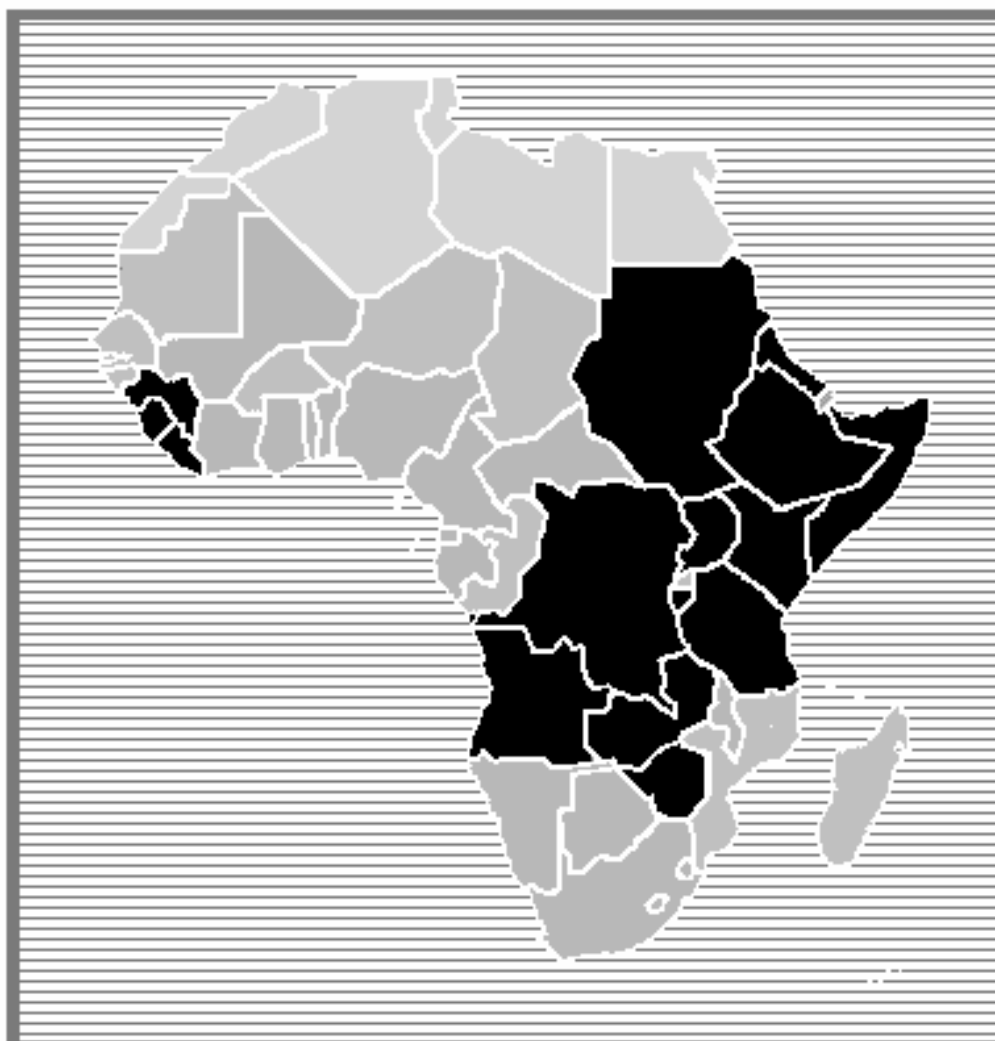


FOOD SUPPLY SITUATION AND CROP PROSPECTS IN SUB-SAHARAN AFRICA

No.3

December 2001



Countries facing exceptional food emergencies:

Angola, Burundi, Dem.Rep. of Congo, Eritrea, Ethiopia, Guinea, Kenya, Liberia, Sierra Leone, Somalia, Sudan, Tanzania, Uganda, Zambia, Zimbabwe



FOOD AND AGRICULTURE ORGANIZATION OF THE UNITED NATIONS

INTRODUCTION

This is the third and final issue in 2001 of this quarterly report prepared by the FAO Global Information and Early Warning System (GIEWS) on the food supply situation, 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.

Part I focuses on the looming food crisis in Somalia and the continuing need for assistance in most pastoral areas of the Horn of Africa despite the overall improved food situation in the sub-region as compared to last year. It highlights the precarious food situation in parts of the Great Lakes region, particularly the Democratic Republic of Congo, mainly due to civil strife. The report also draws attention to emerging food shortages in parts of southern Africa, particularly in Malawi, Mozambique, Zambia and Zimbabwe, as well as the continuing need for food assistance in Angola, Guinea, Liberia and Sierra Leone due to population displacements, refugees and insecurity .

Part II contains an assessment of crop prospects and the food supply situation by sub-region, giving the latest estimates of cereal import and food aid requirements of all four sub-regions of sub-Saharan Africa.

Part III presents the latest analysis and information on crop prospects and the food supply situation and outlook in each country. The information on food aid pledges, triangular transactions and local purchases, and on expected arrivals, is based on data transmitted to GIEWS as of late November 2001 by the following donors: Australia, Belgium, Canada, China, Denmark, EC, Germany, France, Italy, Japan, Netherlands, Sweden, Switzerland, United Kingdom, United States as well as the World Food Programme.

COUNTRIES FACING EXCEPTIONAL FOOD EMERGENCIES (Total: 15 countries)

<u>Country</u>	<u>Reasons for emergency</u>
Angola	Civil strife, population displacement
Burundi	Civil strife and insecurity
Congo, Dem.Rep.	Civil strife, IDPs and refugees
Eritrea	IDPs, returnees and drought
Ethiopia	Drought, IDPs
Guinea	IDPs and refugees
Kenya	Drought
Liberia	Past civil strife, population displacement
Sierra Leone	Civil strife, population displacement
Somalia	Drought, civil strife
Sudan	Civil strife in the south, drought
Tanzania	Food deficits in parts, refugees
Uganda	Civil strife in parts, IDPs
Zambia	Excessive rains, floods
Zimbabwe	Drought in parts

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 Mr. Abdur Rashid, 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 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

The food situation in Somalia gives cause for serious concern. A poor harvest, one of the lowest in the last seven years, has been gathered during the main cropping season of 2001. Late and erratic rainfall was the main cause of the poor harvest. A recovery in production in the previous two cropping seasons had eased the tight food supply situation, but the poor harvest this "Gu" season has offset the temporary respite and put under pressure the already weakened coping mechanisms following a succession of droughts earlier and the long running civil strife, which has flared up in the south in recent weeks. Furthermore, the continuing ban on livestock imports from eastern Africa by countries along the Arabian Peninsula on account of Rift Valley Fever has sharply reduced foreign exchange earnings and severely curtailed the country's import capacity. This has been exacerbated by the recent closure of the Al-Barakaat money transfer company which channelled millions of dollars of remittances to the country from Somalis abroad. In addition, recent floods in parts have caused localised population displacements. Increasing malnutrition and population movements in search of food and work are reported. It is estimated that some 800 000 people face serious food shortages and will require about 70 000 tonnes of emergency food assistance until the next "Gu" season harvest in August 2002. Of particular concern are some 300 000 vulnerable people, particularly in Gedo Region but also in Hiran, Bay and Bakool Regions.

Elsewhere in eastern Africa, the food supply situation has markedly improved compared to last year. In Eritrea, Ethiopia, Kenya, Sudan, Tanzania and Uganda, good harvests have been realised or are in prospect, reflecting favourable weather conditions. However, pastoral regions of Ethiopia and Kenya continue to face food difficulties due to successive poor rains and a large number of people depend on food assistance. In Eritrea, despite improved prospects, food difficulties are still being experienced by people displaced during the conflict with neighbouring Ethiopia and those affected by drought earlier.

