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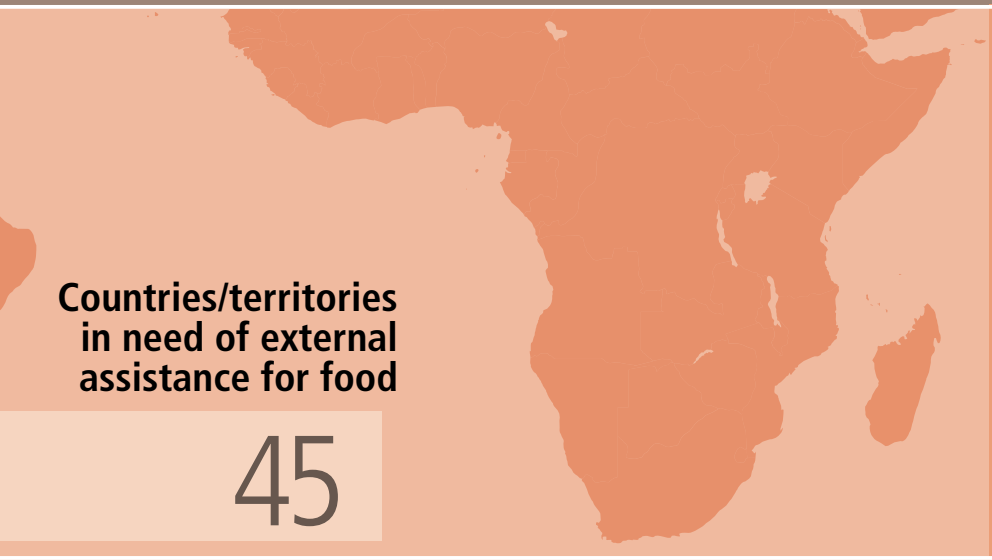
CROP PROSPECTS and FOOD SITUATION

Triannual Global Report



Countries/territories in need of external assistance for food

45

COUNTRIES/TERRITORIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD

FAO assesses that 45 countries, including 33 in Africa, nine in Asia, two in Latin America and the Caribbean, and one in Europe, are in need of external assistance for food. Conflicts and insecurity continue to be the primary drivers of high levels of acute food insecurity, with populations in the Gaza Strip, Haiti, Mali and the Sudan facing Phase 5 (Catastrophe) levels in 2024, according to the latest Integrated Food Security Phase Classification (IPC) analysis.

Asia	+1.5
Africa	-3.4
Central America and the Caribbean	-8.8
South America	+1.8
North America	+0.1
Europe	-6.1
Oceania	+16.8
World	**-0.4**

Global cereal production 2024 over 2023

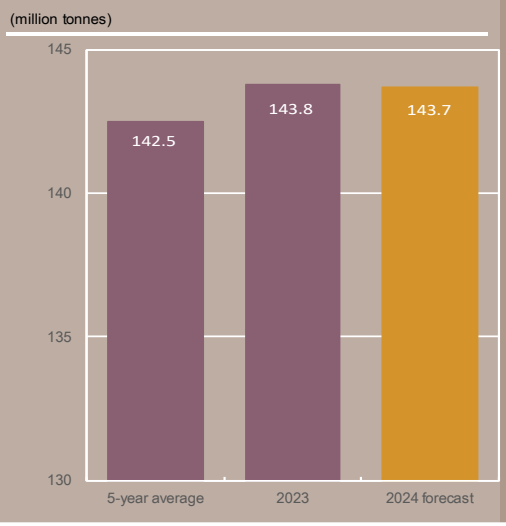
(yearly percentage change)

-0.4%

LIFDCs cereal production 2024 over 2023

(yearly percentage change)

0.0%



REGIONAL HIGHLIGHTS

AFRICA While cereal outputs in most East African and West African countries are forecast at average to above-average levels in 2024, localized crop losses from adverse weather conditions and flooding are curbing harvests. Conflicts in the Sudan and Mali have also led to significantly below-average national outputs. Planting of the 2025 crops is underway in North Africa, as well as in Southern Africa where weather forecasts point to above-average rainfall amounts.

ASIA In Far East Asia, planting of the 2025 wheat crop is underway and sown areas are expected at above-average levels, underpinned by continued strong domestic demand for wheat and government support. This follows a record subregional cereal harvest in 2024. In Near East Asia, favourable weather conditions bolstered 2024 cereal yields and maintained above-average harvests, though ongoing conflicts and socioeconomic challenges continue to limit farmers' access to essential inputs and cropland in several countries.

LATIN AMERICA AND THE CARIBBEAN
In South America, adverse weather conditions reduced the 2024 cereal production in Brazil, while conducive weather conditions in Argentina supported a production recovery following the drought-affected harvest in 2023. In Central America and the Caribbean, cereal harvests are estimated to be below-average levels due to reduced plantings and dry weather conditions. Widespread insecurity in Haiti continues to disrupt agricultural production.

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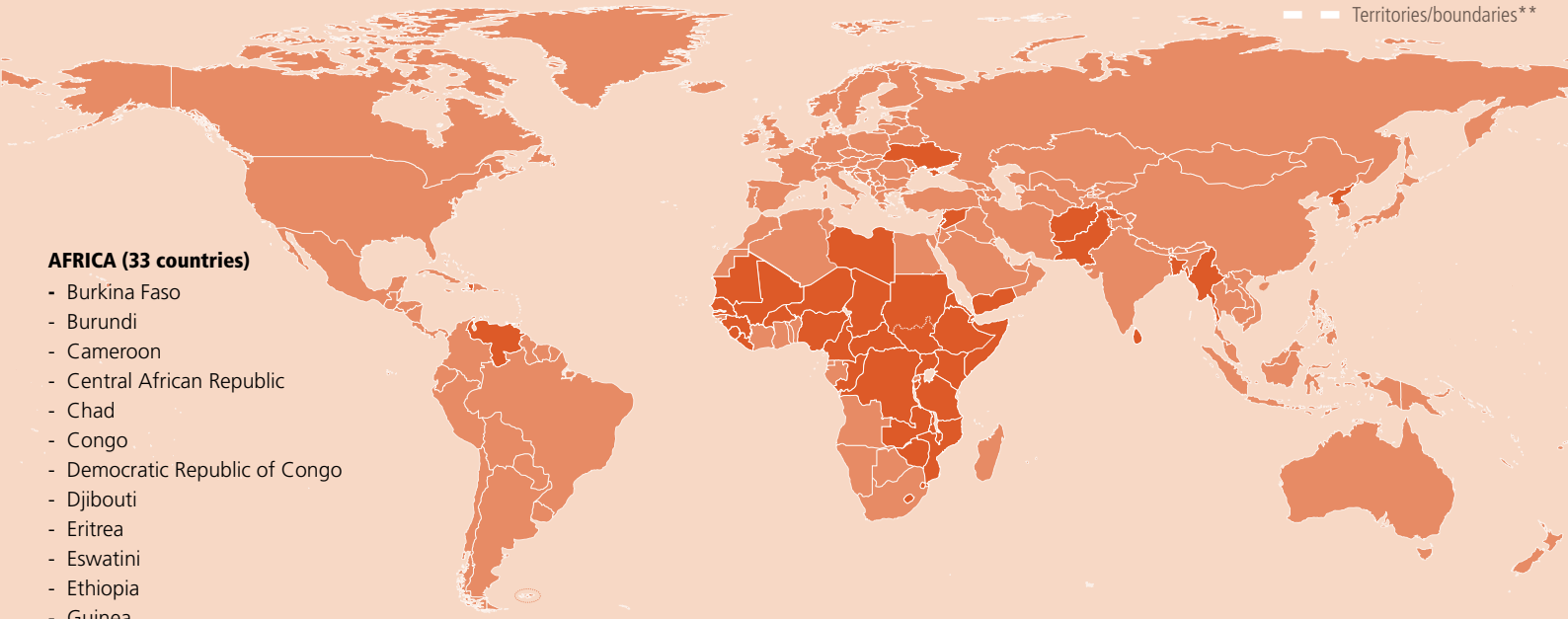
COUNTRIES/TERRITORIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD

Note: Situation as of October 2024

Territories/boundaries**



** See Terminology (*page 8*)

Notes: Final boundary between the Republic of the Sudan and the Republic of South Sudan has not yet been determined. Dotted line represents approximately the Line of Control in Jammu and Kashmir agreed upon by India and Pakistan. The final status of Jammu and Kashmir has not yet been agreed upon by the parties.

Source: FAO/GIEWS, 2024. *Crop Prospects and Food Situation No. 3.* Cited 8 November 2024, modified to comply with the United Nations map No. 4651 Rev. 1, April 2023.

AFRICA (33 countries)

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

ASIA (9 countries/territories)

- Afghanistan
- Bangladesh
- Democratic People's Republic of Korea
- Lebanon
- Myanmar
- Pakistan
- Palestine
- Syrian Arab Republic
- Yemen

LATIN AMERICA AND THE CARIBBEAN (2 countries)

- Haiti
- Venezuela (Bolivarian Republic of)

EUROPE (1 country)

- Ukraine

AFRICA (33 COUNTRIES)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/SUPPLIES

Central African Republic

Conflict, high food prices, weather extremes

- According to the latest Integrated Food Security Phase Classification (IPC)[1] analysis, the number of severely food insecure people (IPC Phase 3 [Crisis] and above) was projected to reach 2.5 million between April and August 2024, including about 508 000 people in IPC Phase 4 (Emergency). The situation reflects the impact of the conflict and civil insecurity, as well as limited market access and rising food prices.
- As of June 2024, over 451 000 people were internally displaced as a result of civil insecurity and armed violence.

Kenya

Drought conditions

- About 1.7 million people are estimated to be acutely food insecure between October 2024 and January 2025, as a result of a prolonged and severe drought between 2020 and 2023, floods in 2024 and the likely negative impacts of below-average rains forecast between October and December.

Somalia

Weather extremes, civil insecurity

- About 4.4 million people are estimated to face severe acute food insecurity between October and December 2024, reflecting the lingering impact of a prolonged and severe drought between 2020 and 2023, floods in 2024, and the likely adverse impacts of below-average rainfall forecast between October and December. The protracted conflict is also contributing to the high levels of acute food insecurity.

Sudan

Conflict, displacements, high food prices

- About 21.1 million people (45 percent of the population) are estimated to face severe acute food insecurity between October 2024 and February 2025, due to the conflict that broke out in mid-April 2023, paralyzing economic activities, causing large-scale displacements and sharply reducing crop production.
- Particular concerns exist for the 109 000 people located in Al Jazirah State and in East, North and South Darfur states facing IPC Phase 5 (Catastrophe) levels of acute food insecurity.

[1] Please see Integrated Food Security Phase Classification (IPC) for further details.

- Under a plausible worst-case scenario of a further escalation of the conflict, there is a risk of famine in seven localities in North Darfur, South Kordofan, Al Jazirah and Khartoum states.

Zambia

Production decline, high food prices

- About 5.8 million people are estimated to face IPC Phase 3 (Crisis) and above levels of acute food insecurity between October 2024 and March 2025. This figure is the highest level on record and reflects the severity of the drought's impact on households' food supply and incomes.
- Food prices are also at elevated levels, lowering the affordability of food and further constraining access for vulnerable households.

Zimbabwe

Production decline, high food prices

- Production of cereals, which are key food staples, declined by 50 percent relative to the five-year average, as widespread drought conditions caused crop failures and low yields.
- Along with the low harvests, households are also facing persistently high food prices, which are aggravating acute food insecurity.
- Although IPC projections are not available, according to estimates from the Global Report on Food Crisis, up to 5 million people are estimated to be facing acute food insecurity between October and December 2024, due to the drought's impact and high food prices.

WIDESPREAD LACK OF ACCESS

Burundi

Weather extremes, high food prices

- About 1.19 million people were estimated to be facing (IPC Phase 3 [Crisis] and above) levels of acute food insecurity between June and September 2024. The main drivers are the protracted macroeconomic challenges, high inflation rates and livelihood losses caused by floods in late 2023 and in 2024.

Chad

Civil insecurity, flooding, high food prices

- According to the latest *Cadre Harmonisé* (CH)[2] analysis, about 3.78 million people were estimated to be experiencing severe acute food insecurity during the June to August 2024 lean period, including approximately 420 000 Sudanese refugees and Chadian returnees, with about 657 000 people in CH Phase 4 (Emergency).
- Acute food insecurity conditions are particularly concerning in eastern areas, where the large majority of the 836 000 refugees and returnees that fled the Sudan since mid-April 2023 are located. Food access also remains constrained in the Lac Region due to persisting insecurity and the suspension of humanitarian assistance to internally displaced persons (IDPs).
- Flooding, which has affected 1.9 million people as of mid-October 2024, along with high food prices, has aggravated acute food insecurity conditions across the country
- As of September 2024, a total of 1.26 million refugees and asylum seekers were residing in the country.

Democratic Republic of the Congo

Conflict

- According to the latest IPC acute food insecurity report, released in October 2024, 25.6 million people are facing IPC Phase 3 (Crisis) and above levels of acute food insecurity between September and December 2024. This is due to an intensification of the conflict in northeastern provinces, which, among other factors, has prevented the completion of harvests and will likely reduce food availability.
- As of April 2024, a total of 7.3 million people in North Kivu, South Kivu and Ituri had been displaced due to the conflict.

Djibouti

Unfavourable weather, high food prices, reduced income-earning opportunities in the port

- About 285 000 people are estimated to face acute food insecurity (IPC Phase 3 [Crisis] and above) between July and December 2024, reflecting the lingering impact of a prolonged and severe drought between late 2020 and early 2023, below-average rains in late 2023 and early 2024, high food prices and the negative impact on employment in port activities following disruptions in sea traffic via the Red Sea.

Eritrea

Macroeconomic challenges have increased the population's vulnerability to food insecurity

Ethiopia

Weather extremes, conflict, high food prices

- According to the 2024 Humanitarian Response Plan, about 15.8 million people were officially estimated to be facing severe acute food insecurity during the lean period between July and September 2024, mainly due to the lingering impact of a prolonged and severe drought between late 2020 and early 2023, floods in late 2023 and early 2024, conflict in northern areas and high food prices.

Malawi

Production decline, high food prices

- An estimated 5.7 million people are facing IPC Phase 3 (Crisis) and above levels of acute food insecurity between October 2024 and March 2025. This figure is about 30 percent higher than the estimate in 2023/24 covering the same period.
- The increase in acute food insecurity is driven by the impact of the drought-reduced 2024 harvest and persistently high food prices.

Mauritania

Refugee influx

- According to the latest CH analysis, about 657 000 people were estimated to be in need of humanitarian assistance during the June to August 2024 lean period, including nearly 29 000 people in CH Phase 4 (Emergency). This represents a deterioration compared to the previous year, when over 472 000 people were estimated to be in need of humanitarian assistance. However, the increase in 2024 may partly be explained by the expanded geographical coverage of the CH analysis for 2024.
- Humanitarian needs remain high among Malian refugees and host communities in the region of Hodh Ech Chargui, which faces a sustained influx of new arrivals, putting a strain on already limited resources.
- As of September 2024, the country was hosting a total of 150 000 refugees and asylum seekers, mostly from Mali.

Niger

Insecurity, flooding, poor economic conditions, high food prices

- According to the latest CH analysis, about 3.44 million people were estimated to

[2] Please see Cadre Harmonisé (CH) for further details.

be facing severe acute food insecurity during the June to August 2024 lean season, including over 126 000 people in CH Phase 4 (Emergency), which is slightly above the 3.28 million people that were estimated to be in need of humanitarian assistance in 2023.

- Widespread flooding has led to a particularly worrisome situation in the conflict-affect regions of Tillaberi, Tahoua, Diffa and Maradi, where it triggered additional internal displacement, exacerbating acute food insecurity among both displaced people and host households. Nationwide, flooding has affected 1.4 million people as of mid-October 2024 and, combined with poor economic conditions, it has significantly constrained food access for vulnerable households.
- As of September 2024, the country was hosting about 417 000 refugees and asylum seekers, mainly from Nigeria and Mali.

Nigeria

Conflict, macroeconomic crisis, high food prices, flooding

- About 31.76 million people were estimated to face severe acute food insecurity during the June to August 2024 lean season, including nearly 1 million people in CH Phase 4 (Emergency), which is well above the 24.86 million people estimated to be severely acute food insecure in 2023.
- The high levels of acute food insecurity are underpinned by escalating civil insecurity and conflicts in northern states, which disrupt agricultural activities and markets, and led to the displacement of nearly 3.6 million people, as of September 2024, while the humanitarian situation has deteriorated and access remains severely constrained in Borno, Adamawa and Yobe states.
- Poor macroeconomic conditions, including high inflation rates and a weak national currency, are curtailing vulnerable households' economic access to food.
- More recently, widespread flooding in northern regions impacted 1.3 million people as of mid-October 2024, with about one-third of them located in Borno State, aggravating acute food insecurity in affected areas.
- As of September 2024, over 109 000 refugees and asylum seekers, mostly from Cameroon, were residing in the country.

South Sudan

Economic downturn, floods, civil insecurity

- Despite sustained humanitarian assistance, food insecurity still affects large segments of the population, owing to rampant inflation, insufficient food supplies, the lingering impact of consecutive years with widespread floods and episodes of intercommunal violence. About 7.1 million people, more than half of the total population, were expected to face severe acute food insecurity between April and July 2024.
- About 11 000 people in Pibor County of Greater Pibor Administrative, 40 000 people in Aweil East County in Northern Bahr el Ghazal State and 28 000 returnees from the conflict-affected Sudan facing IPC Phase 5 (Catastrophe) levels of acute food insecurity.

SEVERE LOCALIZED FOOD INSECURITY

Burkina Faso

Conflict, high food prices

- According to the latest CH analysis, over 2.73 million people were estimated to face severe acute food insecurity during the June to August 2024 lean season, including over 423 000 people in CH Phase 4 (Emergency).
- Acute food insecurity is primarily underpinned by worsening conflict and, in particular, the use of siege tactics by non-state armed groups, which severely disrupt livelihoods and markets, and constrain the delivery of humanitarian assistance. As of March 2023, civil insecurity resulted in the internal displacement of about 2.06 million people. High food prices have aggravated acute food insecurity conditions across the country.
- Flooding affected 16 500 people across the country as of mid-October 2024.
- As of September 2024, nearly 41 000 refugees and asylum seekers, mostly from Mali, were residing in the country.

Cameroon

Civil insecurity, high food prices

- According to the March 2024 CH analysis, about 2.5 million people were estimated to be facing severe acute food insecurity (CH Phase 3 [Crisis] and above), between June and August 2024, as a result of the effects of the conflict, sociopolitical unrest and high food prices, as well as floods that caused population displacements and agricultural damage and losses.
- In 2023, the number of internally displaced persons was more than 1 million due to attacks by non state armed groups in Far North Region.

Congo

Refugee influx, floods

- At the end of 2022, nearly 30 000 refugees from the Central African Republic and approximately 26 000 from the Democratic Republic of the Congo were residing in the country, mostly in Likouala and Plateaux departments. Host communities face pre-existing food shortages and limited livelihood opportunities, and refugees' food security relies heavily on ongoing humanitarian assistance.
- Flooding in late 2023 affected more than 300 000 people, mostly located in the eastern part of the country, where also an estimated 2 300 hectares of croplands (less than 1 percent of the national cropland area) were inundated, causing crop losses and damage.

Eswatini

High food prices

- The latest IPC analysis indicates that 303 725 people are facing acute food insecurity (IPC Phase 3 [Crisis] and above) between October 2024 and March 2025.
- This figure is up 7 percent year on year, reflecting the impact of high food prices and a slowdown in economic growth, which has curbed households' income-earning opportunities. The adverse effects of the dry weather conditions on agricultural production in 2024 have also aggravated acute food insecurity conditions.

Guinea

High food prices, flooding

- Nearly 1.03 million people were estimated to be severely acute food insecure during the June to August 2024 lean season, a deterioration compared to conditions in 2023 when about 710 000 people were estimated to face severe acute food insecurity. However, the projected deterioration may be partly due to an expanded geographical coverage of the CH analysis for 2024.
- High food prices, compounded by flooding, which affected 176 000 people across the country by mid-October 2024,

are the main drivers of acute food insecurity.

- As of September 2024, over 2 200 refugees and asylum seekers, mostly from Sierra Leone, were residing in the country.

Lesotho

High food prices, economic downturn

- An estimated 402 757 people, according to the latest IPC analysis, are facing IPC Phase 3 (Crisis) levels of acute food insecurity between October 2024 and March 2025.
- This figure is 24 percent higher than in 2023/24, covering the same months. The increase is driven by high food prices and a slow economic recovery that is impinging on households' economic capacity to access food. The adverse effects of the dry weather conditions on agricultural production in 2024 also aggravated acute food insecurity.

Liberia

High food prices, macroeconomic challenges

- According to the latest CH analysis, over 531 000 people were estimated to face severe acute food insecurity during the June to August 2023 lean season period, including approximately 21 000 people in CH Phase 4 (Emergency). Acute food insecurity is mainly associated with high food prices.
- Flooding affected 51 000 people across the country as of mid-October 2024.
- As of September 2024, the country was hosting about 1 800 refugees and asylum seekers.

