1*	*1.0*	*0.3*	*0.3*	*0.1*	*5.2*	*4.9*	*4.1*	*-14.7*
Turkey	*21.2*	*21.5*	*20.0*	*14.0*	*13.7*	*13.4*	*0.9*	*0.9*	*0.9*	*36.0*	*36.1*	*34.4*	*-4.9*

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2013-2017 period.

CIS IN ASIA[4]

The 2019 winter cereal crops are in dormancy phase

Planting of winter cereals, to be harvested between June and September 2019, was finalized at the end of November 2018 and the total area planted in the subregion is estimated to be slightly below average. The winter crops, mainly wheat and barley, are now in dormancy phase and their conditions are reported to be generally favourable. In **Kyrgyzstan** and **Tajikistan**, thick snow coverage, over most cropping areas since late October 2018, is expected to contribute to replenishing water reserves for use in the summer period (June-August). The snow is, in fact, a fundamental source for the Amu Darya River, which provides water for the irrigated fields in Tajikistan, Uzbekistan and Turkmenistan. In southern and southeastern **Kazakhstan**, where most of the winter wheat crop is cultivated, land preparation and planting operations were delayed on account of above-normal precipitations, low temperatures and frosts. However, regular snowfalls and below-average temperatures between November 2018 and February 2019 ensured sufficient soil moisture and prevented crops from freezing, lifting production prospects. By contrast, the outlook is more mixed in **Azerbaijan**, **Turkmenistan** and **Uzbekistan**. The uncertain prospects in these countries are associated with an uneven distribution of rainfall between December 2018 and February 2019.

Near-average cereal production in 2018

The aggregate 2018 subregional cereal production is estimated at 34 million tonnes, close to the five-year average, but below the previous year's level. Production of wheat, which accounts for more than 70 percent of the total cereal output, is estimated at 24.4 million tonnes, slightly below the five-year average. In **Kazakhstan**, the main wheat producer in the subregion, the output is officially estimated at 14 million tonnes, close to the average although below the level in 2017 on account of a reduction in the area planted, in favour of more profitable oil crops. The share of milling quality wheat in 2018 is also reported to have decreased, as excessive rains during the harvest period negatively affected soil moisture in northern provinces. Nevertheless, exports are forecast at 8 million tonnes in the 2018/19 marketing year (July/June), which would put this year's quantity above the five-year average. In the remaining countries of the subregion, the 2018 outputs of wheat have mostly decreased compared to the previous year, to levels slightly below the five-year average, and aggregate subregional imports of wheat in 2018/19 are forecast at a below-average level of 7.2 million tonnes. By contrast, the aggregate 2018 coarse grain production is estimated to be well above the five-year average and slightly above the previous year's level.

Domestic prices of wheat flour higher year on year

In **Kazakhstan**, export prices of wheat flour have increased since the last quarter of 2018, amid strong demand for the country's exports and a weaker local

Table 14. CIS in Asia cereal production

(million tonnes)

	Wheat			Coarse grains			Total cereals [1]			
	5-yr Avg.	2017	2018 estim	5-yr Avg.	2017	2018 estim	5-yr Avg.	2017	2018 estim	Change: 2018/2017 (%)
CIS in Asia	***25.9***	***25.5***	***24.4***	***7.8***	***8.4***	***8.9***	***34.6***	***34.9***	***34.3***	***-1.7***
Armenia	*0.3*	*0.2*	*0.2*	*0.2*	*0.1*	*0.1*	*0.5*	*0.3*	*0.3*	*-7.4*
Azerbaijan	*1.7*	*1.8*	*2.0*	*1.1*	*1.1*	*1.1*	*2.9*	*2.9*	*3.1*	*7.2*
Georgia	*0.1*	*0.1*	*0.1*	*0.3*	*0.2*	*0.3*	*0.4*	*0.3*	*0.4*	*21.5*
Kazakhstan	*14.1*	*14.8*	*13.9*	*4.0*	*4.6*	*5.3*	*18.5*	*19.9*	*19.7*	*-0.6*
Kyrgyzstan	*0.7*	*0.6*	*0.6*	*1.0*	*1.1*	*1.1*	*1.7*	*1.7*	*1.8*	*3.6*
Tajikistan	*0.9*	*0.9*	*0.7*	*0.3*	*0.4*	*0.3*	*1.3*	*1.4*	*1.1*	*-20.0*
Turkmenistan	*1.4*	*1.0*	*0.9*	*0.1*	*0.1*	*0.1*	*1.6*	*1.2*	*1.1*	*-9.0*
Uzbekistan	*6.8*	*6.1*	*6.0*	*0.8*	*0.9*	*0.6*	*7.8*	*7.2*	*6.8*	*-5.8*

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2013-2017 period.

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

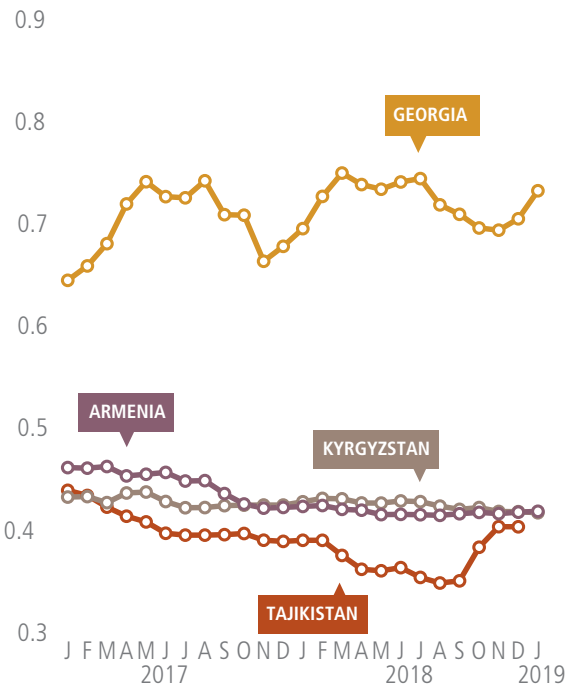
[4] Georgia is no longer a member of CIS but its inclusion in this group is maintained for the time being.

currency. In February 2019, prices were more than 20 percent higher than a year earlier, mainly on account of reduced availabilities of high quality grain. Domestic wholesale prices of wheat flour increased slowly since September 2018 and, in January 2019, they were slightly above their year earlier levels.

In the importing countries of the subregion, domestic retail prices of wheat flour showed mixed trends. In January 2019, prices in **Kyrgyzstan** and **Armenia** remained nearly unchanged from the preceding months. In **Georgia**, an import-dependent country that particularly relies on supplies from the Russian Federation, prices increased in January for the third consecutive month and reached an all-time high, reflecting higher Russian export prices and a weakening of its national currency.

Prices of potatoes, an important staple food in the subregion, increased seasonally in the first months of 2019 in most countries, including **Armenia**, **Georgia** and **Kazakhstan**. By contrast, in **Kyrgyzstan**, prices of potatoes have gradually decreased since September 2018 and in January 2019 were 50 percent lower on a yearly basis.