In the Great Lakes Region, the food situation and outlook remain precarious in the Democratic Republic of Congo due to persistent insecurity and population displacements, notwithstanding favourable crop growing conditions. Over 2.5 million internally displaced people (IDPs) are in dire need of food relief but insecurity hampers distribution of humanitarian assistance. The nutrition and health situation of the IDPs remains serious with alarming rates of child malnutrition being reported. Elsewhere in the region, the food supply situation has improved considerably in Burundi and Rwanda due to substantial increases in 2001 first and second season food production.

In southern Africa, the main cropping season has started with generally favourable weather conditions. However, the food supply situation in the sub-region is tight and localised food shortages are being reported even in countries where the overall cereal production increased this year. In Angola, food assistance is needed for 1.34 million internally displaced and vulnerable people. Large orders of maize imports have been announced by Malawi, Zambia and Zimbabwe where stocks have been depleted and prices have increased sharply. In Mozambique, despite a good harvest, food assistance will be needed for about 100 000 people in southern provinces affected by dry weather. In Botswana, Lesotho, Namibia and Swaziland, where cereal production was poor, food difficulties are anticipated for many households. By contrast, in Madagascar, the overall food supply situation has improved following a bumper paddy harvest and large carryover stocks.

In western Africa, bumper cereal crops have been harvested in the Sahel, reflecting generally favourable growing conditions. This will allow replenishment of farmers' and government stocks. Record harvests are estimated for Burkina Faso, The Gambia and Niger, while above average crops are estimated for Chad, Mali and Senegal. However, prospects are less favourable in Cape Verde, Mauritania and Guinea-Bissau as compared to last year. In the coastal countries, the food supply situation remains tight in Guinea, Liberia and Sierra Leone due to the impact of recent civil conflicts.

Sub-Saharan Africa's cereal import requirements in 2002 are expected to decrease from 2001, reflecting favourable harvests in eastern Africa and the Sahel in western Africa which offset reduced production in southern Africa.

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PART I: OVERVIEW

At the close of 2001, sub-Saharan Africa's overall food supply situation is generally better than it was at the end of last year, with improved harvests in the Horn of Africa and bumper crops in the Sahel in western Africa. However, many countries still face serious food shortages due to natural and/or man-made disasters and need food assistance. Somalia is of particular concern, as the food situation is deteriorating fast following a poor 2001 main season harvest, the lowest in the last seven years, due to drought. An estimated 800 000 people are experiencing food difficulties, with 300 000 mainly in southern regions in urgent need of food assistance. Elsewhere in eastern Africa, pastoral populations in Ethiopia and Kenya continue to depend on food assistance due to drought conditions that have persisted for the past three years. In the Great Lakes region, over 2.5 million internally displaced people (IDPs) in the Democratic Republic of Congo, who are largely inaccessible to humanitarian agencies due to insecurity, live in misery and hunger. In southern Africa, civil strife and population displacements in Angola continue unabated, while serious food shortages are emerging in parts of Malawi, Mozambique, Zambia and Zimbabwe mainly due to adverse weather that sharply reduced food production in the last main season. Elsewhere in sub-Saharan Africa, food assistance continues to be needed in southern Sudan, parts of Uganda, Eritrea, Liberia, Guinea and Sierra Leone mainly due to past or ongoing conflicts.

DETERIORATING FOOD SITUATION IN SOMALIA WHILE FOOD DIFFICULTIES PERSIST IN OTHER PARTS OF THE HORN

Despite an improved food outlook in eastern Africa, the food situation in Somalia and pastoral regions of Ethiopia and Kenya gives cause for concern.

In **Somalia**, the food situation is rapidly deteriorating following sharply reduced 2001 main "Gu" season production, the lowest in the last seven years, due to drought. Recent heavy rains in neighbouring Ethiopian highlands have caused an overflow of rivers in southern Somalia, displacing large numbers of people, aggravating the already serious food supply situation. A recovery in food production in the previous two cropping seasons had eased to some extent the food supply situation, but the current poor harvest has ended the temporary respite, straining the coping mechanisms already weakened by a succession of droughts earlier and the long-term effects of years of insecurity. Furthermore, the continuing ban on livestock imports from eastern Africa by countries along the Arabian Peninsula due to Rift Valley fever is causing substantial loss of income, particularly in northern Somalia. The ban imposed in September 2000 is estimated to have cost the country hard currency earnings amounting to US\$120 million. In addition, remittances from Somalis living abroad have been curtailed by the recent closure of the Al-Barakaat money transfer company which channelled millions of dollars into the country.

Rural people are leaving their villages, many with their livestock, in search of food and water, moving into urban areas and crowding around feeding centres where assistance is being provided by international aid agencies. Reports indicate that some 800 000 people have been affected and will require 70 000 tonnes of emergency food assistance until the next "Gu" harvest in August 2002. Of particular concern are some 300 000 vulnerable people threatened by starvation in Gedo Region in south-western Somalia as well as in Hiran, Bay and Bakool. Despite recent rainfall that enabled some plantings, prospects for the "Deyr" secondary season, which runs from October to February, are uncertain due to the delayed onset of rains. The outlook is unfavourable and the current serious food situation could deteriorate in 2002 if the current (Deyr) season fails or is unsatisfactory.

In **Eritrea**, the tight food supply situation stemming from the recent war with neighbouring Ethiopia and a prolonged drought in parts has somewhat eased with anticipated recovery in 2001 cereal production. Hopes of a strong recovery were dampened following below-normal rains in September at the critical stages of crop flowering and seed setting. Field assessments in September indicated lower production than estimated by the Ministry of Agriculture in early August.

Despite the anticipated improvement in food production, food assistance continues to be needed for more than 50 000 displaced people who are still unable to return to their homes, while large tracts of land remain uncultivated due to fear of landmines.

In **Ethiopia**, above-average 2001 main "Meher" cereal and pulse production is forecast reflecting abundant rains in major agricultural areas. With a favourable short rains "belg" crop earlier in the year, the food supply situation has significantly improved. Nevertheless, serious food shortages and unseasonable migration of

people and livestock are reported in the pastoral areas in the south-eastern parts due to persistent drought. An FAO/WFP Crop and Food Supply Assessment Mission has just returned from the country and a report will be issued shortly.

In **Kenya**, the main rainy season, which normally accounts for 80 percent of total annual food production, has generally been favourable, resulting in improved food supply in most parts of the country. Preliminary official estimates indicate a maize output of about 2.31 million tonnes for the season, an increase of 20 percent over the reduced harvest last year. With a forecast of normal secondary season rains, the 2001/02 aggregate maize output is projected at 2.7 million tonnes, well above average.

In response to the good cereal harvest and carryover stocks, prices of maize, the staple crop, have declined considerably prompting the Government to appeal to donors to increase local purchases to support the market. The improvement in the overall food supply situation notwithstanding, pastoralists in northern and eastern parts of the country continue to face serious food supply difficulties. Water and pasture conditions remain poor, and with below-normal rainfall forecast in the September to December season, the situation is anticipated to deteriorate further. Long distance trekking in search of water and grazing is already evident with the threat of high livestock mortality. In September 2001, WFP distributed full food rations to 1.56 million people in 13 pastoral and agro-pastoral districts.

In **Sudan**, a recent FAO/WFP Crop and Food Supply Assessment Mission to southern Sudan indicated a generally improved food supply situation compared to last year but estimated an overall deficit in cereal production. Heavy rains in August caused localised flooding and water-logging in low-lying areas, particularly in the east. However, the overall advantages of the rainfall were noted to outweigh the disadvantages. Despite the improved situation, food insecurity remains in parts, exacerbated by the absence of normal trade routes which exclude easy movement of grain or cassava flour from surplus to deficit areas.