Libya

Localized conflict, economic and political instability, high food prices

- As of mid-October 2024, over 100 000 Sudanese refugees arrived in Libya since April 2023. The significant arrivals of Sudanese refugees are creating high demand for health, water, sanitation and hygiene (WASH) services, financial support, food and shelter.

Madagascar

Weather extremes

- An estimated 1.3 million people are facing IPC Phase 3 (Crisis) level of acute food insecurity between October and December 2024.
- This figure is lower than the estimates from the same period in 2023, reflecting the positive impact of large-scale humanitarian assistance and a generally good cropping season, with national paddy production increasing to an above-average level in 2024. However, the impact of cyclones, which caused localized floods, have contributed to maintaining the high levels of acute food insecurity.

Mali

Conflict, flooding, high food prices

- According to the latest CH analysis, about 1.37 million people were estimated to face severe acute food insecurity during the June to August 2024 lean season, including nearly 121 000 people in CH Phase 4 (Emergency) and about 2 600 people in CH Phase 5 (Catastrophe). This number is higher than the previous year, when about 1.26 million people were estimated to be in need of humanitarian assistance.
- Acute food insecurity conditions are primarily underpinned by the impact of worsening conflict, mainly affecting northern and central areas, which has disrupted livelihoods and markets, while humanitarian access constraints have worsened. The conflict has also resulted in the internal displacement of about 331 000 people, as of July 2024. Floods, affecting 339 000 people as of mid-October 2024, combined with high food prices, have aggravated acute food insecurity conditions across the country.
- As of September 2024, the country was hosting approximately 123 000 refugees and asylum seekers, mostly from Burkina Faso, the Niger and Mauritania.

Mozambique

Reduced cereal production, insecurity in northern areas

- Continued insecurity in the northern province of Cabo Delgado and the impact of the El Niño-associated drought conditions across the country are key factors driving acute food insecurity in 2024.
- An estimated 3.2 million people between October 2024 and March 2025, similar to the figure in 2023/24, are facing IPC Phase 3 (Crisis) and above levels of acute food insecurity.

Namibia

Reduced cereal production, high food prices

- The number of people facing acute food insecurity has risen steeply in 2024. The latest IPC analysis reveals that nearly 1.3 million people are facing IPC Phase 3 (Crisis) and above levels of acute food insecurity between October 2024 and March 2025.
- The impact of dry weather conditions on agricultural production in 2024 is the main factor underpinning the deterioration in acute food insecurity conditions.

Senegal

Macroeconomic challenges, flooding

- According to the latest CH analysis, about 519 000 people were estimated to be facing severe acute food insecurity during the June to August 2024 lean season, including approximately 12 000 people in CH Phase 4 (Emergency). This figure is less than half the number in the same period of 2023, and the improvement is mostly due to an above average cereal production in 2023.
- The main factors underpinning the current levels of acute food insecurity are macroeconomic challenges and the impact of floods, which have affected 103 000 people as of mid-October 2024.
- As of September 2024, about 13 000 refugees and asylum seekers, mostly from Mauritania, were residing in the country.

Sierra Leone

High food prices, macroeconomic challenges

- According to the latest CH analysis, about 1.57 million people were estimated to be in need of humanitarian assistance during the June to August 2024 lean season period. This marks a deterioration compared to the same period in 2023, when about 1.18 million people were estimated to be severely acute food insecure.
- Acute food insecurity is related to high food and non-food inflation, in part driven by a weak national currency, and low purchasing power of vulnerable households.
- Floods in 2024 have affected a total of 2 800 people, as of mid-October 2024.

Uganda

Weather extremes, insecurity, high food prices

- The latest IPC analysis, conducted in northeastern agropastoral Karamoja Region, estimates that about 401 000 people are facing acute food insecurity (IPC Phase 3 [Crisis] and above) between August 2024 and February 2025. These conditions reflect the adverse impact

of weather shocks, crop and livestock diseases, and civil insecurity.

- The number of refugees and asylum seekers, mainly hosted in camps and relying on humanitarian assistance, was estimated at 1.76 million as of early October 2024, including about 966 000 from South Sudan and about 544 000 from the Democratic Republic of the Congo.

United Republic of Tanzania

Localized shortfalls in staple food production, high food prices

- The latest IPC analysis, conducted in 21 districts of mainland Tanzania, estimated that 379 000 people faced severe acute food insecurity between May and October 2024.
- The main driver was the shortfall in crop production in 2023, due to adverse weather conditions and outbreaks of pests and diseases.

ASIA (9 COUNTRIES/TERRITORIES)

WIDESPREAD LACK OF ACCESS

Democratic People's Republic of Korea

Low food consumption levels, poor dietary diversity, weak economic growth

- Although food insecurity conditions remain of concern amid persistent weak economic growth, household food availability has improved due to the recently-completed 2024 main harvest.

Lebanon

Conflict, protracted economic crisis

- According to the latest IPC analysis, about 1.3 million people, covering Lebanese citizens, Syrian and Palestinian refugees, were projected to face IPC Phase 3 (Crisis) and above levels of acute food insecurity from April to September 2024. The high levels of acute food insecurity are driven by the conflict, the protracted economic crisis and reduced humanitarian assistance. The escalation of the conflict since September 2024 is expected to worsen conditions further, with an additional 1 million people, as of October 2024, internally displaced due to the recent intensification.

Palestine

Conflict, economic collapse

- Risk of famine remains high in the Gaza Strip considering the rise in hostilities. According to IPC analysis, between November 2024 and April 2025, around 2 million (more than 90 percent of the population) in the Gaza Strip are likely to face high levels of acute food insecurity, classified in IPC Phase 3 (Crisis), including 876 000 in IPC Phase 4 (Emergency) and 345 000 in IPC Phase 5 (Catastrophe) driven by the ongoing conflict and restricted humanitarian activities.

Syrian Arab Republic

Economic deterioration, conflict

- About 13 million people (more than 50 percent of the population) are food insecure and 7.2 million are internally displaced as of March 2024. The protracted economic contraction and impact of the regional conflict are key factors driving acute food insecurity.

Yemen

Localized conflict, adverse weather, economic deterioration

- According to the latest IPC report, from October 2024 to February 2025, about 4.6 million people are expected to be in IPC Phase 3 (Crisis) or above, of these, 1.1 million are likely to face critical levels of food insecurity (IPC Phase 4 [Emergency]). The high levels are mainly due the localised conflict, a protracted economic downturn and limited livelihood opportunities.

SEVERE LOCALIZED FOOD INSECURITY

Afghanistan

Economic slowdown, reduced livelihoods opportunities

- The latest IPC analysis indicates that 12.4 million people, 28 percent of the population analysed, are facing IPC Phase 3 (Crisis) and IPC Phase 4 (Emergency) levels of acute food insecurity between May to October 2024, driven by an economic downturn, reduced livelihoods opportunities and a cutback in humanitarian funding and assistance.
- Below-average precipitation amounts, forecast during the upcoming main cropping season (October-May), could adversely impact the 2025 wheat production, the country's main food staple, and further aggravate acute food insecurity conditions.

Bangladesh

Economic constraints, high inflation, weather extremes

- Food insecurity is expected to remain fragile, given persisting economic constraints, high inflation rates and flood events. Typhoon Yagi in late September 2024, affected agricultural production and caused large-scale displacements, loss of livelihoods and damage to housing and infrastructure. About 1 million Forcibly Displaced Myanmar Nationals reside in the country, mainly in Cox's Bazar District.
-

Myanmar

Conflict, economic constraints, high prices of main food staple

- The protracted political crisis is compromising the fragile conditions of vulnerable households and Rohingya IDPs. According to the latest figures (September 2024) from the United Nations High Commissioner for Refugees (UNHCR), the number of IDPs is estimated at about 3.4 million. Most of the IDPs are located in Rakhine, Chin, Kachin, Kayin and Shan states.
- Domestic prices of *Emata* rice, the most consumed variety in the country, were at near-record levels as of September 2024, constraining access to a key staple food.

Pakistan

Economic constraints, high prices of main food staple

- According to the latest IPC analysis, the number of people facing high levels of acute food insecurity (IPC Phase 3 [Crisis] and above) between July and November 2024 was projected at 7.9 million, mostly due to the lingering effects of devastating floods in 2022, economic challenges and generally high domestic food prices.
- Below-average precipitation amounts, forecast during the upcoming main cropping season (October-May), could adversely impact the 2025 wheat production, the country's main food staple, and further aggravate acute food insecurity conditions.

LATIN AMERICA AND THE CARIBBEAN (2 COUNTRIES)

WIDESPREAD LACK OF ACCESS

Haiti

Civil insecurity, high food prices, natural disasters

- A record number of 5.4 million of people, accounting for about half the total population, are projected to

face acute food insecurity between August 2024 and February 2025, including nearly 6 000 people classified in IPC Phase 5 (Catastrophe).

- Worsening civil insecurity has resulted in about 700 000 internally displaced people and continues to impede the proper functioning of food supply chains. Expectations of an above-normal hurricane season at the end of 2024 poses a further risk to acute food security.

Venezuela (Bolivarian Republic of)

Economic crisis

- According to 2024 Humanitarian Response Plan, about 4.4 million people are estimated to be in need of food assistance, despite a slight economic recovery. Although food inflation in 2024 reported its minimum level over the last two years, access to food remains severely limited for the most vulnerable households. The number of refugees and migrants crossing the borders to address their essential needs in neighbouring countries in 2024 was estimated at 7.8 million in 2024.

NORTH AMERICA, EUROPE AND OCEANIA (1 COUNTRY)

WIDESPREAD LACK OF ACCESS

Ukraine

Conflict

- The country[3] continues to be a significant supplier of food commodities for the world. However, according to the 2023 Humanitarian Needs Overview (HNO),[4] at least 17.6 million people are estimated to be in need of multisectoral humanitarian assistance in 2024 due to the war, including over 11 million in need of food security and livelihood interventions. As of April 2024, about 3.5 million people were estimated to be displaced in the country as reported by the International Organization for Migration (IOM).[5]

[3] Information provided by Ukraine excludes statistical data concerning the Autonomous Republic of Crimea, the city of Sevastopol and the Donetsk, Luhansk, Kherson and Zaporizhzhia regions. The information is presented without prejudice to relevant UN General Assembly and UN Security Council resolutions, which reaffirm the territorial integrity of Ukraine.

[4] OCHA. 2023. Ukraine Humanitarian Needs Overview 2023 (December 2022). 28 December 2022.

[5] Please see https://dtm.iom.int/ukraine for further details.

Terminology

Countries/territories 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/territories 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/territories 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/territory.

Countries/territories 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 current conditions indicate a high likelihood that cereal production would fall below 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):

Asia (page 21)
Latin American and the Caribbean (page 28)

** The boundaries and names 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 maps represent approximate border lines for which there may not yet be full agreement. Final boundary between the Republic of the Sudan and the Republic of South Sudan has not yet been determined. Dotted line represents approximately the Line of Control in Jammu and Kashmir agreed upon by India and Pakistan. The final status of Jammu and Kashmir has not yet been agreed upon by the parties.

GLOBAL CEREAL OVERVIEW

Cereal supply and demand overview

FAO's forecast for global cereal **production** in 2024 stands at 2 848 million tonnes, marginally down (0.4 percent) from the previous year, though still the second largest output on record.[6] The modest downturn almost entirely reflects a lower global maize outturn that was largely driven by adverse weather conditions in South America, Europe and Southern Africa. However, world wheat production is expected to rise, with upturns mainly concentrated in Asia, and rice production should also increase, which would partly offset the decrease in maize production.

Pegged at 2 857 million tonnes, the world cereal **utilization** forecast for 2024/25 points to a 0.5 percent increase from the 2023/24 level. The increase is underpinned largely by anticipated growth in food consumption, especially rice and wheat. In 2024/25, other uses of cereals are also seen increasing, albeit marginally, and are almost entirely linked to rice. By contrast, feed use of cereals is likely to contract fractionally due to declines in feed use of wheat and rice that should outweigh an anticipated increase in feed use of coarse grains.

Based on the current forecasts for global cereal production in 2024 and utilization in 2024/25, global cereal **stocks** could rise by 0.6 percent above their opening levels to 889 million tonnes. Global rice inventories are expected to increase the most, followed by coarse grain stocks. By contrast, stocks of wheat are likely to fall below their opening levels. With these current forecasts, the world's cereal stocks-to-use ratio would decline fractionally, from 30.9 percent in 2023/24 to 30.6 percent in 2024/25, remaining near its five- and ten-year average levels.

World **trade** in cereals in 2024/25 is projected to decline from the 2023/24 level by 3.9 percent to 485 million tonnes. The decline stems from anticipated contractions in global trade of wheat and coarse grains, while, by contrast, global rice trade is forecast to increase. In October 2024, the FAO Cereal Price Index averaged 114.4 points, down 10.3 points (8.3 percent) from last year's value and 10.1 points (8.1 percent) below its five-year average level for the same month. Prices of all major cereals (wheat, coarse grain, and rice) have declined over the past year, and the sharpest decreases were in wheat and maize prices.

Table 1. World cereal production

(million tonnes)

	2022	2023 est.	2024 f'cast	Change: 2024 over 2023 (%)
Asia	1 264.4	1 290.3	1 309.2	+1.5
Far East	1 162.7	1 184.1	1 199.2	+1.3
Near East	64.7	73.5	73.1	-0.5
South Caucasus and Central Asia	37.0	32.7	36.8	+12.6
Africa	200.8	198.9	192.2	-3.4
North Africa	31.0	30.9	30.8	-0.4
West Africa	69.3	68.0	67.4	-0.8
Central Africa	7.3	7.2	7.3	+2.1
East Africa	56.1	54.1	56.2	+3.8
Southern Africa	37.2	38.7	30.5	-21.3
Central America and the Caribbean	42.5	41.2	37.6	-8.8
South America	246.6	247.0	251.5	+1.8
North America	472.1	519.8	520.1	+0.1
Europe	526.0	519.4	487.7	-6.1
European Union[I]	270.5	273.7	264.5	-3.4
CIS in Europe	162.5	147.2	134.4	-8.7
Oceania	61.1	42.6	49.7	+16.8
World	2 813.5	2 859.2	2 848.1	-0.4
- wheat	806.9	789.5	792.2	+0.3
- coarse grains	1 480.9	1 535.0	1 517.1	-1.2
- rice (milled)	525.6	534.7	538.9	+0.8

Notes: Includes rice in milled terms. Totals and percentage changes are computed from unrounded data.

Table 2. Basic facts of world cereal situation

(million tonnes)

	2022/23	2023/24 est.	2024/25 f'cast	Change: 2024/25 over 2023/24 (%)
Production[I]	2 813.5	2 859.2	2 848.1	-0.4
Trade[II]	479.4	504.6	485.0	-3.9
Utilization	2 786.3	2 843.2	2 857.4	+0.5
Per caput cereal food use (kg/year)	147.3	148.1	148.5	+0.3
Stocks[III]	872.7	883.8	888.6	+0.6
World stock-to-use ratio (%)	**30.7**	**30.9**	**30.6**	**-1.0**

Note: Totals and percentage changes are computed from unrounded data.

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

[II] For wheat and coarse grains, trade refers to exports based on July/June marketing season. For rice, trade refers to exports based on the calendar year of the second year shown.

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

[6] For further information on global food markets please see monthly FAO World Food Situation update and the latest Food Outlook report.

LOW-INCOME FOOD-DEFICIT COUNTRIES' FOOD SITUATION OVERVIEW

Above average cereal production among LIFDCs in 2024

Aggregate cereal production among Low-Income Food-Deficit Countries (LIFDCs)[7] is forecast at approximately 143.7 million tonnes in 2024, slightly above the five-year average.

Among African LIFDCs, total cereal production is forecast at 109.2 million tonnes in 2024, marginally above the five-year average. In East Africa, most LIFDCs are expected to register near-average cereal harvests, despite an erratic rainfall distribution. In the Sudan, however, cereal production is preliminarily forecast to be significantly below the average for a second consecutive year, as the ongoing conflict continues to restrict access to croplands, disrupt markets and drive up input costs, limiting the area cultivated. Cereal harvests in West African LIFDCs are estimated at near to above-average levels, reflecting overall conducive rainfall conditions. However, rainfall deficits and periods of heavy rains, which caused flooding across the subregion, have curbed harvests in some areas. Ongoing insecurity and conflict also continue to have a negative impact on agricultural production in some areas, notably in Mali where the 2024 cereal harvest is estimated at a below-average level. In Southern Africa, widespread and substantial rainfall deficits kept cereal harvests at below-average levels, except for Madagascar where generally good weather conditions, notwithstanding localized flooding, resulted in an upturn in 2024 paddy production. Planting of the 2025 crops in Southern Africa is anticipated to begin

Table 3. Basic facts of low-income food-deficit countries (LIFDCs) cereal situation
(million tonnes, rice in milled basis)

	5-year average	2023/24 est.	2024/25 f'cast	Change: 2024/25 over 2023/24 (%)
Cereal production[I]	142.5	143.8	143.7	-0.0
Utilization	186.0	191.4	193.1	+0.9
Food use	142.9	150.1	153.6	+2.3
Per caput cereal food use (kg per year)	140.9	140.9	140.6	-0.2
End of season stocks[II]	46.7	43.8	41.8	-4.6

[I] Data refer to calendar year of the first year shown.
[II] May not equal the difference between supply and utilization because of differences in individual country marketing years.

Table 4. Cereal production of LIFDCs
(million tonnes)

	5-year average	2023 est.	2024 f'cast	Change: 2024 over 2023 (%)
Africa (34 countries)	108.5	109.2	109.2	-0.0
East Africa	56.1	54.1	56.2	+3.8
Southern Africa	11.8	12.4	10.2	-18.3
West Africa	33.6	35.5	35.5	+0.1
Central Africa	7.0	7.1	7.3	+2.1
Asia (8 countries)	33.0	33.6	33.6	-0.1
Central Asia	10.3	10.6	10.7	+1.5
Far East	18.3	18.1	18.8	+3.8
Near East	4.4	5.0	4.1	-17.4
Central America and the Caribbean (2 countries)	1.0	1.0	1.0	+2.6
LIFDCs (44 countries)	142.5	143.8	143.7	-0.0

Notes: Includes rice in milled terms. Totals and percentage changes are computed from unrounded data. The five-year average refers to the 2019–2023 period.

[7] Please see https://www.fao.org/countryprofiles/lifdc/en/ for further details.

in November 2024 and weather forecasts indicate a likely return to wetter conditions, boosting early 2025 production prospects.

In Asia, aggregate cereal production among LIFDCs in 2024 is forecast at 33.6 million tonnes, slightly above the five-year average. Central Asian LIFDCs have benefited from good weather conditions and harvests are pegged at above-average levels. In the Near East, production in the Syrian Arab Republic is estimated below the five-year average due to high temperatures and limited access to farming inputs. By contrast, mostly conducive weather patterns helped push up cereal production in Afghanistan to an above-average level, amid challenging socioeconomic conditions.

In Central America, production is expected to be below the average level in Haiti as continuing civil insecurity restricts access to agricultural inputs, while generally poor weather conditions have curtailed yields.

Table 5. Cereal imports of LIFDCs

(thousand tonnes)

	2022/23 or 2023	2023/24 or 2024	2024/25 or 2025
	Actual imports	Import estimate	Import requirement[1]
Africa (34 countries)	29 009	29 352	31 423
East Africa	14 051	15 164	15 459
Southern Africa	3 270	3 478	4 023
West Africa	9 132	8 093	9 074
Central Africa	2 556	2 618	2 867
Asia (8 countries)	18 770	17 887	17 742
Central Asia	5 840	5 442	5 503
Far East	5 019	5 225	5 220
Near East	7 910	7 220	7 020
Central America and the Caribbean (2 countries)	1 498	1 561	1 567
LIFDCs (44 countries)	49 277	48 800	50 732

Note: Totals computed from unrounded data.

