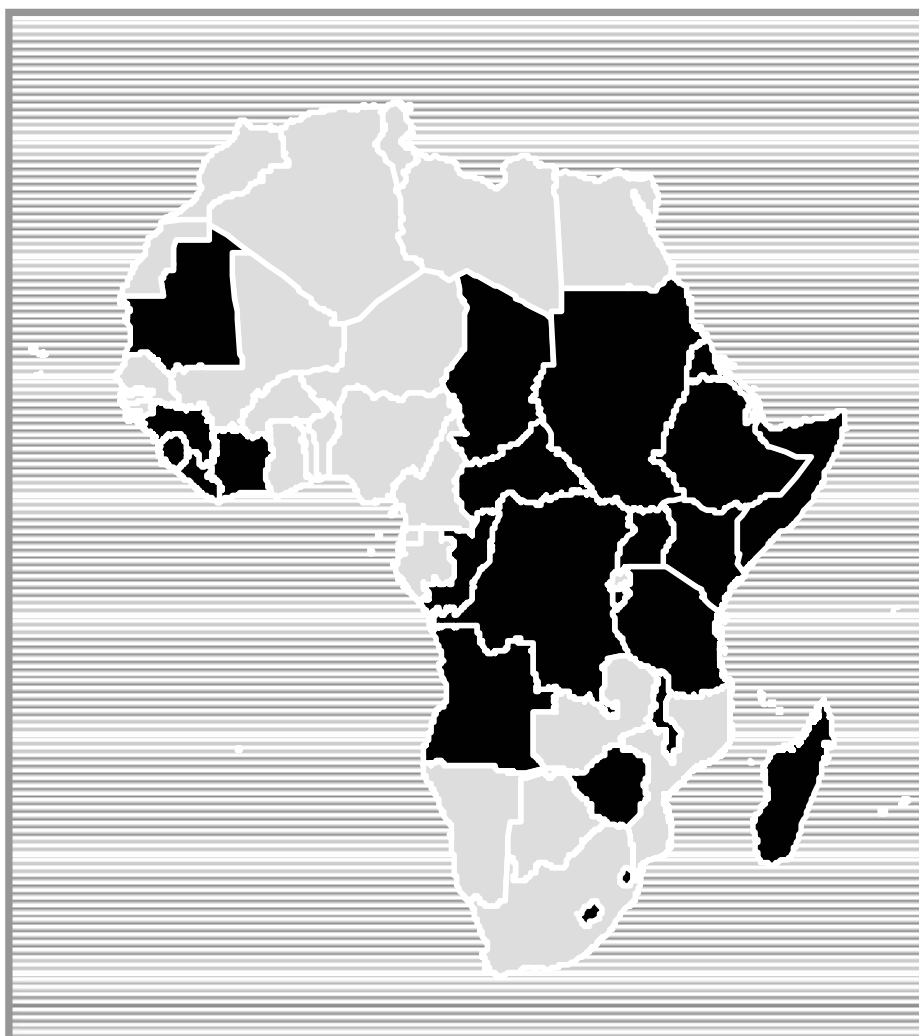


FOOD SUPPLY SITUATION AND CROP PROSPECTS IN SUB-SAHARAN AFRICA

No. 3

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Countries facing food emergencies:

Angola, Burundi, Chad, Central Afr. Rep., Congo Dem. Rep. of, Congo Rep. of, Côte d'Ivoire, Eritrea, Ethiopia, Guinea, Kenya, Lesotho, Liberia, Madagascar, Malawi, Mauritania, Sierra Leone, Somalia, Sudan, Swaziland, Tanzania U. R., Uganda, Zimbabwe



FOOD AND AGRICULTURE ORGANIZATION OF THE UNITED NATIONS

INTRODUCTION

This is the third and last issue for 2004 of this report prepared by the FAO Global Information and Early Warning System (GIEWS) on the food supply situation and cereal import and food aid requirements for all countries in sub-Saharan Africa. The report is designed to provide the latest analysis and information on the food situation in these countries to governments, international organizations and other institutions engaged in humanitarian operations.

In this introductory part, countries in the sub-region facing serious food shortages are listed with principal causes of food insecurity. This is followed by the Highlights of the report.

Part I provides a country-by-country review of the food supply situation by sub-region, as well as current crop prospects. The accompanying tables (Tables 1- 6) provide data on production, cereal import requirements and food aid needs. The information on food aid pledges, triangular transactions and local purchases is based on data transmitted to GIEWS as of mid November 2004 by the World Food Programme.

Part II provides country cereal balance sheets (CCBS), highlighting cereal import and food aid requirements of individual countries, as well as other important data.

COUNTRIES FACING FOOD EMERGENCIES (Total: 23 countries)

<u>Country</u>	<u>Reasons for emergency</u>
Angola	Returnees
Burundi	Civil strife, IDPs and returnees
Chad	Refugees
Central Afr. Rep.	Civil strife
Congo, Dem.Rep.	Civil strife, IDPs and refugees
Congo Rep. of	Civil strife, IDPs
Côte d'Ivoire	Civil strife, IDPs
Eritrea	Drought, IDPs, returnees
Ethiopia	Drought in parts, IDPs
Guinea	IDPs and refugees
Kenya	Drought in parts
Lesotho	Drought
Liberia	Civil strife, IDPs
Madagascar	Drought in southern parts
Malawi	Drought in parts
Mauritania	Drought, locusts
Sierra Leone	Returnees
Somalia	Civil strife, drought in parts
Sudan	Civil strife, drought in parts
Swaziland	Drought
Tanzania, U.R.	Drought in parts, refugees
Uganda	Civil strife, IDPs
Zimbabwe	Economic disruption

Since conditions can change rapidly, and published information may not always represent the most up-to-date basis for action, enquiries or corrections should be directed to Henri Josserand, Chief, Global Information and Early Warning Service (ESCG), FAO, Rome (Fax: 39-06-5705-4495, E-mail: GIEWS1@FAO.ORG).

Please note that this report is also available on the Internet as part of the FAO World Wide Web (www.fao.org) at the following address: <http://www.fao.org/giews/>

HIGHLIGHTS

Eastern Africa

- Below-average crop production is estimated in several countries of the sub-region in 2004, following erratic seasonal rains and conflict in parts. This will exacerbate the already precarious food situation in the sub-region. Reports of recent FAO/WFP missions to the sub-region are expected to be issued in the coming weeks.
- In Somalia, a serious humanitarian emergency persists in several parts of the country with an estimated 700 000 people depending on food assistance.
- In Eritrea, successive poor seasonal rains and lingering effects of war with Ethiopia render an estimated 1.4 million people dependent on food assistance with additional half a million people reported to be at risk.
- In Ethiopia, poor and erratic rains in the pastoral areas, particularly in the Somali Region, have led to serious food and water shortages. Nationally, in spite of improved crop production, large numbers of people are expected to be in need of food assistance.
- In Kenya, a well-below average main season maize crop coupled with successive poor seasons in most pastoral areas have resulted in a precarious food situation. Overall, nearly 2.7 million people are estimated to be in need of humanitarian assistance.
- In Sudan, more than 4 million people are estimated to be in need of humanitarian assistance mainly due to conflict. The humanitarian crisis in Greater Darfur is particularly worrying but the emergency needs in southern Sudan are also serious, despite improvements in security conditions.
- In the United Republic of Tanzania, the overall food supply situation is satisfactory following an above average cereal crop. However, some 12 districts in northern and central Tanzania are facing varying degrees of food difficulties.
- In Uganda, the overall food supply situation remains stable but prices are relatively high following the reduced 2004 main season food crops. Nearly 2 million people in the northern parts of the country are in need of food assistance, mainly due to conflict.

Southern Africa

- Weather conditions for 2004/05 main agricultural season which has just begun are forecast to be normal.
- In Zimbabwe, high prices and shortage of maize grain in certain areas are causing serious food security concerns. Continued widespread shortages of key inputs such as seeds, fertilizer, fuel and farm power are expected during this planting season. Some 4.8 million people, about 40 percent of the total population, are in need of emergency food assistance.
- In Swaziland and Lesotho, large sections of the populations lack access to food and require emergency food aid and agricultural inputs, mainly due to the impact of drought in 2004.
- In Angola, food assistance is needed for up to 717 000 returnees and other vulnerable people notwithstanding the good harvests in 2004.
- In Malawi, about 1.3 million vulnerable people, including those affected by crop failures and HIV/AIDS, require emergency food assistance, estimated at 56 000 tonnes of cereals during the 2004/05 (April/March) marketing year.
- To deal with the problem of food insecurity caused by the HIV/AIDS pandemic, WFP has launched a three-year regional Protracted Relief and Recovery Operation (PRRO) requiring 656 573 tonnes of food.

Western Africa

- A series of joint FAO/CILSS/WFP Crop and Food Supply Assessment Missions to the nine CILSS member countries in the Sahel in October estimated that aggregate cereal production will remain within the five year average of around 11.6 million tonnes, although a combination of drought and locusts has caused severe localised damage to crops and pastures in many rural communities, notably in the northern parts of most countries.
- In Mauritania, the most affected country, 2004 aggregate cereal production is expected to drop by 44 percent compared to last year, and pasture has been severely affected.

- Cape Verde has been severely affected by poor rainfall and locust attacks, and will be facing a larger than usual food deficit in 2004/05.
- In Mauritania and Cape Verde as well as in other affected countries, many farming families will need seeds and other inputs for off-season agriculture, and even for the next main growing season, in addition to food assistance to the most affected populations.
- In Côte d'Ivoire, an escalation of violence has caused thousands of people to cross into Liberia since early October.
- In Guinea, Liberia and Sierra Leone, food assistance continues to be needed for internally displaced people and refugees.

Central Africa

- In Central African Republic, strong agricultural recovery is constrained by persistent insecurity.
- In the Republic of Congo, the volatile security situation continues to hamper humanitarian assistance.
- Increased tensions recently between Rwanda and the DR Congo have raised the spectre of renewed armed conflict.
- Dry weather conditions at the start of the main cropping season in September-October in Burundi and Rwanda have rendered early prospects for 2005 A season harvest unfavourable.

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PART I: POSITION BY SUB-REGION

SUB-SAHARAN AFRICA'S CROP CALENDAR

Cereal Crop Calendar

Sub-Region	Cereal Crops	
	Planting	Harvesting
Eastern Africa ^{1/}	March-June	August-December
Southern Africa	October-December	April-June
Western Africa		
- Coastal areas (first season)	March-April	July-September
(second season)	August-September	November-December
- Sahel zone	June-July	October-November
Central Africa ^{1/}	April-June	August-December

^{1/} Except Burundi, Rwanda and the Democratic Republic of Congo which have two main seasons and Tanzania whose main season follows the southern Africa planting calendar. For Sudan, the planting period for the staple coarse grain crop is June-July and the harvesting period is October-December.