In central and northern Sudan, harvesting of the 2001 main season cereal crops has just started. Despite the extensive floods that displaced a large number of people and destroyed crops, overall harvest prospects are favourable. An FAO/WFP Crop and Food Supply Assessment Mission has just returned from the country and a report is to be issued shortly.

In **Tanzania**, food production in 2001 is estimated at nearly 15 percent above the level of 2000 but slightly below the average of the last five years. The Strategic Grain Reserve (SGR) has targeted purchases of 25 000 tonnes for the marketing year 2001/02 (June/May) which would bring stocks to 59 000 tonnes, or about 84 percent of the total planned reserve of 70 000 tonnes.

The overall food supply situation is satisfactory with stable or declining cereal prices in central, east, lake and northern regions. However, sharp price increases have been reported in southern highlands and southern coast areas due partly to increased cereal demand from neighbouring countries, particularly Malawi and Zambia. Furthermore, some 12 districts in northern and central Tanzania, mainly in the regions of Arusha, Kilimanjaro, Dodoma, Morogoro, Shinyanga and Singida are reported to be facing varying degrees of food insecurity.

In **Uganda**, prospects for the second season harvest early next year are favourable. Widespread and abundant rains in September and October benefited developing food crops. The rains have also improved pasture conditions and water availability for livestock in pastoral districts of Kotido and Moroto. The overall food supply situation is satisfactory. However, the situation remains precarious in Katakwi District mainly due to insecurity and loss of cattle to raids. Food assistance also continues to be needed for nearly 112 000 people in Bundibugyo District, in the west, displaced by civil unrest.

FOOD SUPPLY SITUATION TIGHTENING IN SOUTHERN AFRICA

In **Zimbabwe**, the already tight food supply situation has deteriorated as a result of reduced cereal production and general economic decline. Serious food difficulties are reported in the south, east and extreme north where production was reduced by dry weather or excessive rains. A recent vulnerability assessment indicated that 705 000 people in rural areas are at risk of food shortages. In addition, 250 000 people in urban areas are experiencing food difficulties due to a sharp increase in food prices, while some 30 000 farm workers have lost their jobs and are left without means of subsistence. The Government has started to distribute food in drought-prone areas of Masvingo and Matabeleland provinces and appealed for

international food assistance on 8 November. WFP plans to distribute emergency food aid to about 558 000 most needy people spread throughout 22 districts located in chronically food deficit areas.

At the national level, stocks are being depleted. The Government has made arrangements to import 150 000 tonnes of maize but the grain has not yet reached the country. Prices of basic food commodities, as well as those of agricultural inputs, which had increased sharply in recent months, are now controlled by the Government. However, price cuts have led to significant shortages of commodities in the markets. The situation could further deteriorate next year as planting of the 2002 maize crop, now underway, is likely to be disrupted following a Government decree authorizing the seizure of commercial farms targeted for acquisition. Losses of export earnings and intensification of economic difficulties are also anticipated as commercial farmers abandon agriculture.

In **Malawi** the food supply situation is very tight following a decline of 25 percent in the 2001 maize crop, caused by excessive rains and floods during the last season. The strategic grain reserve has been depleted. Prices of maize, the staple food of the country, have increased by some 400 percent compared to a year ago. By October 2001, a kilogram of maize was quoted at 18 Kwacha, against 2 to 5 Kwacha at the same time last year. The sharp increase in prices has severely reduced access to food for large sections of the population. The Government has made arrangements to import 150 000 tonnes of maize but only 10 000 tonnes had been delivered by the end of October. However, substantial cross-border inflows of grain from Mozambique and Tanzania are reported.

At the household level, food shortages are emerging in the southern parts of the country, where floods affected some 650 000 people earlier in the year and caused severe crop losses. Emergency food aid is being provided to 208 500 most affected persons. Availability of other foods such as cassava and potatoes is also helping to alleviate the food shortage. Seeds and other agricultural inputs for the new season, now underway, have been distributed by the Government with the assistance of FAO and other agencies. Targeted areas include the worst affected districts of Chikwawa and Nsanje. FAO is also assisting in the vaccination/treatment of livestock to combat diseases.

In **Zambia**, the food supply situation in marketing year 2001/02 (April/March) is tight following a sharply reduced cereal crop. Production of maize, the country's main staple, was adversely affected by excessive rains and floods, as well as dry weather in southern parts. Maize prices have risen substantially since early June, when they should normally be declining. The Government announced a ban on maize exports in early September and has made arrangements to import 150 000 tonnes of maize.

Food difficulties are being experienced by rural communities which gathered a poor crop and by vulnerable urban households whose access to food has been significantly curtailed by high prices. The Government has appealed for international food assistance for 2 million worst affected people in 42 districts (out of 73 in the country) which have been declared as being in a state of emergency. WFP plans to distribute 42 000 tonnes to 1.3 million people in targeted districts from December until the next harvest.

In **Mozambique**, despite an overall satisfactory 2001 cereal harvest and food supply situation, serious food difficulties have been reported in southern provinces affected by prolonged dry weather during the growing season. These provinces were the worst affected by the severe floods last year and coping mechanisms of households have been virtually exhausted. A recent vulnerability assessment in these areas by the Government and WFP indicates that about 100 000 people are in need of emergency food assistance until the next harvest. The food situation is also difficult for low-income sections of the urban population as a result of sharp increases in maize prices. Increases have been particularly high in northern areas, partially reflecting substantial cross-border exports to Malawi. Shortages of maize for the milling industry have also been reported in Maputo, where maize prices have reached record levels.

In **Madagascar**, a bumper 2001 cereal crop, mainly paddy, has improved the overall food supply situation. In the chronically food deficit southern areas, production of maize and tubers was also good and structural food aid requirements are estimated at minimum levels. Prices of paddy have declined by up to 50 percent of normal levels following the exceptional harvest and high levels of carryover stocks due to late imports in marketing year 2000/01 (April/May). The low price of paddy has negatively affected incomes of commercial farmers and there is serious concern about planting prospects for the new season which has just started.

Elsewhere in the sub-region, 2001 cereal output was sharply reduced in **Botswana, Lesotho, Namibia and Swaziland**. Despite the relatively strong commercial import capacity of these countries, food difficulties are

being experienced by vulnerable groups with low purchasing power. In Angola, although foodcrop production increased this year, the food situation of large numbers of IDPs remains very serious. Distribution of humanitarian assistance continues to be constrained by insecurity and insufficient resources.

CRITICAL FOOD SITUATION IN THE DEMOCRATIC REPUBLIC OF CONGO WHILE FOOD PROSPECTS IMPROVE ELSEWHERE IN THE GREAT LAKES

In the **Democratic Republic of Congo** the food situation is extremely tight, particularly in eastern parts worst affected by persistent fighting and insecurity. Planting of the 2002 first season crops has started under favourable weather conditions in these areas but the on-going conflict continues to disrupt agricultural activities. The number of internally displaced people and refugees to neighbouring countries continues to increase. Access to the displaced population in some areas has improved in recent months with partial pullback of foreign armies and strengthening of UN peace-keepers. However, insecurity continues to hinder distribution of food aid in most areas. Overall, it is estimated that out of some 2.5 million internally displaced people, less than half have direct access to relief assistance.

The nutritional and health situation of the displaced population gives cause for serious concern. Recent assessments indicate alarming rates of children malnutrition in the southeastern province of Katanga, where 11 children are reportedly dying daily. In general, the nutritional situation remains serious throughout the country, including in Kinshasa and other urban centres.