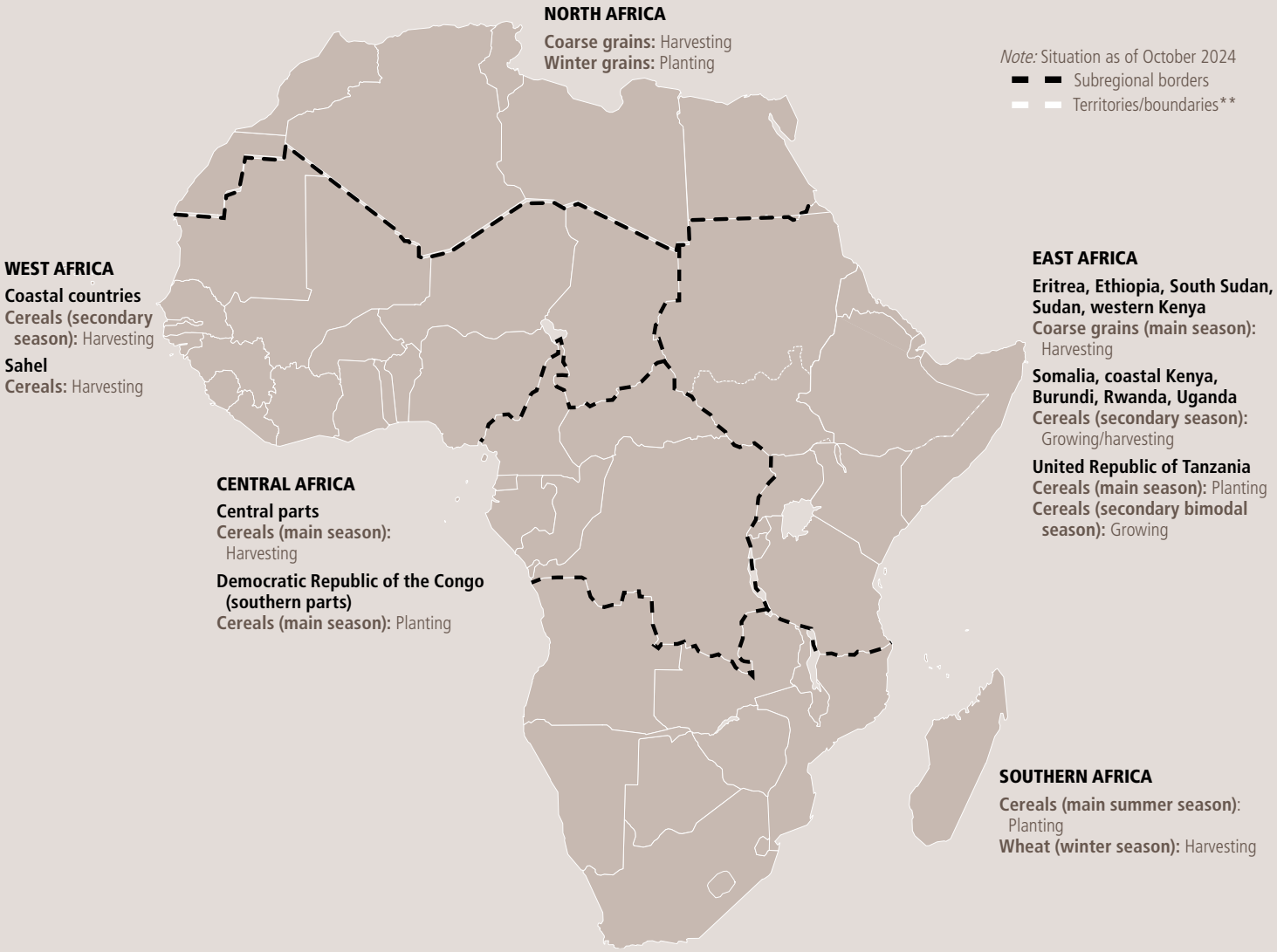
[1] The import requirement is the difference between utilization (food, feed, other uses, exports plus closing stocks) and domestic availability (production plus opening stocks).

Import needs expected to grow in East Africa and Southern Africa

The total cereal import requirement for LIFDCs is forecast at 50.7 million tonnes in the 2024/25 marketing year, approximately 3 million tonnes (about 7 percent) above the five-year average. This increase in import needs is mainly concentrated in East Africa and Southern Africa.

In Southern Africa, import requirements are estimated at 4 million tonnes, above the five-year average of 3.3 million tonnes, primarily due to drought-induced domestic production shortfalls. However, import needs for Madagascar have been reduced on account of a larger output in 2024. In the Sudan, where ongoing conflict has severely affected domestic agricultural production, import needs are pegged at 4.3 million tonnes in 2024, well above the five-year average of 3 million tonnes. In Asia, import requirements are estimated close to average levels in most countries. Global cereal prices have been generally low in 2024 compared to recent years, with the FAO Cereal Price Index falling 10 percent year-on-year as of October 2024. This reduction in international cereal commodity prices is helping to alleviate import costs for LIFDCs. However, the impact of declining global prices on domestic markets remains limited due to the persistent weakness of national currencies in many LIFDCs.

REGIONAL REVIEWS
AFRICA



** See Terminology (*page 8*).

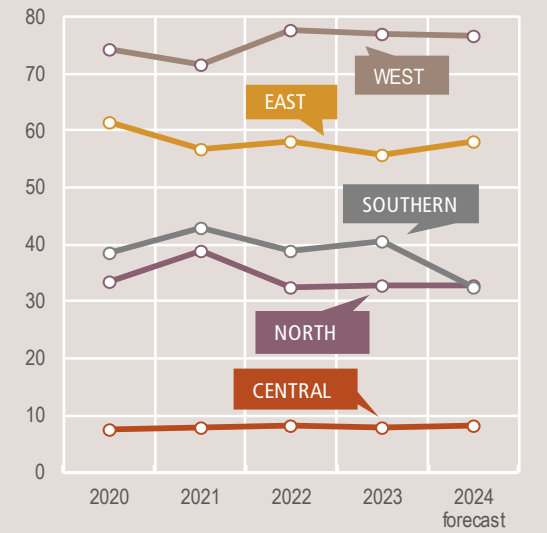
Notes: Final boundary between the Republic of the Sudan and the Republic of South Sudan has not yet been determined.

Source: FAO/GIEWS, 2024. *Crop Prospects and Food Situation No. 3*. Cited 8 November 2024, modified to comply with the United Nations map No. 4045 Rev. 9, December 2022.

Production Overview

Total cereal production (rice in paddy terms) in Africa is forecast to reach 207.9 million tonnes, 2.7 percent below the five-year average. The lower outturn is largely driven by drought-reduced harvests in Southern Africa, where widespread rainfall deficits significantly curbed yields and reduced the harvested area. In East Africa, a second consecutive below-average harvest in the Sudan has also contributed to the overall production downturn among African countries, as the conflict continues to weaken productive capacities and restrict access to croplands. Elsewhere in East Africa, cereal harvests are expected to range from average to above-average levels. In West Africa, flooding has caused localized crop losses, but abundant rainfall has also supported average to above average outputs. Conflicts in the Liptako-Gourma Region (overlapping Mali, the Niger and Burkina Faso), the Lake Chad Basin and northern Nigeria continue to impede agricultural activities. Wheat production recovered in several North African countries in 2024, except in Morocco where drought conditions persisted, resulting in a well below-average output for a second consecutive year. Planting of the 2025 crop has begun in Southern Africa and North Africa.

Cereal production
(million tonnes)



NORTH AFRICA

Forecasts of high temperatures and below-average precipitation raise concern in rainfed croplands

The planting season of the 2025 winter cereal crops started in October 2024 and will continue until the end of the year. Forecasts of below-average precipitation and high temperatures between November 2024 and January 2025, raise some concern on the extent of the area planted in rainfed croplands, including central **Morocco**, eastern **Algeria** and northern parts of **Tunisia**.

Third consecutive below-average cereal harvest in 2024

Subregional cereal production in 2024 is estimated at 32.7 million tonnes, about 7 percent below the five-year average. The bulk of the downturn is accounted by a very low production in **Morocco**, which reached 3.3 million tonnes, down by 42 percent compared to the average. The poor output was driven by below-average cumulative rainfall amounts from February until early March 2024, and high temperatures. In **Tunisia**, the cereal output in 2024 is estimated at 1.5 million tonnes, almost triple compared to the 2023 drought-affected production, mainly due to abundant rainfall amounts and favourable weather conditions throughout the whole season. In **Egypt**, the 2024 cereal harvest is estimated at a near-average 23.7 million tonnes, owing to sufficient water supply for irrigation and good weather conditions. Domestic wheat consumption requirements are mostly covered by imports in the subregion. In the 2024/25 marketing season (July/June), wheat import requirements are forecast at 32 million tonnes, about 11 percent above average, driven by the 2024 below-average production. In **Morocco**, in response to a low 2024 production, import requirements for 2024/25 are expected to increase substantially, supported by a regular government subsidy programme that also helps to ensure stable domestic prices.

Food inflation rates remain mostly at high levels

In **Egypt**, the subsidized price of a loaf of bread increased fourfold in June 2024 from EGP 0.05 to EGP 0.20/loaf, marking the first price increase in more than three decades. This, along with price hikes of other essential food commodities, drove the annual food inflation to nearly 32 percent in June 2024. In **Morocco**, despite the country's high import dependency rate, low international food prices and the government's regular subsidies for essential food commodities, have lessened pressure on retail prices and the annual food inflation rate in August 2024 was estimated at 2 percent, down from 10.4 percent in the same period last year. In **Tunisia**, in September 2024, the annual food inflation rate reached 9.2 percent, a significant drop from the record level of 15.9 percent in May 2023. In **Algeria**, the annual food inflation rate was estimated at 7.6 percent in July 2024, down from 13.2 percent in July 2023. In **Libya**, the annual food inflation rate in September 2024 was at 4.1 percent, a slight increase from the previous year's level of 3.4 percent.

Conflict in the Sudan causes increased cross border displacements

As of early October 2024, about 800 000 refugees and asylum-seekers were registered in **Egypt**, mostly from the Sudan due to ongoing conflict. Based on a WFP Sudanese Vulnerability Assessment conducted from March to May 2024, about 65 percent of refugees receiving assistance are food insecure.

According to the United Nations High Commissioner for Refugees (UNHCR), as of mid-October 2024, an estimated 100 000 Sudanese refugees have arrived in **Libya** since April 2023. The substantial arrivals of Sudanese refugees are driving increased demand for health, water, sanitation and hygiene (WASH), cash, food and shelter.

Table 6. North Africa cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year average	2023 est.	2024 f'cast	5-year average	2023 est.	2024 f'cast	5-year average	2023 est.	2024 f'cast	5-year average	2023 est.	2024 f'cast	Change: 2024/2023 (%)
North Africa	*17.6*	*16.6*	*16.2*	*11.5*	*10.3*	*10.4*	*5.8*	*5.9*	*6.2*	*35.0*	*32.8*	*32.7*	*-0.2*
Algeria	*3.0*	*2.7*	*3.0*	*1.2*	*1.0*	*1.1*	*0.0*	*0.0*	*0.0*	*4.1*	*3.7*	*4.1*	*+12.3*
Egypt	*9.2*	*9.1*	*9.4*	*8.4*	*7.8*	*8.2*	*5.8*	*5.8*	*6.1*	*23.4*	*22.7*	*23.7*	*+4.2*
Morocco	*4.2*	*4.2*	*2.5*	*1.4*	*1.4*	*0.7*	*0.1*	*0.0*	*0.1*	*5.6*	*5.6*	*3.3*	*-42.0*
Tunisia	*1.1*	*0.5*	*1.2*	*0.5*	*0.1*	*0.3*	*0.0*	*0.0*	*0.0*	*1.6*	*0.6*	*1.5*	*+155.1*

Notes: Totals and percentage changes are computed from unrounded data. The five-year average refers to the 2019–2023 period.

WEST AFRICA

Aggregate cereal production slightly above average in 2024

In southern bimodal rainfall areas of countries along the Gulf of Guinea, harvesting of the 2024 main season maize crop was completed in September 2024. Weather conditions were generally favourable between March and July, boosting yields. The second season maize crop in southern bimodal rainfall is expected to be harvested between late 2024 and early 2025. According to latest weather forecasts, precipitation amounts between November and December are expected to be average to above average, and this is anticipated to have a positive impact on yields. In central and northern unimodal rainfall areas, harvesting of cereal crops is underway and will be completed by the end of the year. Overall production prospects are favourable, reflecting adequate cumulative rainfall amounts during the June to October rainy season. However, rainfall deficits between July and September are expected to cause reduced yields in parts of northern **Côte d'Ivoire**, **Benin**, **Ghana** and **Togo**, likely resulting in localized shortfalls in production. In **Nigeria**, cereal production is forecast at a below-average level in 2024. The poor production outlook reflects a combination of factors, including dry spells in southern and central areas, which limited plantings and led to crop wilting and stunting, while widespread floods in northern regions caused crop damage and losses. A further aggravating factor was the high prices of agricultural inputs that contributed to a reduced planted area. A below-average cereal production is also forecast in **Liberia**, where rainfall deficits have curtailed yield prospects.

In Sahelian countries, harvesting of the 2024 cereal crops is underway and will be completed in early 2025. In most areas, cumulative rainfall amounts between June and September were average to above average, favouring crop establishment and development, and production prospects are generally favourable. However, abundant rainfall triggered widespread flooding, which is expected to result in localized crop losses in **Burkina Faso**, **Chad** and **the Niger**. In **Mali**, cereal production in 2024 is preliminarily forecast at a slightly below-average level, reflecting crop losses due to floods and pests, a reduction in planted area due to insecurity and famers' limited access to agricultural inputs.

Conflict in the Liptako-Gourma Region (overlapping **Mali**, **the Niger** and **Burkina Faso**), the Lake Chad Basin and northern **Nigeria** as well as civil insecurity in some areas of northern **Benin**, **Côte d'Ivoire**, **Ghana** and **Togo**, continued to undermine farmers' productive capacities, resulting in localized production shortfalls.

Aggregate cereal production in 2024 is preliminarily forecast at 76.5 million tonnes, similar to the level of the previous year and slightly above the five-year average.

High prices of coarse grains

In **Nigeria**, prices of millet, sorghum and maize rose by 25 to 55 percent between May and August 2024, when they were 60 to 95 percent higher on a yearly basis in most markets. The high prices reflect the weakness of the national currency, a below-average cereal output in 2023 and high transport costs. Furthermore, conflict-related market disruptions contributed to price increases. In **Benin**, prices of maize declined by up to 35 percent between June and September, while prices of sorghum rose by up to 40 percent across the country. Prices of both maize and sorghum were near or below their year-earlier levels in September. In **Togo**, prices of maize and sorghum were mostly stable during the same period. In September, prices of sorghum were near or below their year-earlier values, while prices of maize were up to 30 percent higher year-on-year, reflecting elevated production and transport costs.

In most markets of central Sahelian countries, prices of sorghum rose by 10 to 35 percent between June and September 2024, while prices of millet increased by 20 to 40 percent. Prices of coarse grains reached record highs in several areas. In **the Niger**, the lingering effects of the Economic Community of West African States (ECOWAS) sanctions, which were lifted in February 2024, a reduced cereal output in 2023 as well as market disruptions due to conflict and floods, kept prices of coarse grains 25 to 55 percent higher year-on-year in September. Similar

Table 7. West Africa cereal production

(million tonnes)

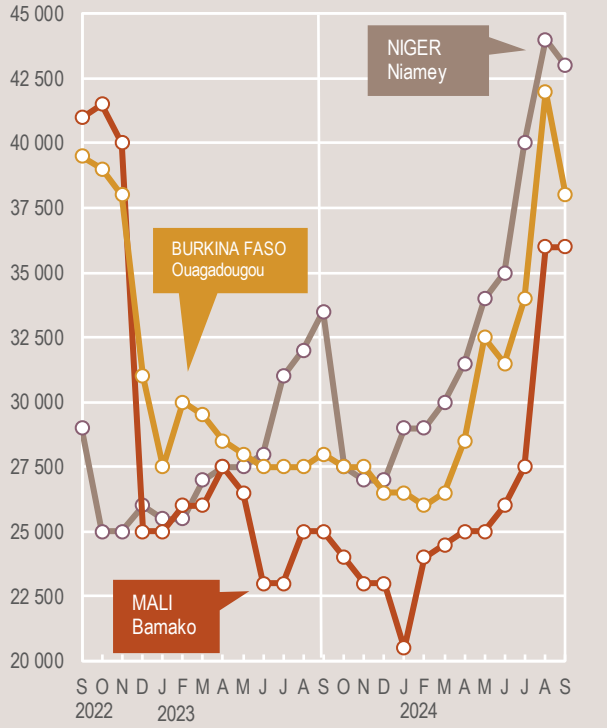
	Coarse grains			Rice (paddy)			Total cereals[1]			
	5-year average	2023 est.	2024 f'cast	5-year average	2023 est.	2024 f'cast	5-year average	2023 est.	2024 f'cast	Change: 2024/2023 (%)
West Africa	*52.5*	*52.5*	*51.9*	*22.1*	*24.4*	*24.5*	*74.8*	*77.0*	*76.5*	*-0.6*
Burkina Faso	*4.6*	*4.6*	*4.5*	*0.4*	*0.5*	*0.4*	*5.0*	*5.1*	*5.0*	*-3.7*
Chad	*2.5*	*2.4*	*2.6*	*0.3*	*0.2*	*0.3*	*2.8*	*2.6*	*2.8*	*+6.9*
Ghana	*3.8*	*4.3*	*4.3*	*1.2*	*1.5*	*1.4*	*4.9*	*5.8*	*5.7*	*-0.7*
Mali	*7.0*	*6.9*	*6.8*	*2.9*	*3.0*	*2.8*	*9.9*	*10.0*	*9.6*	*-3.6*
Niger	*5.0*	*4.9*	*5.6*	*0.1*	*0.1*	*0.1*	*5.1*	*5.0*	*5.7*	*+14.0*
Nigeria	*20.9*	*19.1*	*18.3*	*8.5*	*8.9*	*9.1*	*29.5*	*28.1*	*27.5*	*-2.2*

Notes: Totals and percentage changes are computed from unrounded data. The five-year average refers to the 2019-2023 period.

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

year-on-year price increases of sorghum and millet were registered in **Burkina Faso,** mostly due to reduced imports and strong demand, especially in urban centres and in areas with a high concentration of internally displaced persons (IDPs). In addition, the high prices were driven by conflict-related market disruptions, a factor that also contributed to the price increases in **Mali**, where prices of sorghum and millet were up to 65 and 75 percent, respectively, higher on a yearly basis. Furthermore, strong local demand and concerns over the performance of the 2024 cropping season exerted upward pressure on prices. In **Chad**, prices of coarse grains rose by 25 to 40 percent between April and August 2024. Prices of maize and millet were up to 35 and 45 percent, respectively, higher than a year earlier. Prices of sorghum were up to 65 percent above their year-earlier values in the capital, N'Djamena, and in eastern areas. The elevated prices of coarse grains were supported by low supply due to the below-average 2023 cereal output, reduced cereal imports, elevated transport costs and strong local demand, especially in refugee-hosting areas. In **Senegal**, prices of maize and millet registered modest increases, while prices of sorghum declined slightly between June and September 2024, and they were lower on a yearly basis, mostly due to the above-average cereal output in 2023.

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



Widespread flooding exacerbates already critical levels of acute food insecurity

Due to worsening conflicts, persisting civil insecurity and high food prices, about 50 million people were estimated to face severe acute food insecurity in the subregion during the June to August 2024 lean season, according to the March 2024 *Cadre Harmonisé* (CH) analyses. This figure is up from 42.8 million people estimated in the same period in 2023. However, the actual number of acutely food insecure in 2024 is likely to be higher because of the impact of the widespread floods, which severely disrupted livelihoods and markets, and affected about 5.4 million people , as of mid-October 2024, mostly in countries with already high levels of acute food insecurity.

In **Nigeria**, about 31.76 million people were estimated to be severely acute food insecure during the June to August 2024 lean season, including nearly 1 million people in CH Phase 4 (Emergency). The first eight months of 2024 witnessed a significant increase in the number of violent events compared to the same period in 2023, and humanitarian access worsened in northern areas and remained severely limited in Borno, Adamawa and Yobe states. Acute food insecurity has been exacerbated by persisting high inflation and widespread flooding, which affected about 1.3 million people, mainly in northern regions. In **Chad**, about 3.78 million people were estimated to face severe acute food insecurity, including about 420 000 Sudanese refugees and Chadian returnees, with about 656 700 people in CH Phase 4 (Emergency). Most refugees and returnees are located in Ouaddaï, Wadi Fira and Sila regions, where sustained pressure on livelihoods and food stocks is increasing humanitarian needs. Food access also remains constrained in the Lac Region due to persisting insecurity and the suspension of humanitarian assistance to IDPs since April 2024. The region also hosts the largest number of people affected by flooding, which impacted 1.9 million people across the country. In **the Niger**, nearly 3.44 million people were estimated to be severely acute food insecure, including about 126 200 people in CH Phase 4 (Emergency). The extensive floods affected about 1.4 million people and triggered additional internal displacement in the conflict-affected regions of Tillabéri, Tahoua, Diffa and Maradi, exacerbating acute food insecurity among both displaced and host households. Furthermore, poor economic conditions have constrained access to food for vulnerable households across the country. In **Burkina Faso**, over 2.73 million people were estimated to face severe acute food insecurity, including about 423 300 people in CH Phase 4 (Emergency), mostly concentrated in the conflict-affected provinces of Loroum, Soum, Oudalan and Komondjari. The conflict intensified in the second quarter of 2024 and humanitarian access remains severely constrained. Several localities continue to be besieged by non-state armed groups (NSAGs), which have significantly restricted population movements. In **Mali**, about 1.37 million people were estimated to be acutely food insecure, including over 120 900 in CH Phase 4 (Emergency) and about 2 600 in CH Phase 5 (Catastrophe) in Ménaka Region. Following the full withdrawal of the UN Multidimensional Integrated Stabilization Mission in Mali (MINUSMA) in December 2023, the conflict has escalated and humanitarian access constraints have worsened in areas besieged by NSAGs. Floods between July and mid-October 2024 also affected 339 000 people in the country.