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



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

REGIONAL REVIEWS

LATIN AMERICA AND THE CARIBBEAN

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

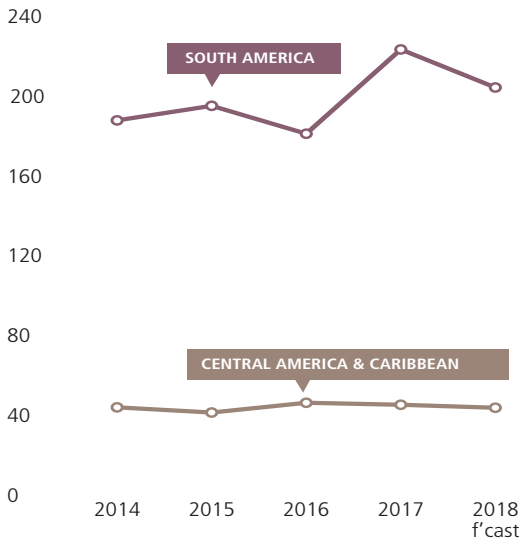
** See Terminology (*page 5*)

Latin America and the Caribbean Production Overview

Cereal production in Latin America and the Caribbean in 2018 is estimated at an above-average level of 248 million tonnes, but with a sharp decline compared to the previous year's bumper high.

Harvesting of the 2019 first season maize crop and planting of the second crop are underway in Argentina and Brazil, under generally favourable weather conditions. The aggregate area sown is officially forecast to increase on a yearly basis, reflecting higher prices and adequate moisture conditions at planting time. Overall, cereal production in the subregion is foreseen to increase in 2019.

Cereal production
(million tonnes)



CENTRAL AMERICA AND THE CARIBBEAN

Wheat plantings in 2019 expected to be close to last year's low level

In **Mexico**, virtually the only wheat producer in the subregion, planting of the 2019 main wheat crop was almost complete by the end of February under generally favourable weather conditions. Despite early forecasts portending an increase in the area planted, as of January, the sown area to wheat was comparable to last year's low level for the corresponding period. Consequently, under an assumption of a recovery in yields to average levels and low plantings, FAO forecasts wheat production in **Mexico** to increase year on year, but remain below average at 3.3 million tonnes.

With regard to the 2019 maize crop, early indications point to a rebound in the area planted, which has been mostly instigated by a government-supported price programme for smallholder maize farmers. In addition, higher market prices also induced farmers to expand the sown area to maize.

Despite localized drought conditions, the 2018 maize output is estimated to be above average

The 2018 maize harvest is mostly complete, except in northern **Guatemala** and **Nicaragua** where the "apante" season harvest, that accounts for less than 10 percent of the domestic outputs, is expected to last until April. The subregional 2018 maize output is estimated at about 31 million tonnes, slightly higher than the five year average. In **Mexico**, despite a contraction in the area sown, maize production in 2018 is estimated at 26.9 million tonnes, slightly above average. Elsewhere in *Central America*, despite concerns driven by localized unfavourable climatic conditions in the "Dry Corridor" area, which runs through **Guatemala**, **El Salvador**, **Honduras** and **Nicaragua**, the 2018 maize output is estimated to be similar to the five-year average. Although the impact of the drought in Nicaragua was not as severe as in neighbouring countries, social unrest caused uncertainties on access to finance and difficulties in transporting produce to markets. In an effort to mitigate the impact of crop losses in the previous season, the government distributed packages of certified seeds to be planted in the following minor season.

In **Haiti**, drought-reduced outputs in the key producing rainfed Artibonite and Centre departments more than offset the good outputs obtained from the irrigated areas and the highlands, resulting in an overall below-average 2018 maize harvest. By contrast, paddy production in 2018 is estimated at an above-average level of 183 000 tonnes, on account of higher yields in the main producing Artibonite Department, following a government-financed programme to rehabilitate irrigation canals and other agricultural infrastructure. In **the Dominican Republic**, the 2018 paddy output (irrigated) is estimated at a bumper level in 2018, mainly reflecting increased harvesting the second semester of 2018.

Cereal imports anticipated to increase in 2018/19

Cereal imports have been increasing in the subregion for more than five consecutive years, mainly due to increasing maize demand for feed use and wheat demand for food use. Cereal import requirements in the 2018/19 marketing year (September/August) are anticipated at a well above-average level of 36.2 million tonnes, about 2 million tonnes above the previous year.

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

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2017	2018 estim	5-yr Avg.	2017	2018 estim	5-yr Avg.	2017	2018 estim	5-yr Avg.	2017	2018 estim	Change: 2018/2017 (%)
Central America & Caribbean	***3.6***	***3.5***	***2.9***	***37.1***	***38.7***	***37.6***	***2.9***	***3.0***	***3.1***	***43.5***	***45.2***	***43.7***	***-3.3***
El Salvador	*0.0*	*0.0*	*0.0*	*1.0*	*1.0*	*0.9*	*0.0*	*0.0*	*0.0*	*1.0*	*1.0*	*1.0*	*-5.5*
Guatemala	*0.0*	*0.0*	*0.0*	*1.9*	*2.0*	*1.9*	*0.0*	*0.0*	*0.0*	*1.9*	*2.0*	*1.9*	*-2.8*
Honduras	*0.0*	*0.0*	*0.0*	*0.6*	*0.7*	*0.6*	*0.1*	*0.1*	*0.1*	*0.6*	*0.7*	*0.6*	*-12.3*
Mexico	*3.6*	*3.5*	*2.9*	*32.2*	*33.7*	*32.8*	*0.2*	*0.3*	*0.3*	*36.1*	*37.5*	*36.1*	*-3.7*
Nicaragua	*0.0*	*0.0*	*0.0*	*0.5*	*0.5*	*0.5*	*0.3*	*0.4*	*0.4*	*0.8*	*0.8*	*0.9*	*2.7*
South America	***23.9***	***25.9***	***29.0***	***146.1***	***172.6***	***150.4***	***24.6***	***25.1***	***25.0***	***194.6***	***223.5***	***204.4***	***-8.6***
Argentina	*14.3*	*18.5*	*19.5*	*45.4*	*56.4*	*50.8*	*1.5*	*1.3*	*1.4*	*61.1*	*76.2*	*71.6*	*-6.0*
Brazil	*5.7*	*4.3*	*5.5*	*84.2*	*100.7*	*84.2*	*11.9*	*12.3*	*12.1*	*101.8*	*117.3*	*101.8*	*-13.2*

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2013-2017 period.