In **eastern Africa**, harvesting of the 2004 main season cereal crops is well underway in northern parts of the sub-region while it has been completed in southern parts. The 2004 aggregate sub-regional output is expected to be lower than last year's crop due to drought, erratic rainfall and conflict. The impact of severe drought conditions in parts of Somalia, Eritrea, Kenya and south-eastern Ethiopia is a cause for serious concern.

In **Eritrea**, the 2004 main "kremti" season cereal harvest has started. Seasonal rains which normally occur between June and September were below the long-term average in most of the country. Most parts of Maekel, Gash Barka, Anseba and eastern parts of Debub have particularly received poor rains. Preliminary crop estimates by the Ministry of Agriculture indicate a cereal output of about 109 000 tonnes, almost similar to last year's well below average crop. In Debub and Maekel zones, planting of late season crops (chick pea and vetch) was also constrained partly due to high market prices that have made seeds inaccessible to many. Pasture and forage availability was unsatisfactory in most parts of the country, due to the inadequate rains.

The food supply situation remains tight as a result of consecutive poor harvests and lingering effects of war with neighbouring Ethiopia. High cereal prices continue to impact on purchasing power and the food security of large numbers of people. Prevalence of Global Acute Malnutrition rates, particularly in Gash Barka and Anseba zones, was 19.1 and 18.4 percent respectively, placing them both above the World Health Organization's (WHO) critical cut off point of 15 percent. An Emergency Operation was jointly approved in July 2004 by FAO and WFP for food assistance to about 600 000 people affected by crop failure, worth a total sum of US\$49 million for a period of 9 months (July 2004 to March 2005).

An FAO/WFP Crop and Food Supply Assessment Mission has just completed its visit to the country and a full report is expected soon.

In **Ethiopia**, harvesting of the 2004 main "meher" cereal crop is well underway. The main producing regions in western and central parts of the country are expected to have an average crop while the eastern crop producing and agro-pastoral areas are facing serious problems due to late and erratic seasonal rains coupled with inadequate seed supplies. Furthermore, in the secondary "belg" season dependent areas crop and livestock production were adversely affected by insufficient and poorly distributed rains. Normally, the belg season rains extend from February to May and the crop accounts for some 10 percent of total grain production but in some areas it provides the bulk of annual grain production.

The pastoral areas of south-central and eastern parts of the country are particularly affected with unusual migration of livestock being reported in parts. A recent inter-agency assessment of belg dependent and pastoral areas has estimated that emergency food needs have risen with 7.8 million people now requiring assistance for the remainder of 2004, compared to 6.9 million in June 2004. An FAO/WFP Crop and Food Supply Assessment Mission has just completed its visit to the country and a full report is expected soon.

In **Kenya**, planting of the secondary short rains crops is almost complete. Weather forecasts indicate that the short rains would be favourable in most parts of the country, but are expected to be below-normal in the pastoral areas of the north. Parts of central and coastal areas have received unseasonable rains improving water availability in pastoral districts.

Harvesting of the 2004 main "long-rains" cereal crop is complete in the main growing areas of the Rift Valley, Western and Nyanza Provinces. The revised forecast by the Ministry of Agriculture and Livestock Development of this season's maize crop stands at about 1.7 million tonnes, well below the average of the previous five years. This is expected to result in an acute maize shortfall and the Government is gearing up for major food imports.

Successive poor seasons in most pastoral areas of the country have also left large numbers of households highly vulnerable and unable to cope with continued losses of livestock and livelihood options. An Emergency Operation was jointly approved in August 2004 by FAO and WFP for food assistance to about 2.3 million people affected by drought, worth a total sum of US\$81 million for a period of 6 months (August 2004 to January 2005). At the end of October, confirmed contributions amounted to about 60 percent of the total requirements.

In **Somalia**, heavy rains in October and November caused flooding and asset damage in some areas. These rains which signalled an early start of the secondary "deyr" season were particularly abundant in drought-affected northern pastoral regions and large areas of the Juba valley in southern Somalia. More land is expected to be planted in this deyr season compared to the last four deyr seasons, due to the prevailing normal to above normal deyr rainfall in most areas.

The above notwithstanding, the humanitarian emergency in the country is severe and is expected to continue due to insecurity, previous high loss of livestock, poor rangeland conditions, high household debt, and destitution. Recent nutrition surveys in parts of the country indicate serious malnutrition rates. The main "gu" season cereal crop, harvested last August/September in southern Somalia is estimated at some 125 000 tonnes, about 25 percent below average.

The Food Security Assessment Unit (FSAU) has recently issued estimates of the 2004/05 Cereal Balance, indicating a national cereal shortfall of about 36 000 tonnes. Further information and analysis can be accessed at: www.unsomalia.net under the FSAU web page.

In **Sudan**, a humanitarian crisis prevails in Greater Darfur, where fighting has forced more than 1.2 million people from their homes and farms, with large numbers crossing into neighbouring Chad. Reports paint a grim picture where the conflict has engulfed almost all parts of Greater Darfur, making agricultural activities and humanitarian assistance very difficult.

In southern Sudan, a current assessment indicates a decline in the current season's cereal harvest compared to last year. In central and northern Sudan, harvesting of the 2004 main season cereal crops has started. A decline in production, compared to the previous year, is expected due to erratic rainfall and civil unrest. A revised Emergency Operation was jointly approved by FAO and WFP on 9 July 2004 for food assistance to 2.1 million people affected by war and drought, worth US\$158 million until the end of 2004.

In **Uganda**, prospects for the 2004 second season food crops, to be harvested from January, remain uncertain. Sporadic rains since August have raised concerns over the development of crops.

The overall food supply situation remains stable but prices are relatively high following the reduced 2004 main season food crops. Maize prices, for instance, have remained particularly high over the last nine months, with prices in Kampala nearly 30 percent higher than average. However, the flow of crops to major markets, including conflict affected areas, is normal.

The civil strife in northern Uganda, despite reduced rebel attacks in recent months, continues to severely constrain the food situation of the population. WFP food distribution continues to reach over 1.4 million vulnerable people, mainly in northern Uganda. Preliminary results of a recent nutrition assessment (August 2004) in the semi-pastoral Karamoja region indicate a global acute malnutrition rate for children under five of 18.7 percent. This is above the critical 15 percent level but is a slight improvement from 22 percent in May 2003.

In the **United Republic of Tanzania**, planting of the 2004/05 "vuli" season crops in the bi-modal northern areas is well underway. With normal to above normal rainfall predicted in September to December period in most parts of the country, prospects are generally favourable.

The 2004 cereal crop, mainly maize, is estimated at about 4.9 million tonnes, more than 20 percent above last year's crop and the previous five years average. The overall food supply situation is satisfactory with stable or declining cereal prices in central, east coast, lake and northern Tanzania. However, sharp price increases were observed in southern highlands and southern coast areas due partly to the increased cereal demand from neighbouring countries like Democratic Republic of Congo and Malawi which experienced major deficits due to adverse weather or insecurity. Furthermore, some 12 districts in northern and central Tanzania, mainly in the regions of Arusha, Kilimanjaro, Dodoma, Morogoro, Shinyanga and Singida are reported to face varying degrees of food insecurity.

In **southern Africa**, planting of the 2004/05 cereal crops is underway with forecasts of normal rainfall for the season. Serious farm input shortages are expected in several countries in the sub-region, notably in Zimbabwe and drought ravaged Swaziland and Lesotho. The 2004 cereal production (including rice in paddy) has been estimated at 21.9 million tonnes, a slight decrease from last year's output. Consequently, cereal import requirements for 2004/05 are estimated at about 7 million tonnes, 8 percent higher than last year's estimated imports. Although cereal surpluses in South Africa and Zambia and trade among the other countries are expected to meet much of these requirements commercially, substantial amounts of emergency food aid (about 930 000 tonnes) would be required. For the first time, WFP has launched a three-year regional Protracted Relief and Recovery Operation (PRRO) requiring US\$405 million and involving 656 573 tonnes of food commodities to assist food insecure and AIDS affected populations in the sub-region.

In **Angola**, the normal rains received during late October and heavy rains during early November should help start the planting of main season crops. Final area planted, however, may be adversely affected by shortages of the much needed farm inputs such as seeds, tools and draught power unless these are resolved. With the improvement in the security situation, large numbers of internally displaced persons and refugees have returned to their former areas.

Even though the 2004 cereal output was above average, it could meet only half of the country's total cereal requirement. Current vulnerability analysis indicates 334 000 people as food insecure and 717 000 as highly vulnerable to food insecurity. An FAO/WFP Crop and Food Supply Assessment Mission in May 2004 estimated that about 178 000 tonnes of cereal food aid would be required during the 2004/05 marketing year (April/March). With the beginning of the lean season, maize prices in September were consistently higher in most markets compared to the prices in August.

In **Lesotho**, planting of main season crops has started in parts. Although the rains during early October and early November in the eastern half of the country will be beneficial for planting, in general there has been an erratic start of the 2004/05 growing season. Owing to the major drought in 2004, the food supply situation remains very tight. Although much of the cereal import requirements can be covered on commercial basis, lack of purchasing power of a large section of the population has created a major problem of food insecurity. A revised estimate of emergency food relief is about 48 500 tonnes of cereals for the most vulnerable people affected by crop failure and by HIV/AIDS. Currently WFP feeds up to 400 000 people through general and targeted distributions. A new regional PRRO will target about 171 000 beneficiaries.

In **Madagascar**, normal to above normal rains in October/November benefited the potato crop planted in September and allowed planting of maize and rice. However, at this early stage in the season, the overall harvest prospects are unknown. The area planted to paddy is reported to have increased in response to the current high rice prices. The official estimate of paddy production in 2004 is 3 million tonnes, some 8 percent higher than last year. Maize production is estimated at an average level of 170 000 tonnes, an increase of

about 10 percent on last year's drought- reduced harvest. The impact of cyclones, rising cost of oil imports and depressed prices of its main exports such as vanilla and shrimp have caused serious food security problems for vulnerable groups. The rapid rise in the price of rice (for example, a reported increase from 4 500 Fmg/kg in mid November to 6 500 Fmg/kg on 23 November) primarily due to high world prices and devaluation of the local currency, has seriously affected the food security situation of the country. Rice imports have declined sharply this year. The government announced recently that it will import 100.000 tonnes of rice. In June the European Union committed 70 million euros to its biggest ever African project to rehabilitate the main north-south road. In October the IMF announced disbursement of \$16.6 million aimed at promoting economic growth and reducing poverty.