In **Rwanda**, excessive rains in September and October caused serious crop damage in high altitude areas mainly in the northwestern province of Gisenyi, but also in Gitarama and Gikongoro Provinces. Loss of life and severe damage to housing and infrastructure due to floods were reported. It is estimated that 5 000 households have been seriously affected by the floods and need emergency relief.

The overall food supply situation has improved considerably following good harvests in the 2001 A and B seasons. In particular, areas affected by recurring droughts in recent years obtained good harvests this season. Food prices have stabilized and import requirements have declined substantially.

In **Burundi**, the security situation remains volatile in many areas. Incidents of violence continue to be reported in Makamba, Rutana and Ruyigi provinces. Armed attacks have also been reported in Bujumbura Rural and peripheral suburbs of Bujumbura, the capital city.

The overall food supply situation has improved with the substantially increased food production in 2001. The nutritional situation has also improved with a decline in the number of beneficiaries in nutrition centres in recent months. However emergency food assistance continues to be needed for some 432 000 internally displaced people and other vulnerable sections of the population.

FAVOURABLE FOOD OUTLOOK IN THE SAHEL, BUT DIFFICULTIES PERSIST IN PARTS OF WESTERN AFRICA

In the **Sahel**, the rainy season is over and harvest prospects are good. Rains started on time and remained generally widespread and regular in June, July and August. Only limited replantings were necessary in localized areas as no prolonged dry spells were experienced. However, in September, precipitation ceased somewhat early in Burkina Faso and remained below average in Cape Verde. The pest situation was mostly calm. The rains permitted satisfactory regeneration of pastures and replenishment of water reserves.

In October 2001, joint FAO/CILSS Crop Assessment Missions to the nine CILSS member countries estimated aggregate 2001 cereal production at around 11.7 million tonnes, well above 2000 production and above the average of the last five years. Record harvests were estimated in Burkina Faso, The Gambia and Niger, while production was above average in Chad, Mali and Senegal. Prospects are less favourable in Cape Verde, Mauritania and Guinea-Bissau as compared to last year.

Following these good harvests, the overall food supply situation has improved, notably in certain areas in Burkina Faso, Chad and Niger, where harvests were poor last year. Farmers will be able to replenish their grain stocks, while replenishment of national food reserves, depleted by food aid distributions or sales at subsidised prices during the 2001 lean season, will be facilitated by low cereal prices on local markets. Localized deficits in some areas can be covered by transfers from surplus areas. Overall, therefore, the food supply situation in the Sahel is expected to be stable in the 2002 marketing year.

Among the countries along the Gulf of Guinea, food difficulties persist in a few countries. In **Guinea**, although harvest prospects are favourable, reflecting generally good weather conditions, flooding in Haute Guinée in August and September affected some 220 000 people and destroyed over 20 000 hectares of crops. In the border areas, recurrent rebel incursions from Sierra Leone have also affected agriculture and marketing activities. The security situation has improved recently except in Kissidougou area, in southern Guinea. Refugees have been relocated from the Parrot's Beak to new camps in Upper Guinea. There are about 180 000 IDPs in the country.

In **Liberia**, crop growing conditions have been generally favourable for the rice crop about to be harvested. However, food supply difficulties persist as domestic production has not fully recovered from several years of civil war. It is estimated that there are about 70 000 Sierra Leonean refugees, mainly in Lofa county, one of Liberia's main rice producing areas. Recent fighting in the county disrupted farming and displaced thousands of people. Food distributions are underway in IDP camps but some areas remain inaccessible to relief agencies.

In **Sierra Leone**, rice production is expected to be above last year's level, reflecting increased plantings by returning farmers and improved conditions for distribution of inputs. However, the food supply situation remains tight as a result of years of civil strife. About 400 000 IDPs and returnees are presently housed in various camps but mostly in the main towns and in Tonkili and Port Loko districts. An improvement in the security situation has facilitated access to vulnerable populations. Sierra Leone continues to depend heavily on international food assistance.

AREAS OF PRIORITY ACTION

While the overall food outlook for sub-Saharan Africa is better than it was at this time last year, a number of countries need continued food assistance, as well as support to national agricultural recovery and reconstruction programmes. The attention of the international community is drawn to the following areas requiring priority action.

First, urgent food assistance is needed in Somalia where the food situation is deteriorating fast due drought, heightened insecurity and sharply diminished hard currency earnings and remittances. It is estimated that around 800 000 people are at risk of serious food shortages and even starvation if food assistance is not provided as a matter of urgency.

Second, in southern Africa, serious food shortages are emerging in Malawi, Mozambique, Zambia and Zimbabwe, mainly due to weather adversities during the last cropping season. Given the limited commercial import capacity of these countries, international food assistance is needed to alleviate the suffering of the affected populations.

Third, sustained international support is needed for rehabilitation and reconstruction of agriculture in countries emerging from years of conflict or emergency situations. These countries include Eritrea, Liberia, Mozambique and Sierra Leone.

Fourth, the long-running complex emergencies in Angola and the Democratic Republic of Congo need to be given greater attention in order to find solutions that will bring much needed relief for the suffering populations of these countries.

PART II : POSITION BY SUB-REGION

The 2001/02 cereal crops have been planted or are being planted in southern Africa. Main season crops in eastern Africa have been harvested or are being harvested although the wheat crop in Sudan will be harvested from March 2002. Secondary (short rains) crops are in the ground in several countries in eastern Africa. Harvesting of the main crop is largely complete in western Africa. The 2002 main season crops will not be planted until March in the coastal countries and June in the Sahelian countries.

Cereal Crop Calendar

Sub-Region	Cereal Crops	
	Planting	Harvesting
Eastern Africa ^{1/}	March-June	Aug.-Dec.
Southern Africa	Oct.-Dec.	April-June
Western Africa		
- Coastal areas (first season)	March-April	July-Sept.
- Sahel zone	June-July	Oct.-Nov.
Central Africa ^{1/}	April-June	Aug.-Dec.

^{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 2001 cereal crops is underway in the northern countries of the sub-region while it has been completed in the southern parts. The 2001 aggregate sub-regional output is anticipated to increase substantially over the reduced level of last year. However, successive poor rains in most pastoral areas, particularly in Somalia, Kenya and Ethiopia, continue to cause acute food shortages and the migration of thousands of people in search of water and food. In Somalia, the 2001 main "Gu" season crop was sharply reduced by dry weather. Despite recent showers that eased severe water shortages in parts, up to 800 000 people may face severe food difficulties. A recovery in food production in the previous two cropping seasons had eased to some extent the food supply difficulties, but the current poor harvest has offset the temporary respite and put under strain coping mechanisms already weakened by a succession of droughts earlier and the persistent insecurity. In Eritrea, good main season rainfall from June improved the food outlook. However, a large number of people remain displaced and dependent on emergency food assistance. In Kenya, overall food supply has improved considerably due to favourable rains in major cereal producing areas. However, a precipitous decline in maize prices is negatively impacting on farmers' incomes. In northern and eastern Kenya, hopes of recovery for pastoralists from the effects of the recent devastating prolonged drought have once again been dashed by continued drought conditions and poor weather outlook in the coming months. In Ethiopia, abundant rains in major agricultural areas preceded by a favourable short rains "belg" crop, have significantly improved the food supply situation. Nevertheless, severe food shortages and unseasonable migration of people and livestock are reported in the in pastoral areas in the south-eastern parts of the country due to persistent drought. In Sudan, despite extensive floods in parts that displaced tens of thousands of people, overall prospects for current crops have improved. In Tanzania and Uganda, the overall food supply situation is adequate following recent good harvests and improved pastures. However, food difficulties remain in parts, due to localised drought conditions and/or insecurity.