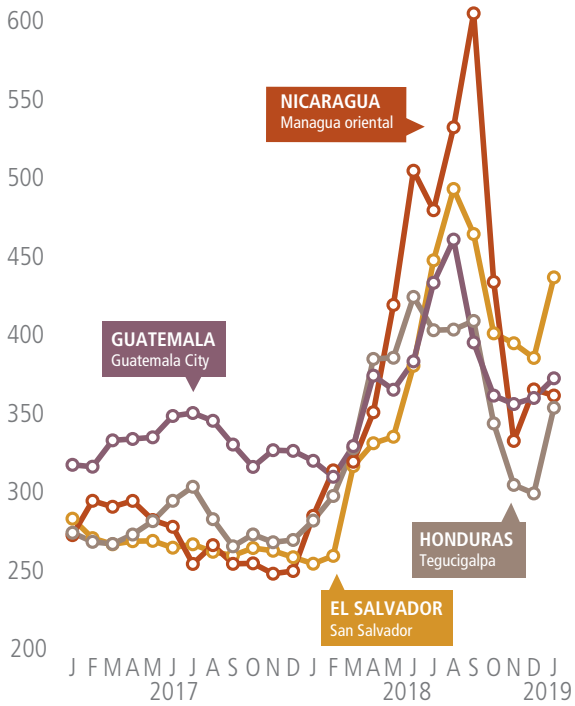
Prices of maize well above their year-earlier levels

In **El Salvador**, **Guatemala**, **Honduras** and **Nicaragua**, prices of white maize rose seasonally in the first months of 2019, after significant declines in late 2018 with the commercialization of the main and second season harvests. At the beginning of 2019, prices of maize were above their year-earlier levels, ranging from 20 to 70 percent, due mainly to higher input costs. In **Mexico**, prices continued a declining trend that began in late 2018, reflecting increased market availabilities from the main season harvest. However, prices of maize were still 14 percent higher in February 2019 than their year-earlier levels, mainly on account of the year-on-year decrease in production.

Prices of black and red beans in the subregion weakened during the December 2018-February 2019 period and were below their levels of a year earlier, reflecting large supplies from the recent harvests. In **the Dominican Republic**, prices of rice, the staple food, were higher on a yearly basis. Similarly, in **Haiti,** prices of imported rice were above their year-earlier levels due to reduced imports and a weakening of the local currency.

Wholesale white maize prices in selected countries in Central America

(USD/tonne)



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

SOUTH AMERICA

Maize production expected to recover in 2019 due to larger plantings and favourable weather conditions

In *South America*, harvesting of the first season maize crop and planting of the second season crop are underway under generally favourable weather conditions in the major producing countries. In **Argentina**, maize plantings were completed in mid-February and the area sown is officially estimated at 9.35 million hectares, a 2 percent year-on-year increase. Crops are developing under favourable weather conditions in the main producing regions of Buenos Aires and Córdoba, while harvesting has already started in centralwestern regions. Reflecting prospects of higher yields, the official maize production forecast indicates a recovery to a well above-average level of 49.7 million tonnes. In **Brazil**, production of the 2019 first season maize crop (which accounts for about 35 percent of the national aggregate output) is forecast at a similar level to the previous year's low outturn. The subdued outlook for this year's minor season is mainly on account of a contraction in plantings, reflecting farmers' decision to shift away from maize production to more the profitable soybean crop. Furthermore, centralwestern regions were adversely affected by reduced rainfalls and high temperature in December 2018, which diminished yield prospects and further weighed on production expectations. Although higher year-on-year yields are expected in the major producing Río Grande do Sul and Paraná states, which is foreseen to avert a larger production decline for the first season crop. The main second-season maize crop is currently being sown and the planting pace is faster than average, in part reflecting beneficial rains that improved soil moisture conditions in the important producing State of Paraná. With higher yields forecast for the "safrinha" crop, the output is projected to increase by 20 percent compared to the previous year's drought-reduced level and more than compensate for the lower output from the first season. Accordingly, the aggregate maize output in **Brazil** in 2019 is forecast to rebound by 10 percent to an above-average level of 91.6 million tonnes.

Elsewhere in the subregion, harvesting of the 2019 summer season maize crop is underway or expected to start in March, and production prospects are mixed. This reflects contractions in the area sown in **Bolivia (Plurinational State of)**, **Chile** and Peru, while increased outputs are forecast in **Colombia**, underpinned by beneficial weather conditions, and in **Paraguay**, on account of expansion in plantings, spurred by growing demand for maize for industrial use. In **Uruguay**, planting intentions indicate a significant increase in the area sown, mostly induced by higher prices.

Cereal production declined in 2018 but remained above average

The subregional 2018 cereal output is estimated at 204 million tonnes, 5 percent above the five-year average, but below the record high of the previous year. Maize production constitutes the bulk of subregion's cereal output and the 2018 harvest is estimated at 137 million tonnes, slightly above average but lower on a yearly basis. The year-on-year decline reflects reduced outputs in **Argentina**, **Bolivia (Plurinational State of)**, **Brazil**, **Colombia**, **Ecuador** and **Uruguay**, due to a decrease in yields following dry weather conditions. By contrast, production in **Paraguay** is estimated at a well above-average level, mostly reflecting an enlarged area planted prompted by growing demand for maize in ethanol production.

The aggregate wheat production in 2018 is estimated at a well above-average level of 29 million tonnes. The good outturn is

mostly on account of a well above-average harvest in **Argentina**, the major wheat producing country of the subregion, where the harvest was completed in January 2019. The increase stems from an expansion in the area sown and higher yields. Lastly, the 2018 rice paddy production in the subregion is estimated at 25 million tonnes, slightly higher than the average, following above-average outputs in Brazil, Colombia and Peru, the subregion's main rice producers.

In **Venezuela**, cereal production in 2018 is estimated at a well below-average level. The lower output is mostly on account of a lack of seeds and agricultural inputs, coupled with the impact of fixed prices of maize and rice, amidst hyperinflation, that acted as disincentive to produce these cereals.

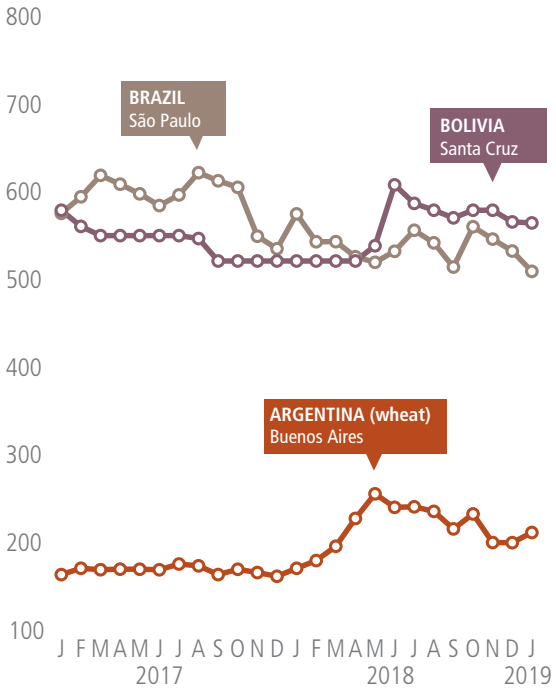
Cereal exports anticipated to remain high in 2018/19

Aggregate cereal exports in the 2018/19 marketing year are forecast at an above-average level of 75.6 million tonnes, with maize accounting for over two-thirds of this volume. Reflecting the slightly above-average 2018 maize output and weak local currencies in **Argentina** and **Brazil**, which have increased their competitiveness on international markets, subregional maize exports are estimated to be 14 percent above average. However, this quantity remains 10 percent below the record high estimated in 2017/18. Subregional wheat exports are forecast to be 42 percent higher than average, on account of a large wheat output in 2018, coupled with the depreciation of the local currency of Argentina, the main wheat producer.