In **Malawi**, field preparation is underway for planting of main season crops in November-December period. So far some rainfall has been received, especially in the south, prompting in some cases early planting of maize. The overall food supply is satisfactory but limited access to food for low-income families with rising staple food prices is becoming a major problem. In most markets, September and October 2004 prices were consistently higher than the ADMARC subsidized corresponding prices in 2003. During July-October period a total of 40 000 tonnes of maize came into Malawi as cross-border imports, the bulk of them from Mozambique (FEWS NET Malawi and IMCS). This has helped stabilize prices around 17-20 MK/kg. Recently ADMARC has set the price of maize at 17 MK/kg.

An FAO/WFP Crop and Food Supply Assessment Mission in April 2004 estimated the 2004 cereal output at 1.8 million tonnes, a decline of about 14 percent from the near-average production of last year. Total cereal import requirement is estimated at 408 000 tonnes, largely expected to be met commercially.

The Vulnerability Assessment Committee (VAC) estimated that about 1.26 million vulnerable people including those in areas that experienced crop failures and those seriously affected by HIV/AIDS would require emergency food assistance to the tune of 56 000 tonnes of cereals during the 2004/05 marketing year (April/March). Rising maize prices are expected to increase this number.

In **Mozambique**, planting of the main season crops has been disrupted by erratic rains in October and early November. Thus the early prospects for 2004/05 season are unfavourable at this stage. The 2004 cereal production, estimated at about 2 million tonnes (some 17 percent above average and 11 percent above good harvest of last year), shows a continuation of steady recovery in agricultural production over the past several years. Despite the overall satisfactory national production, the country as a whole faces a deficit of about 160 000 tonnes of cereals particularly in the south and parts of the centre. In specific areas, such as the southern districts of Tete province, the northern and southern tips of Manica province among other localities in southern provinces, harvests were reduced. As reported by SIMA/MADER, maize retail prices have stabilized in most markets in the country and are generally lower currently compared to the same months in 2003 and 2002. Vulnerability analysis indicates that some 187 000 people will need 49 000 tonnes of relief food assistance in marketing year 2004/05 due to the impact of floods/droughts in the previous years and to cope with the HIV/AIDS problem.

In **Swaziland**, the sowing of main-season crops has been delayed due to dry conditions in much of October and prospects for crops are uncertain. The food security situation throughout the country is serious following a drought that caused 30 percent reduction in the 2004 harvest of main season cereals. With a self-sufficiency rate for cereals of only about a third, the Swazi population is mostly dependent on food imports. The FAO/WFP Mission of April/May 2004 estimated the cereal import requirement in the 2004/05 marketing year (May/April) at about 132 000 tonnes, of which about 100 000 tonnes are expected to be imported commercially. The Mission also recommended the balance (32 000 tonnes) as food aid targeted to the most vulnerable people numbering 142 000, primarily for mitigating the impact of HIV/AIDS, and providing direct support to households unable to access available food and agricultural inputs.

In **Zambia**, below normal rainfall in the first two dekads of November 2004 was reported over much of the country except in the north where more favourable precipitation was received. Land preparations are in progress in anticipation of planting rains. The long range forecast for the season is considered to be normal. Similar to last year, the Government's subsidy programme for fertilizer and seed to selected farmers is also being implemented. As a result of two consecutive good harvests maize prices are reported to be below the ten-year average (FEWSNET). The 2004 cereal production, estimated at 1.37 million tonnes, is 1 percent over last year's bumper harvest and about 23 percent above the average of the past five years. Considering the country's total utilization needs and substantial carry over stocks, an export surplus of about 150 000

tonnes is expected during the 2004/05 marketing year. According to the Ministry of Agriculture and Cooperatives, the area under mature cassava increased by 47 percent from 140 251 hectares in 2002/03 to 206 051 hectares in 2003/04 resulting in a production increase of 46 percent to about 1.4 million tonnes.

In **Zimbabwe**, although some rains during October were experienced in the central and north-eastern parts of the country, the bulk of planting is not expected to start until later following the recommendation of the Zimbabwe Meteorological Services Department. Similar to the past few years farmers are expected to face seed, fertilizer, fuel, spare parts and draught power shortages.

Reportedly, maize purchases by the government's Grain Marketing Board (GMB) have been significantly lower than expected. As stated by the FEWS-NET this year the average price of maize during post-harvest period in April was much higher than normal, between Zim\$ 5 000 – 8 000 per bucket (equivalent to 18kg). Prices soared to Zim\$ 10 000-20 000 a bucket in October, partly due to general inflation and partly due to unavailability of cereals in the food deficit markets. Thus, hyper inflation, although steadily coming down, was estimated at an annual rate of 251.5 percent in September 2004. This combined with extremely high levels of unemployment greatly limit access to food for the most vulnerable population groups. According to the Vulnerability Assessment Committee (VAC) about 2.3 million people in rural areas alone will not be able to cover their food needs, and possibly just as many in the urban areas.

In the Sahelian part of **western Africa**, joint FAO/CILSS/WFP Crop and Food Supply Assessment Missions (CFSAMs) visited Mali, Mauritania, Niger and Senegal last October to assess the impact of the Desert Locust outbreak on food production in these most-affected countries. The remaining five CILSS member countries (Burkina Faso, Cape Verde, Chad, Gambia, Guinea-Bissau) were visited by joint FAO/CILSS Missions. FEWSNET participated in some of the missions. Mission reports are expected to be issued in mid to late December. Overall, agricultural production in the nine CILSS countries is expected to be close to the five-year average, although a combination of drought and locusts has caused severe localised damage to crops and pastures in many rural communities notably in the northern parts of most countries. The country-by-country situation is quite mixed.

In **Burkina Faso**, this year's cereal output is provisionally estimated at 3.06 million tonnes, some 14 percent lower than the record crop harvested in 2003 but still above the average for the previous five years. Output of sorghum, the most important cereal crop, decreased by 8 percent to 1.48 million tonnes. Millet and maize declined by 26 percent and 11 percent respectively to 881 000 tonnes and 594 400 tonnes. Output of fonio increased by some 22 percent to some 11 000 tonnes. Dry weather and Desert Locusts infestation have caused severe damage to crops and pastures in the northern areas near the Mali border. Oudalan province was the most affected with crop losses estimated at nearly 100 percent for millet and 80 percent for pastures. In the northern region some 98 villages are reported to be at risk while in the centre-north the decline in production is estimated between 30 percent and 50 percent.

However, the fall in production in the north should not affect significantly the national food supply. Commercial imports of cereal in the marketing year ending in October 2005 are forecast to increase to about 217 000 tonnes, (180 000 tonnes of rice and 37 000 tonnes of wheat). Commercial cereal imports in 2003/04 were estimated at some 131 000 tonnes

In **Cape Verde**, due to a late start of the rainy season which delayed plantings, and subsequent erratic precipitation combined with desert locust infestations, the growing conditions for the maize crop, the only cereal grown, have been poor in most islands. An FAO/CILSS mission estimated the output of the maize crop at some 4 042 tonnes mostly produced on Santiago Island (over 50 percent). This level of production is only one third of last year's output and similar to the poor crops of 1997 and 1998. Production of beans and potatoes will also be below normal. Although the country imports the bulk of its consumption requirement even in good years, the rural population particularly in the semi-arid zones could be severely affected by the production shortfall.

In **Chad**, a joint FAO/CILSS/FEWSNET mission has provisionally estimated cereal production in 2004/05 at 1.038 million tonnes. At this level, production is about one third lower than last year's good output. Production of sorghum and millet, the most important crops, is estimated to have declined by 30 percent and 43 percent, respectively, to 0.4 million tonnes and 0.3 million tonnes. The reduction in production was mainly due to inadequate rains in September in some areas of the Sahelian zone. Losses due to Desert Locusts infestation are not significant.

In **Côte d'Ivoire**, an escalation of violence has caused between 19 000 and 20 000 people to cross into Liberia since early October, putting a heavy strain on the Government, humanitarian agencies and host communities. According to UNHCR, the refugees are dispersed in more than 20 villages in a very remote corner of Liberia where there is an urgent need for potable water, food and medicine. Moreover, almost 9 000 foreigners, most of them French, were evacuated from Cote d'Ivoire since October. In spite of overall favourable weather conditions, a strong agricultural recovery is not expected this year due to persistent insecurity, population displacement and the prolonged partition of the country that continue to hamper inputs distribution and marketing activities. Food security for many households continues to be affected by the disruption of livelihoods especially in the west and the north. Moreover, smallholder cash-crop producers are experiencing a significant loss of income. Cotton production in 2003/04 has been estimated at 230 000 tonnes, about half of the previous year's level, and marketing of the produce has been seriously disrupted. The sugar industry is about to collapse, since three of the four sugar growing areas and processing plants are in the north and have been hard hit by the crisis

In **Guinea**, precipitation has been generally adequate, and an above average harvest is expected. The repatriation of Sierra Leonean refugees in Guinea was completed in late July. About 12 170 people have been repatriated this year, bringing the number of refugees repatriated since the beginning of the operation in October 2001 to about 56 000. Although the restoration of peace in Sierra Leone has resulted in a decrease of the number of refugees in Guinea, the country still hosts a large number of refugees. According to the results of a refugee verification exercise carried out by WFP in June, 80 806 refugees are still living in the country (including 73 840 from Liberia; some 3 980 from Cote d'Ivoire and over 1 830 from Sierra Leone), in addition to some 80 000 IDPs and over 100 000 returnees from Côte D'Ivoire in 2002 in Guinea Forestière.

In **Guinea-Bissau**, an FAO/CILSS Crop Assessment Mission has estimated the 2004 aggregate cereal production at some 208 000 tonnes, 72 percent above last year's level. Rice, the main crop, is expected to increase by 92 percent to 127 000 tonnes. Commercial imports in 2004/05 (November/October) are forecast at 50 000 tonnes of rice and 15 000 tonnes of wheat. With food markets well supplied, prices of cereals are lower than those prevailing in the same period last year.