In Rwanda and Burundi, abundant rains in September and October allowed planting and establishment of the 2002 A season foodcrops, to be harvested from January. Despite localized floods and crop losses, early prospects are favourable. Notwithstanding favourable 2001 harvest in Burundi, the food situation remains difficult for some 432 000 internally displaced people who are in need of food assistance.

The aggregate cereal import requirement of the sub-region in marketing year 2001/02 is estimated at 3.3 million tonnes. Commercial imports are estimated at 2.6 million tonnes and the food aid requirements at some 0.7 million tonnes. Food aid pledges reported to GIEWS up to end-November amount to 0.2 million tonnes, with 99 000 tonnes delivered so far.

In **southern Africa**, harvesting of the 2001 irrigated wheat crop is well advanced. A good crop is in prospect particularly in South Africa, the largest wheat producer in the sub-region. In Zimbabwe, production of wheat is forecast to be substantially higher than last year at 275 000 tonnes, reflecting larger plantings, but below the average of the past five years. In aggregate, the sub-regional wheat output is forecast at 2.7 million tonnes.

Planting of the 2001/02 crops has started. Normal to above normal precipitation in September and October in most countries of the sub-region allowed planting of the coarse grain crops, to be harvested from next April, and benefited establishment of early sown crops. The sub-region's 2001 coarse grain production is estimated at 14.7 million tonnes, a decline of 24.1 percent over 2000 and below average. This is the result of a decline in the area planted, coupled with unfavourable weather conditions. A prolonged mid-season dry spell and excessive rains during the growing season adversely affected yields. Production of maize, the main staple in the sub-region, declined substantially in all countries except Mozambique and Angola. The overall food supply situation is tight and food assistance is needed for populations affected by a poor harvest in Malawi, Mozambique, Zambia and Zimbabwe. In Angola, needed food assistance is needed for large numbers of internally displaced people. By contrast, in Madagascar, the overall food supply situation has improved substantially following a bumper paddy harvest coupled with large carry-over stocks.

The aggregate cereal import requirement for marketing year 2001/2002 (May/April) is estimated at 4.5 million tonnes. With commercial imports expected to reach 4.1 million tonnes, food aid requirements amount to 0.4 million tonnes.

In **western Africa**, FAO/CILSS Crop Assessment Missions in October 2001 to the nine CILSS member countries estimated aggregate 2001 cereal production at around 11.7 million tonnes, well above 2000 production and above the average of the last five years. Record crops have been gathered in Burkina Faso, The Gambia and Niger. Production is well above average in Chad, Mali and Senegal, but prospects are less favourable for Cape Verde, Mauritania and Guinea-Bissau as compared to last year. These estimates should be viewed as preliminary, as the national surveys include forecasts for recession and off-season crops yet to be planted. The estimates may, therefore, be revised in the coming months, but it is unlikely that there will be a significant change in the overall picture.

The aggregate cereal import requirement in the 2001/02 marketing year (November/October) of the nine Sahelian countries is estimated at about 2.1 million tonnes and the food aid requirement at 0.1 million tonnes, mainly in wheat and rice.

In the coastal countries along the Gulf of Guinea, estimates of the 2001 cereal production are not yet available. Harvest prospects are mixed in Côte d'Ivoire, Ghana, Nigeria and Togo, following reduced rains in September. They are favourable in Guinea following good rains except in the areas affected by floods in Haute Guinée or by rebel activity in border areas. Rice production should increase in Liberia and Sierra Leone following an improvement in the security situation. For the coastal countries, which have a January/December marketing year, the aggregate 2001 cereal import requirement was estimated at 5.3 million tonnes. Commercial imports are estimated at 5.05 million tonnes, while food aid needs are estimated at 0.2 million tonnes. Food aid pledges reported to GIEWS as of end-November 2001 amount to 206 000 tonnes.

LOCUST SITUATION

The Desert Locust situation remained mostly calm during 2001 growing season. In western Africa, isolated adults were reported in western Mauritania and northern Niger where small-scale breeding was in progress in a few places. Scattered adults are expected to appear and lay on a limited scale in northwestern Mauritania where unusually heavy rains fell in late September. Although no significant developments are expected, regular surveys are recommended in the above areas.

In eastern Africa, summer breeding has probably ended in the interior of Sudan where little rain fell in October and vegetation is drying out. Low numbers of adults are likely to appear and lay on the Red Sea coast, primarily in the Tokar Delta of Sudan, which received heavy rainfall in late October, and to a lesser extent on the surrounding plains as far south as northern Eritrea.

In **central Africa**, crop prospects are generally favourable in Central African Republic and Cameroon. Agriculture is steadily recovering in the Republic of Congo following civil disturbances in 1998 and 1999. Persistent civil strife in the Democratic Republic of Congo continues to hamper agricultural and marketing activities. The food and health situation of over 2.5 million internally displaced people gives cause for serious concern.

For the countries of the sub-region which have a January/December marketing year, the 2001 cereal import requirement is estimated at 846 000 tonnes. The food aid requirement, estimated at 40 000 tonnes, is fully covered.

The table below summarises sub-Saharan Africa's cereal import and food aid requirements by sub-region.

Sub-Saharan Africa: Cereal Import and Food Aid Requirements by Sub-Region (in thousand tonnes)

Sub-Region	2000 Production	2000/01 or 2001		
		Cereal import requirements	Anticipated commercial imports	Food aid Requirements
Eastern Africa	20 141	5 982	3 794	2 188
Southern Africa	23 826	4 419	3 950	469
Western Africa	36 047	7 372	6 941	431
Central Africa	2 858	846	806	40
TOTAL	82 872	18 619	15 491	3 128

Table 1: Cereal Imports and Food Aid Requirements in 2001/02 for Sub-Saharan Africa Countries

which have entered their 2001/02 marketing year (in thousand tonnes)

Sub-Region/ Country	Marketing year	2001 Cereal production 1/		Position for 2001/02						
		Total	As %of average of previous 5 years	Cereal import require- ments 2/	Antici- pated com- mer- cial imports	Food aid require- ments	Cereal import position			
							Commer- cial imports already made or contracted	Pledges	of which received so far	Uncov. food aid require- ments
Eastern Africa		12 379	113	3 265	2 551	714	7	174	99	555
Kenya	Oct./Sept.	3 202	122	1 200	751	449	-	93	56	356
Somalia	Aug./July	191	71	310	225	85	-	14	6	71
Sudan	Nov./Oct.	5 193	123	1 415	1 275	140	-	13	-	127
Tanzania	June/May	3 793	100	340	300	40	7	55	38	
Southern Africa		19 336	87	4 518	4 148	370	562	277	99	108
Angola	April/March	533	103	581	405	176	13	124	87	52
Botswana	April/March	10	26	263	263	-	53	-	-	
Lesotho	April/March	80	42	332	327	5	59	-	-	5
Madagascar	April/March	1 937	104	195	188	7	-	34	6	
Malawi	April/March	1 823	90	274	255	19	180	6	-	
Mozambique	April/March	1 516	100	499	387	112	61	113	6	
Namibia	May/April	107	100	125	125	-	23	-	-	
South Africa	May/April	10 264	85	1 306	1 306	-	155	-	-	
Swaziland	May/April	74	62	123	123	-	18	-	-	
Zambia	May/April	1 133	94	268	217	51	-	-	-	51
Zimbabwe	April/March	1 859	77	552	552	-	-	-	-	
Western Africa		11 200	123	2 050	1 917	133	-	67	-	84
Sahelian countries		11 200	123	2 050	1 917	133	-	67	-	84
Burkina Faso	Nov./Oct.	2 762	124	170	150	20	-	13	-	7
Cape Verde	Nov./Oct.	19	146	93	45	48	-	7	-	42
Chad	Nov./Oct.	1 202	116	65	55	10	-	-	-	10
Gambia	Nov./Oct.	186	151	123	120	3	-	2	-	1
Guinea-Bissau	Nov./Oct.	135	107	70	60	10	-	-	-	10
Mali	Nov./Oct.	2 597	117	90	85	5	-	2	-	3
Mauritania	Nov./Oct.	141	101	279	257	22	-	11	-	11
Niger	Nov./Oct.	3 132	132	320	315	5	-	21	-	
Senegal	Nov./Oct.	1 026	120	840	830	10	-	11	-	
TOTAL		42 915	102	9 833	8 616	1 217	569	517	199	746

1/ Including rice in milled equivalent.