Wheat and maize prices rebound in the December 2018 to February 2019 period

Following declines in October and November 2018, prices of yellow maize and wheat grain generally increased in the December-February period and were above their year-earlier levels. In **Argentina** and Brazil, prices of yellow maize were 90 and 20 percent, respectively, higher on a yearly basis as of February 2019, sustained by weak local currencies, that encouraged international buyers to pre-purchase the 2019 crops. Elsewhere in the subregion, prices of yellow maize increased seasonally in most countries, including in **Bolivia (Plurinational State of)**, where prices were slightly above their levels a year earlier, underpinned by the reduced 2018 output and forecasts of a contraction in the area sown to maize for the 2019 main season. In **Chile**, prices of yellow maize continued to increase supported by a weaker currency, while in **Colombia**, prices declined on account of large imports that reinforced domestic supplies.

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.

In **Argentina**, prices of wheat increased in the first months of 2019 despite a good harvest that was completed in January, mainly reflecting the weaker currency, and were more than double on a yearly basis. The higher prices in Argentina, given its status as the main wheat supplier in the subregion, contributed to higher prices in neighbouring countries including **Bolivia (Plurinational State of)** and **Brazil**. By contrast, in **Chile**, prices of wheat grain declined, but were still more than 20 percent higher than their levels in the same period last year due to costlier imports, that represent around half of the total domestic supply. In **Colombia**, **Ecuador** and **Peru**, prices of wheat flour were near their year-earlier values.

With regards to rice, prices of paddy in **Brazil** weakened at the beginning of 2019 as the harvest of the new crop boosted market supplies. In **Colombia**, prices of rice remained relatively stable although higher than the low levels of the previous year. In **Bolivia (Plurinational State of)**, **Ecuador** and **Peru**, prices of rice were also stable but lower on a yearly basis reflecting good domestic supplies from 2018 harvests, while prices of rice strengthened in **Uruguay**.

REGIONAL REVIEWS

NORTH AMERICA, EUROPE AND OCEANIA

Note: Situation as of February
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

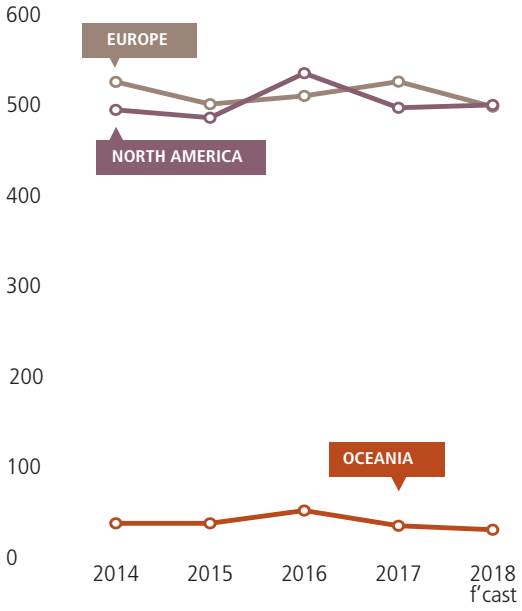
Source: GIEWS
**(disputed territories and boundaries in conformity with UN maps)
** See Terminology (*page 5*)

North America, Europe and Oceania Production Overview

In the United States of America, the 2019 wheat output set to remain nearly unchanged on a yearly basis, as an expected rise in yields is foreseen to offset a decline in winter wheat plantings amid excessively wet weather conditions. Canada's main 2018 wheat crop will be sown in the spring and preliminary forecasts indicate an enlarged area, with total production forecast to expand in 2019.

In Europe, wheat production is expected to rebound in the European Union in 2019, based on larger plantings and a likely increase in yields after the drought-affected low levels in 2018. In the CIS countries, mostly favourable weather and an expansion in the area sown is expected to foster an increase in wheat production in both the Russian Federation and Ukraine. In Oceania, although wheat plantings in Australia will only commence in May, wheat production is likely to rebound from the previous year's drought-reduced level.

Cereal production
(million tonnes)



NORTH AMERICA

Winter wheat area in 2019 falls to second lowest level on record

For the 2019 crop, winter wheat plantings in **the United States of America** are estimated to have contracted by 4 percent to the second lowest area on record, reflecting excessively wet weather conditions in some of the main producing states that hindered planting operations. With only a small proportion of the winter wheat area experiencing drought conditions, a moderate upturn in yields is expected in 2019 while the abandonment rate is also foreseen to decline to normal levels, partly offsetting the impact of a reduction in plantings. Overall, with the spring wheat area anticipated to rise slightly, total wheat production in 2019 is foreseen to remain nearly unchanged compared to last year's output, which was below the five-year average.

In **Canada**, the total area planted with wheat in 2019 is forecast at almost 10 million hectares, unchanged from the previous year and 20 percent above the five-year average. This reflects an expected increase in the area sown to spring wheat, the country's major wheat crop, that would more than offset a contraction in winter wheat sowings, which are estimated at a 14-year low of 0.55 million hectares. As of late February, the winter wheat crop was reported to be in a favourable condition, with the harvest expected to begin in June. Assuming a continuation of beneficial weather and likely average yields for both the winter and spring crops, aggregate wheat production in 2019 is forecast at 33 million tonnes, slightly above the previous year's level and 8 percent higher than the five-year average.

EUROPE

EUROPEAN UNION

Wheat plantings and production in 2019 forecast close to average

In the *European Union*, the area sown to winter wheat in 2019 is estimated at 26.6 million hectares, slightly above the previous year's level and close to the five-year average. Despite dry weather conditions in late 2018 in central countries and, more recently, excessive precipitations in southeastern parts of the European Union, overall weather conditions have since been favourable, with higher-than-average temperatures protecting crops from frost damage. Given the estimated increase in plantings and an expected recovery in yields compared to last year's below-average level, wheat production is forecast to increase in 2019 to 153 million tonnes, well above 2018's output and close to the five-year average.

CIS IN EUROPE

Wheat production in 2019 forecast to rebound

Planting of the 2019 winter cereal crops was completed last November. Crops, to be harvested between July and August, are currently in dormancy phase over most part of the subregion and production prospects are generally favourable.