In **Liberia**, the crisis in Côte d'Ivoire led to an influx of over 19 000 refugees, according to Liberian authorities. With the end of the civil war and the consequent return of many displaced farmers, agricultural production in 2004 is expected to recover somewhat from last year's very low level, although shortage of seeds and tools are reportedly preventing most of the farmers from cultivating. Since 1 October, UNHCR has organised repatriation of over 300 000 Liberian refugees scattered across West Africa. The UN disarmament programme has been officially completed on 31 October as planned. By 6 November, a total of over 96 325 ex-combatants had been disarmed and some 85 240 demobilized since December 2003. With the improvement of the security situation, WFP has extended its operation to other parts of the country outside the capital of Monrovia. However, the agency is facing a serious shortfall in resources and has been forced, since June, to distribute reduced rations to the approximately 500 000 refugees, returnees and IDPs receiving its assistance in the country.

In **Mali**, according to the FAO/WFP/CILSS Crop and Food Supply Assessment Mission that visited the country in October, the most significant crop loss due to locusts occurred in millet (37 000 tonnes), cowpeas (3 000 tonnes) and sorghum (9 000 tonnes). Although crop loss is significant in affected areas, good crop production in the most important southern producing areas means that losses are not great at national level. While the 2004/05 cereal production is expected to be lower than last year's record output, it will be close to the five-year average. Domestic production should cover most of the country's cereal utilisation requirement, but many farming families will need food assistance as well as seeds and other inputs for off-season agriculture, and even for the next main growing season.

In **Mauritania** the food situation gives cause for serious concern. The Crop and Food Supply Assessment Mission that visited the country from 17 through 30 October, estimated 2004 cereal output at some 101 192 tonnes, about 44 percent below last year and 36 percent below the previous five years average. This was the result of drought and widespread desert locust infestations that caused severe damage to crops and pastures across the country. The diéri (rainfed) crops, which normally account for approximately 30 percent of the total national cereal harvest, were seriously damaged by both locusts and drought. Loss of millet, early sorghum and legumes was nearly total in all areas visited by the Mission. The mission estimated that 30 percent of rice crops in the large-scale irrigated sector - accounting for more than 90 percent of rice production and 50 percent of national cereal production in recent years - has been devastated by desert locusts but farmers feared far greater

losses if the swarms were still present during the grain filling stages. Pastures have been severely affected and early southern movement of livestock herds has already started. The country has already faced several years of drought and poor harvests, and the ability of the Mauritians to cope with this situation has been exhausted. Access to food is already difficult for thousands of rural households and the situation will get worse by early 2005 if appropriate actions are not taken to assist affected communities. The country could sink back into a food crisis similar to the one it faced in 2002/03.

In **Niger**, an early end of the rains in September affected cereal crops and pastures and contributed to the movement of Desert Locusts to crop areas. Out of 205 villages in Tahoua region, about 125 have reported crop damage due to locusts. The joint FAO/CILSS/WFP Crop and Food Supply Assessment Mission has provisionally estimated the 2004 cereal production at 3.14 million tonnes, which is 12 percent lower than last year's good crop, but close to the average for the previous five years. However, due to the fall in grain output, some 3.6 million people are estimated to be at risk of food shortage. In 2003 the population at risk was estimated at 1.58 million people.

In **Senegal**, the FAO/CILSS/WFP Crop and Food Supply Assessment Mission estimated the 2004 cereal production at some 1 132 700 tonnes, which is 22 percent lower than last year's record crop of 1.4 million tonnes, but close to the five-year average. The important millet crop is estimated to decrease by 40 percent to some 379 166 tonnes, while sorghum production is 30 percent down from the previous year. This decline is due to inadequate rainfall combined with severe Desert Locust infestations in several areas in the north and centre, including Matam, Saint-Louis, Thiès, Diourbel and Louga regions. By contrast, production of groundnut, the main cash crop, will be up by 28 percent due to the substitution of millet and sorghum with groundnut by farmers and renewal of several government agricultural programs including subsidizing maize and groundnut seeds and fertilisers. Moreover, the main groundnut producing areas were spared by both desert locusts and inadequate rainfall.

Millet prices have been increasing steeply since September in affected regions. Although the total cereal import requirement, estimated at 952 000 tonnes, (mainly wheat and rice) is anticipated to be covered on commercial basis, millet prices are likely to remain high. In addition to food assistance to the most affected populations, many farming families will need seeds and other inputs for off-season agriculture, and even for the next main growing season. Pastoral and agro-pastoral groups have been especially hard hit. With scarce pasture and water, the early southern movement of livestock herds has already started, which may lead to confrontations. Urgent action is needed to establish safe passage areas for livestock and to vaccinate animals on their way to southern pastures.

In **Sierra-Leone**, rice production is expected to further increase this year, reflecting an improved security situation, increased plantings following the return of refugees and farmers previously displaced, as well as improved availabilities of agricultural inputs. The repatriation of Sierra Leonean refugees in Guinea was completed in late July. About 12 170 people have been repatriated this year, bringing the number of refugees repatriated since the beginning of the operation in October 2001 to about 56 000. An estimated 1 million internally displaced people have also been resettled. However, 65 000 Liberian refugees are still living in the country.

In **The Gambia**, inadequate rains at the start of the rainy season were followed by adequate and widespread precipitation for the remainder of the growing season. The joint FAO/CILSS Mission in late October provisionally estimated cereal production in 2004 at a record 239 000 tonnes, an increase of about 12 percent over last year's good crop and significantly above the average for the previous five years. Although grasshopper, blister beetles and striga infestations have been reported in several areas, overall damage to crops has been limited. The Desert Locust situation remains calm. Reflecting the bumper harvest, including a good groundnut output, the food position this year is expected to be satisfactory. With the arrival of new harvests on the markets the price of coarse grains has declined. Prices of maize, millet and sorghum have decreased by 22 percent, 25 percent and 28 percent, respectively compared with same period last year.

In **Central Africa**, civil strife and insecurity continue to undermine food security in several countries.

In **Burundi**, September planting of the 2004/05 main-season foodcrops was adversely affected by lack of rain during the second dekad of the month. This may result in replanting in some areas thereby causing overlapping between the 2005 A and 2005 B seasons in February-March. Total cereal production for 2004 has been

estimated at about 280 000 tonnes, about 3 percent higher than last year. It should be noted, however, that total food production remains below the average of pre-civil war period (1988–93).

Insecurity continues to be reported in some areas of the country causing disruptions in the repatriation and resettlement of the refugees. According to UNHCR some 220 000 Burundian refugees have returned since 2002, but the situation has been complicated by the arrival of more refugees from eastern DRC into north-western Burundi, numbering over 25 000. Moreover, due to recent violent clashes in the rural communes of Kabezi and Mutambu, an estimated 50 000 civilians have been displaced, according to Human Rights Watch.

In **Central African Republic**, in spite of good weather conditions and seed distributions, a strong agricultural recovery is not expected this year due to persistent insecurity. Although most of the 230 000 IDPs have returned home, an estimated 41 000 refugees from CAR are still living in Chad.

In **Congo**, following the peace agreement between the Government and the rebels in March 2003, the Government and several international organizations have set up a disarmament, demobilization and reintegration (DDR) programme for former militiamen. The last 3 250 displaced people who were still living in camps near Brazzaville returned home in mid-April. However, the security situation remains volatile and hampers humanitarian aid. WFP is facing a serious shortfall in resources as its programme over the last two years was funded at only 46 percent and the new programme is yet to receive pledges.

In the **Democratic Republic of Congo (DRC)**, planting of main season maize was carried out in September-October 2004 under above average rainfall conditions. Harvesting of the 2004 second season food crops, principally maize, has been completed. No estimates are yet available but satellite based data suggest that production should be near normal. The relative improvement in the security situation in the country and assistance provided to the internally displaced persons and returning refugees are expected to have a positive impact. However, recent violent clashes in the east of the country, particularly around areas bordering South Kivu province, and the town of Bukavu, give cause for concern. Thus insecurity is still a major constraint to food production and food security.

In **Rwanda**, generally dry weather conditions affected September-October plantings of the 2004/05 main-season foodcrops, making early prospects for 2005A crops unfavourable. The estimate of 2004 total production (seasons A and B) of all cereals has been put at about 266 000 tonnes, similar to the five-year average but slightly below last year's output. Much of the estimated cereal import requirement of 230 000 tonnes is expected to be covered through commercial imports.

About 250 000 to 400 000 chronically food insecure people in the most vulnerable districts will need 15 000 to 25 000 tonnes of food assistance till the end of this year.

UPDATE ON FOOD AID PLEDGES AND DELIVERIES

Estimated cereal import requirements in sub-Saharan Africa in 2004 remain high but are expected to be lower than last year. GIEWS latest estimates of 2003 production and 2003/04 import and food aid requirements are summarized in Tables 1 and 3. Total food aid requirement is estimated at 3.1 million tonnes, against about 4.0 million tonnes received in 2002/03. Cereal food aid pledges for 2003/04, including those carried over from 2002/03, amount to 3.3 million tonnes of which 2.8 million tonnes have so far been delivered.

**Table 1. Cereal Import and Food Aid Requirements by sub-Region:
2003/04 or 2004 (in '000 tonnes)**

Sub-Region	2003 Cereal Production 1/		2003/04 or 2004		
	Total	As % of average of previous 5 years	Cereal import requirements 2/	Anticipated commercial imports	Food aid requirements
Eastern Africa	25 350	112	4 581	3 213	1 368
Southern Africa	20 978	101	6 884	5 847	1 037
Western Africa	42 004	112	9 362	8 757	605
Central Africa	2 963	101	1 034	966	68
TOTAL	91 295	109	21 861	18 783	3 078

1/ Including rice in milled equivalent.

2/ Excluding re-exports.