2/ Excluding re-exports.

Table 2: Cereal Imports and Food Aid Requirements in Sub-Saharan Africa, 2000/01 or 2001 (in thousand tonnes)

Sub-Region/ Country	Marketing year	2000 Cereal production 1/		1999/00 or 2000 imports			Position for 2000/01 or 2001						
		Total	As % of average of previous 5 years	Total imports	As % of average of previous 5 years	Food aid	Cereal import require- ment 2/	Antici- pated commer- cial imports	Food aid require- ment	Commer- cial imports already made or contracted	Food aid		
											Pledges 3/	of which received so far	Uncov. food aid require- ments
Countries still in 2000/01 or 2001 marketing year													
Eastern Africa		11 101	102	2 071	163	1 575	1 488	452	1 036	126	1 187	919	67
Burundi	Jan./Dec.	254	98	70	149	9	106	50	56	41	26	22	30
Comoros	Jan./Dec.	6	100	46	104	-	46	46	-	5	-	-	-
Djibouti	Jan./Dec.	-	-	68	75	10	68	55	13	10	8	8	5
Eritrea	Jan./Dec.	71	33	364	183	218	281	68	213	32	232	142	-
Ethiopia 4/	Jan./Dec.	8 938	106	1 213	236	1 107	690	45	645	26	832	672	-
Rwanda	Jan./Dec.	236	129	219	81	175	175	115	60	3	28	25	32
Seychelles	Jan./Dec.	-	-	13	102	-	13	13	-	-	-	-	-
Uganda	Jan./Dec.	1 596	90	78	83	57	109	60	49	10	60	50	-
Southern Africa		2	100	314	128	-	248	248	-	233	-	-	-
Mauritius	Jan./Dec.	2	100	314	128	-	248	248	-	233	-	-	-
Western Africa		27 184	104	5 175	133	245	5 278	5 046	232	3 087	206	94	87
Coastal countries		27 184	104	5 175	133	245	5 278	5 046	232	3 087	206	94	87
Benin	Jan./Dec.	985	120	155	123	6	113	102	11	69	13	9	-
Côte d'Ivoire	Jan./Dec.	1 408	118	1 222	198	17	858	851	7	654	5	5	2
Ghana	Jan./Dec.	1 679	101	526	125	95	490	460	30	253	86	6	-
Guinea	Jan./Dec.	810	119	273	74	1	347	317	30	19	31	24	-
Liberia	Jan./Dec.	94	90	204	94	102	200	160	40	19	12	11	28
Nigeria	Jan./Dec.	21 381	102	2 562	146	-	2 820	2 820	-	1 996	-	-	-
Sierra Leone	Jan./Dec.	142	56	154	60	20	360	250	110	16	53	40	57
Togo	Jan./Dec.	685	107	78	57	4	90	86	4	63	6	-	-
Central Africa		2 858	99	1 031	136	61	846	806	40	340	67	56	-
Cameroon	Jan./Dec.	1 237	101	302	114	3	300	297	3	174	6	6	-
Cent.Afr.Rep.	Jan./Dec.	132	100	43	127	3	33	31	2	14	1	1	-
Congo, Dem. Rep of	Jan./Dec.	1 452	97	300	122	39	250	244	6	29	21	21	-
Congo, Rep. of	Jan./Dec.	4	100	252	219	11	155	128	27	81	33	28	-
Equat. Guinea	Jan./Dec.	-	-	18	148	1	10	10	-	6	2	-	-
Gabon	Jan./Dec.	33	118	104	138	1	87	87	-	37	-	-	-
Sao Tome	Jan./Dec.	-	-	12	107	4	11	9	2	-	4	1	-
Sub-total		41 145	103	8 591	139	1 881	7 860	6 552	1 308	3 786	1 460	1 069	154
Countries which have entered their 2001/02 marketing year													
Eastern Africa		9 040	80	3 761	180	368	4 494	3 342	1 152	3 938	524	511	636
Kenya	Oct./Sept.	2 085	73	1 609	150	119	2 164	1 401	763	1 872	301	301	462
Somalia	Aug./July	321	124	310	138	36	203	176	27	169	34	34	-
Sudan	Nov./Oct.	3 330	79	1 318	250	144	1 437	1 225	212	1 386	170	157	42
Tanzania	June/May	3 304	82	524	193	70	690	540	150	511	18	18	132
Southern Africa		23 824	117	4 689	116	383	4 171	3 702	469	3 799	424	424	202
Angola	April/March	506	107	641	135	154	753	420	333	441	199	199	134
Botswana	April/March	21	49	250	126	-	250	250	-	250	-	-	-
Lesotho	April/March	148	84	265	142	3	248	248	-	225	3	3	-
Madagascar	April/March	1 725	91	174	112	6	518	426	92	369	24	24	68
Malawi	April/March	2 432	128	112	47	68	60	60	-	12	30	30	-
Mozambique	April/March	1 425	98	336	103	125	413	370	43	271	158	158	-
Namibia	May/April	140	154	132	139	1	100	100	-	81	1	1	-
South Africa	May/April	13 447	123	1 923	112	-	1 571	1 571	-	1 859	-	-	-
Swaziland	May/April	87	74	73	100	-	88	88	-	87	-	-	-
Zambia	May/April	1 460	135	443	160	23	64	63	1	64	4	4	-
Zimbabwe	April/March	2 433	114	340	116	5	106	106	-	140	4	4	-
Western Africa		8 863	96	2 110	106	183	2 094	1 895	199	2 431	174	130	47
Sahelian countries		8 863	96	2 110	106	183	2 094	1 895	199	2 431	174	130	47
Burkina Faso	Nov./Oct.	2 251	93	172	103	35	210	165	45	217	26	17	19
Cape Verde	Nov./Oct.	24	218	80	90	50	88	35	53	42	42	35	11
Chad	Nov./Oct.	900	87	61	79	15	85	70	15	69	20	20	-
Gambia	Nov./Oct.	164	152	137	126	5	120	118	2	163	3	1	-
Guinea-Bissau	Nov./Oct.	133	102	65	84	10	72	60	12	43	5	5	7
Mali	Nov./Oct.	2 142	97	107	99	3	90	80	10	108	5	3	5
Mauritania	Nov./Oct.	153	101	274	96	17	285	260	25	295	36	35	-
Niger	Nov./Oct.	2 101	89	353	113	11	377	352	25	622	21	9	4
Senegal	Nov./Oct.	995	116	861	112	38	767	755	12	873	16	6	-
Sub-total		41 727	102	10 560	130	935	10 759	8 939	1 820	10 168	1 122	1 065	884
TOTAL		82 872	102	19 152	134	2 815	18 619	15 491	3 128	13 954	2 582	2 134	1 038

Note : Totals computed from unrounded data.

1/ Including rice in milled equivalent.

2/ Excludes re-exports.

3/ Includes all pledges reported to the GIEWS, whether for free distribution or market sale. However, there may be some cases where governments count some food aid received for market sale against commercial import requirements.

4/ Includes refugee needs.