In **the Russian Federation**, the 2019 planted area to winter cereals, mostly wheat, is estimated at about 17.6 million hectares, 5 percent higher than last's year above-average level. Winter grains are in fair to good condition throughout more than 90 percent of the planted area, reflecting favourable weather conditions. At the beginning of February, in the main wheat producing southern and northern Caucasian districts, snow coverage was reported to be below average, but still sufficient to prevent crops from freezing and to secure good moisture reserves in early spring (March-April), when crop growth will resume. The expansion in winter plantings is expected to more than offset a foreseen drop in spring sowings and

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

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2017	2018 estim	5-yr Avg.	2017	2018 estim	5-yr Avg.	2017	2018 estim	5-yr Avg.	2017	2018 estim	Change: 2018/2017 (%)
North America	***87.2***	***77.4***	***83.1***	***406.0***	***411.1***	***406.5***	***9.1***	***8.1***	***10.2***	***502.4***	***496.6***	***499.7***	***0.6***
Canada	*31.3*	*30.0*	*31.8*	*25.9*	*26.4*	*26.3*	*0.0*	*0.0*	*0.0*	*57.3*	*56.3*	*58.0*	*3.0*
United States of America	*55.9*	*47.4*	*51.3*	*380.1*	*384.8*	*380.3*	*9.1*	*8.1*	*10.2*	*445.1*	*440.2*	*441.7*	*0.3*
Europe	***251.0***	***271.9***	***242.8***	***254.0***	***249.6***	***251.0***	***4.1***	***4.0***	***4.0***	***509.0***	***525.5***	***497.8***	***-5.3***
Belarus	*2.6*	*2.6*	*2.6*	*5.2*	*4.9*	*5.1*	*0.0*	*0.0*	*0.0*	*7.8*	*7.5*	*7.7*	*2.9*
European Union	*151.5*	*152.0*	*137.5*	*158.6*	*156.4*	*152.3*	*2.9*	*2.9*	*2.8*	*313.0*	*311.2*	*292.7*	*-6.0*
Russian Federation	*66.5*	*85.9*	*72.1*	*41.4*	*44.3*	*36.4*	*1.0*	*1.0*	*1.0*	*109.0*	*131.1*	*109.5*	*-16.5*
Serbia	*2.5*	*2.3*	*3.2*	*6.7*	*4.5*	*7.6*	*0.0*	*0.0*	*0.0*	*9.2*	*6.8*	*10.8*	*58.8*
Ukraine	*25.0*	*26.2*	*24.6*	*37.5*	*34.6*	*44.4*	*0.1*	*0.1*	*0.1*	*62.6*	*60.8*	*69.1*	*13.5*
Oceania	***25.3***	***21.6***	***17.7***	***14.3***	***12.3***	***11.9***	***0.8***	***0.8***	***0.6***	***40.4***	***34.7***	***30.3***	***-12.7***
Australia	*24.9*	*21.2*	*17.3*	*13.7*	*11.7*	*11.3*	*0.8*	*0.8*	*0.6*	*39.3*	*33.8*	*29.2*	*-13.5*

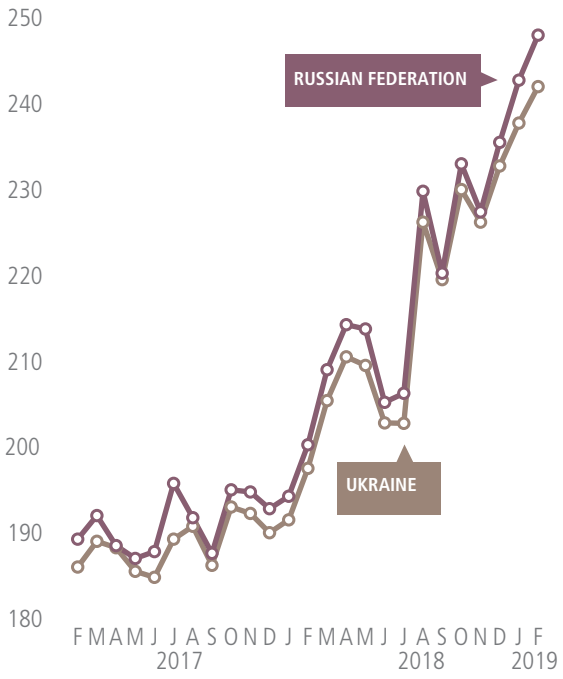
Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2013-2017 period.

the total area planted with wheat in 2019 is, therefore, projected at above-average 27.2 million hectares. Given the increase in area planted and assuming average yields, the 2019 total wheat production is forecast at 79 million tonnes, above both the previous year and the five year average.

In **Ukraine**, the area planted with winter cereals (mainly wheat) is officially estimated at 7.6 million hectares, slightly above the five-year average. In most winter cereal producing provinces, crops have been in the dormant phase under thick snow cover since late November 2018 and weather conditions were reported to be generally favourable, particularly when compared to preceding years. However, in some southern provinces, warmer temperatures in recent months prompted early plant growth at the start of 2019, which could diminish yield potentials. Given a year-on-year increase in winter wheat plantings to an above-average 6.45 million hectares, as well as assuming an average area planted with spring wheat and favourable weather conditions throughout the rest of the growing season, the aggregate wheat output in 2019 is forecast to increase slightly to 26.5 million tonnes.

In **the Republic of Moldova** and **Belarus**, the areas planted to winter cereals are officially estimated to be close to average levels. Above-average precipitations in December 2018 and January 2019 benefited winter crops, however, below-average rains in the first half of February might have affected soil moisture levels.

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



Source: International Grains Council.

Ukraine maize production estimated at an all-time high in 2018

The 2018 subregional aggregate cereal output is estimated at about 189.7 million tonnes, 6.5 percent below the previous year's level but still slightly above the five-year average. Wheat production, which normally accounts for more than half of the subregional cereal output, is pegged at an above-average 100 million tonnes. By country, in **the Russian Federation**, production of wheat in 2018 is estimated at 72 million tonnes, 8.3 percent above the five-year average on account of increased plantings, but below the level in 2017, as several large grain producing areas in the southern and central regions were affected by unfavourable weather conditions that reduced yields. Reflecting the above average output, Russian wheat exports, accounting for about 70 percent of total wheat shipments in the subregion are forecast at 35.6 million tonnes in the 2018/19 marketing year (July/June), more than 32 percent above the five-year average. For maize, the total subregional output in 2018 is set to rebound from the previous year, reaching 49.5 million tonnes. Maize shipments are forecast at 31 million tonnes, well above the five-year average, as record shipments from **Ukraine**, where maize output in 2018 reached an all-time high, are expected to more than outweigh below-average exports from **the Russian Federation**. The 28 million tonnes of maize exports expected from **Ukraine**, in the 2018/19 marketing year, would make the country the second largest exporter of maize in the world, after the United States of America.

Export prices of wheat reached a four-year high

In **the Russian Federation** and **Ukraine**, export prices of milling wheat increased since November 2018 and, in February 2019, reached a four-year high. The recent spike in prices is mainly due to tightening availabilities of domestically produced wheat and steady foreign demand for the countries' exports. Moreover, shrinking supplies put upward pressure on domestic prices of wheat grain and wheat flour, which increased over the last months of 2018 and the first quarter of 2019, to levels 20 percent higher on a yearly basis.