**Table 2. Cereal Import and Food Aid Requirements in 2004/05 for sub-Saharan Africa:
countries which have entered the 2004/05 marketing year (in '000 tonnes)**

Sub-Region/ Country	Marketing year	2004 Cereal Production 1/		2004/05 2/		
		Total	As % of average of previous 5 years	Cereal import requirements 3/	Anticipated commercial imports	Food aid requirements
Eastern Africa		10 408	91	4 293	3 534	759
Kenya	Oct./Sept.	2 430	83	2 030	1 580	450
Somalia	Aug./July	237	83	332	242	90
Sudan	Nov./Oct.	3 172	73	1 479	1 340	139
Tanzania, U. R.	June/May	4 569	119	452	372	80
Southern Africa		20 696	98	7 120	6 184	936
Angola	April/March	713	126	820	642	178
Botswana	April/March	19	100	315	315	-
Lesotho	April/March	49	31	352	303	49
Madagascar	April/March	2 240	114	375	290	85
Malawi	April/March	1 812	84	408	352	56
Mozambique	April/March	1 942	117	785	655	130
Namibia	May/April	131	134	150	135	15
South Africa	May/April	11 383	97	2 431	2 431	-
Swaziland	May/April	64	67	132	100	32
Zambia	May/April	1 368	123	62	47	15
Zimbabwe	April/March	975	60	1 290	914	376
Western Africa		11 396	103	2 643	2 390	253
Sahelian countries		11 396	103	2 643	2 390	253
Burkina Faso	Nov./Oct.	3 030	104	245	217	28
Cape Verde	Nov./Oct.	4	20	101	42	59
Chad	Nov./Oct.	1 011	83	109	81	28
Gambia, Rep. of	Nov./Oct.	225	136	141	140	1
Guinea-Bissau	Nov./Oct.	165	136	74	65	9
Mali	Nov./Oct.	2 653	106	160	160	-
Mauritania	Nov./Oct.	83	63	357	262	95
Niger	Nov./Oct.	3 112	104	504	478	26
Senegal	Nov./Oct.	1 113	114	952	945	7
TOTAL		42 500	97	14 056	12 108	1 948

1/ Including rice in milled equivalent.

2/ Preliminary estimates.

3/ Excluding re-exports.

**Table 3. Cereal Import and Food Aid Requirements for sub-Saharan Africa:
countries still in 2003/04 or 2004 marketing year (in '000 tonnes)**

Sub-Region/ Country	Marketing year	2003 Cereal production 1/		2002/03 or 2003 imports			Position for 2003/04 or 2004		
		Total	As % of average of previous 5 years	Total imports 2/	As % of average of previous 5 years	Food aid	Cereal import require- ment 2/	Antici- pated commer- cial imports	Food aid require- ment
Eastern Africa		12 178	109	3 128	185	2 195	1 397	503	894
Burundi	Jan./Dec.	253	103	96	150	49	82	27	55
Comoros	Jan./Dec.	6	100	24	66	-	33	33	-
Djibouti	Jan./Dec.	-	-	63	91	6	63	55	8
Eritrea	Jan./Dec.	105	45	576	199	310	321	51	270
Ethiopia 3/	Jan./Dec.	9 630	115	1 949	236	1 684	476	35	441
Rwanda	Jan./Dec.	270	113	224	100	21	229	199	30
Seychelles	Jan./Dec.	-	-	13	100	-	13	13	-
Uganda	Jan./Dec.	1 914	91	183	110	124	180	90	90
Southern Africa		1	100	284	106	-	267	267	-
Mauritius	Jan./Dec.	1	100	284	106	-	267	267	-
Western Africa		28 326	104	7 266	130	228	7 096	6 684	412
Coastal countries		28 326	104	7 266	130	228	7 096	6 684	412
Benin	Jan./Dec.	1 021	108	137	110	11	168	160	8
Côte d'Ivoire	Jan./Dec.	1 122	80	1 406	126	11	1 392	1 207	185
Ghana	Jan./Dec.	1 932	113	613	123	71	536	460	76
Guinea	Jan./Dec.	808	107	479	126	33	425	385	40
Liberia	Jan./Dec.	65	52	169	95	48	187	137	50
Nigeria	Jan./Dec.	22 293	105	4 043	136	-	3 991	3 980	11
Sierra Leone	Jan./Dec.	290	157	296	131	46	287	245	42
Togo	Jan./Dec.	795	116	123	110	8	110	110	-
Central Africa		2 963	101	1 174	128	68	1 034	966	68
Cameroon	Jan./Dec.	1 392	112	410	121	7	387	385	2
Cent.Afr.Rep.	Jan./Dec.	116	82	57	142	4	44	41	3
Congo, Dem. Rep of	Jan./Dec.	1 413	93	356	139	51	300	250	50
Congo, Rep. of	Jan./Dec.	5	125	228	132	6	185	175	10
Equat. Guinea	Jan./Dec.	-	-	17	113	-	16	16	-
Gabon	Jan./Dec.	35	109	94	112	-	90	90	-
Sao Tome and Principe	Jan./Dec.	2	100	11	103	1	12	9	3
TOTAL		43 468	105	11 852	140	2 491	9 794	8 420	1 374

Note: totals computed from unrounded data

1/ Including rice in milled equivalent.

2/ Excludes re-exports.

3/ Includes refugee needs.

Table 4. Triangular Transactions within sub-Saharan Africa in 2003/04 or 2004
(in '000 tonnes) 1/

Donor	Source of supply	Recipient Country	Total by donor
EC	Mozambique South Africa Zambia	Zimbabwe (3.6) Zimbabwe (10.0) Zimbabwe (7.0)	20.6
Germany	South Africa	Swaziland (0.5)	0.5
United Kingdom	South Africa	Zimbabwe (14.5)	14.5
NGOs	Burkina Faso South Africa	Niger (0.3) Swaziland (0.2)	0.5
WFP	Cameroon Côte d'Ivoire Kenya South Africa Zambia	Chad (1.8), Central African Rep.(0.9) Guinea (1.8), Liberia (0.4), Sierra Leone (0.7) Somalia (0.6) Angola (19.0), Burkina Faso (0.8), Congo, dem. Rep.of (8.6), Côte d'Ivoire (0.2), Eritrea (1.4), Ethiopia (1.9), Guinea-Bissau (0.9), Liberia (1.3), Madagascar (5.6), Mali (0.7), Mozambique (10.7), Namibia (1.0), Sudan (1.4), Swaziland (2.8), Tanzania, U.R. (38.6), Zambia (5.1), Zimbabwe (89.6) Zimbabwe (30.4)	226.2
TOTAL			262.3

1/ Based on information reported by WFP to GIEWS as of mid-November 2004.

Table 5. Local Purchases within sub-Saharan Africa in 2003/04 or 2004
(in '000 tonnes) 1/

Donor	Recipient Country	Total by donor
Canada	Niger (0.1)	0.1
EC	Burundi (0.4), Congo, dem.Rep.of (1.1), Ethiopia (9.5), Madagascar (1.6), Niger (0.3), Sudan (13.3), Zambia (5.6), Zimbabwe (1.6)	33.4
Germany	Burundi (1.4), Malawi (1.5), Mali (0.8), Swaziland (0.3)	4.0
Italy	Niger (1.2)	1.2
Japan	Mali (0.4)	0.4
Libyan Arab Jamahiriya	Swaziland (4.0)	4.0
Netherlands	Ethiopia (1.3)	1.3
NGOs	Burkina Faso (0.2), Ethiopia (0.9), Gambia (1.9), Malawi (2.3), Sudan(0.2), Tanzania, U.R. (0.8), Uganda (0.2), Zimbabwe (0.1)	6.6
Norway	Tanzania, U.R. (1.4)	1.4
WFP	Angola (2.6), Benin (1.7), Burundi (2.0), Burkina Faso (6.5), Cameroon (2.9), Chad (6.0), Congo, dem.Rep.of (1.7), Côte d'Ivoire (2.6), Ghana (0.2), Guinea-Bissau (0.4), Ethiopia (92.8), Kenya (40.2), Lesotho (12.6), Madagascar (1.1), Malawi (66.3), Mali (14.5), Mozambique (21.7), Niger (10.8), Rwanda (0.5), Senegal (1.4), Sudan (96.4), Tanzania, U.R. (20.4), Uganda (60.7), Zambia (38.7), Zimbabwe (8.9)	513.6
TOTAL		566.0

1/ Based on information reported by WFP to GIEWS as of mid-November 2004.

Table 6. Cereal Food Aid Pledges and Percent Delivered for sub-Saharan African Countries in 2003/04 or 2004 (in '000 tonnes)

Donor/Recipient	China	EC	India	Japan	NGOs	U.S.A.	WFP	Food aid pledges	Percent delivered as of mid-November 2/
Eastern Africa	-	-	-	20.1	3.3	484.2	956.1	1 463.7	84
Burundi	-	-	-	-	-	-	64.7	64.7	81
Comoros	-	-	-	-	-	-	-	-	-
Djibouti	-	-	-	-	-	-	4.8	4.8	100
Eritrea	-	-	-	-	-	85.8	209.1	294.9	79
Ethiopia 1/	-	-	-	-	3.3	286.5	200.2	490.0	76
Kenya	-	-	-	-	-	40.6	29.6	70.2	100
Rwanda	-	-	-	-	-	5.3	24.6	29.9	70
Seychelles	-	-	-	-	-	-	-	-	-
Somalia	-	-	-	-	-	7.6	15.0	22.6	100
Sudan	-	-	-	-	-	34.6	189.0	223.6	100
Tanzania, U.R.	-	-	-	20.1	-	-	114.2	134.3	100
Uganda	-	-	-	-	-	23.8	104.9	128.7	70
Southern Africa	-	88.5	50.0	27.2	4.6	347.4	670.3	1 188.0	94
Angola	-	2.2	-	14.1	-	35.6	166.9	218.8	100
Botswana	-	-	-	-	-	-	-	-	-
Lesotho	-	-	-	-	-	-	19.0	19.0	100
Madagascar	-	1.1	-	-	-	26.6	15.8	43.5	100
Malawi	-	-	-	-	1.9	10.6	4.6	17.1	89
Mauritius	-	-	-	-	-	-	-	-	-
Mozambique	-	45.6	-	13.1	-	118.2	97.9	274.8	100
Namibia	-	-	-	-	-	10.0	1.6	11.6	100
South Africa	-	-	-	-	-	74.6	-	74.6	100
Swaziland	-	4.5	-	-	0.2	-	10.8	15.5	100
Zambia	-	-	-	-	-	44.1	21.1	65.2	100
Zimbabwe	-	35.1	50.0	-	2.5	27.7	332.6	447.9	84
Western Africa	1.9	38.5	-	57.8	2.1	282.4	170.4	553.1	62
Coastal countries	-	-	-	5.1	1.5	158.5	126.0	291.1	51
Benin	-	-	-	5.1	-	13.2	-	18.3	73
Côte d'Ivoire	-	-	-	-	-	12.0	24.9	36.9	66
Ghana	-	-	-	-	-	98.7	6.7	105.4	17
Guinea	-	-	-	-	-	-	10.9	10.9	98
Liberia	-	-	-	-	1.5	1.9	63.6	67.0	84
Nigeria	-	-	-	-	-	10.5	-	10.5	-
Sierra Leone	-	-	-	-	-	22.2	19.9	42.1	62
Togo	-	-	-	-	-	-	-	-	-
Sahelian countries	1.9	38.5	-	52.7	0.6	123.9	44.4	262.0	73
Burkina Faso	-	-	-	6.5	-	35.2	0.9	42.6	57
Cape Verde	-	21.8	-	7.7	-	22.8	1.6	53.9	61
Chad	-	-	-	-	-	12.9	19.9	32.8	100
Gambia, Rep.of	-	1.3	-	-	0.3	-	2.5	4.1	100
Guinea-Bissau	1.9	3.4	-	-	-	-	5.1	10.4	100
Mali	-	-	-	-	-	-	0.9	0.9	100
Mauritania	-	12.0	-	18.9	-	22.1	10.7	63.7	83
Niger	-	-	-	9.3	0.3	18.4	-	28.0	74
Senegal	-	-	-	10.3	-	12.5	2.8	25.6	52
Central Africa	-	-	-	2.8	-	27.2	62.2	92.2	89
Cameroon	-	-	-	-	-	25.0	3.0	28.0	100
Cent.Afr.Rep.	-	-	-	-	-	-	2.7	2.7	100
Congo, Dem.Rep.of	-	-	-	-	-	-	53.5	53.5	87
Congo, Rep.of	-	-	-	-	-	2.2	2.9	5.1	47
Equat. Guinea	-	-	-	-	-	-	-	-	-
Gabon	-	-	-	-	-	-	-	-	-
Sao Tome and Principe	-	-	-	2.8	-	-	0.1	2.9	100
TOTAL	1.9	127.0	50.0	107.9	10.0	1141.2	1 859.0	3 297.0	84

1/ Includes refugee needs.