Table 3: Utilization of 2000/01 or 2001 Cereal Surpluses in Sub-Saharan Africa (in thousand tonnes)

Sub-Region/ Country	Cereal import requirement		Total availabilities for export and/or local purchases	of which local purchase requirement	Surpluses utilized or committed so far			Remain- ing surpluses
	Wheat and rice	Coarse grains			Donor financed local purchases	Exports		
						Commer- cial	Trian- gular trans- actions 1/	
Eastern Africa	3 576	2 406	725	379	130	-	17	579
Burundi	25	81	-	-	-	-	-	-
Comoros	46	-	-	-	-	-	-	-
Djibouti	65	3	-	-	-	-	-	-
Eritrea	228	53	3	3	3	-	-	-
Ethiopia 2/	645	45	500	300	60	-	-	440
Kenya	800	1 364	19	19	19	-	-	-
Rwanda	25	150	2	2	2	-	-	-
Seychelles	7	6	-	-	-	-	-	-
Somalia	132	71	20	4	4	-	-	16
Sudan	1 283	154	20	20	11	-	-	9
Tanzania	240	450	70	20	20	-	17	33
Uganda	80	29	91	11	11	-	-	81
Southern Africa	3 126	1 293	2 014	46	46	1 361	147	460
Angola	359	394	1	1	1	-	-	-
Botswana	65	185	-	-	-	-	-	-
Lesotho	58	190	1	1	1	-	-	-
Madagascar	488	30	3	3	3	-	-	0
Malawi	60	-	357	6	6	-	1	350
Mauritius	228	20	-	-	-	-	-	-
Mozambique	310	103	77	17	17	-	-	60
Namibia	40	60	-	-	-	-	-	-
South Africa	1 300	271	1 507	-	-	1 361	146	-
Swaziland	48	40	-	-	-	-	-	-
Zambia	64	-	68	18	18	-	-	50
Zimbabwe	106	-	-	-	-	-	-	-
Western Africa	6 804	568	347	29	25	-	-	322
Coastal countries	5 097	181	286	1	1	-	-	285
Benin	112	1	71	1	1	-	-	70
Côte d'Ivoire	850	8	10	-	-	-	-	10
Ghana	440	50	5	-	-	-	-	5
Guinea	335	12	-	-	-	-	-	-
Liberia	190	10	-	-	-	-	-	-
Nigeria	2 750	70	200	-	-	-	-	200
Sierra Leone	330	30	-	-	-	-	-	-
Togo	90	-	-	-	-	-	-	-
Sahelian countries	1 707	387	61	28	24	-	-	37
Burkina Faso	160	50	25	5	3	-	-	22
Cape Verde	53	35	-	-	-	-	-	-
Chad	70	15	-	-	2	-	-	-
Gambia	120	-	-	-	-	-	-	-
Guinea-Bissau	67	5	-	-	-	-	-	-
Mali	90	-	20	8	8	-	-	12
Mauritania	270	15	1	-	-	-	-	1
Niger	147	230	10	10	10	-	-	-
Senegal	730	37	5	5	1	-	-	4
Central Africa	764	82	8	3	3	-	-	5
Cameroon	290	10	6	1	1	-	-	5
Cent.Afr.Rep.	30	3	-	-	-	-	-	-
Congo, Dem.Rep.of	190	60	1	1	1	-	-	-
Congo, Rep. of	150	5	1	1	1	-	-	-
Equat.Guinea	10	-	-	-	-	-	-	-
Gabon	85	2	-	-	-	-	-	-
Sao Tome	9	2	-	-	-	-	-	-
TOTAL	14 270	4 349	3 094	457	204	1 361	164	1 365

Note: Totals computed from unrounded data.

1/ Referring to supplying countries

2/ Includes refugee needs.

**Table 4 - Triangular Transactions within Sub-Saharan Africa in 2000/01 or 2001
(in thousand tonnes) 1/**

Donor	Source of supply	Recipient Country	Total by donor
EC	Côte d'Ivoire South Africa	Burkina Faso (0.5) Angola (0.3)	0.8
NGOs	Kenya South Africa	Somalia (0.1) Angola (0.4)	0.5
WFP	Malawi South Africa	Mozambique (0.7), Zambia (0.5) Angola (6.8), Burundi (1.0), Chad (0.9), Kenya (33.5), Lesotho (0.9), Madagascar (3.6), Mali (0.6), Mozambique (25.5), Namibia (0.6), Rwanda (9.8), Somalia (6.4), Sudan (2.7), Zambia (0.9)	94.4
TOTAL			95.7

1/ Based on information reported by donors to GIEWS as of end November 2001.

**Table 5 - Local Purchases within Sub-Saharan Africa in 2000/01 or 2001
(in thousand tonnes) 1/**

Donor	Recipient Country	Total by donor
EC	Ethiopia (16.0), Kenya (2.0), Madagascar (1.1), Mali (0.8), Zambia (4.1), Zimbabwe (0.3)	24.3
Germany	Congo Rep. of (1.5), Congo Dem. Rep. (0.6), Ethiopia (1.2), Kenya (4.0), Malawi (2.0), Rwanda (0.7), Sudan (0.1)	10.1
NGOs	Eritrea (3.1), Kenya (0.1), Somalia (4.4)	7.6
Switzerland	Madagascar (0.6)	0.6
WFP	Angola (0.9), Benin (0.7), Burkina Faso (3.2), Cameroon (0.6), Chad (1.7), Congo, Dem.Rep. of (0.3), Ethiopia (43.1), Gambia (0.2), Kenya (12.8), Lesotho (0.8), Madagascar (1.7), Malawi (4.4), Mali (7.5), Mozambique (17.2), Namibia (0.2), Niger (10.4), Rwanda (0.9), Senegal (0.6), Sudan (10.7), Tanzania (19.6), Uganda (10.5), Zambia (13.6)	161.6
TOTAL		204.2

1/ Based on information reported by donors to GIEWS as of end November 2001.

Table 6: Availabilities for Export and Local Purchase Requirements in Cereals in Sub-Saharan Africa

Current position (in thousand tonnes)

Sub-Region / Country	Availabilities for export		Local Purchase Requirements	
	Total	Contracted so far	Total	Utilized so far
<i>Countries still in 2000/01 or 2001 marketing year</i>				
Eastern Africa	280	-	316	76
Eritrea	-	-	3	3
Ethiopia	200	-	300	60
Rwanda	-	-	2	2
Uganda	80	-	11	11
Western Africa	285	-	1	1
Coastal countries	285	-	1	1
Benin	70	-	1	1
Côte d'Ivoire	10	-	-	-
Ghana	5	-	-	-
Nigeria	200	-	-	-
Central Africa	5	-	3	3
Cameroon	5	-	1	1
Congo, Dem.Rep.of	-	-	1	1
Congo, Rep.of	-	-	1	1
Sub-total	570	-	320	80
<i>Countries which have entered their 2001/02 marketing year</i>				
Eastern Africa	150	-	231	20
Kenya	-	-	1	1
Sudan	150	-	200	-
Tanzania	-	-	30	19
Western Africa	81	-	50	-
Sahelian countries	81	-	50	-
Burkina Faso	45	-	20	-
Chad	20	-	20	-
Mali	-	-	10	-
Mauritania	1	-	-	-
Niger	15	-	-	-
Southern Africa	2 200	150	50	50
Angola	-	-	5	5
Lesotho	-	-	2	2
Madagascar	-	-	3	3
Malawi	-	-	15	15
Mozambique	100	-	8	8
Namibia	-	-	2	2
South Africa	2 100	150	-	-
Zambia	-	-	15	15
Sub-total	2 431	150	331	70
TOTAL	3 001	150 1/	651	150

Note: Totals computed from unrounded data.