High numbers of people affected by severe acute food insecurity were also estimated in **Sierra Leone** (1.57 million), **Ghana** (1.05 million) and **Guinea** (1.03 million), where macroeconomic challenges, including slow economic growth, currency depreciation and high inflation rates, have negatively affected households' purchasing power and access to food.

CENTRAL AFRICA

Below-average harvests due to conflicts and seasonal flooding

In **Cameroon** and **the Central African Republic**, harvesting of the 2024 millet, sorghum and maize crops is currently ongoing. Planting of 2024 main season maize crops, to be harvested in December 2024, finalized in the central provinces of **the Democratic Republic of the Congo**, **the Republic of the Congo** and **Gabon**. Ongoing insecurity and consequent population displacements in **the Central African Republic**, eastern areas of **the Democratic Republic of the Congo,** and northwest and southwest regions of **Cameroon,** continue to limit farmers' access to crop-growing areas and agricultural inputs. Above-average rainfall amounts are expected in November 2024, raising the risk of floods and crop losses.

Prices of imported food remain high

In **Cameroon**, **the Central African Republic** and **the Democratic Republic of the Congo**, prices of imported food commodities, such as rice, wheat flour and vegetable oil, remained at high levels in the third quarter of 2024, supported by weak national currencies.

Over 30 million people face severe acute food insecurity

A combined total of over 30 million people are estimated to be facing severe acute food insecurity in the **Democratic Republic of the Congo**, **Cameroon** and **the Central African Republic**, about one-quarter of the aggregate population. Ongoing conflicts and armed violence continue to cause population displacements and widespread disruptions to agricultural and marketing activities, a key cause underlying the high prevalence of acute food insecurity. In addition, households' purchasing power has been significantly reduced by the high prices of staple foods.

In **the Democratic Republic of the Congo**, according to the latest IPC analysis, released in October 2024, 25.6 million people (about 22 percent of the total population) are projected to experience severe acute food insecurity (IPC Phase 3 [Crisis] or above) between July and December 2024, with over 3 million people in IPC Phase 4 (Emergency). In **the Central African Republic**, 2.5 million people (about 45 percent of the total population) were estimated to be in IPC Phase 3 (Crisis) and above between April and August 2024, with over 500 000 people in IPC Phase 4 (Emergency). In **Cameroon**, according to the March 2024 CH analysis, 2.5 million people were projected to face acute food insecurity (IPC Phase 3 [Crisis] and above) between April and June 2024.

Table 8. Central Africa cereal production

(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals[1]			
	5-year average	2023 est.	2024 f'cast	5-year average	2023 est.	2024 f'cast	5-year average	2023 est.	2024 f'cast	Change: 2024/2023 (%)
Central Africa	*5.9*	*6.0*	*6.1*	*1.9*	*1.9*	*2.0*	*7.8*	*7.9*	*8.1*	*+2.5*
Cameroon	*3.4*	*3.5*	*3.5*	*0.3*	*0.4*	*0.4*	*3.7*	*3.8*	*3.9*	*+1.8*
Central African Republic	*0.1*	*0.1*	*0.1*	*0.0*	*0.1*	*0.1*	*0.2*	*0.2*	*0.2*	*+4.3*
Democratic Republic of the Congo	*2.3*	*2.3*	*2.3*	*1.5*	*1.5*	*1.6*	*3.8*	*3.8*	*3.9*	*+3.2*

Notes: Totals and percentage changes are computed from unrounded data. The five-year average refers to the 2019-2023 period.

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

EAST AFRICA

Erratic rainfall and insecurity affected cereal production in several areas

In northern parts of the subregion, including **the Sudan**, **South Sudan**, the Karamoja Region in **Uganda**, **Eritrea**, **Ethiopia** and in central and western **Kenya**, harvesting of 2024 main season cereal crops is underway and will be concluded in December 2024. In **the Sudan**, the conflict that broke out in March 2023 continues to severely disrupt agricultural operations and similar to 2023, cereal production in 2024 is expected to be significantly below the five-year average. Hostilities have gradually expanded since late 2023 to southeastern key-producing areas, particularly to Gezira, Sennar, White Nile and Blue Nile states, displacing farmers and restricting access to fields. In areas where farming could continue, insufficient availability and high prices of key agricultural inputs, including fuel, seeds, fertilizers and pesticides, constrained yields, while abundant June to September seasonal rains triggered widespread floods which resulted in significant crop losses. In **South Sudan**, the rainy season has been characterized by average rainfall amounts, but precipitation had an erratic temporal distribution. Torrential rains in August 2024, which, together with overflows of the river Nile and its tributaries, triggered widespread floods causing substantial crop losses. The states most affected were Unity, Warrap, Lakes and Jonglei. Overall, cereal production in South Sudan is forecast to be lower than the bumper harvest obtained in 2023. Crop production is expected to be below average in the agropastoral Karamoja Region of **Uganda**, mainly due to an erratic temporal distribution of rains. In key unimodal rainfall growing areas of Central, Rift Valley and Western provinces of **Kenya**, the 2024 *long-rains* crops benefited from average to above-average rainfall amounts that boosted yields. However, the aggregate *long-rains* maize production is officially estimated at 5–10 percent below average due to significant production shortfalls in bimodal rainfall agropastoral and marginal agricultural areas, where crops, harvested in July and August 2024, were affected by erratic rainfall. In **Ethiopia**, production prospects for the 2024 main *Meher* crops are generally favourable, as above-average rainfall amounts boosted yields in western key-growing areas of western Amhara, western Oromiya and Benishangul Gumuz regions. However, localized shortfalls in cereal production are reported in some southwestern agropastoral areas due to floods and in parts of Amhara Region due to insecurity that disrupted agricultural operations. Cereal production prospects are favourable in **Eritrea**, as the 2024 *Kiremti* (June–September) rainy season was characterized by abundant rainfall amounts, up to twice the average, which is expected to have had a positive impact on yields.

In southern parts of the subregion, planting of the 2024 second season cereal crops, for harvest between late 2024 and early 2025, recently concluded in bimodal rainfall areas covering most of **Uganda**, in southern **South Sudan**, northeastern **United Republic of Tanzania** (*Vuli*), **Somalia** (*Deyr*) and marginal and coastal agricultural areas of southeastern **Kenya** (*short-rains*). Planting operations of the *2025A* season crops have been recently completed in **Rwanda** and **Burundi**.

According to latest weather forecasts, precipitation amounts during the October to December rainy season are expected to be below-average over **Somalia**, southern **Ethiopia**, eastern **Kenya**, southern **Uganda** and central and southern **United Republic of Tanzania**. By contrast, above-average rainfall is expected over southeastern **South Sudan**, northern **Uganda**, western and northwestern **Kenya** and northern **United Republic of Tanzania.**

In pastoral areas of southern **Ethiopia**, central and eastern **Somalia,** and northern and eastern **Kenya**, following above-average rainfall amounts during the March to May *Gu/Genna/short-rains* rainy season, vegetation and livestock body conditions remained favourable during the July to September dry season. However, if forecasts of below-average October to December rains materialize, they are likely to have a negative impact on the regeneration of rangeland resources and on livestock production and reproduction. Consistent with the forecasts, as of mid-October 2024, severe dryness prevailed in the east of the subregion, including pastoral areas of southern Ethiopia, most of Somalia and eastern Kenya, while in western areas the rainy season had a generally timely onset.

The subregion's 2024 aggregate cereal output, including a forecast for the second season, is preliminarily estimated at an average level of 58.2 million tonnes.

Table 9. East Africa cereal production

(million tonnes)

	Wheat			Coarse grains			Total cereals[I]			
	5-year average	2023 est.	2024 f'cast	5-year average	2023 est.	2024 f'cast	5-year average	2023 est.	2024 f'cast	Change: 2024/2023 (%)
East Africa	6.7	6.6	6.6	46.2	44.4	45.8	57.8	55.8	58.2	+4.3
Ethiopia[II]	5.6	5.8	5.8	23.1	22.8	22.9	29.0	28.9	29.0	+0.4
Kenya	0.3	0.3	0.3	3.9	4.1	4.1	4.4	4.6	4.7	+0.2
Sudan	0.6	0.4	0.4	5.8	3.8	3.8	6.4	4.2	4.2	-0.0
Uganda	0.0	0.0	0.0	3.5	3.5	3.4	3.8	3.8	3.7	-2.1
United Republic of Tanzania	0.1	0.1	0.1	7.7	7.7	9.3	11.6	11.4	13.9	+22.0

Notes: Totals and percentage changes are computed from unrounded data. The five-year average refers to the 2019-2023 period.

[I] Total cereals include wheat, coarse grains and rice (paddy).

[II] Official production estimates for Ethiopia by the Ethiopian Statistics Service from 2020 onwards do not include Tigray Region.

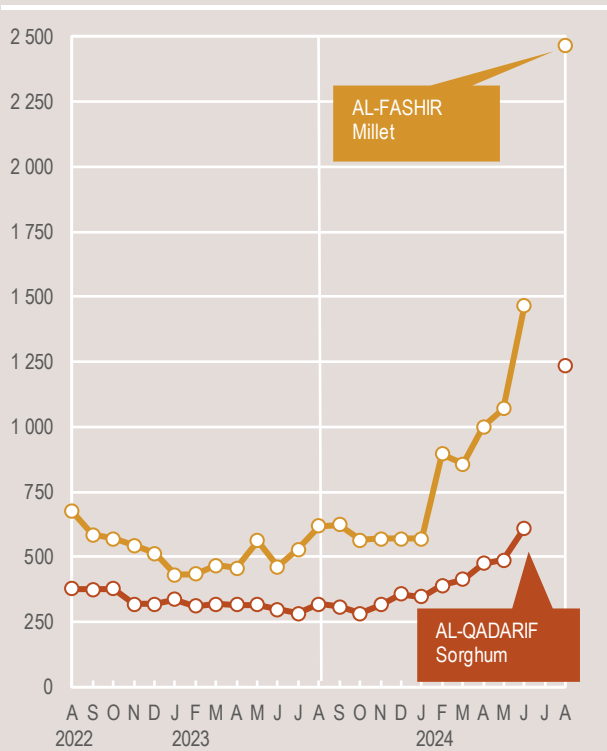
Prices of coarse grains at new record highs in the Sudan and South Sudan

In **the Sudan**, prices of domestically produced sorghum and millet continued to follow an increasing trend, which began after the breakout of the conflict in April 2023, due to insufficient supply and trade disruptions. From April to August 2024, prices of coarse grains more than doubled, and reached new record highs. In **South Sudan**'s capital, Juba, prices of maize and sorghum surged by about 85 percent between February and August 2024, while prices of imported wheat quadrupled over the same period, reaching record levels. In a context of severe macroeconomic challenges, the steep increase of cereal prices since early 2024 has been caused by a sharp depreciation of the national currency, amid a substantial reduction of oil exports caused by damages to the pipelines passing through the Sudan and by disruptions in oil shipments via the Red Sea. In **Kenya**, prices of maize declined by 10–20 percent between July and September as the *long-rains* harvest increased market availability. Prices in September were between 25 and 35 percent lower than one year earlier, reflecting ample national supplies. In **the United Republic of Tanzania**, despite seasonal increases of about 10 percent between June and August 2024, maize prices in August were still about 35 percent lower on a yearly basis due to adequate domestic availability. In **Ethiopia**, prices of maize in August were between 10 and 20 percent lower than their year-earlier levels in Bahirdar, Mekele and Shashemene markets, located in surplus producing areas. By contrast, in the capital, Addis Ababa, and in Diredawa markets, both located in deficit areas, prices of maize were 10 and 20 percent higher than one year earlier. In **Uganda**, the national average price of maize declined by about 10 percent between May and August 2024 as the first season harvest increased market availability. Prices in August 2024 were about 35 percent lower year-on-year, mainly due to adequate carryover stocks. In **Kenya**, wholesale prices of maize decreased by 5 to 20 percent between July and September with the *long-rains* harvest, and on a yearly basis were between 25and 40 percent lower, due to adequate domestic availability. Similarly, in **Somalia**, prices of locally grown maize and sorghum declined seasonally in several monitored markets by 10 to 20 percent between June and August 2024, amid the *Gu* harvest. Prices of cereals in August were around their year-earlier levels, due to adequate carryover stocks from the above-average cereal production in 2023.

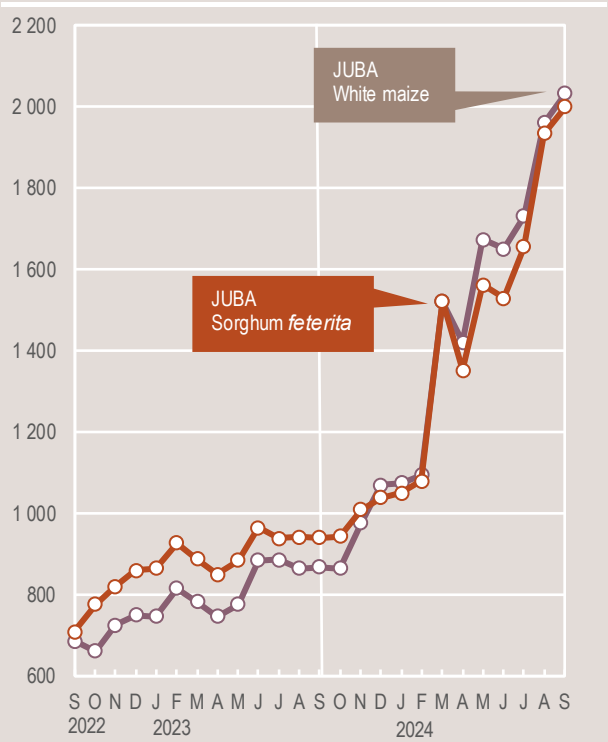
Dire food insecurity situation in the Sudan due to the ongoing conflict

In **the Sudan**, the ongoing conflict has severely disrupted livelihoods, paralyzed economic activities and triggered large-scale population displacements. According to the latest IPC analysis, about 21.1 million people (45 percent of the population) are estimated to face severe acute food insecurity between October 2024 and February 2025, almost three times the estimate of 7.7 million people in the same period of the previous year, before the outbreak of hostilities, and includes about 6.4 million people in IPC Phase 4 (Emergency) and 109 000 people in IPC Phase 5 (Catastrophe). Under a plausible worst-case scenario of a further worsening of the conflict, there is a risk of famine in seven localities in North Darfur, South Kordofan, Al Jazirah and Khartoum states. In **South Sudan**, about 7.1 million people were estimated to face severe acute food insecurity between April and July 2024. This figure amounts to 56 percent of the total population and includes almost 80 000 people in IPC Phase 5 (Catastrophe) in Pibor County of Greater Pibor Administrative Area in Aweil East County, in Northern

Retail prices of millet and sorghum in the Sudan
(Sudanese pound/kg)

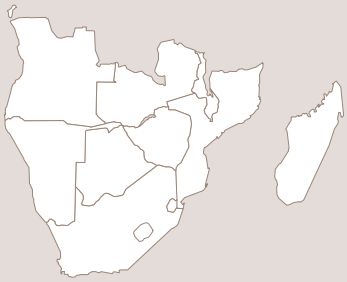


Retail prices of maize and sorghum in South Sudan
(South Sudanese pound/kg)



Bahr el Ghazal State and among returnees from the Sudan spread across the country. The main drivers of the dire food insecurity situation are the protracted macroeconomic crisis, insufficient food supply, the lingering impact of consecutive years of widespread floods and episodes of intercommunal violence. In **Ethiopia**, according to the 2024 Humanitarian Response Plan, about 15.8 million people were estimated to be facing severe acute food insecurity during the lean period between July and September 2024. The main drivers of acute food insecurity are the lingering impact of the drought, which affected northern areas, floods and intercommunal conflict which caused large-scale displacements and livelihood losses across the country in 2023. The food security situation has generally improved since September 2024 as the newly harvested 2024 *Meher* crops increased domestic availability. However, in southern and southeastern pastoral areas, with weather forecasts pointing to below-average precipitation amounts during the October to December *Deyr/Hageya* rainy season, the likely negative impact on livestock body conditions and on the availability of livestock products is expected to result in a deterioration of the food security situation. Similarly, in **Kenya,** the expected poor performance of the October to December rains is expected to result in an increase of the number of people facing severe acute food insecurity from 900 000 between July and September 2024 to 1.7 million between October 2024 and January 2025. The number of severely acute food insecure people is also expected to rise in **Somalia**, from 3.6 million between July and September 2024 to 4.4 million between October and December 2024.

SOUTHERN AFRICA



Good rainfall outlook augurs well for 2025 cereal production

Planting of 2025 cereal crops is underway, with the main harvest period to start in April 2025.

Weather forecasts point to a high likelihood of above-average rainfall amounts in most countries of the subregion between November 2024 and March 2025, boding well for subregional cereal production in 2025. However, below-normal rainfalls quantities are predicted in **Angola** and **Namibia**, raising concerns for crop prospects in these countries, also given the poor soil moisture levels present in October 2024, following substantial rainfall deficits in the previous cropping season. A second area of concern, which affects all countries, is the reduced revenues from the drought-affected 2024 harvests that are likely to constrain smallholder farmers' ability to purchase agricultural inputs, with a likely negative impact on 2025 cereal plantings. To help ameliorate input access, the governments of **Malawi**, **Zambia** and **Zimbabwe** are continuing to implement large-scale input subsidy programmes.

El Niño-driven drought sharply reduced the 2024 cereal harvest

Reflecting the effects of an intense drought linked to the El Niño phenomenon, aggregate cereal production was estimated at 32.3 million tonnes in 2024, about 16 percent below the five-year average. Most of the decrease is accounted for by **South Africa**, the leading cereal producer in the subregion, where the 2024 cereal harvest is estimated at a below-average level of 16 million tonnes. Maize makes up the largest proportion of this output and is pegged at 13.3 million tonnes, about 13 percent below the five-year average. The severe rainfall deficits affected more the white maize crop, the key food staple in the subregion, than the yellow maize crops. In **Zambia**, the cereal output dropped sharply to 1.9 million tonnes, about 43 percent below the five-year average. In **Zimbabwe**, dry weather conditions cut cereal production by half compared to the five-year average. Overall, crops in **Malawi** and **Mozambique** were less affected by the drought, with certain areas registering average outputs. Nationally, 2024 cereal outputs in **Malawi** and **Mozambique** were 17 and 11 percent, respectively, below average. Below-average harvests were also estimated in **Botswana**, **Eswatini**, **Lesotho** and **Namibia**, though these countries rely heavily on imports to cover their domestic consumption needs. In **Madagascar**, although some areas experienced localized flooding due to excessive rainfall in the north, overall weather conditions were more favourable and rice production, the main staple, is expected to be slightly above the five-year average in 2024.

Steep increase in cereal import needs in the 2024/25 marketing year

Maize import requirements in the 2024/25 marketing year (generally May/ April) are estimated to 3.8 million tonnes, more than double the five-year average, assuming

Table 10. Southern Africa cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year average	2023 est.	2024 f'cast	5-year average	2023 est.	2024 f'cast	5-year average	2023 est.	2024 f'cast	5-year average	2023 est.	2024 f'cast	Change: 2024/2023 (%)
Southern Africa	2.5	2.6	2.5	30.8	32.4	24.3	5.0	5.4	5.5	38.3	40.5	32.3	-20.2
excl. South Africa	0.5	0.6	0.5	14.7	15.5	10.3	5.0	5.4	5.5	20.2	21.5	16.3	-23.9
Madagascar	0.0	0.0	0.0	0.2	0.3	0.3	4.4	4.8	5.0	4.7	5.1	5.2	+2.8
Malawi	0.0	0.0	0.0	3.9	3.7	3.3	0.1	0.1	0.1	4.1	3.8	3.4	-10.8
Mozambique	0.0	0.0	0.0	2.2	2.2	1.9	0.4	0.4	0.4	2.6	2.6	2.3	-12.8
South Africa	2.0	2.1	2.0	16.0	17.0	14.0	0.0	0.0	0.0	18.1	19.0	16.0	-16.1
Zambia	0.2	0.3	0.2	3.1	3.3	1.6	0.1	0.1	0.0	3.3	3.7	1.9	-48.8
Zimbabwe	0.2	0.2	0.2	1.9	2.3	0.8	0.0	0.0	0.0	2.1	2.6	1.0	-59.7

Notes: Totals and percentage changes are computed from unrounded data. The five-year average refers to the 2019–2023 period.

normal consumption levels are maintained. The sharp increase is mainly driven by the downturn in 2024 production, particularly in **Zambia**, which is expected to transition from a net exporter to a net importer of maize. Large maize import needs are also forecast in **Angola**, **Malawi**, **Mozambique** and **Zimbabwe**. Imports of wheat and rice in 2024/25 are expected to remain at near-average levels.