OCEANIA

Area planted with 2019 summer cereals estimated close to average

In **Australia**, sowing of the 2019 summer cereal crops was completed in January and the planted area is estimated to be close to last year's average level. The area planted with sorghum, the main summer cereal crop, is officially estimated to increase marginally to 537 000 hectares, while maize plantings are estimated to have contracted to 51 000 hectares. Between November 2018 and January 2019, below-average rains and higher-than-average temperatures were observed in the main cereal crops growing provinces of Queensland and northern New South Wales, leading to below-average soil moisture levels that are likely to adversely affect early development of the summer crops. Unless adequate and timely precipitation over the remainder of the season occurs, production of the 2019 summer cereals is expected to be well below average.

The 2018 wheat production, which was recently harvested, is officially estimated at 17.3 million tonnes, well below the previous year's level and almost 30 percent below the five-year average. The significant reduction is mainly due to a decrease in yields, driven by dry weather conditions between June and September, especially in key cropping areas of New South Wales and Western Australia. Barley production also declined to 8.3 million tonnes, putting the 2018 harvest 16 percent below the five-year average.

STATISTICAL APPENDIX

Table A1. Global cereal supply and demand indicators

	Average 2013/14 - 2017/18	2014/15	2015/16	2016/17	2017/18	2018/19
Ratio of world stocks to utilization (%)						
Wheat	*32.4*	*30.6*	*32.2*	*34.5*	*37.1*	*35.0*
Coarse grains	*24.4*	*24.9*	*24.8*	*25.5*	*25.8*	*22.6*
Rice	*33.8*	*34.2*	*33.5*	*33.4*	*33.9*	*34.4*
Total cereals	*28.5*	*28.3*	*28.6*	*29.6*	*30.5*	*28.3*
Ratio of major grain exporters' supplies to market requirements (%) [1]	*123.4*	*124.3*	*124.0*	*123.2*	*122.6*	*116.1*
Ratio of major exporters' stocks to their total disappearance (%) [2]						
Wheat	*18.6*	*18.4*	*18.0*	*19.9*	*20.8*	*17.2*
Coarse grains	*13.4*	*14.3*	*12.6*	*14.0*	*15.2*	*13.4*
Rice	*22.0*	*24.6*	*19.7*	*18.8*	*18.0*	*19.4*
Total cereals	*18.0*	*19.1*	*16.8*	*17.6*	*18.0*	*16.7*

	Annual trend growth rate 2008-2017	Change from previous year 2014	2015	2016	2017	2018
Changes in world cereal production (%)	*1.6*	*1.8*	*-1.2*	*2.8*	*1.7*	*-1.9*
Changes in cereal production in the LIFDCs (%)	*2.1*	*2.9*	*-3.8*	*4.7*	*3.6*	*1.3*
Changes in cereal production in the LIFDCs excluding India (%)	*2.3*	*5.3*	*-2.5*	*4.3*	*1.4*	*1.2*

	2016	2017	2018	2019*	Change 2019* over 2018*
Selected cereal price indices[3]					
Wheat	*125.2*	*133.4*	*148.5*	*154.2*	*12.0%*
Maize	*151.0*	*146.3*	*155.9*	*158.9*	*5.0%*
Rice	*193.5*	*206.4*	*224.4*	*223.2*	*-1.1%*

Source: FAO

Notes: Utilization is defined as the sum of food use, feed and other uses. Cereals refer to wheat, coarse grains and rice; grains refer to wheat and coarse grains (barley, maize, millet, sorghum and cereals NES).

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

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

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

*January-February average.

Table A2. World cereal stocks[1]

(million tonnes)

	2014	2015	2016	2017	2018 estimate	2019 forecast
TOTAL CEREALS	***636.3***	***711.7***	***734.3***	***772.8***	***809.7***	***766.5***
Wheat	***196.5***	***217.4***	***236.2***	***254.5***	***275.3***	***264.7***
held by:						
- main exporters[2]	*57.4*	*69.0*	*70.2*	*80.2*	*83.7*	*67.9*
- others	*139.1*	*148.4*	*166.0*	*174.3*	*191.6*	*196.8*
Coarse grains	***273.4***	***325.4***	***331.1***	***349.9***	***361.9***	***324.2***
held by:						
- main exporters[2]	*84.7*	*111.2*	*99.7*	*113.2*	*125.9*	*111.2*
- others	*188.7*	*214.2*	*231.4*	*236.7*	*236.0*	*213.0*
Rice (milled basis)	***166.4***	***169.0***	***167.0***	***168.4***	***172.5***	***177.6***
held by:						
- main exporters[2]	*49.6*	*43.6*	*34.5*	*33.1*	*32.1*	*34.9*
- others	*116.8*	*125.4*	*132.5*	*135.3*	*140.4*	*142.7*
Developed countries	***150.8***	***181.0***	***177.5***	***203.6***	***208.3***	***183.6***
Australia	*7.7*	*7.8*	*6.6*	*8.7*	*9.1*	*7.7*
Canada	*15.2*	*10.5*	*10.0*	*12.5*	*10.5*	*9.6*
European Union	*32.7*	*40.0*	*36.4*	*33.2*	*42.0*	*36.9*
Japan	*7.1*	*7.1*	*7.3*	*6.6*	*6.7*	*6.8*
Russian Federation	*8.1*	*12.8*	*11.4*	*19.2*	*23.4*	*17.6*
South Africa	*1.7*	*3.4*	*3.8*	*1.8*	*4.9*	*2.7*
Ukraine	*10.9*	*12.9*	*9.4*	*7.3*	*6.0*	*5.8*
United States of America	*51.4*	*69.0*	*76.1*	*95.8*	*88.8*	*77.1*
Developing countries	***485.6***	***530.7***	***556.8***	***569.2***	***601.4***	***582.9***
Asia	***403.0***	***430.3***	***459.6***	***469.6***	***483.5***	***468.5***
China (Mainland)	*257.9*	*282.5*	*325.5*	*351.1*	*359.9*	*346.5*
India	*49.6*	*48.9*	*41.9*	*34.5*	*41.8*	*46.1*
Indonesia	*10.9*	*9.9*	*9.6*	*8.9*	*10.0*	*9.9*
Iran (Islamic Republic of)	*6.0*	*9.4*	*9.9*	*8.4*	*6.5*	*5.3*
Korea, Republic of	*3.7*	*3.9*	*4.3*	*3.7*	*3.1*	*3.1*
Pakistan	*5.2*	*6.2*	*5.2*	*5.1*	*4.2*	*2.3*
Philippines	*3.2*	*4.2*	*4.0*	*3.7*	*4.1*	*4.9*
Syrian Arab Republic	*3.2*	*2.0*	*1.5*	*2.0*	*2.0*	*1.4*
Turkey	*7.2*	*6.3*	*5.9*	*4.7*	*6.0*	*3.8*
Africa	***44.2***	***50.1***	***51.9***	***51.6***	***55.1***	***55.8***
Algeria	*4.2*	*5.0*	*5.7*	*5.6*	*5.4*	*6.0*
Egypt	*6.2*	*6.3*	*7.1*	*6.7*	*7.0*	*6.3*
Ethiopia	*1.8*	*3.1*	*4.2*	*4.8*	*5.6*	*5.8*
Morocco	*5.8*	*5.4*	*8.2*	*5.9*	*6.6*	*7.1*
Nigeria	*3.4*	*4.3*	*3.0*	*2.4*	*2.6*	*3.3*
Tunisia	*0.9*	*1.2*	*1.0*	*1.0*	*1.1*	*1.0*
Central America	***7.5***	***8.2***	***9.7***	***12.3***	***13.3***	***12.9***
Mexico	*3.3*	*3.6*	*4.6*	*6.5*	*7.6*	*7.5*
South America	***30.4***	***41.7***	***35.2***	***35.3***	***49.1***	***45.3***
Argentina	*6.5*	*11.6*	*7.7*	*7.4*	*12.4*	*10.8*
Brazil	*12.5*	*17.5*	*14.2*	*12.7*	*19.9*	*16.8*

Source: FAO

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

[1] Stocks data are based on an aggregate of carryovers at the end of national crop years and do not represent world stock levels at any point in time.