2/ Percentages calculated from unrounded data.

**PART II: CEREAL SUPPLY/DEMAND SITUATION
IN INDIVIDUAL COUNTRIES**

(Situation as of mid-November 2004)

BURKINA FASO

A joint FAO/CILSS Crop and Food Supply Assessment Mission that visited the country recently provisionally estimated this year's cereal output at 3.06 million tonnes, some 14 percent lower than the record crop harvested in 2003 but still above the average for the previous five years. Output of millet, which was seriously damaged by drought and desert locusts, declined by 26 percent to about 881 000 tonnes. Imports of cereal in the marketing year ending in October 2005 are forecast to increase sharply to some 245 000 tonnes. Commercial imports and pledged food aid will largely cover the rice and wheat requirements. However, the shortfall in millet could be more difficult to offset given the low availability and trade of this cereal in the sub-region. This could result in millet being replaced by sorghum and rice. The shortfall could also be partly covered by unregistered imports from neighbouring coastal countries.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004/05 MARKETING YEAR (November/October)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	-	96	3 469	3 564
Previous five years average production (incl. paddy rice)	-	95	2 857	2 952
Previous year imports	31	118	6	156
Previous five years average imports	54	180	15	249
<u>2004/05 Domestic Availability</u>	-	63	2 967	3 030
2004 Production (incl. paddy rice)	-	95	2 967	3 063
2004 Production (incl. milled rice)	-	63	2 967	3 030
Possible stock drawdown	-	-	-	-
<u>2004/05 Utilization</u>	47	250	2 977	3 275
Food use	46	240	2 442	2 729
Non-food use	1	10	475	486
Exports or re-exports	-	-	60	60
Possible stock build up	-	-	-	-
<u>2004/05 Import Requirement</u>	47	188	10	245
Anticipated commercial imports	37	180	-	217
of which: received or contracted	-	-	-	-
Food aid needs	10	8	10	28
<u>Current Aid Position</u>				
Food aid pledges	6	16	2	24
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	4	19	194	216
	[percentage]			
<u>Indexes</u>				
2004 Production compared to average (incl. paddy rice)	-	100	104	104
2004/05 Import requirement compared to average	88	104	67	98
Cereal share of total calorie intake				75
<u>Additional Information</u>				
Major foodcrops	millet; sorghum; pulses; maize			
Lean season	July-September			
Population (000s)	12 614			
GNI per capita in 2003 (US\$)	300			

CAMEROON

Following overall favourable growing conditions, cereal production in 2003 is estimated to have increased by 10 percent to 1.4 million tonnes. Output of maize and sorghum, by far the most important cereals, both are estimated to have increased by some 10 percent to 0.7 million tonnes and 0.58 million tonnes, respectively. Cereal import requirements for 2004, mainly wheat and rice, are estimated at some 387 000 tonnes, anticipated to be covered mainly by commercial imports.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	-	87	1 209	1 297
Previous five years average production (incl. paddy rice)	-	89	1 195	1 284
Previous year imports	261	130	20	410
Previous five years average imports	231	108	14	353
<u>2004 Domestic Availability</u>	12	62	1 330	1 404
2003 Production (incl. paddy rice)	-	92	1 330	1 422
2003 Production (incl. milled rice)	-	62	1 330	1 392
Possible stock drawdown	12	-	-	12
<u>2004 Utilization</u>	242	204	1 345	1 791
Food use	233	184	1 000	1 417
Non-food use	4	15	275	294
Exports or re-exports	5	-	10	15
Possible stock build up	-	5	60	65
<u>2004 Import Requirement</u>	230	142	15	387
Anticipated commercial imports	230	140	15	385
of which: received or contracted	105	130	5	239
Food aid needs	-	2	-	2
<u>Current Aid Position</u>				
Food aid pledges	-	26	2	28
of which: delivered	-	26	2	28
Donor-financed purchases	-	-	6	6
of which: for local use	-	-	3	3
for export	-	-	3	3
<u>Estimated Per Caput Consumption (kg/year)</u>	14	11	60	85
	[percentage]			
2003 Production compared to average (incl. paddy rice)	-	103	111	111
2004 Import requirement compared to average	100	131	107	110
Cereal share of total calorie intake				43
<u>Additional Information</u>				
Major foodcrops	roots; tubers; coarse grains; fruit			
Lean season	June-August			
Population (000s)	16 760			
GNI per capita in 2003 (US\$)	640			

CONGO, DEMOCRATIC REPUBLIC OF

The country's food import requirement for 2004 is estimated at 300 000 tonnes or about one-sixth of total utilisation. The food aid requirement for 2004 estimated at 50 000 tonnes, is slightly reduced from the previous years due to the improvement in the security situation.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	8	315	1 255	1 578
Previous five years average production (incl. paddy rice)	9	338	1 284	1 631
Previous year imports	226	50	80	356
Previous five years average imports	167	50	65	282
<u>2004 Domestic Availability</u>	18	200	1 215	1 433
2004 Production (incl. paddy rice)	18	300	1 195	1 513
2004 Production (incl. milled rice)	18	200	1 195	1 413
Possible stock drawdown	-	-	20	20
<u>2004 Utilization</u>	188	250	1 295	1 733
Food use	180	207	1 030	1 417
Non-food use	8	43	265	316
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2004 Import Requirement</u>	170	50	80	300
Anticipated commercial imports	170	50	30	250
of which: received or contracted	127	3	20	150
Food aid needs	-	-	50	50
<u>Current Aid Position</u>				
Food aid pledges	-	-	54	54
of which: delivered	-	-	46	46
Donor-financed purchases	-	-	3	3
of which: for local use	-	-	3	3
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	4	4	21	29
	[percentage]			
2004 Production compared to average (incl. paddy rice)	200	89	93	93
2004 Import requirement compared to average	102	100	123	106
Cereal share of total calorie intake				18
<u>Additional Information</u>				
Major foodcrops	roots; tubers; coarse grains; fruit			
Lean season	north: October; south: November-December			
Population (000s)	48 547			
GNI per capita in 2003 (US\$)	100			

The just ending 2004 marketing year (January/December) domestic cereal availability is now estimated at 10.08 million tonnes against total utilization requirements of about 10.55 million tonnes. Total cereal import requirement is thus estimated at 475 000 tonnes. With commercial imports anticipated at 35 000 tonnes, food aid needs amount to 440 000 tonnes. As of mid November, food aid pledges stood at 490 000 tonnes of which 372 000 tonnes had been delivered.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	1 147	-	5 641	6 788
Previous five years average production (incl. paddy rice)	1 325	-	7 078	8 403
Previous year imports	1 792	16	142	1 949
Previous five years average imports	1 016	13	72	1 101
<u>2004 Domestic Availability</u>	2 177	-	7 903	10 080
2003 Production (incl. paddy rice)	1 727	-	7 903	9 630
2003 Production (incl. milled rice)	1 727	-	7 903	9 630
Possible stock drawdown	450	-	-	450
<u>2004 Utilization</u>	2 557	16	7 983	10 556
Food use	2 384	16	7 003	9 403
Non-food use	173	-	870	1 043
Exports or re-exports	-	-	20	20
Possible stock build up	-	-	90	90
<u>2004 Import Requirement</u>	380	16	80	476
Anticipated commercial imports	20	15	-	35
of which: received or contracted	18	-	-	18
Food aid needs	360	1	80	441
<u>Current Aid Position</u>				
Food aid pledges	410	1	79	490
of which: delivered	319	1	52	372
Donor-financed purchases	35	-	70	105
of which: for local use	35	-	70	105
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	33	-	97	130
	[percentage]			
2003 Production compared to average (incl. paddy rice)	130	-	112	115
2004 Import requirement compared to average	37	123	111	43
Cereal share of total calorie intake				79
<u>Additional Information</u>				
Major foodcrops	sorghum; teff; millet; maize; pulses			
Lean season	August-November			
Population (000s)	72 438			
GNI per capita in 2003 (US\$)	90			

The 2003 aggregate cereal crop, estimated at about 2 million tonnes, is 12 percent higher than the average for the previous five years but about 7 percent down from the previous year. The cereal import requirement for 2004, mainly wheat and rice, is forecast at 536 000 tonnes of which about 460 000 tonnes are anticipated to be covered by commercial imports.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	-	280	1 875	2 155
Previous five years average production (incl. paddy rice)	-	241	1 563	1 804
Previous year imports	266	333	14	613
Previous five years average imports	257	241	37	535
<u>2004 Domestic Availability</u>	-	162	1 770	1 932
2003 Production (incl. paddy rice)	-	243	1 770	2 013
2003 Production (incl. milled rice)	-	162	1 770	1 932
Possible stock drawdown	-	-	-	-
<u>2004 Utilization</u>	266	412	1 790	2 468
Food use	263	372	1 241	1 876
Non-food use	3	30	399	432
Exports or re-exports	-	10	150	160
Possible stock build up	-	-	-	-
<u>2004 Import Requirement</u>	266	250	20	536
Anticipated commercial imports	210	240	10	460
of which: received or contracted	107	230	-	337
Food aid needs	56	10	10	76
<u>Current Aid Position</u>				
Food aid pledges	82	7	16	105
of which: delivered	6	7	5	18
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	13	18	61	92
	[percentage]			
2003 Production compared to average (incl. paddy rice)	-	101	113	112
2004 Import requirement compared to average	104	104	54	100
Cereal share of total calorie intake				28
<u>Additional Information</u>				
Major foodcrops	roots; tubers; coarse grains; rice			
Lean season	April-June			
Population (000s)	20 422			
GNI per capita in 2003 (US\$)	320			