Concurrently, exports from the subregion are expected to decline in 2024/25, with **South Africa** likely to be the only source of white maize supply, given Zambia's significant production shortfall. However, the South African export availability has also tightened, and the country is anticipated to export only 2 million tonnes in 2024/25, about one-third lower than the five-year average. Reflecting increased export demand, the monthly pace of South African white maize exports between May and September 2024 to southern African countries surged by 25 percent compared to the same months in 2023.

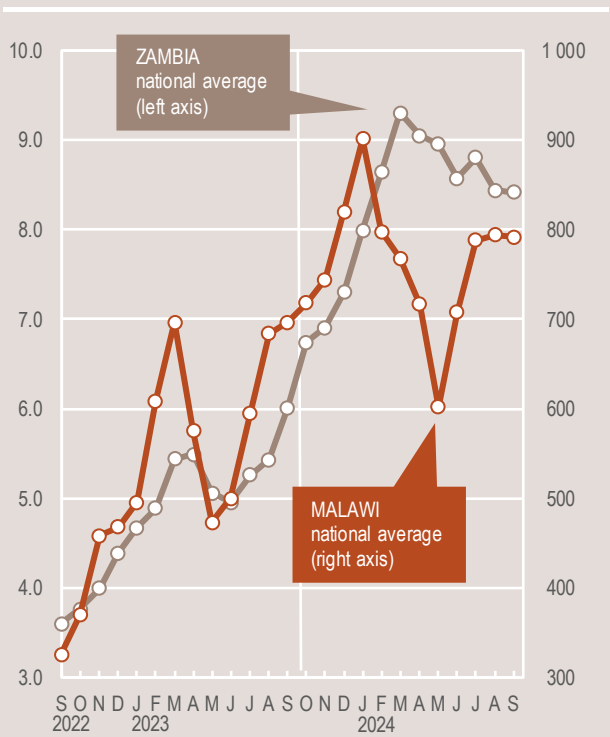
Considering that the subregional maize export supply will likely fall short of import needs, maize grains would need to be sourced from outside the subregion, similar to 2015/16 when an El Niño-associated drought also affected local production. Constraints to maize trade options are envisaged as global production of white maize, the primary food staple in Southern Africa, is relatively limited and concentrated in only a few countries. A key potential source of white maize is likely to be the United Republic of Tanzania, which has already entered into a government-to-government agreement with **Zambia** to export more than 500 000 tonnes. In addition, it is likely that substitutions between white maize and other cereal commodities may take place to ensure that calorie requirements are met.

Prices of maize remain elevated

Tight supplies, weaker year-on-year currencies and robust export demand are supporting high maize grain prices across the subregion. However, international reference prices of cereals, including maize, were mostly at lower year-on-year levels as of September 2024, abating some inflationary pressure.

In **South Africa**, wholesale prices of white maize grain reached new record highs in September 2024. The key drivers are the tight domestic supply, following the weather-stricken 2024 harvest, and heightened export demand from regional neighbouring countries, whose maize crops were also affected by drought. Yellow maize wholesale prices increased between July and September 2024, but at a slower pace, and were about 18 percent below their record-high level reached in November 2022. This reflects a global ample supply of yellow maize, declining prices on the international markets and considering that the yellow maize production declined by a lesser extent compared to white maize. In **Botswana**, **Eswatini** and **Lesotho**, all net cereal importing countries, prices of maize meal (mostly made from white maize) have increased gradually between July and August 2024 as the elevated prices in South Africa were transmitted to domestic markets. In **Zambia**, despite some stability since July 2024, maize grain prices in September 2024 were about 40 percent higher year-on-year, underpinned by the steep production downturn and prices of maize meal hit record highs in September. The national currency's stability since August 2024, following a period of persistent depreciation, could help to limit imported inflation in the coming months. In **Malawi**, the national average price of maize grain in September was below the January 2024 peak, but still 14 percent higher year-on-year, owing to the effects of a weak currency and a reduced cereal output in 2024. In **Zimbabwe**, amid a broadening gap between the official and parallel exchange rates, the national currency was devalued by more than 40 percent in September 2024. This depreciation could fuel price growth, particularly given the increased proportion of imports to cover food needs in 2024/25. The monthly food inflation rate jumped to 10 percent in September, up from 2 percent in August. In **Mozambique**, the annual food inflation rate has remained around 5 percent since March 2024.

Maize grain prices in selected Southern African markets



Drought drives up the number of people facing acute food insecurity in 2024/25

According to the results of the latest IPC analyses, the El Niño-induced drought has led to a sharp increase in acute food insecurity in 2024/25. Reduced agricultural production has tightened food availability, especially for rural households dependent on farming for their livelihoods. Additionally, high food prices are further eroding households' purchasing power, constraining access to food. This financial strain could also lead to a deterioration in the diversity and quality of diets, with a decline in the consumption of other essential products and services, such as health and education, as households allocate larger proportions of their income to food purchases.

In **Zambia**, an estimated 5.8 million people are projected to face IPC Phase 3 (Crisis) or higher levels of acute food insecurity between October 2024 and March 2025, the highest number on record, reflecting the severe drought conditions in 2024. In **Namibia**, about 1.25 million people are expected to experience acute food insecurity during the same period, nearly double the previous year's figure and the highest on record. Acute food insecurity numbers have also increased in **Eswatini**, **Lesotho** and **Malawi**, though they remain below the peak levels experienced during the 2016 El Niño event. While IPC analysis for **Zimbabwe** is unavailable, indications suggest a steep rise in levels of acute food insecurity due to the weather shock and exacerbated by persistently high food prices.

REGIONAL REVIEWS
ASIA AND PACIFIC ISLANDS

Countries with unfavourable cereal production prospects in 2024*

Bhutan: limited availability of agricultural inputs and localized unfavourable weather

Timor-Leste: unfavourable weather

*/** See Terminology (*page 8*).

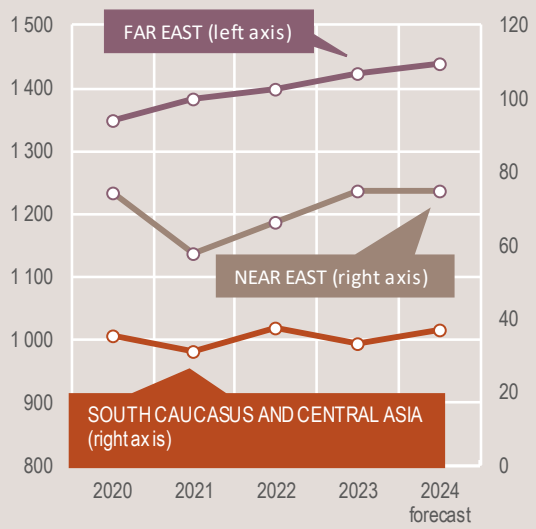
Notes: Dotted line represents approximately the Line of Control in Jammu and Kashmir agreed upon by India and Pakistan. The final status of Jammu and Kashmir has not yet been agreed upon by the parties.

Source: FAO/GIEWS, 2024. *Crop Prospects and Food Situation No. 3*. Cited 8 November 2024, modified to comply with the United Nations map No. 4651 Rev. 1, April 2023.

Production Overview

Total regional cereal production (rice in paddy terms) is forecast to increase in 2024 to a well above-average level of 1 551 million tonnes. Most of the production growth is linked to Far East Asian countries, where there was a sizeable increase in the paddy harvest, as well in maize production driven in part by continued strong demand from the feed industry. Good rainfall conditions in Near East Asian countries helped maintain above-average wheat harvests in the leading producers in 2024, but high temperatures in the Syrian Arab Republic, as well as Lebanon, curbed wheat outputs. Furthermore, the escalation of the regional conflicts and the economic crises remain key obstacles that are hindering farmers' access to inputs in several Near East Asia countries, weakening agricultural productive capacities. In Central Asia, conducive weather conditions resulted in above-average wheat harvests in 2024. Planting of the 2025 wheat crops has started in Far East Asia, and early indications point to an above-average wheat area.

Cereal production
(million tonnes)



FAR EAST

Area planted with 2025 wheat crop forecast at above-average level

Planting of the mostly irrigated 2025 winter wheat crop, to be harvested between March and June 2025, is ongoing, amid generally adequate soil moisture conditions. In **China (mainland)**, the leading producer in the subregion, the 2025 area planted with wheat is forecast to be above the five-year average, underpinned by official incentive measures, including remunerative minimum support prices and subsidies for agricultural inputs. In **India**, plantings of wheat are expected to surpass last year's record level, driven by strong domestic demand and government support. In **Pakistan**, the area planted with wheat is forecast to be near average. In the remaining countries of the subregion, where only small quantities of wheat are produced, plantings are expected to be above average, driven by strong domestic demand for wheat-based products. Overall, the availability of irrigation water, quality seeds, fertilizers and herbicides is adequate, which is expected to benefit yields. However, the final output will depend on precipitation patterns until April/May 2025, which are likely to be influenced by the La Niña event predicted to emerge in late 2024. La Niña is typically associated with below-average precipitation amounts in key wheat producing areas, including the Korean Peninsula, central-eastern China (mainland), central and northern Pakistan, and most of Afghanistan. Limited snow cover in areas with freezing temperatures could expose germinating crops to frost damage and reduce soil moisture from melting snow during the spring months.

Cereal output in 2024 forecast at above-average level

Harvesting of the 2024 main season cereals crops, mostly rice and coarse grains, is ongoing in Northern Hemisphere countries, with the secondary season crops to be planted towards the end of the year. In countries along or south of the Equator, the 2024 main season harvest finalized and farmers are currently harvesting the secondary or tertiary crops. In aggregate, subregional cereal production in 2024, including the output of main and secondary crops, is forecast at a slightly above-average level of 1 440 million tonnes (rice in paddy equivalent). Despite poor rains in the first half of the year associated with the 2023/24 El Niño event, abundant monsoon rains from July to September 2024, combined with adequate availability of agricultural inputs, led to upturns in cereal production in most countries. Heavy rains and several typhoons and cyclones, including Typhoon Yagi in late September 2024, caused flooding and crop losses, especially affecting paddy crops in parts of **Bangladesh, China (mainland)**, **India**, **Myanmar**, **Nepal**, **the Lao People's Democratic Republic** and **Pakistan**, curbing production gains in some countries.

Production of rice, the major staple in the subregion, is forecast at an above-average level of 717.9 million tonnes (paddy), amid expectations of above-average harvests in **Bangladesh**, **Cambodia**, **India**, **Pakistan**, **the Philippines** and **Thailand**. In **Viet Nam** and **Sri Lanka**, rice production is expected to be near average, while below-average outputs are anticipated in **Indonesia**, **Malaysia** and **Timor-Leste,** due to a reduction in main season harvests on account of El Niño-related dryness.

Aggregate production of coarse grains in the subregion, which mostly consists of maize, is forecast at 426.5 million tonnes. This output is 7 percent above the five-year average, primarily resulting from large plantings driven by continued strong demand from the feed industry. Bumper maize outputs are expected in the leading producers, including **Bangladesh**, **China (mainland)** and **India**. By contrast, below-average out-turns are forecast in **Viet Nam**, owing to low plantings as farmers opted for more profitable vegetables and cash crops. The aggregate subregional wheat out-turn, with the bulk of harvests completed in June 2024, is estimated at a record level of 294.8 million tonnes in 2024.

Table 11. Far East cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year average	2023 est.	2024 f'cast	5-year average	2023 est.	2024 f'cast	5-year average	2023 est.	2024 f'cast	5-year average	2023 est.	2024 f'cast	Change: 2024/2023 (%)
Far East	279.3	284.7	294.8	397.8	422.8	426.5	698.3	716.1	717.9	1 375.3	1 423.6	1 439.2	+1.1
Afghanistan	4.4	4.3	5.0	0.4	0.4	0.4	0.6	0.6	0.6	5.4	5.3	6.0	+14.1
Bangladesh	1.1	1.2	1.2	4.1	4.6	5.2	57.2	60.6	60.2	62.4	66.3	66.5	+0.3
Cambodia	0.0	0.0	0.0	1.0	1.5	1.4	11.7	12.9	13.1	12.7	14.4	14.5	+0.7
China (mainland)	135.8	136.6	140.1	281.7	298.4	301.6	209.9	206.6	207.4	627.5	641.6	649.0	+1.2
India	107.9	110.6	113.3	52.9	57.2	57.6	193.9	206.7	209.7	354.6	374.4	380.6	+1.6
Japan	1.0	1.1	1.1	0.3	0.3	0.3	10.4	10.1	10.2	11.7	11.5	11.5	-0.1
Myanmar	0.1	0.1	0.1	2.4	2.4	2.4	27.4	28.7	27.2	30.0	31.2	29.7	-4.9
Nepal	2.1	2.1	2.1	3.3	3.3	3.2	5.5	5.7	5.6	10.9	11.1	10.9	-1.6
Pakistan	26.3	28.2	31.4	9.9	10.3	10.0	12.7	14.8	15.2	48.9	53.3	56.6	+6.2
Philippines	0.0	0.0	0.0	8.2	8.1	8.3	19.6	19.6	20.4	27.8	27.7	28.7	+3.5
Republic of Korea	0.0	0.1	0.1	0.2	0.2	0.2	5.0	4.9	4.8	5.2	5.2	5.1	-0.9
Sri Lanka	0.0	0.0	0.0	0.3	0.3	0.3	4.6	4.5	4.6	4.9	4.8	4.9	+2.7
Thailand	0.0	0.0	0.0	4.9	5.1	5.2	32.0	33.0	33.4	36.9	38.2	38.5	+1.0
Viet Nam	0.0	0.0	0.0	4.5	4.4	4.4	43.3	43.5	43.2	47.8	47.9	47.6	-0.6

Notes: Totals and percentage changes are computed from unrounded data. The five-year average refers to the 2019–2023 period.

Above-average cereal imports forecast for 2024/25

In the 2024/25 marketing year, subregional cereal import requirements are forecast at an above-average level of 176.3 million tonnes. Imports of coarse grains, which account for the largest share of subregional cereal imports, are forecast at an above-average level of 94.4 million tonnes, amid continued strong demand from the feed industry. Imports of wheat are forecast at a slightly above-average level of 63.2 million tonnes, amid robust demand by the main importing countries, namely **Bangladesh**, **Indonesia**, **Malaysia** and **the Philippines**. Imports of rice in the 2025 calendar year are forecast at 16.1 million tonnes.

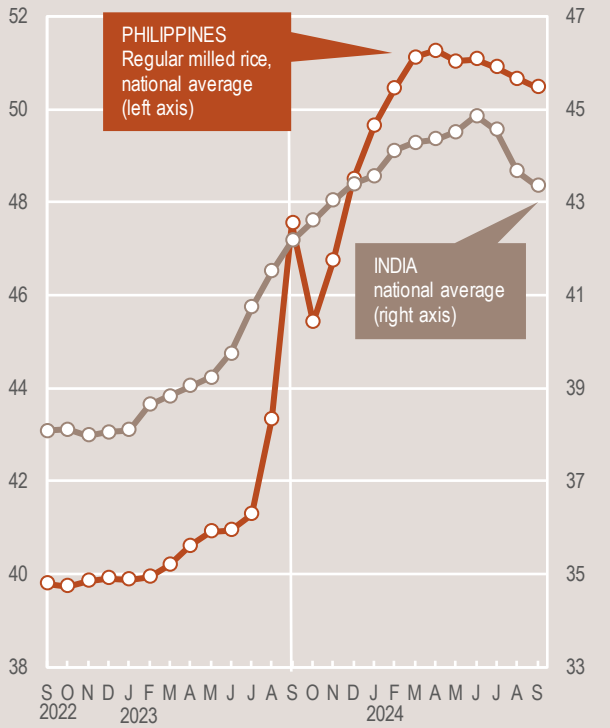
Aggregate rice exports, which account for the largest share of subregional cereal exports, are forecast at 46.2 million tonnes in the 2025 calendar year, 6 percent higher year-on-year, driven by increased exports by **India**; the Government of India removed all restrictions on exports of non-broken rice in October.

Domestic prices of rice at near-record level in Myanmar

In **Myanmar**, retail prices of rice have increased since early 2023, and were at near-record levels in September 2024,

Rice retail prices in selected Far East countries

(Philippine peso/kg) (Indian rupee/kg)



Wheat flour retail prices in selected Far East countries

(Sri Lanka rupee/kg) (Indian rupee/kg)

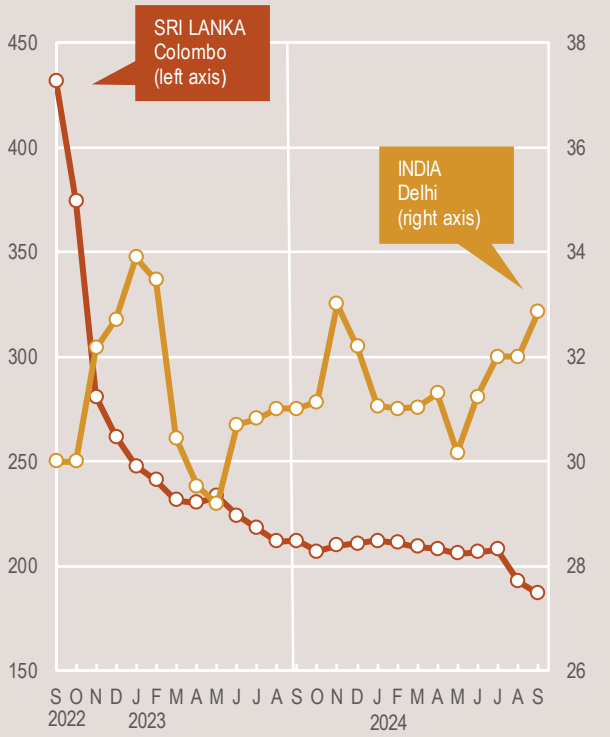


Table 12. Far East cereal production and anticipated trade in 2024/25

(thousand tonnes)

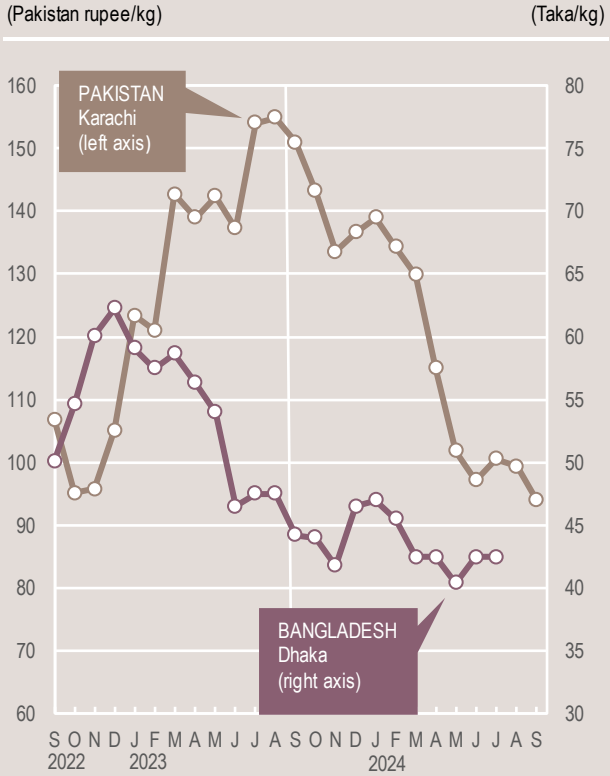
	5-year average (2019/20 to 2023/24)	2023/24	2024/25	Change: 2024/25 over 2023/24 (%)	Change: 2024/25 over 5-year average
Coarse grains					
Exports	5 739	5 136	5 928	+15.4	+3.3
Imports	93 220	103 273	94 387	-8.6	+1.3
Production	397 753	422 813	426 517	+0.9	+7.2
Rice (millled)					
Exports	43 691	43 682	46 222	+5.8	+5.8
Imports	16 949	17 723	16 075	-9.3	-5.2
Production	464 884	476 605	477 927	+0.3	+2.8
Wheat					
Exports	4 730	1 799	2 025	+12.6	-57.2
Imports	62 324	70 431	63 209	-10.3	+1.4
Production	279 311	284 656	294 761	+3.5	+5.5

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

sustained by conflict-related market disruptions and concerns over the impact of floods on the 2024 main harvest. In importing countries, including **Indonesia**, **Nepal**, **the Philippines** and **Timor-Leste**, prices of rice generally increased and, as of September 2024, were significantly higher year-on-year, driven by elevated production and transport costs, high international prices and production shortfalls in some countries. In **Thailand** and **Viet Nam**, the main rice exporting countries, domestic prices of rice declined for the fourth consecutive month in September 2024 reaching lower year-on-year levels, amid adequate market availability from the 2024 harvests. In **India**, prices of rice declined marginally between June and September 2024, but strong domestic demand kept them higher year on year. In **China (mainland)**, wholesale prices of rice were generally stable throughout 2024.

Domestic prices of wheat and wheat flour declined between June and September 2024 and were generally lower year on year in most countries of the subregion. In the wheat producing countries of **Bangladesh**, **China (mainland)**, **India** and **Pakistan**, prices of wheat declined following the commercialization of the 2024 wheat harvests, while in importing countries, namely **Afghanistan**, **Bhutan, Indonesia**, **the Philippines** and **Sri Lanka**, prices decreased in line with trends in international markets.