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

Table A3. Selected international prices of wheat and coarse grains

(USD/tonne)

	Wheat			Maize		Sorghum
	US No.2 Hard Red Winter Ord. Protein [1]	US Soft Red Winter No.2 [2]	Argentina Trigo Pan[3]	US No.2 Yellow[2]	Argentina[3]	US No.2 Yellow[2]
Annual (July/June)						
2005/06	175	138	138	104	101	108
2006/07	212	176	188	150	145	155
2007/08	361	311	318	200	192	206
2008/09	270	201	234	188	180	170
2009/10	209	185	224	160	168	165
2010/11	316	289	311	254	260	248
2011/12	300	256	264	281	269	264
2012/13	348	310	336	311	278	281
2013/14	318	265	335	217	219	218
2014/15	266	221	246	173	177	210
2015/16	211	194	208	166	170	174
2016/17	197	170	190	156	172	151
2017/18	230	188	203	159	165	174
Monthly						
2017 - February	210	180	186	163	179	157
2017 - March	198	176	191	159	163	150
2017 - April	191	173	189	157	164	150
2017 - May	200	175	189	158	161	158
2017 - June	226	182	190	158	155	164
2017 - July	240	206	193	159	150	173
2017 - August	201	173	190	148	149	170
2017 - September	215	176	181	147	149	169
2017 - October	214	177	182	148	149	171
2017 - November	220	176	179	148	150	167
2017 - December	219	171	178	149	158	174
2018 - January	229	178	178	156	164	178
2018 - February	240	191	189	164	177	188
2018 - March	245	198	211	171	188	181
2018 - April	240	198	229	175	189	180
2018 - May	250	211	261	179	192	165
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

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 2017/18 or 2018
(thousand tonnes)

		2016/17 or 2017			2017/18 or 2018
	Marketing year	Commercial purchases	Food aid	Total imports *(commercial and aid)*	Total import requirements *(excl. re-exports)*
AFRICA		***34 889.1***	***994.3***	***35 883.4***	***36 298.1***
East Africa		***10 611.6***	***599.0***	***11 210.6***	***12 065.5***
Burundi	Jan/Dec	*160.9*	*15.0*	*175.9*	*169.8*
Comoros	Jan/Dec	*41.0*	*0.0*	*41.0*	*61.0*
Djibouti	Jan/Dec	*81.0*	*4.0*	*85.0*	*85.0*
Eritrea	Jan/Dec	*447.3*	*0.0*	*447.3*	*447.7*
Ethiopia	Jan/Dec	*1 677.6*	*54.0*	*1 731.6*	*1 946.9*
Kenya	Oct/Sept	*3 220.0*	*80.0*	*3 300.0*	*3 664.6*
Rwanda	Jan/Dec	*195.0*	*0.0*	*195.0*	*200.0*
Somalia	Aug/Jul	*695.0*	*170.0*	*865.0*	*950.0*
South Sudan	Nov/Oct	*500.0*	*60.0*	*560.0*	*665.0*
Sudan	Nov/Oct	*2 100.0*	*182.0*	*2 282.0*	*2 360.0*
Uganda	Jan/Dec	*482.2*	*23.0*	*505.2*	*560.5*
United Republic of Tanzania	Jun/May	*1 011.6*	*11.0*	*1 022.6*	*955.0*
Southern Africa		***3 767.3***	***93.2***	***3 860.5***	***2 963.8***
Lesotho	Apr/Mar	*249.5*	*14.0*	*263.5*	*189.1*
Madagascar	Apr/Mar	*467.4*	*17.1*	*484.5*	*1 023.6*
Malawi	Apr/Mar	*540.0*	*6.0*	*546.0*	*167.0*
Mozambique	Apr/Mar	*1 295.0*	*1.0*	*1 296.0*	*1 116.0*
Zimbabwe	Apr/Mar	*1 215.4*	*55.1*	*1 270.5*	*468.1*
West Africa		***18 331.9***	***143.1***	***18 475.0***	***19 099.5***
Coastal Countries		***13 190.1***	***44.5***	***13 234.6***	***14 091.1***
Benin	Jan/Dec	*426.0*	*6.0*	*432.0*	*612.0*
Côte d'Ivoire	Jan/Dec	*2 065.0*	*5.5*	*2 070.5*	*2 170.5*
Ghana	Jan/Dec	*1 260.2*	*5.0*	*1 265.2*	*1 452.6*
Guinea	Jan/Dec	*897.0*	*5.5*	*902.5*	*1 007.5*
Liberia	Jan/Dec	*490.0*	*12.0*	*502.0*	*487.0*
Nigeria	Jan/Dec	*7 390.0*	*0.0*	*7 390.0*	*7 710.0*
Sierra Leone	Jan/Dec	*466.9*	*10.0*	*476.9*	*356.0*
Togo	Jan/Dec	*195.0*	*0.5*	*195.5*	*295.5*
Sahelian Countries		***5 141.8***	***98.6***	***5 240.4***	***5 008.4***
Burkina Faso	Nov/Oct	*703.0*	*10.0*	*713.0*	*698.0*
Chad	Nov/Oct	*121.0*	*38.6*	*159.6*	*169.6*
Gambia	Nov/Oct	*217.0*	*1.5*	*218.5*	*278.5*
Guinea-Bissau	Nov/Oct	*158.0*	*6.3*	*164.3*	*119.3*
Mali	Nov/Oct	*451.2*	*0.0*	*451.2*	*451.2*
Mauritania	Nov/Oct	*589.7*	*16.1*	*605.8*	*578.8*
Niger	Nov/Oct	*625.0*	*18.0*	*643.0*	*638.0*
Senegal	Nov/Oct	*2 276.9*	*8.1*	*2 285.0*	*2 075.0*
Central Africa		***2 178.3***	***159.0***	***2 337.3***	***2 169.3***
Cameroon	Jan/Dec	*1 335.0*	*10.0*	*1 345.0*	*1 160.0*
Central African Republic	Jan/Dec	*81.0*	*23.0*	*104.0*	*106.0*
Democratic Republic of the Congo	Jan/Dec	*745.0*	*125.0*	*870.0*	*885.0*
Sao Tome and Principe	Jan/Dec	*17.3*	*1.0*	*18.3*	*18.3*