KENYA

Domestic cereal availability in 2004/05 is estimated at 2.45 million tonnes against total utilization requirements of 4.48 million tonnes. Thus, total cereal import requirement is estimated at 2.03 million tonnes, of which commercial imports are estimated at 1.58 million tonnes, leaving a food aid requirement of 450 000 tonnes. As of mid November, food aid pledges amounted to 63 000 tonnes of which 27 000 tonnes had been delivered.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004/05 MARKETING YEAR (October/September)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	196	50	2 816	3 062
Previous five years average production (incl. paddy rice)	232	50	2 660	2 942
Previous year imports	426	200	625	1 251
Previous five years average imports	545	181	657	1 383
<u>2004/05 Domestic Availability</u>	197	30	2 224	2 451
2004 Production (incl. paddy rice)	197	45	2 204	2 446
2004 Production (incl. milled rice)	197	29	2 204	2 430
Possible stock drawdown	-	1	20	21
<u>2004/05 Utilization</u>	797	260	3 424	4 481
Food use	767	242	3 110	4 119
Non-food use	30	18	314	362
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2004/05 Import Requirement</u>	600	230	1 200	2 030
Anticipated commercial imports	500	230	850	1 580
of which: received or contracted	-	5	83	88
Food aid needs	100	-	350	450
<u>Current Aid Position</u>				
Food aid pledges	22	-	42	63
of which: delivered	-	-	27	27
Donor-financed purchases	-	-	47	47
of which: for local use	-	-	47	47
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	24	8	96	127
	[percentage]			
2004 Production compared to average (incl. paddy rice)	85	90	83	83
2004/05 Import requirement compared to average	110	127	183	147
Cereal share of total calorie intake				50
<u>Additional Information</u>				
Major foodcrops	maize; wheat; pulses; roots; tubers			
Lean season	June-July			
Population (000s)	32 440			
GNI per capita in 2003 (US\$)	390			

The estimated 2004 cereal production is estimated at 49 000 tonnes, less than half of the previous year. Consequently, the country needs to import 352 000 tonnes (or 85 percent of its total requirements) of cereals to cover domestic consumption requirements, including 49 000 tonnes of food aid for vulnerable groups who experienced crop failure.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004/05 MARKETING YEAR (April/March)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	37	-	82	119
Previous five years average production (incl. paddy rice)	24	-	132	156
Previous year imports	66	10	165	241
Previous five years average imports	62	9	163	234
<u>2004/05 Domestic Availability</u>	25	-	39	64
2004 Production (incl. paddy rice)	13	-	36	49
2004 Production (incl. milled rice)	13	-	36	49
Possible stock drawdown	12	-	3	15
<u>2004/05 Utilization</u>	96	3	317	416
Food use	95	3	314	413
Non-food use	1	-	2	3
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2004/05 Import Requirement</u>	71	3	278	352
Anticipated commercial imports	71	3	229	303
of which: received or contracted	35	-	75	110
Food aid needs	-	-	49	49
<u>Current Aid Position</u>				
Food aid pledges	-	-	6	6
of which: delivered	-	-	5	5
Donor-financed purchases	-	-	21	21
of which: for local use	-	-	21	21
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	42	1	139	182
	[percentage]			
2004 Production compared to average (incl. paddy rice)	54	-	28	32
2004/05 Import requirement compared to average	114	33	170	150
Cereal share of total calorie intake				78
<u>Additional Information</u>				
Major foodcrops	maize; sorghum; vegetables			
Lean season	February-April			
Population (000s)	2 264			
GNI per capita in 2003 (US\$)	590			

MADAGASCAR

The 2004 main paddy crop is estimated at 3.03 million tonnes, 8 percent above last year's level. The coarse grain crop, mainly produced in southern parts, is estimated to improve by 10 percent compared to last year's drought-affected crop. Cereal imports and food aid needs are forecast in the 2004/05 marketing year at 375 000 tonnes.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004/05 MARKETING YEAR (April/March)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	10	2 800	155	2 965
Previous five years average production (incl. paddy rice)	10	2 601	173	2 784
Previous year imports	105	240	22	367
Previous five years average imports	99	231	17	347
<u>2004/05 Domestic Availability</u>	10	2 060	170	2 240
2004 Production (incl. paddy rice)	10	3 030	170	3 210
2004 Production (incl. milled rice)	10	2 060	170	2 240
Possible stock drawdown	-	-	-	-
<u>2004/05 Utilization</u>	140	2 275	200	2 615
Food use	140	2 095	179	2 414
Non-food use	-	150	21	171
Exports or re-exports	-	-	-	-
Possible stock build up	-	30	-	30
<u>2004/05 Import Requirement</u>	130	215	30	375
Anticipated commercial imports	80	200	10	290
of which: received or contracted	9	100	1	110
Food aid needs	50	15	20	85
<u>Current Aid Position</u>				
Food aid pledges	8	10	7	25
of which: delivered	-	10	5	15
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	8	118	10	136
	[percentage]			
2004 Production compared to average (incl. paddy rice)	100	116	98	115
2004/05 Import requirement compared to average	131	93	176	108
Cereal share of total calorie intake				53
<u>Additional Information</u>				
Major foodcrops	rice; roots; tubers; maize; fruit			
Lean season	February-March			
Population (000s)	17 788			
GNI per capita in 2003 (US\$)	290			

Aggregate 2004 cereal production has been estimated at about 2.93 million tonnes, which is close to the average for the previous five years. As a result, the food position is expected to be satisfactory. Commercial imports of cereal are expected to be around 160 000 tonnes, while cereal exports are forecast at about 145 000 tonnes, mostly unregistered cross-border trade.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004/05 MARKETING YEAR (November/October)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	6	938	2 465	3 409
Previous five years average production (incl. paddy rice)	7	812	1 941	2 760
Previous year imports	98	125	1	224
Previous five years average imports	65	112	15	192
<u>2004/05 Domestic Availability</u>	7	596	2 050	2 653
2004 Production (incl. paddy rice)	7	877	2 050	2 934
2004 Production (incl. milled rice)	7	596	2 050	2 653
Possible stock drawdown	-	-	-	-
<u>2004/05 Utilization</u>	67	696	2 050	2 813
Food use	66	509	1 683	2 257
Non-food use	1	88	322	411
Exports or re-exports	-	100	45	145
Possible stock build up	-	-	-	-
<u>2004/05 Import Requirement</u>	60	100	-	160
Anticipated commercial imports	60	100	-	160
of which: received or contracted	-	-	-	-
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	6	45	147	198
	[percentage]			
2004 Production compared to average (incl. paddy rice)	100	108	106	106
2004/05 Import requirement compared to average	92	89	-	83
Cereal share of total calorie intake				73
<u>Additional Information</u>				
Major foodcrops	millet; sorghum; rice; maize			
Lean season	July-September			
Population (000s)	11 425			
GNI per capita in 2003 (US\$)	290			

NIGERIA

Aggregate 2003 cereal production has been estimated at 23.7 million tonnes, fractionally higher than both in 2002 and the average for the previous five years. Cereal imports have trended upwards in recent years, due mainly to high urban population growth and changing consumption pattern. However, following a lightening of controls against illegal rice and wheat inflows, imports of cereals are forecast to remain at the same level as last year.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004 MARKETING YEAR (January/December)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	50	3 367	19 681	23 098
Previous five years average production (incl. paddy rice)	46	3 355	19 285	22 686
Previous year imports	2 441	1 481	121	4 043
Previous five years average imports	2 097	1 326	102	3 525
<u>2004 Domestic Availability</u>	105	2 040	20 528	22 673
2003 Production (incl. paddy rice)	55	3 400	20 198	23 653
2003 Production (incl. milled rice)	55	2 040	20 198	22 293
Possible stock drawdown	50	-	330	380
<u>2004 Utilization</u>	2 505	3 551	20 608	26 664
Food use	2 413	3 143	15 933	21 489
Non-food use	92	408	4 536	5 036
Exports or re-exports	-	-	140	140
Possible stock build up	-	-	-	-
<u>2004 Import Requirement</u>	2 400	1 511	80	3 991
Anticipated commercial imports	2 400	1 500	80	3 980
of which: received or contracted	1 772	800	-	2 572
Food aid needs	-	11	-	11
<u>Current Aid Position</u>				
Food aid pledges	-	11	-	11
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	20	26	130	176
	[percentage]			
2003 Production compared to average (incl. paddy rice)	120	101	105	104
2004 Import requirement compared to average	114	114	78	113
Cereal share of total calorie intake				46
<u>Additional Information</u>				
Major foodcrops	roots; tubers; coarse grains; rice			
Lean season	April-May			
Population (000s)	122			
	367			
GNI per capita in 2003 (US\$)	320			

The FAO/CILSS/WFP Crop and Food Supply Assessment Mission that visited the country recently, estimated the 2004 cereal production at some 1.185 million tonnes, including about 52 000 tonnes of off-season crop. The important millet crop is expected to decrease by 40 percent to some 379 166 tonnes, while sorghum production is 30 percent down from the previous year. Although commercial imports and pledged food aid will largely cover the rice and wheat requirements, the shortfall in millet could be more difficult to offset given the low availability and trade of this cereal in the sub-region. This could result in millet being replaced by maize and rice.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004/05 MARKETING YEAR (November/October)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	-	232	1 220	1 452
Previous five years average production (incl. paddy rice)	-	240	837	1 077
Previous year imports	252	561	43	855
Previous five years average imports	266	619	57	942
<u>2004/05 Domestic Availability</u>	-	168	1 005	1 173
2004 Production (incl. paddy rice)	-	240	945	1 185
2004 Production (incl. milled rice)	-	168	945	1 113
Possible stock drawdown	-	-	60	60
<u>2004/05 Utilization</u>	285	800	1 040	2 125
Food use	280	776	695	1 751
Non-food use	5	24	145	174
Exports or re-exports	-	-	200	200
Possible stock build up	-	-	-	-
<u>2004/05 Import Requirement</u>	285	632	35	952
Anticipated commercial imports	285	625	35	945
of which: received or contracted	-	-	-	-
Food aid needs	-	7	-	7
<u>Current Aid Position</u>				
Food aid pledges	2	12	-	14
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	26	72	64	162
	[percentage]			
2004 Production compared to average (incl. paddy rice)	-	100	113	110
2004/05 Import requirement compared to average	107	102	61	101
Cereal share of total calorie intake				61
<u>Additional Information</u>				
Major foodcrops	millet; sorghum; rice; maize; wheat			
Lean season	August-September			
Population (000s)	10 834			
GNI per capita in 2003 (US\$)	550			