Wheat flour retail prices in selected Far East countries



Large number of people remain acutely food insecure

Although food security conditions are gradually improving in most countries, high domestic food prices and macroeconomic challenges, which limit income-earning opportunities for households, continue to have a significant negative effect on acute food insecurity for a large number of people. In the areas affected by floods, acute food insecurity has worsened due to large-scale displacements, loss of livelihoods and damage to housing and infrastructure. In **Myanmar**, according to the 2024 Humanitarian Needs and Response Plan, about 13.3 million people (24 percent of the total population) were estimated to face high levels of acute food insecurity (equivalent to IPC Phase 3 [Crisis] and above) between April and September 2024. This is mainly due to high food prices and the ongoing conflict, which began in early 2021 and intensified since late 2023, causing large-scale displacements. As of September 2024, the number of internally displaced persons (IDPs) was estimated at a record of 3.4 million. In **Bangladesh**, about 1 million Forcibly Displaced Myanmar Nationals, the bulk of which are located in the Cox's Bazar District, remain highly dependent on humanitarian assistance to fulfill their basic needs. In **Afghanistan**, according to the latest IPC analysis, about 12.4 million people were estimated to face high levels of acute food insecurity from May to October 2024, a slight improvement compared to the previous year's high level, largely due to humanitarian and livelihood support initiatives and the year-on-year increase in cereal production. In **Pakistan**, the number of people facing high levels of acute food insecurity between July and November 2024 is projected at 7.9 million, down from the 8.6 million in the March to June 2024 period. This modest improvement is mostly due to the positive impact of the record 2024 cereal production. In **the Democratic People's Republic of Korea**, although food insecurity conditions remain of concern, households' food availability has improved due to the recently completed main harvest.

NEAR EAST

Forecasts of below-average rainfall in 2024/25 raise some concerns over early crop prospects

Planting of the 2025 winter wheat is currently ongoing in the subregion and will continue until the end of the year. In September 2024, above-average rainfall in central **Türkiye** improved soil moisture for planting operations, while in northern regions of **the Islamic Republic of Iran** dry weather conditions delayed the start of the planting period for the upcoming crop season. In **Iraq**, a delayed start of the 2024/25 rainy season is anticipated due to the influence of a potential La Niña event. Elsewhere, in **Lebanon**, **the Syrian Arab Republic** and **Yemen**, the regional escalation of conflicts and the economic crises remain key obstacles that are hindering farmers' access to imported inputs, due to high costs. This could lead to a cutback in plantings. Another potential risk is related to forecasts of below-average rainfall quantities from November 2024 to January 2025, underpinned by the likely La Niña event. If this rainfall outlook materializes, it could have a negative impact on yields.

Import requirements to decrease, owing to 2024 above-average cereal production

Cereal production in 2024 is estimated at 75.1 million tonnes, about 9 percent above average, mainly due to favourable weather conditions in major producing countries. In **Türkiye**, cereal production is officially estimated at 39.8 million tonnes, about 8 percent above the five-year average. In **Iraq**, adequate rainfall amounts, coupled with the continued provision of subsidized mechanization services by the government, led to a large cereal outturn, estimated at 6.6 million tonnes, about 11 percent above average. By contrast, in **the Syrian Arab Republic**, cereal production is estimated at 3.7 million tonnes, 7 percent below the five-year average, driven by high temperatures during April and May 2024, and limited access to farming inputs due to high prices. In **Lebanon**, according to the preliminary results from the joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM), cereal production in 2024 is estimated at 120 000 tonnes, about 34 percent below average (2020–2023) due to unfavourable weather conditions, challenging socioeconomic conditions and the conflict which constrained farmers' access to inputs and croplands.

At the subregional level, cereal import requirements for the 2024/25 marketing year (July/June) are forecast at 65 million tonnes, about 12 percent below the average, mainly due to an increase in the aggregate cereal output. The countries affected by regional conflicts and economic crises are likely to face some constraints to import, partly due to increasing import costs, attributed to weak currencies, and the impact of the conflict on logistical operations.

Conflicts and economic instability drive up acute food insecurity

Acute food insecurity levels are likely to increase, amid an escalation of conflicts that are disrupting food supply chains and displacing people, coupled with economic downturns that are reducing livelihood opportunities and access to food.

In **Palestine**, the risk of famine persists across the whole Gaza Strip, amid the escalating hostilities in 2024. By the end of August 2024, about 1.9 million people (90 percent of the Gaza population) have been displaced. Diseases and growing constraints on access to water and healthcare services are expected to exacerbate acute malnutrition. From November 2024 to April 2025, about 2 million people are classified in IPC Phase 3 (Crisis) or above, including 876 000 people in IPC Phase 4 (Emergency) and 345 000 people in IPC Phase 5 (Catastrophe).

In **Lebanon,** between April and September 2024, about 1.3 million people (23 percent of the population) were projected to face high levels of acute food insecurity (IPC Phase 3 [Crisis] or above) including Lebanese residents as well as Syrian and Palestinian refugees. Given the escalation of the conflict, food insecurity is expected to deteriorate further. As of late September 2024, about 1 million people have been displaced, primarily from the southern regions and Beirut southern suburbs due to the conflict intensification.

In **the Syrian Arab Republic,** nearly 15.4 million people (65 percent of the population) are estimated to require food assistance in 2024. Furthermore, the suspension of the World Food Programme's (WFP's) funding from the beginning of 2024 continues to hamper the delivery of food assistance to most vulnerable households.

In **Yemen**, mixed weather conditions and floods, which affected agricultural activities, coupled with an economic downturn and the ongoing conflict, are the main drivers of the high levels of acute food insecurity reported in 2024. From October 2024 to February 2025, about 4.6 million people are projected to face IPC Phase 3 (Crisis) or above acute food insecurity, including 1.1 million people in IPC Phase 4 (Emergency).

Table 13. Near East cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year average	2023 est.	2024 f'cast	5-year average	2023 est.	2024 f'cast	5-year average	2023 est.	2024 f'cast	5-year average	2023 est.	2024 f'cast	Change: 2024/2023 (%)
Near East	40.5	44.2	44.8	23.5	26.5	25.0	5.1	4.4	5.3	69.1	75.1	75.1	-0.1
Iran (Islamic Republic of)	12.8	13.5	14.0	3.8	4.1	4.2	3.8	3.5	4.2	20.4	21.1	22.4	+6.2
Iraq	4.4	4.2	5.6	1.3	0.7	0.8	0.0	0.0	0.2	5.9	4.9	6.6	+33.2
Türkiye	19.8	22.0	21.0	16.1	19.3	17.9	1.0	0.9	1.0	36.9	42.2	39.8	-5.6

Notes: Totals and percentage changes are computed from unrounded data. The five-year average refers to the 2019–2023 period.

SOUTH CAUCASUS AND CENTRAL ASIA

Favourable weather conditions for 2025 winter cereal crops

Planting of the 2025 winter cereal crops, mainly wheat, to be harvested from June 2025, started in October under favourable weather conditions. At the subregional level, the aggregate area planted is expected at an average level. Weather forecasts indicate a high likelihood of above-average rainfall amounts in the subregion between November and December.

Wheat production estimated at above-average levels in 2024

Regarding the 2024 cropping season, harvesting of the winter cereals finalized in August, while harvesting of the spring crops was completed in October. Total subregional cereal production is estimated at about 37 million tonnes in 2024, 10 percent above the five-year average level. Wheat output, accounting for about 70 percent of the total cereal production, is estimated at an above-average level of 27 million tonnes.

In **Kazakhstan**, which accounts for the bulk of the subregional cereal output, yields are estimated to be above the average reflecting generally beneficial weather conditions. The 2024 wheat production is estimated at 15.8 million tonnes, about 20 percent above the five-year average.

Cereal exports forecast at above-average levels in 2024/25

Amid ample harvests in the main exporters, subregional cereal exports in the 2024/25 (July/June) marketing year are forecast at just over 13 million tonnes, about 24 percent above the five-year average, including 12 million tonnes of wheat and 1 million tonnes of barley.

Total subregional import requirements of cereals, mainly wheat, are forecast at a near-average level of 9.2 million tonnes, reflecting the upturn in domestic production in 2024. From August to December 2024, the Government of **Kazakhstan** imposed a suspension on wheat imports from all countries, including members of the Eurasian Economic Union (EAEU) members.

Domestic prices of wheat flour decreased in Kazakhstan and Tajikistan

Domestic retail prices of wheat flour decreased moderately in **Tajikistan** and **Kazakhstan** from June to September 2024, due to improved market availability from the ongoing harvest. Elsewhere in the subregion, in **Armenia, Azerbaijan, Georgia** and **Kyrgyzstan**, wheat flour prices remained stable between April and September 2024.

Retail wheat flour prices in selected South Caucasus and Central Asia countries

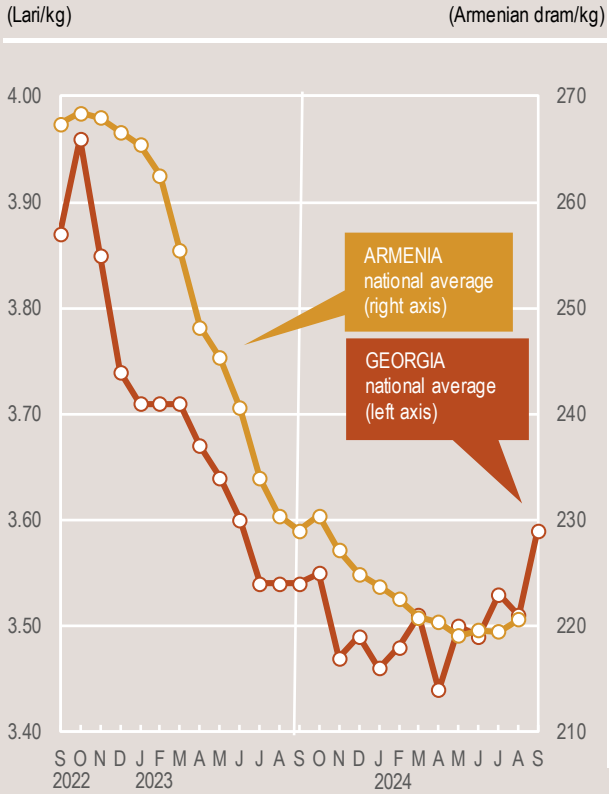


Table 14. South Caucasus and Central Asia cereal production

(million tonnes)

	Wheat			Coarse grains			Total cereals[1]			
	5-year average	2023 est.	2024 f'cast	5-year average	2023 est.	2024 f'cast	5-year average	2023 est.	2024 f'cast	Change: 2024/2023 (%)
South Caucasus and Central Asia	*24.1*	*23.2*	*26.9*	*8.9*	*8.8*	*9.2*	*34.1*	*33.1*	*37.2*	*+12.4*
Armenia	*0.1*	*0.1*	*0.1*	*0.1*	*0.1*	*0.1*	*0.2*	*0.2*	*0.2*	*-11.8*
Azerbaijan	*1.9*	*1.8*	*1.8*	*1.4*	*1.4*	*1.4*	*3.3*	*3.2*	*3.2*	*-0.2*
Georgia	*0.1*	*0.2*	*0.2*	*0.3*	*0.3*	*0.3*	*0.4*	*0.4*	*0.4*	*+3.4*
Kazakhstan	*13.2*	*12.1*	*15.8*	*4.7*	*4.6*	*4.9*	*18.4*	*17.2*	*21.2*	*+23.1*
Kyrgyzstan	*0.6*	*0.5*	*0.6*	*1.2*	*1.2*	*1.2*	*1.8*	*1.7*	*1.8*	*+5.6*
Tajikistan	*0.9*	*1.1*	*1.1*	*0.4*	*0.3*	*0.4*	*1.4*	*1.5*	*1.5*	*+6.1*
Turkmenistan	*1.2*	*1.1*	*1.1*	*0.1*	*0.1*	*0.1*	*1.3*	*1.2*	*1.2*	*-0.0*
Uzbekistan	*6.2*	*6.3*	*6.3*	*0.8*	*0.9*	*0.9*	*7.3*	*7.6*	*7.5*	*-0.3*

Notes: Totals and percentage changes are computed from unrounded data. The five-year average refers to the 2019-2023 period.

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

PACIFIC ISLANDS

Mixed outlook for the 2024/25 agricultural season

Planting of the main 2025 food staple crops, mainly tubers and rice, is underway and harvesting is expected to start in May. There has been significant spatial variation in rainfall quantities across the subregion between August and October 2024, with countries like **Palau** and parts of **the Federated States of Micronesia** receiving above-average cumulative rainfall amounts, while **Kiribati** has faced drier-than-normal conditions. Climate forecasts suggest a high likelihood of La Niña developing by the end of 2024, and this phenomenon is likely to affect normal rainfall patterns and consequently agricultural productivity. Above-average rainfall amounts are expected in **Palau**, **the Marshall Islands**, western **Solomon Islands**, **Vanuatu** and parts of **Fiji**, while southern **Federated States of Micronesia**, **Nauru** and **Kiribati** might experience below-normal rainfall levels, with potentially negative impacts on crop growth of key food staples, including taro, cassava and sweet potatoes, which are essential for food security.

Cassava and taro prices rise steeply in Fiji, Tonga and Samoa

In **Fiji**, cassava prices rose significantly between January and September 2024, increasing by an average of 59 percent. This increase is attributed to a rise in industrial demand, following the opening of a large-scale cassava flour processing factory.

In **Tonga**, a similar trend to Fiji is observed, with cassava prices rising by 75 percent from January to September 2024. The high prices for cassava, with prices of taro, yam and other crops also at elevated levels, are attributed to local supply shortages resulting from adverse weather conditions in 2024, underscoring the high vulnerability of the agrifood system to weather shocks.

In **Samoa**, the national average price of taro decreased seasonally by 13 percent between January and August 2024. However, a slight price increase was noted in September, in part reflecting expectations of a weather-reduced 2024 taro output, for crops normally harvested from September onwards.

REGIONAL REVIEWS
LATIN AMERICA AND THE CARIBBEAN

Note: Situation as of October 2024
Subregional borders
Territories/boundaries**

CENTRAL AMERICA AND THE CARIBBEAN

Mexico
Maize and rice (summer season): Harvesting
Wheat (winter season): Planting

Central America
Maize (second season): Harvesting

SOUTH AMERICA

Brazil, Argentina
Coarse grains: Planting
Wheat (winter season): Harvesting

Countries with unfavourable cereal production prospects in 2024*
Bolivia (Plurinational State of): unfavourable weather
Haiti: insecurity and limited availability of agricultural inputs
Mexico: unfavourable weather

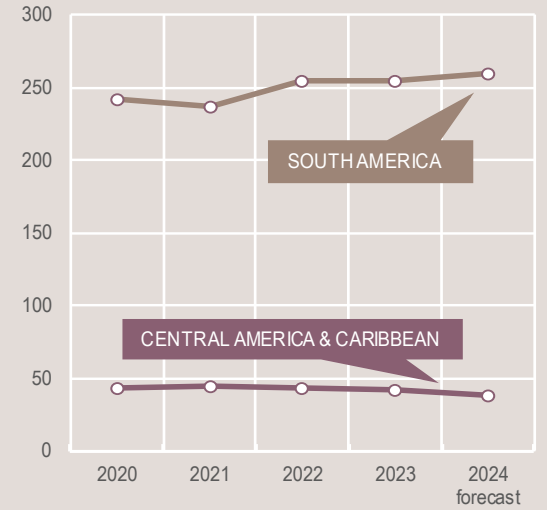
*/** See Terminology (*page 8*).

Source: FAO/GIEWS, 2024. *Crop Prospects and Food Situation No. 3*. Cited 8 November 2024, modified to comply with the United Nations map No. 4651 Rev. 1, April 2023.

Production Overview

Total cereal production in Latin America and the Caribbean is forecast at an above-average level of 298.1 million tonnes (rice in paddy terms), albeit down from the all-time high of 2023. The above-average output principally reflects a production recovery in Argentina, following dry-weather conditions in 2023, while in Brazil challenging weather conditions reduced yields from the highs of the previous year, but the country is still seen gathering an above-average cereal harvest. Cereal production among Central American and the Caribbean countries is reported to be below average in 2024 primarily driven by a low maize harvest in Mexico, the major producer in the subregion, amid prolonged dry spells.

Cereal production
(million tonnes)



CENTRAL AMERICA AND THE CARIBBEAN

Below-average 2024 wheat output due to reduced plantings

In **Mexico**, harvesting of the 2024 minor season wheat crop, which accounts for about 5 percent of the annual production, is ongoing. Wheat production from the minor season is estimated at a near-average level, but below the previous year's bumper level, as dry weather conditions caused a contraction in the area sown. Overall, total wheat production in the subregion is forecast at 2.6 million tonnes in 2024, about 20 percent below the average, reflecting reduced plantings.

Maize output forecast at a slightly below-average level in 2024

In **Mexico**, the largest cereal producer in Central America, harvesting of the main season maize crop started in October 2024 and the output is expected at a below-average level, driven by an 8 percent decline in plantings, amid reduced rains during the planting period. The aggregate annual maize production in Mexico, including a below-average minor season crop harvested earlier in the year, is forecast at 23.1 million tonnes in 2024, below the previous five-year average.

Elsewhere in the subregion, harvesting of the 2024 main season maize crop is nearing completion with a month-long seasonal delay, due to severe dry weather earlier in the season. Erratic precipitation and high temperatures also resulted in a reduced maize area in the *Dry Corridor* area of **El Salvador** and **Nicaragua**, and consequently production in these two countries is expected to be slightly below the average. By contrast, in **Guatemala** and **Honduras**, maize harvests in 2024 are estimated to be at near-average levels on account of favourable rainfall amounts. Excluding Mexico, aggregate maize production in Central America is expected to be near the previous five-year average.

In the Caribbean, planting of the 2024 minor maize crop in **Haiti** started in September and the harvest is expected to begin in December. Following dry-weather conditions in September, weather forecasts point to a higher-than-normal probability of above-average rainfall amounts and a high likelihood of a severe hurricane season, associated with the La Niña phenomenon. These conditions raise the risk of significant crop losses and damage to infrastructures. In **the Dominican Republic**, where the second season paddy harvest is ongoing, aggregate cereal production in 2024 is expected to be above average owing to a larger planted area in both the minor and the major season, mostly reflecting higher year-on-year prices.

Dry weather conditions hamper sowing of the 2025 maize crop

Planting of the 2025 minor season (*Postrera*) maize crop is underway in **Mexico** and sowing operations are being hampered by hot and dry-weather conditions in the country's main producing state of Sinaloa, where the maize crop is, however, mostly grown under irrigation. Weather forecasts for the November to January point to below-average precipitation amounts, weighing on early yield prospects.

Elsewhere in the subregion, sowing of the 2025 minor season (*Postrera*) maize crop is underway. In line with the La Niña phenomenon, weather forecasts point to above-average precipitation amounts in the fourth quarter of 2024, with a likely positive impact on crop yields. However, if excessive rains materialize, this would pose an increased risk of floods and landslides that may cause localized crop losses.

Cereal import needs forecast at above-average level in 2024/25

Cereal import requirements in the 2024/25 (September/August) marketing year are forecast at 41.4 million tonnes, 7.1 percent above the previous five-year average, mostly driven by continued strong demand for yellow maize from the feed industry. Maize imports in **Mexico** are forecast to increase by about 11 percent compared to the five-year average, reflecting the reduced domestic output in 2024.

Table 15. Central America and the Caribbean cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year average	2023 est.	2024 f'cast	5-year average	2023 est.	2024 f'cast	5-year average	2023 est.	2024 f'cast	5-year average	2023 est.	2024 f'cast	Change: 2024/2023 (%)
Central America and the Caribbean	*3.3*	*3.5*	*2.6*	*37.3*	*36.2*	*33.2*	*2.6*	*2.4*	*2.6*	*43.2*	*42.0*	*38.5*	*-8.5*
El Salvador	*0.0*	*0.0*	*0.0*	*0.9*	*0.9*	*0.9*	*0.0*	*0.0*	*0.0*	*0.9*	*0.9*	*0.9*	*+1.5*
Guatemala	*0.0*	*0.0*	*0.0*	*2.1*	*2.1*	*2.0*	*0.0*	*0.0*	*0.0*	*2.1*	*2.2*	*2.1*	*-4.6*
Honduras	*0.0*	*0.0*	*0.0*	*0.7*	*0.8*	*0.7*	*0.1*	*0.0*	*0.0*	*0.7*	*0.8*	*0.8*	*-4.9*
Mexico	*3.3*	*3.5*	*2.6*	*32.5*	*31.4*	*28.5*	*0.2*	*0.2*	*0.2*	*36.1*	*35.1*	*31.4*	*-10.4*
Nicaragua	*0.0*	*0.0*	*0.0*	*0.4*	*0.4*	*0.4*	*0.4*	*0.4*	*0.5*	*0.8*	*0.8*	*0.9*	*+4.7*

Notes: Totals and percentage changes are computed from unrounded data. The five-year average refers to the 2019–2023 period.