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 1 985 in 2013); for full details see http://www.fao.org/countryprofiles/lifdc

Table A4b. Estimated cereal import requirements of Low-Income Food-Deficit Countries[1] in 2017/18 or 2018
(thousand tonnes)

		2016/17 or 2017			2017/18 or 2018
	Marketing year	Commercial purchases	Food aid	Total imports *(commercial and aid)*	Total import requirements *(excl. re-exports)*
ASIA		***28 547.1***	***773.1***	***29 320.2***	***30 114.3***
Cis in Asia		***4 579.1***	***0.1***	***4 579.2***	***4 634.0***
Kyrgyzstan	Jul/Jun	*565.3*	*0.1*	*565.4*	*617.5*
Tajikistan	Jul/Jun	*1 147.5*	*0.0*	*1 147.5*	*1 032.5*
Uzbekistan	Jul/Jun	*2 866.3*	*0.0*	*2 866.3*	*2 984.0*
Far East		***14 396.0***	***153.0***	***14 549.0***	***14 858.3***
Bangladesh	Jul/Jun	*6 674.9*	*85.0*	*6 759.9*	*10 980.9*
Democratic People's Republic of Korea	Nov/Oct	*390.0*	*66.0*	*456.0*	*641.0*
India	Apr/Mar	*6 030.8*	*0.0*	*6 030.8*	*1 893.8*
Nepal	Jul/Jun	*1 144.2*	*2.0*	*1 146.2*	*1 190.8*
Pakistan	May/Apr	*156.1*	*0.0*	*156.1*	*151.8*
Near East		***9 572.0***	***620.0***	***10 192.0***	***10 622.0***
Afghanistan	Jul/Jun	*2 922.0*	*100.0*	*3 022.0*	*2 882.0*
Syrian Arab Republic	Jul/Jun	*2 650.0*	*290.0*	*2 940.0*	*3 430.0*
Yemen	Jan/Dec	*4 000.0*	*230.0*	*4 230.0*	*4 310.0*
CENTRAL AMERICA AND THE CARIBBEAN		***1 476.2***	***10.0***	***1 486.2***	***1 402.1***
Haiti	Jul/Jun	*866.6*	*10.0*	*876.6*	*810.1*
Nicaragua	Jul/Jun	*609.6*	*0.0*	*609.6*	*592.0*
OCEANIA		***483.3***	***0.0***	***483.3***	***504.0***
Papua New Guinea	Jan/Dec	*420.2*	*0.0*	*420.2*	*440.2*
Solomon Islands	Jan/Dec	*63.1*	*0.0*	*63.1*	*63.8*
TOTAL		***65 395.7***	***1 777.4***	***67 173.1***	***68 318.5***

Source: FAO

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

Table A5. Estimated cereal import requirements of Low-Income Food-Deficit Countries[1] in 2018/19*
(thousand tonnes)

		2017/18			2018/19
	Marketing year	Commercial purchases	Food aid	Total imports *(commercial and aid)*	Total import requirements *(excl. re-exports)*
AFRICA		***15 826.6***	***740.2***	***16 566.8***	***15 895.7***
Eastern Africa		***7 958.6***	***636.0***	***8 594.6***	***7 829.3***
Kenya	Oct/Sep	*3 579.6*	*85.0*	*3 664.6*	*3 154.3*
Somalia	Aug/Jul	*760.0*	*190.0*	*950.0*	*850.0*
South Sudan	Nov/Oct	*575.0*	*90.0*	*665.0*	*680.0*
Sudan	Nov/Oct	*2 100.0*	*260.0*	*2 360.0*	*2 240.0*
United Republic of Tanzania	Jun/May	*944.0*	*11.0*	*955.0*	*905.0*
Southern Africa		***2 949.0***	***14.8***	***2 963.8***	***2 733.0***
Lesotho	Apr/Mar	*188.5*	*0.6*	*189.1*	*235.9*
Madagascar	Apr/Mar	*1 015.6*	*8.0*	*1 023.6*	*751.0*
Malawi	Apr/Mar	*165.0*	*2.0*	*167.0*	*277.0*
Mozambique	Apr/Mar	*1 115.0*	*1.0*	*1 116.0*	*1 096.0*
Zimbabwe	Apr/Mar	*464.9*	*3.2*	*468.1*	*373.1*
West Africa		***4 919.0***	***89.4***	***5 008.4***	***5 333.4***
Sahelian Countries		***4 919.0***	***89.4***	***5 008.4***	***5 333.4***
Burkina Faso	Nov/Oct	*688.0*	*10.0*	*698.0*	*753.0*
Chad	Nov/Oct	*131.0*	*38.6*	*169.6*	*169.6*
Gambia	Nov/Oct	*277.0*	*1.5*	*278.5*	*248.5*
Guinea-Bissau	Nov/Oct	*113.0*	*6.3*	*119.3*	*149.3*
Mali	Nov/Oct	*451.2*	*0.0*	*451.2*	*501.2*
Mauritania	Nov/Oct	*565.8*	*13.0*	*578.8*	*603.8*
Niger	Nov/Oct	*620.0*	*18.0*	*638.0*	*708.0*
Senegal	Nov/Oct	*2 073.0*	*2.0*	*2 075.0*	*2 200.0*
ASIA		***25 160.7***	***643.6***	***25 804.3***	***22 760.5***
CIS in Asia		***4 633.9***	***0.1***	***4 634.0***	***5 167.5***
Kyrgyzstan	Jul/Jun	*617.4*	*0.1*	*617.5*	*588.5*
Tajikistan	Jul/Jun	*1 032.5*	*0.0*	*1 032.5*	*1 232.0*
Uzbekistan	Jul/Jun	*2 984.0*	*0.0*	*2 984.0*	*3 347.0*
Far East		***14 604.8***	***253.5***	***14 858.3***	***10 361.0***
Bangladesh	Jul/Jun	*10 879.4*	*101.5*	*10 980.9*	*8 702.4*
Democratic People's Republic of Korea	Nov/Oct	*491.0*	*150.0*	*641.0*	-
India	Apr/Mar	*1 893.8*	*0.0*	*1 893.8*	*396.0*
Nepal	Jul/Jun	*1 188.8*	*2.0*	*1 190.8*	*1 090.8*
Pakistan	May/April	*151.8*	*0.0*	*151.8*	*171.8*
Near East		***5 922.0***	***390.0***	***6 312.0***	***7 232.0***
Afghanistan	Jul/Jun	*2 782.0*	*100.0*	*2 882.0*	*3 492.0*
Syrian Arab Republic	Jul/Jun	*3 140.0*	*290.0*	*3 430.0*	*3 740.0*
CENTRAL AMERICA AND THE CARIBBEAN		***1 392.0***	***10.1***	***1 402.1***	***1 412.1***
Haiti	Jul/Jun	*800.0*	*10.1*	*810.1*	*830.1*
Nicaragua	Jul/Jun	*592.0*	*0.0*	*592.0*	*582.0*
TOTAL		***42 379.3***	***1 393.9***	***43 773.2***	***40 068.3***

Source: FAO

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

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

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