SOUTH AFRICA

The final official estimate of the main maize crop in 2004 has been revised upwards to 8.9 million tonnes, and those of sorghum to 336 000 tonnes. In aggregate, the coarse grain crop is slightly below average. Consequently, export availability of maize is reduced.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004/05 MARKETING YEAR (November/October)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production	1 540	3	10 179	11 722
Previous five years average production	2 086	3	9 590	11 679
Previous year imports	1 042	780	572	2 394
Previous five years average imports	713	590	735	2 038
2004/05 Domestic Availability	2 110	2	9 517	11 629
2004 Production (rice in paddy terms)	1 864	3	9 517	11 384
2004 Production (rice in milled terms)	1 864	2	9 517	11 383
Possible stock drawdown	246	-	-	246
2004/05 Utilization	2 960	752	10 348	14 060
Food use	2 570	697	4 630	7 897
Non-food use	190	55	4 729	4 974
Exports or re-exports	200	-	930	1 130
Possible stock build up	-	-	59	59
2004/05 Import Requirement	850	750	831	2 431
Anticipated commercial imports	850	750	831	2 431
of which: received or contracted	467	540	142	1 149
Food aid needs	-	-	-	-
Current Aid Position				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
Estimated Per Caput Consumption (kg/year)	57	15	102	174
	[percentage]			
2004 production compared to average (rice paddy terms)	89	100	99	97
2004/05 Import requirement compared to average	119	127	113	119
Cereal share of total calorie intake				-
Additional Information				
Major foodcrops	Maize, wheat			
Lean season	February-April			
Population (000s)	45 295			
GNI per capita in 2003 (US\$)	2 780			

Based on an estimated domestic cereal availability of 4.11 million tonnes and total utilization requirement of about 5.59 million tonnes, the total cereal import requirement in 2004/05 (November/October) is estimated at 1.48 million tonnes, mostly wheat. With commercial imports anticipated at 1.34 million tonnes, the food aid requirement amounts to 139 000 tonnes. As of mid November, food aid pledges stood at 62 000 tonnes of which 12 000 tonnes have been delivered.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004/05 MARKETING YEAR (November/October)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	398	35	5 608	6 041
Previous five years average production (incl. paddy rice)	305	18	4 063	4 386
Previous year imports	894	25	130	1 049
Previous five years average imports	999	34	104	1 137
<u>2004/05 Domestic Availability</u>	320	-	3 792	4 112
2004 Production (incl. paddy rice)	320	20	2 852	3 192
2004 Production (incl. milled rice)	320	-	2 852	3 172
Possible stock drawdown	-	-	940	940
<u>2004/05 Utilization</u>	1 670	40	3 881	5 591
Food use	1 638	39	3 282	4 959
Non-food use	32	1	549	582
Exports or re-exports	-	-	50	50
Possible stock build up	-	-	-	-
<u>2004/05 Import Requirement</u>	1 350	40	89	1 479
Anticipated commercial imports	1 300	40	-	1 340
of which: received or contracted	372	3	-	374
Food aid needs	50	-	89	139
<u>Current Aid Position</u>				
Food aid pledges	-	-	62	62
of which: delivered	-	-	12	12
Donor-financed purchases	-	-	25	25
of which: for local use	-	-	25	25
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	48	1	96	144
	[percentage]			
<u>Indexes</u>				
2004 Production compared to average (incl. paddy rice)	105	111	70	73
2004/05 Import requirement compared to average	135	118	85	130
Cereal share of total calorie intake				56
<u>Additional Information</u>				
Major foodcrops	sorghum; millet; wheat; roots; tubers; oils			
Lean season	September-October			
Population (000s)	34 360			
GNI per capita in 2003 (US\$)	460			

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Domestic cereal availability in 2004/05 marketing year (June/May) is estimated at 4.62 million tonnes against total utilization of 5.07 million tonnes. The cereal import requirement is thus estimated at 452 000 tonnes. With commercial imports estimated at 372 000 tonnes, the food aid requirement is 80 000 tonnes.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004/05 MARKETING YEAR (June/May)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	71	650	3 334	4 055
Previous five years average production (incl. paddy rice)	71	756	3 286	4 113
Previous year imports	200	154	264	618
Previous five years average imports	276	139	115	530
<u>2004/05 Domestic Availability</u>	135	488	3 997	4 619
2004 Production (incl. paddy rice)	85	750	3 997	4 832
2004 Production (incl. milled rice)	85	488	3 997	4 569
Possible stock drawdown	50	-	-	50
<u>2004/05 Utilization</u>	255	620	4 197	5 071
Food use	226	545	3 567	4 338
Non-food use	9	60	450	519
Exports or re-exports	20	5	150	175
Possible stock build up	-	10	30	40
<u>2004/05 Import Requirement</u>	120	132	200	452
Anticipated commercial imports	120	132	120	372
of which: received or contracted	106	17	67	190
Food aid needs	-	-	80	80
<u>Current Aid Position</u>				
Food aid pledges	-	-	9	9
of which: delivered	-	-	7	7
Donor-financed purchases	-	-	10	10
of which: for local use	-	-	10	10
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	6	14	95	115
	[percentage]			
2004 Production compared to average (incl. paddy rice)	120	99	122	117
2004/05 Import requirement compared to average	43	95	174	85
Cereal share of total calorie intake				51
<u>Additional Information</u>				
Major foodcrops	maize; roots; tubers; sorghum; pulses; plantains; rice			
Lean season	February-April			
Population (000s)	37 691			
GNI per capita in 2003 (US\$)	290			

Zambia's total cereal production in 2004 has been estimated at 1.37 million tonnes. This is about the same as last year but 23 percent above the average of the last five years. As a result, the country is expected to have exportable surplus of 150 000 tonnes of maize in the 2004/05 marketing year. Cereal import requirements are limited to reduced quantities of wheat and rice in which the country has a structural deficit and are met through commercial imports.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004/05 MARKETING YEAR (May/April)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	136	11	1 216	1 363
Previous five years average production (incl. paddy rice)	93	13	1 013	1 119
Previous year imports	43	23	231	297
Previous five years average imports	45	23	226	294
2004/05 Domestic Availability	93	8	1 373	1 474
2004 Production (rice in paddy terms)	83	12	1 277	1 372
2004 Production (rice in milled terms)	83	8	1 277	1 368
Possible stock drawdown	10	-	96	106
2004/05 Utilization	141	22	1 373	1 536
Food use	137	21	1 006	1 164
Non-food use	4	-	217	221
Exports or re-exports	-	-	150	150
Possible stock build up	-	1	-	1
2004/05 Import Requirement	48	14	-	62
Anticipated commercial imports	33	14	-	47
of which: received or contracted	19	16	1	36
Food aid needs	15	-	-	15
Current Aid Position				
Food aid pledges	13	-	-	13
of which: delivered	6	-	-	6
Donor-financed purchases	-	-	24	24
of which: for local use	-	-	24	24
for export	-	-	-	-
Estimated Per Caput Consumption (kg/year)	13	2	93	107
	[percentage]			
2004 production compared to average (incl. paddy rice)	89	90	126	123
2004/05 Import requirement compared to average	107	61	-	21
Cereal share of total calorie intake				65
Additional Information				
Major foodcrops	maize; roots; tubers			
Lean season	March-May			
Population (000s)	10 832			
GNI per capita in 2003 (US\$)	380			

An FAO/WFP Crop and Food Supply Assessment Mission in April estimated the 2004 cereal production at 976 000 tonnes, including forecast for the winter wheat and barley crops. At this level, production is 3.5 percent below last year and well below average. Consequently, cereal import requirement for 2004/05 are increased to 1.29 million tonnes, of which maize accounts for 77 percent. Given the current tight foreign exchange position, only about 910 000 tonnes are anticipated to be imported commercially.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2004/05 MARKETING YEAR (April/March)

	Wheat	Rice	Coarse Grains	Total Cereals
	[thousand tonnes]			
Previous year production (incl. paddy rice)	90	5	917	1 011
Previous five years average production (incl. paddy rice)	230	1	1 396	1 627
Previous year imports	33	9	845	886
Previous five years average imports	109	18	497	624
<u>2004/05 Domestic Availability</u>	80	2	893	975
2004 Production (incl. paddy rice)	80	3	893	976
2004 Production (incl. milled rice)	80	2	893	975
Possible stock drawdown	-	-	-	-
<u>2004/05 Utilization</u>	356	11	1 898	2 265
Food use	345	11	1 584	1 940
Non-food use	11	-	269	280
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	45	45
<u>2004/05 Import Requirement</u>	276	9	1 005	1 290
Anticipated commercial imports	276	9	629	914
of which: received or contracted	115	18	124	257
Food aid needs	-	-	376	376
<u>Current Aid Position</u>				
Food aid pledges	-	-	115	115
of which: delivered	-	-	99	99
Donor-financed purchases	-	-	5	5
of which: for local use	-	-	5	5
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	29	1	133	163
	[percentage]			
2004 Production compared to average (incl. paddy rice)	35	300	64	60
2004/05 Import requirement compared to average	253	50	202	207
Cereal share of total calorie intake				58
<u>Additional Information</u>				
Major foodcrops	maize; wheat; millet; sorghum			
Lean season	February-April			
Population (000s)	11 900			
GNI per capita in 2003 (US\$)	n.a.			

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"Utilization": All elements of utilisation for wheat and coarse grains are expressed in grain equivalent. For rice, all elements are expressed in milled form. Non-food use includes post-harvest losses, seed use, feed use, industrial use for all cereals.

"Countries Facing Food Emergencies": Refer to an exceptional shortfall in aggregate supplies or a localised deficit as a result of crop failures, natural disasters, interruption of imports, disruption of distribution, excessive post-harvest losses, other supply bottlenecks and/or an increased demand for food arising from population movements within the country or an influx of refugees. In the case of an exceptional shortfall in aggregate food supplies, emergency food aid may be required to cover all or part of the deficit.

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