White maize prices well below year-earlier levels

After two months of consecutive seasonal increases in June and July, maize prices decreased month on month in September 2024 in **Honduras**, **Guatemala** and **El Salvador**, amid an upturn in supplies following the start of the *Primera* harvest. Lower maize prices on a yearly basis in the United States of America, the main source of grains for the subregion, are also supporting lower year-on-year levels in Honduras, Guatemala and El Salvador. By contrast, white maize prices in **Mexico** were at higher year-on-year levels in 2024, reflecting the impact of a reduced harvest.

Prices of beans decreased seasonally in August and September across the subregion. In **El Salvador** and **Honduras**, bean prices were below year-earlier levels, on account of lower prices in **Nicaragua**, the subregion's main exporter of red beans. In **Guatemala** and **Mexico**, however, prices of black beans were up on a yearly basis as of September, reflecting the lower year-on-year output in 2023.

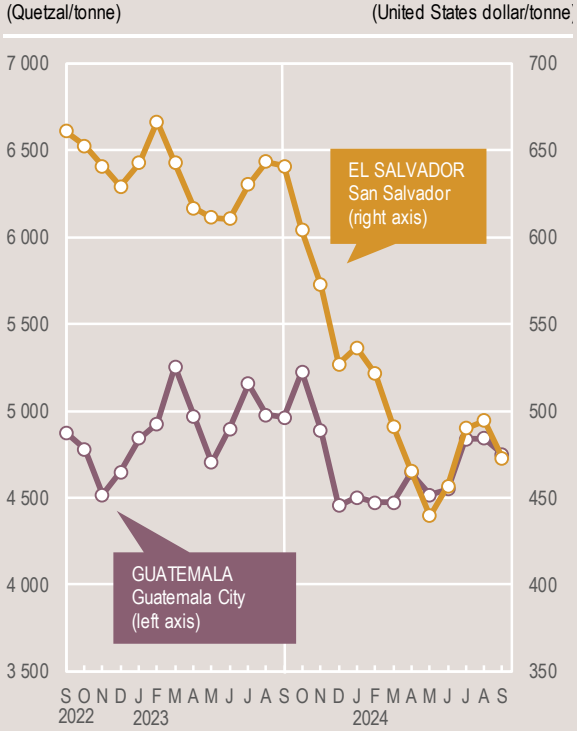
In **Haiti**, prices of domestically produced maize and black beans were stable between April and July 2024, before decreasing in August, amid the main harvest period. On a yearly basis, prices of black beans were slightly lower, while maize prices were about 12 percent higher in Port-au-Prince market driven by a low output in 2023. Prices of imported rice, wheat and vegetable oil remained mostly stable between April and August, reflecting a more stable national currency against the United States dollar.

Record high 5.4 million people acutely food insecure

The security situation in **Haiti** continued worsening in the third quarter of 2024, with food supply chains under significant strain and humanitarian agencies unable to fully meet the essential needs of the population. According to the latest IPC analysis, a record number of 5.4 million people, accounting for nearly half of the population, were projected to face acute food insecurity between August 2024 and February 2025, including about 6 000 people classified in IPC Phase 5 (Catastrophe), who are facing catastrophic levels of hunger and a collapse of their livelihoods. As of October 2024, the poor security situation has resulted in 700 000 internally displaced people.

Wholesale white maize prices in selected Central America countries

Wholesale white maize prices in selected Central America countries



SOUTH AMERICA

Planting of 2025 coarse grain crops hampered by unfavourable dry weather conditions

Plantings of the 2025 first season maize crop is underway in Brazil and Argentina. In **Brazil**, planted area of the minor season maize crop is reported to be below average on account of the increase in plantings of more profitable and less drought-sensitive soybean crops. Adequate rainfall amounts in the key producing southern region is currently providing conducive soil conditions for planting operations. However, if forecasts of below-average precipitation amounts for the last quarter of 2024 materialize, this is likely to hamper crop germination and curb yields. In **Argentina**, planted area in 2025 is estimated at 9.4 million hectares, about 16 percent below the 2024 high level and about 8 percent below the five-year average. Planting operations for early planted maize crops were hampered by soil moisture deficits which curbed farmers' sowing intentions. Weather forecast for the November 2024 to February 2025 period indicate a high probability of below-average precipitation amounts in the key producing central and norther regions, with likely negative impacts on yields.

In **Brazil**, the main producer in the subregion, the paddy area in the 2025 season is forecast to be about 10 percent higher than the previous five-year average mainly on account of higher year-on-year prices. In Rio Grande do Sul, the main producing state, paddy planting started in September 2024, earlier than in previous years, amid favourable weather conditions. Average precipitation amounts are forecast in southern regions for the last quarter of 2024 and are expected to have a positive impact on yields of partially rainfed crops whose final outturn is expected at above-average levels.

Maize production in the subregion estimated above average in 2024

Aggregate 2024 maize production in the subregion is estimated at an above-average level of 187 million tonnes, primarily reflecting large outputs in Argentina and Brazil. In **Argentina**, production of maize in 2024, the main cereal crop grown in the country, rebounded from the previous year's drought-reduced output and is estimated at a slightly above-average level of 57.4 million tonnes. Large plantings, about 10 percent above the average, is the main driver of the increased output and helped offset the impact of crop losses due to a stunt disease (*Spiroplasma*) transmitted by leafhoppers. In **Brazil**, maize production in 2024 is estimated at 115.7 million tonnes, slightly above the average, but 12.3 percent down the 2023 bumper harvest, reflecting a year-on-year cutback in plantings driven by low prices and prolonged dry spells in central regions. Additionally, excessive precipitation in key producing southern areas contributed to reduce productivity. Maize outputs in **Bolivia (Plurinational State of), Chile** and **Colombia** were estimated at below-average levels, due to reduced profit margins for maize that triggered cuts in plantings. In **Paraguay** and **Peru**, maize outputs in 2024 are pegged at above-average levels, mostly owing to large plantings. A record planted area in **Uruguay** led to a bumper output in 2024, about 45 percent above the five-year average.

Harvesting of the 2024 wheat crop is underway in the subregion and production is estimated moderately above the five-year average at 30.1 million tonnes. In **Argentina**, the main wheat producer in the subregion, following a drought-affected season in 2023, generally favourable conditions in 2024 led to a production recovery and the wheat harvest is pegged at a slightly above-average level. Official estimates point to an above-average 2024 wheat output in **Brazil,** and an average output in **Paraguay**, where mixed weather conditions have curbed yield expectations. In **Uruguay**, the 2024 wheat output is estimated to be above average, supported by large plantings and favourable weather conditions in the latter half of the season.

Cereal exports forecast near average in 2024/25

Aggregate cereal exports in the 2024/25 (March/February) marketing year are forecast at about 97 million tonnes, about 2 percent below the previous five-year average, resting on lower rice and maize exports. After record highs in 2022 and 2023, subregional exports of maize are forecast at 75.1 million tonnes slightly below the five-year average. The decline mostly reflects a decrease in exports from Brazil, amid a reduced output. Rice exports in 2024/25 are forecast 3.2 million tonnes, about 12 percent below the average, on account of low outputs in Uruguay and Brazil.

Higher year-on-year maize prices in most countries

In **Brazil**, prices of yellow maize increased seasonally in August and September and

Table 16. South America cereal production

(million tonnes)

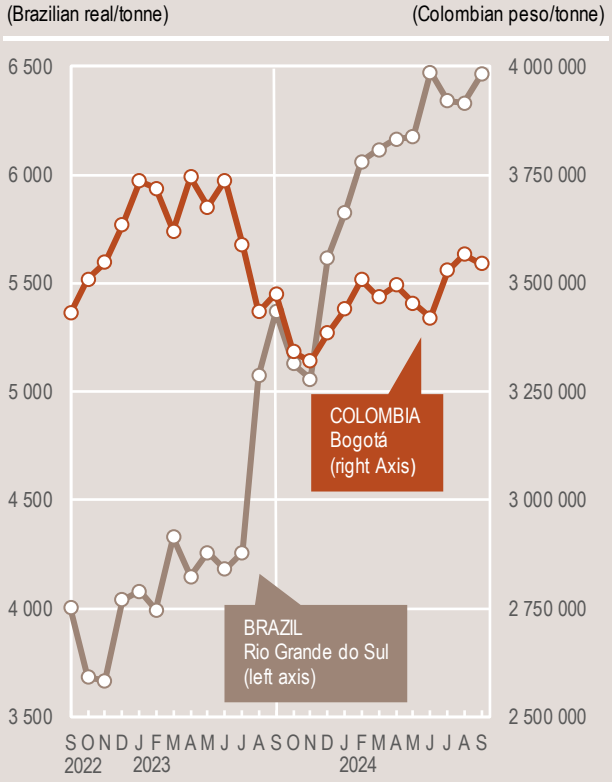
	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year average	2023 est.	2024 f'cast	5-year average	2023 est.	2024 f'cast	5-year average	2023 est.	2024 f'cast	5-year average	2023 est.	2024 f'cast	Change: 2024/2023 (%)
South America	*29.0*	*27.8*	*30.1*	*191.3*	*202.8*	*204.4*	*24.5*	*24.2*	*25.1*	*244.8*	*254.8*	*259.6*	*+1.9*
Argentina	*17.6*	*15.9*	*18.0*	*62.9*	*48.9*	*65.7*	*1.3*	*1.2*	*1.3*	*81.8*	*65.9*	*85.1*	*+29.0*
Brazil	*7.5*	*8.1*	*8.3*	*111.4*	*138.1*	*121.7*	*10.8*	*10.0*	*10.6*	*129.7*	*156.2*	*140.6*	*-10.0*
Chile	*1.2*	*1.2*	*1.2*	*1.4*	*1.3*	*1.1*	*0.1*	*0.1*	*0.1*	*2.8*	*2.6*	*2.4*	*-5.5*
Colombia	*0.0*	*0.0*	*0.0*	*1.6*	*1.6*	*1.5*	*2.9*	*3.0*	*3.1*	*4.4*	*4.6*	*4.6*	*-0.7*
Peru	*0.2*	*0.2*	*0.2*	*1.8*	*1.9*	*1.9*	*3.4*	*3.4*	*3.4*	*5.4*	*5.4*	*5.5*	*+0.6*

Notes: Totals and percentage changes are computed from unrounded data. The five-year average refers to the 2019–2023 period.

were at higher year-on-year levels, in part reflecting the production decline in 2024. Across markets in **the Plurinational State of Bolivia** and **Colombia**, yellow maize prices rose in September and were mostly higher on a yearly basis. In **Uruguay**, wholesale maize prices were stable in September, after three months of consecutive increases, amid strong export demand, mainly from South Korea.

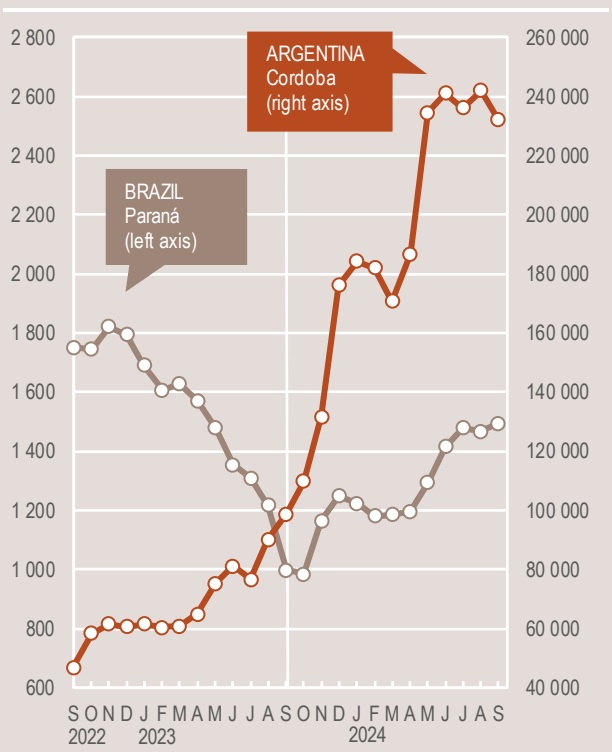
In August and September 2024, prices of rice were stable or increased in line with seasonal trends in **Brazil**, **Paraguay** and **Uruguay**, where planting of the 2025 season crop is ongoing. On a yearly basis, prices were higher reflecting the low domestic outputs from 2023. In **Ecuador** and **Colombia**, rice prices declined in August and September, as the recently completed harvest boosted domestic supply.

Wholesale rice prices in selected countries in South America

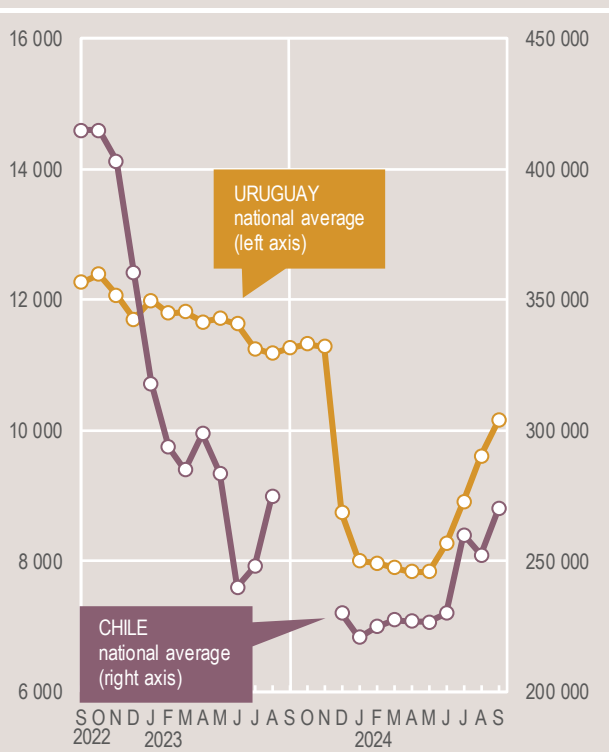


Wholesale maize prices in selected countries in South America

Wholesale wheat prices in selected countries in South America



Wholesale wheat prices in selected countries in South America



Rising number of Venezuelan migrants and refugees in need of food assistance

According to official data, the number of refugees and migrants from **the Bolivarian Republic of Venezuela** is estimated at 7.8 million people, with an increasing number of people crossing borders to meet basic needs in neighbouring countries. As of August 2024, the largest groups of Venezuelans were located in **Colombia** (2.81 million), **Peru** (1.66 million), **Brazil** (0.58 million), **Chile** (0.53 million) and **Ecuador** (0.44 million).

According to the 2024 Humanitarian Response Plan, despite a slight economic recovery, with food inflation reaching a two-year low in August of 34.1 percent, about 4.4 million people in the Bolivarian Republic of Venezuela were reported to be in need of food assistance.

REGIONAL REVIEWS
NORTH AMERICA, EUROPE AND OCEANIA

Note: Situation as of October 2024
Territories/boundaries**

** See Terminology (page 8).

Source: FAO/GIEWS, 2024. *Crop Prospects and Food Situation No. 3*. Cited 8 November 2024, modified to comply with the United Nations map No. 4651 Rev. 1, April 2023.

Production Overview

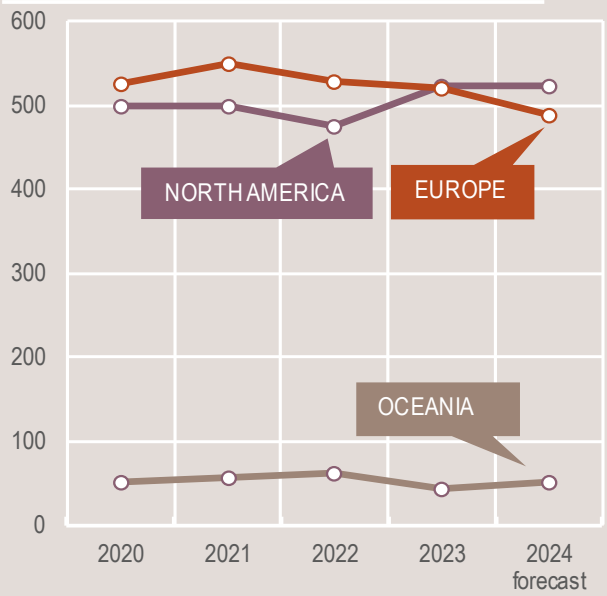
Total cereal production in the United States of America is forecast at 462 million tonnes in 2024, 6 percent above the five-year average, driven by yields upturns amid mostly favourable weather conditions. Planting of the 2025 winter wheat crop is underway, with drought conditions affecting a larger wheat area compared to the previous year.

Cereal production in Canada is forecast to reach a slightly above-average level in 2024, mostly on account of a recovery in wheat production, but hot and dry weather conditions reduced the barley output.

Cereal production in the European Union is forecast 9 percent below the five-year average, mainly due to adverse weather conditions that cut wheat and maize yields, with the maize crop particularly affected by drought in eastern parts.

Wheat production in Australia is forecast to recover to an above-average level in 2024, on account of improved rains after the drought-reduced harvest in 2023. Barley production is also expected to increase to near-average levels.

Cereal production
(million tonnes)



NORTH AMERICA

Conducive weather boosts cereal yields in 2024

In **the United States of America**, with the 2024 maize harvest nearly complete, the 2024 total cereal production is forecast at 462 million tonnes, 6 percent above the five-year average and similar to the previous year's level. Maize production, which constitutes the bulk of the cereal output, is expected to reach an above-average level of 386 million tonnes, owing to bumper yields, supported by favourable weather conditions. Aggregate wheat output is forecast at 53.7 million tonnes in 2024, 11 percent higher than the five-year average and the largest production since 2016. This good outturn similarly reflects beneficial weather that boosted yields and increased the area harvested, despite lower plantings.

Planting of the 2025 winter wheat crop is underway and progressing at an average pace. However, as of late October 2024, drought conditions were affecting almost 60 percent of the planted area, about 10 percentage points more than the same period last year. The potential emergence of the La Niña phenomenon by the end of the year, normally associated with below-normal rainfall amounts in southern wheat-growing areas, could have an adverse impact on crop development.

In **Canada**, total cereal production is forecast at 60.8 million tonnes in 2024, marginally above the five-year average. The wheat crop, primarily spring wheat, was harvested by October 2024, with production pegged at 34.3 million tonnes, about 8 percent above the average, mainly due to beneficial weather conditions that improved yields. Barley production, however, is expected at a below-average level due to hot and dry mid-season weather, which curbed yields.

EUROPE

Adverse weather curtails cereal production in 2024

In **the European Union,** harvesting of the 2024 cereal crops is expected to conclude in November. Total production is pegged at 265.5 million tonnes in 2024, 9 percent below the five-year average. The lower output mainly reflects the impact of adverse weather conditions that cut plantings and yields of wheat, and production is estimated at 122.7 million tonnes, about 11 percent lower than the previous three-year average. Maize production, with harvesting underway, is forecast at a below-average level of 60 million tonnes in 2024, driven by dry and hot weather conditions in eastern areas that lowered yields.

Table 17. North America, Europe and Oceania cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-year average	2023 est.	2024 f'cast	5-year average	2023 est.	2024 f'cast	5-year average	2023 est.	2024 f'cast	5-year average	2023 est.	2024 f'cast	Change: 2024/2023 (%)
North America	79.9	82.0	87.9	405.9	430.8	425.2	8.9	9.9	10.0	494.7	522.8	523.1	+0.1
Canada	31.7	32.9	34.3	28.4	27.6	26.5	0.0	0.0	0.0	60.1	60.5	60.8	+0.4
United States of America	48.2	49.1	53.7	377.6	403.2	398.7	8.9	9.9	10.0	434.7	462.2	462.4	+0.0
Europe	269.1	271.8	247.3	260.9	245.5	238.0	3.7	3.4	3.8	533.7	520.6	489.1	-6.0
Belarus	2.6	2.4	2.6	5.0	4.9	5.0	0.0	0.0	0.0	7.5	7.3	7.6	+5.0
European Union[I]	137.7	133.6	122.7	150.8	138.8	140.2	2.6	2.3	2.7	291.1	274.6	265.5	-3.3
Russian Federation[II]	86.7	92.8	82.0	43.3	43.2	41.1	1.1	1.1	1.1	131.1	137.1	124.2	-9.4
Serbia	3.1	3.4	2.9	7.1	7.3	6.1	0.0	0.0	0.0	10.2	10.8	9.0	-16.2
Ukraine[III]	25.7	22.5	22.9	42.5	38.0	32.1	0.0	0.0	0.0	68.2	60.5	55.1	-9.0
Oceania	30.3	26.4	32.2	17.2	15.8	17.0	0.4	0.5	0.7	47.8	42.8	49.9	+16.8
Australia	29.8	26.0	31.8	16.6	15.2	16.4	0.3	0.5	0.6	46.8	41.7	48.9	+17.3

Notes: Totals and percentage changes are computed from unrounded data. The five-year average refers to the 2019–2023 period.

[I] Data for the European Union from the year 2020 (including the 2020/21 marketing year) excludes the United Kingdom of Great Britain and Northern Ireland.

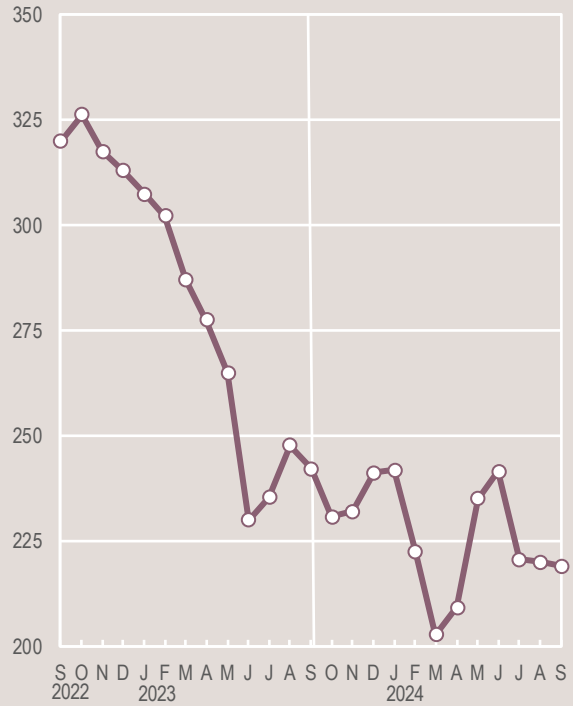
[II] Information provided by the Russian Federation includes statistical data for the Autonomous Republic of Crimea and the city of Sevastopol, Ukraine, temporarily occupied by the Russian Federation and is presented without prejudice to relevant UN General Assembly and UN Security Council resolutions, including UN General Assembly resolution 68/262 of 27 March 2014 and UN Security Council resolution 2202 (2015) of 17 February 2015, which reaffirm the territorial integrity of Ukraine.

[III] Information provided by Ukraine excludes statistical data concerning the Autonomous Republic of Crimea, the city of Sevastopol and certain areas of the Donetsk and Luhansk regions. The information is presented without prejudice to relevant UN General Assembly and UN Security Council resolutions, including UN General Assembly resolution 68/262 of 27 March 2014 and UN Security Council resolution 2202 (2015) of 17 February 2015, which reaffirm the territorial integrity of Ukraine.

Planting of the 2025 winter crop is underway in CIS Europe and Ukraine under dry weather conditions

Planting of the 2025 winter cereal crops, mainly wheat, to be harvested from July 2025, started in October. At the subregional level, the area sown is forecast at a below average level. This reflects likely low plantings in **Ukraine**,[8] as the war continues to impede farmers' access to fields, while lower year-on-year wheat prices may disincentivize farmers to plant across the subregion. Furthermore, low rainfall amounts and above-average temperatures at the beginning of the sowing period in the southern and central regions of the Russian Federation have delayed sowing operations.

Wheat export prices in the Russian Federation
(United States dollar/tonne)



Below-average 2024 cereal output in CIS Europe and Ukraine

Harvesting of the 2024 winter cereals, mainly wheat, concluded in August, while harvesting of spring cereals is expected to finalize in November.

In **Ukraine**,the 2024 wheat production is estimated at 23 million tonnes, similar to the previous year, but still 13 percent below the five-year average, mainly due to reduced planted area and unfavorable weather conditions. Maize production, with crops still being harvested, is tentatively pegged at 25 million tonnes, about 25 percent below the five-year average, due to unfavourable weather conditions during critical stages of crop development. Overall, the total 2024 domestic cereal output is expected at a well below-average level of 55 million tonnes.

In **the Russian Federation**, the aggregate 2024 wheat output is forecast at a below average 82 million tonnes, primarily due to unfavourable weather conditions and a decline in yields in the region of Siberia. Maize and barley outputs are expected at near-average levels of 13 million tonnes and 20 million tonnes, respectively. Total cereal production is forecast at about 124 million tonnes in 2024.

In **the Republic of Moldova**, the 2024 aggregate cereal production stands at a near-average level of 2.9 million tonnes, reflecting favourable weather conditions, while in **Belarus** the output is pegged at 7.6 million tonnes, a near-average level.

Low cereal exports forecast in 2024/25

Exports of maize and wheat from **Ukraine** are forecast at 21 million and 15.5 million tonnes, respectively, well-below the five-year average, reflecting the extensive damage to transport and storage infrastructures, caused by the war.

In **the Russian Federation**, total cereal exports in 2024/25 are forecast at an above-average level of 58 million tonnes, including 48 million tonnes of wheat.

Russian export prices of wheat below year-earlier levels

In **the Russian Federation**, export prices of milling wheat decreased by 10 percent between June and September 2024, and were 15 percent lower on a yearly basis. Prices would likely have declined further if not for the below-average wheat harvest in 2024. However, subdued export activities still contributed to the overall price drop. By contrast, in **Ukraine**, the export price of wheat increased between June and September 2024, due to a fall in export demand, but remained about 10 percent higher than the same period in 2023. In **the Republic of Moldova**, the national average retail price of wheat flour decreased between May and September 2024, and was 10 percent lower than the previous year's level, due to the favourable production in 2024.

About 17.6 million people in need of humanitarian assistance in Ukraine

In **Ukraine**, according to the 2024 Humanitarian Needs Overview (HNO),[9] about 17.6 million people are estimated to be in need of multisectoral humanitarian assistance in 2024. As of August 2024, about 3.7 million people were estimated to be displaced in the country as reported by the International Organization for Migration (IOM).[10]

[8] Information provided by Ukraine excludes statistical data concerning the Autonomous Republic of Crimea, the city of Sevastopol and the Donetsk, Luhansk, Kherson and Zaporizhzhia regions. The information is presented without prejudice to relevant UN General Assembly and UN Security Council resolutions, which reaffirm the territorial integrity of Ukraine.

[9] OCHA. 2023. Ukraine Humanitarian Needs Overview 2023 (December 2022). 28 December 2022.

[10] Please see https://dtm.iom.int/ukraine for further details.

OCEANIA

Wheat production recovers in 2024

In **Australia**, harvesting of the 2024 wheat crop is underway and production is forecast at 31.8 million tonnes, 7 percent above the five-year average and a notable 23 percent jump from the drought-affected harvest of 2023. The production upturn in 2024 is attributed to a return to wetter weather conditions, which supported an increase in yields and area. Barley production is also expected to increase year on year in 2024, owing to favourable weather conditions, and is estimated at a near-average level of 12.2 million tonnes.

STATISTICAL APPENDIX

Table A1. Global cereal supply and demand indicators

	5-year average (2019/20 – 2023/24)	2020/21	2021/22	2022/23	2023/24	2024/25
Ratio of world stocks to utilization (%)						
Wheat	38.6	37.6	37.8	40.5	40.0	39.1
Coarse grains	24.0	23.4	24.7	23.4	24.0	23.7
Rice	36.9	36.9	37.0	36.9	37.2	37.9
Total cereals	**30.5**	**29.9**	**30.7**	**30.7**	**30.9**	**30.6**
Ratio of major cereal exporters' supplies to market requirements (%)[I]	117.0	115.2	114.7	117.3	119.5	116.3
Ratio of major exporters' stocks to their total disappearance (%)[II]						
Wheat	18.1	15.3	16.8	22.4	20.4	18.5
Coarse grains	12.7	11.5	13.2	12.5	11.8	12.3
Rice	27.8	27.7	26.9	28.5	31.0	31.5
Total cereals	**19.5**	**18.2**	**19.0**	**21.2**	**21.1**	**20.8**

	Average growth rate 2014–2023	2020	2021	2022	2023	2024
Annual growth in world cereal production (%)	1.0	2.3	1.3	0.1	1.6	-0.4
Annual growth in cereal production in the LIFDCs (%)	1.3	4.7	-6.6	3.0	1.2	0.0

	2021	2022	2023	2024*	Change 2024* over 2023*
Selected cereal price indices[III]					
Wheat	132.1	164.9	127.3	107.8	-16.8%
Maize	144.8	169.5	134.4	108.3	-21.3%
Rice	105.8	108.8	132.0	135.7	4.1%

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).

[I] 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.

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

[III] Price indices: The wheat price index is constructed based on the International Grains Council (IGC) wheat price index, rebased to 2014–2016 = 100; The coarse grains price index is constructed based on the IGC price indices for maize and barley and one sorghum export quotation, rebased to 2014-2016 = 100. For rice, data refers to the FAO All Rice Price Index, 2014-2016 = 100, which is based on 21 rice export quotations.

*January–October average.

Table A2. World cereal stocks

(million tonnes)

	2020	2021	2022	2023	2024 est.	2025 f'cast
TOTAL CEREALS	***831.2***	***833.2***	***854.4***	***872.7***	***883.8***	***888.6***
Wheat	***282.6***	***289.4***	***293.2***	***322.9***	***318.3***	***314.8***
held by:						
- main exporters[I]	*63.3*	*60.9*	*65.1*	*90.0*	*83.7*	*74.7*
- others	*219.3*	*228.5*	*228.1*	*232.9*	*234.6*	*240.1*
Coarse grains	***361.0***	***350.1***	***366.7***	***355.8***	***366.0***	***368.5***
held by:						
- main exporters[I]	*122.8*	*100.4*	*114.8*	*106.8*	*104.8*	*107.3*
- others	*238.2*	*249.7*	*251.9*	*249.0*	*261.2*	*261.2*
Rice (milled basis)	***187.6***	***193.8***	***194.5***	***194.0***	***199.4***	***205.4***
held by:						
- main exporters[I]	*43.8*	*50.9*	*52.8*	*56.4*	*62.7*	*65.6*
- others	*143.8*	*142.9*	*141.7*	*137.6*	*136.7*	*139.8*
Developed countries	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***
Australia	*4.2*	*5.4*	*8.0*	*9.9*	*5.5*	*7.2*
Canada	*9.5*	*9.7*	*8.0*	*9.5*	*8.6*	*8.5*
European Union[II]	*41.7*	*36.1*	*43.0*	*45.9*	*43.5*	*39.5*
Japan	*6.9*	*6.8*	*6.9*	*6.7*	*6.0*	*6.1*
Russian Federation	*13.6*	*17.6*	*18.1*	*40.1*	*39.2*	*29.3*
South Africa	*2.7*	*4.0*	*4.7*	*4.9*	*4.8*	*3.0*
Ukraine	*5.6*	*5.9*	*23.6*	*12.5*	*6.5*	*5.7*
United States of America	*83.0*	*58.4*	*57.1*	*53.6*	*67.9*	*77.1*
Developing countries	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***
Asia	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***
China (mainland)	*386.5*	*393.9*	*398.6*	*402.8*	*418.5*	*432.9*
India	*62.7*	*67.9*	*64.2*	*63.8*	*69.7*	*70.4*
Indonesia	*9.6*	*7.0*	*7.1*	*6.6*	*9.2*	*9.1*
Iran (Islamic Republic of)	*4.9*	*6.0*	*7.1*	*7.7*	*6.9*	*6.2*
Pakistan	*2.0*	*4.6*	*6.0*	*5.2*	*6.2*	*6.4*
Philippines	*4.5*	*4.4*	*4.2*	*3.3*	*3.5*	*3.6*
Republic of Korea	*4.6*	*4.5*	*5.1*	*4.8*	*4.9*	*4.4*
Syrian Arab Republic	*3.7*	*4.1*	*3.1*	*1.7*	*1.9*	*1.4*
Türkiye	*10.1*	*10.5*	*9.2*	*12.9*	*11.0*	*9.2*
Africa	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***
Algeria	*6.7*	*6.3*	*5.0*	*5.3*	*5.7*	*6.0*
Egypt	*6.3*	*6.0*	*5.9*	*4.6*	*4.1*	*3.5*
Ethiopia	*7.1*	*7.1*	*6.8*	*6.6*	*6.0*	*5.7*
Morocco	*5.8*	*3.6*	*5.7*	*4.0*	*4.8*	*4.4*
Nigeria	*3.3*	*3.1*	*2.9*	*2.7*	*2.5*	*2.0*
Tunisia	*1.2*	*1.0*	*1.0*	*1.0*	*0.7*	*1.0*
Central America and the Caribbean	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***
Mexico	*7.4*	*6.9*	*8.0*	*7.9*	*7.7*	*6.0*
South America	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***	***0.0***
Argentina	*12.7*	*11.0*	*7.7*	*12.4*	*6.8*	*7.5*
Brazil	*17.2*	*17.9*	*15.2*	*10.5*	*8.6*	*7.0*

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

[I] 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.

[II] Data for the European Union from the year 2020 (including the 2020/21 marketing year) excludes the United Kingdom of Great Britain and Northern Ireland.

Table A3. Selected international prices of wheat and coarse grains

(USD/tonne)

	Wheat			Maize		Sorghum
	US No.2 Hard Red Winter Ord. Protein[I]	US Soft Red Winter No.2[II]	Argentina Trigo Pan[III]	US No.2 Yellow[II]	Argentina[III]	US Gulf
Annual (July/June)						
2010/11	316	289	311	254	260	258
2011/12	300	256	264	281	269	286
2012/13	348	310	336	311	278	304
2013/14	318	265	335	217	219	244
2014/15	266	221	246	173	177	247
2015/16	211	194	208	166	170	192
2016/17	197	170	190	156	172	172
2017/18	230	188	203	159	165	190
2018/19	232	210	233	166	166	183
2019/20	220	219	231	163	163	190
2020/21	269	254	263	220	225	308
2021/22	399	343	348	288	275	279
2022/23	389	305	385	299	289	343
2023/24	293	240	273	205	210	256
Monthly						
2022 - October	439	352	422	344	308	371
2022 - November	423	336	415	321	301	367
2022 - December	387	315	394	302	312	361
2023 - January	380	314	375	303	311	365
2023 - February	395	308	364	298	313	363
2023 - March	370	283	349	285	299	343
2023 - April	378	278	345	291	285	342
2023 - May	365	248	366	267	253	307
2023 - June	346	260	358	268	238	292
2023 - July	344	257	336	238	227	277
2023 - August	318	235	322	209	221	243
2023 - September	315	231	313	224	237	247
2023 - October	297	238	302	224	243	268
2023 - November	283	241	251	208	213	271
2023 - December	290	257	248	204	217	269
2024 - January	284	248	245	197	208	255
2024 - February	277	242	221	184	184	239
2024 - March	274	220	222	191	190	252
2024 - April	273	223	245	191	195	251
2024 - May	291	256	287	197	198	253
2024 - June	267	230	288	191	192	247
2024 - July	260	211	273	177	183	236
2024 - August	249	206	270	168	185	243
2024 - September	270	227	258	184	193	239
2024 - October	272	234	242	190	208	235

[I] Delivered United States of America f.o.b. Gulf.

[II] Delivered United States of America Gulf.

[III] Up River f.o.b.

Table A4a. Estimated cereal import requirements of low-income food-deficit countries in 2023/24 or 2024

(thousand tonnes)

	Marketing year	2022/23 or 2023 Total imports	2023/24 or 2024 Total imports
AFRICA		***29 009.1***	***29 352.4***
East Africa		***14 051.1***	***15 163.9***
Burundi	Jan/Dec	*191.9*	*188.0*
Comoros	Jan/Dec	*82.0*	*67.0*
Eritrea	Jan/Dec	*470.0*	*480.0*
Ethiopia	Jan/Dec	*1 955.0*	*2 200.0*
Kenya	Oct/Sept	*4 616.6*	*4 075.9*
Rwanda	Jan/Dec	*382.5*	*280.0*
Somalia	Aug/Jul	*1 205.0*	*1 075.0*
South Sudan	Nov/Oct	*730.0*	*690.0*
Sudan	Nov/Oct	*2 690.0*	*4 185.0*
Uganda	Jan/Dec	*668.0*	*608.0*
United Republic of Tanzania	Jun/May	*1 060.0*	*1 315.0*
Southern Africa		***3 270.1***	***3 477.5***
Lesotho	Apr/Mar	*201.1*	*174.1*
Madagascar	Apr/Mar	*1 081.5*	*534.2*
Malawi	Apr/Mar	*107.2*	*144.2*
Mozambique	Apr/Mar	*1 355.9*	*1 576.0*
Zimbabwe	Apr/Mar	*524.4*	*1 049.1*
West Africa		***9 131.6***	***8 093.0***
Coastal Countries		***3 389.0***	***2 751.0***
Benin	Jan/Dec	*769.0*	*331.0*
Guinea	Jan/Dec	*1 260.5*	*1 291.5*
Liberia	Jan/Dec	*379.0*	*431.0*
Sierra Leone	Jan/Dec	*505.0*	*431.0*
Togo	Jan/Dec	*475.5*	*266.5*
Sahelian Countries		***5 742.6***	***5 342.0***
Burkina Faso	Nov/Oct	*559.0*	*579.0*
Chad	Nov/Oct	*217.6*	*236.0*
Gambia	Nov/Oct	*402.0*	*314.0*
Guinea-Bissau	Nov/Oct	*123.0*	*148.0*
Mali	Nov/Oct	*741.0*	*576.0*
Mauritania	Nov/Oct	*490.0*	*496.0*
Niger	Nov/Oct	*369.0*	*432.0*
Senegal	Nov/Oct	*2 841.0*	*2 561.0*
Central Africa		***2 556.3***	***2 618.0***
Cameroon	Jan/Dec	*1 330.0*	*1 445.0*
Congo	Jan/Dec	*383.0*	*304.0*
Central African Republic	Jan/Dec	*75.0*	*77.0*
Democratic Republic of the Congo	Jan/Dec	*745.2*	*770.0*
Sao Tome and Principe	Jan/Dec	*23.1*	*22.0*

Notes: 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 International Development Association (IDA) assistance (i.e. USD 2 045 in 2021); for full details see http://www.fao.org/countryprofiles/lifdc

Table A4b. Estimated cereal import requirements of low-income food-deficit countries in 2023/24 or 2024

(thousand tonnes)

	Marketing year	2022/23 or 2023 Total imports	2023/24 or 2024 Total imports
ASIA		***18 769.6***	***17 886.5***
Central Asia		***5 840.2***	***5 441.7***
Kyrgyzstan	Jul/Jun	*377.2*	*515.7*
Tajikistan	Jul/Jun	*1 142.0*	*1 247.0*
Uzbekistan	Jul/Jun	*4 321.0*	*3 679.0*
Far East		***5 019.5***	***5 224.8***
Afghanistan	Jul/Jun	*4 104.0*	*4 204.0*
Democratric People's Republic of Korea	Nov/Oct	*	*
Nepal	Jul/Jun	*915.5*	*1 020.8*
Near East		***7 910.0***	***7 220.0***
Syrian Arab Republic	Jul/Jun	*2 720.0*	*2 305.0*
Yemen	Jan/Dec	*5 190.0*	*4 915.0*
CENTRAL AMERICA AND THE CARIBBEAN		***1 497.9***	***1 560.9***
Haiti	Jul/Jun	*772.9*	*747.0*
Nicaragua	Jul/Jun	*725.0*	*813.9*
TOTAL		***49 276.7***	***48 799.9***

Notes: 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 International Development Association (IDA) assistance (i.e. USD 2 045 in 2021); for full details see http://www.fao.org/countryprofiles/lifdc

* Estimates not available.

Table A5. Estimated cereal import requirements of low-income food-deficit countries in 2024/25

(thousand tonnes)

		2023/24	2024/25
	Marketing year	Total imports	Total import requirements
AFRICA		***5 867.6***	***6 298.4***
East Africa		***2 390.0***	***2 275.0***
Somalia	Aug/Jul	*1 075.0*	*1 230.0*
United Republic of Tanzania	Jun/May	*1 315.0*	*1 045.0*
Southern Africa		***3 477.6***	***4 023.4***
Lesotho	Apr/Mar	*174.1*	*234.8*
Madagascar	Apr/Mar	*534.2*	*501.0*
Malawi	Apr/Mar	*144.2*	*310.5*
Mozambique	Apr/Mar	*1 576.0*	*1 925.0*
Zimbabwe	Apr/Mar	*1 049.1*	*1 052.1*
ASIA		***12 971.5***	***13 082.4***
Central Asia		***5 441.7***	***5 502.6***
Kyrgyzstan	Jul/Jun	*515.7*	*586.6*
Tajikistan	Jul/Jun	*1 247.0*	*1 249.0*
Uzbekistan	Jul/Jun	*3 679.0*	*3 667.0*
Far East		***5 224.8***	***5 219.8***
Afghanistan	Jul/Jun	*4 204.0*	*3 574.0*
Nepal	Jul/Jun	*1 020.8*	*1 645.8*
Near East		***2 305.0***	***2 360.0***
Syrian Arab Republic	Jul/Jun	*2 305.0*	*2 360.0*
CENTRAL AMERICA AND THE CARIBBEAN		***1 560.9***	***1 567.0***
Haiti	Jul/Jun	*747.0*	*817.0*
Nicaragua	Jul/Jun	*813.9*	*750.0*
TOTAL		***20 400.0***	***20 947.8***

Notes: Countries included in this table are only those that have entered the new marketing year. 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 International Development Association (IDA) assistance (i.e. USD 2 045 in 2021); for full details see http://www.fao.org/countryprofiles/lifdc

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The data used to create the charts and tables are taken from the following sources:

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