1/ Commercial exports only.

Table 7: Cereal Food Aid Pledges to Sub-Saharan Africa for 2000/01 or 2001 and Triangular

Transactions/Local Purchases known to FAO as of end November 2001 (in thousand tonnes).

Donor	Wheat	Rice	Coarse grains	Total cereals	Of which: triangular	Local purchases
Canada	16.8	-	-	16.8	-	-
China	-	3.5	-	3.5	-	-
EC	267.4	12.6	35.9	315.9	0.8	34.4
of which:						
Community action	208.6	3.2	10.5	222.3	0.8	24.3
National action	58.8	9.4	25.4	93.6	-	10.1
Austria	3.3	-	-	3.3	-	-
Belgium	5.5	-	-	5.5	-	-
France	35.0	-	1.0	36.0	-	-
Germany	0.2	0.6	16.5	17.3	-	10.1
Italy	11.0	3.6	7.9	22.5	-	-
Luxembourg	2.0	1.4	-	3.4	-	-
Netherlands	-	-	-	0.0	-	-
Spain	1.8	3.8	-	5.6	-	-
Japan	-	69.3	-	69.3	-	-
NGOs	7.1	0.5	0.2	7.8	0.5	7.6
Switzerland	-	-	-	-	-	0.6
United States	675.9	62.0	165.9	903.8	-	-
World Food Programme	526.7	27.4	710.6	1 264.7	94.4	161.6
TOTAL	1 493.9	175.3	912.6	2 581.8	95.7	204.2

Note: Totals computed from unrounded data

Table 8: Food Aid Pledges in Cereals for 2000/01 or 2001 by Donor and by Recipient (in thousand tonnes)

Donor/Recipient	Total	delivered	Canada	China	EC	Japan	NGOs	U.S.A.	WFP
Eastern Africa	1 710.6	1 429.3	2.5	-	248.3	-	7.2	459.5	993.1
Burundi	26.4	22.0	-	-	1.4	-	-	3.0	22.0
Comoros	-	-	-	-	-	-	-	-	-
Djibouti	8.1	8.1	-	-	-	-	-	-	8.1
Eritrea	232.0	141.7	-	-	34.9	-	-	90.3	106.8
Ethiopia 1/	832.3	672.3	2.5	-	208.5	-	5.1	289.0	327.2
Kenya	301.1	301.1	-	-	-	-	2.0	0.1	299.0
Rwanda	27.8	24.9	-	-	1.2	-	-	7.6	19.0
Seychelles	-	-	-	-	-	-	-	-	-
Somalia	34.4	34.4	-	-	2.3	-	0.1	12.0	20.0
Sudan	170.0	157.1	-	-	-	-	-	24.3	145.7
Tanzania	18.1	18.1	-	-	-	-	-	-	18.1
Uganda	60.4	49.6	-	-	-	-	-	33.2	27.2
Southern Africa	424.2	424.2	14.3	-	31.8	23.9	0.6	194.6	159.0
Angola	199.1	199.1	-	-	22.1	-	0.6	75.6	100.8
Botswana	-	-	-	-	-	-	-	-	-
Lesotho	3.1	3.1	-	-	2.2	-	-	-	0.9
Madagascar	24.4	24.4	-	-	0.2	10.0	-	5.7	8.5
Malawi	29.9	29.9	14.3	-	-	-	-	12.9	2.7
Mauritius	-	-	-	-	-	-	-	-	-
Mozambique	158.0	158.0	-	-	1.1	13.9	-	100.4	42.6
Namibia	1.4	1.4	-	-	-	-	-	-	1.4
South Africa	-	-	-	-	-	-	-	-	-
Swaziland	-	-	-	-	-	-	-	-	-
Zambia	3.9	3.9	-	-	1.8	-	-	-	2.1
Zimbabwe	4.4	4.4	-	-	4.4	-	-	-	-
Western Africa	380.0	224.0	-	3.5	35.4	42.3	-	213.2	85.6
Coastal countries	205.9	93.7	-	-	0.2	19.3	-	139.9	46.5
Benin	12.9	8.5	-	-	-	4.4	-	8.5	-
Côte d'Ivoire	5.2	4.5	-	-	-	-	-	4.5	0.7
Ghana	86.2	5.7	-	-	-	8.5	-	76.9	0.8
Guinea	30.7	24.1	-	-	0.2	6.4	-	4.0	20.1
Liberia	11.8	10.6	-	-	-	-	-	6.2	5.6
Nigeria	-	-	-	-	-	-	-	-	-
Sierra Leone	53.1	40.3	-	-	-	-	-	33.8	19.3
Togo	6.0	-	-	-	-	-	-	6.0	-
Sahelian countries	174.1	130.3	-	3.5	35.2	23.0	-	73.3	39.1
Burkina Faso	25.6	16.5	-	-	1.3	7.4	-	16.9	-
Cape Verde	42.0	35.0	-	-	20.5	3.6	-	17.9	-
Chad	20.0	20.0	-	-	-	-	-	3.1	16.9
Gambia	2.9	1.2	-	-	-	-	-	1.9	1.0
Guinea-Bissau	5.3	5.3	-	3.5	-	-	-	-	1.8
Mali	4.9	2.7	-	-	1.3	-	-	3.0	0.6
Mauritania	36.4	35.0	-	-	12.1	6.4	-	9.6	8.3
Niger	20.6	8.9	-	-	-	-	-	11.9	8.7
Senegal	16.4	5.7	-	-	-	5.6	-	9.0	1.8
Central Africa	491.2	56.4	-	-	0.4	3.1	-	36.5	27.0
Cameroon	6.1	6.1	-	-	-	-	-	5.0	1.1
Cent.Afr.Rep.	0.6	0.6	-	-	-	-	-	-	0.6
Congo, Dem.Rep.of	21.2	21.2	-	-	0.4	-	-	0.4	20.4
Congo, Rep.of	33.2	27.7	-	-	-	-	-	29.6	3.6
Equat. Guinea	1.5	-	-	-	-	-	-	1.5	-
Gabon	-	-	-	-	-	-	-	-	-
Sao Tome	4.4	0.8	-	-	-	3.1	-	-	1.3
TOTAL	2 581.8	2 133.9	16.8	3.5	315.9	69.3	7.8	903.8	1 264.7

1/ Includes refugee needs.

**PART III : CROP PROSPECTS AND FOOD SUPPLY POSITION
IN INDIVIDUAL COUNTRIES**

(situation as of late November 2001)

ANGOLA

Area:	1 247 000 sq.km
Climate:	Coastal desert, south-west semi-arid, rest tropical wet-dry. Rainy season: Sept.-May
Population:	13.76 million (2001 estimate), G.N.P. per caput US\$240 (2000)
Specific characteristics of the country:	Low-income food-deficit country; infrastructure devastated by prolonged civil strife
Logistics:	Inadequate port, rail and road facilities
Major foodcrops:	Roots, tubers, maize, plantains
Marketing year:	April/March; Lean season: January-April
Share of cereals in total calorie intake:	35 percent

CURRENT SITUATION

Below-average precipitation during October, particularly in central parts, has delayed planting of 2002 maize and stressed earlier sown crops. Better rains are needed to avoid reductions in plantings and yields of maize and for the sowing of the millet and sorghum crops in southern parts. Agricultural activities are also hindered by renewed fighting in most of the provinces, mainly in the unstable areas of Bié, northeastern parts of Huila, Moxico, Malange, Huambo and Uige, and the resulting displacement of rural people from their farms. The flare up of military activity has also further limited the distribution of humanitarian assistance outside the provincial capitals.

Aggregate cereal production in 2001 rose by 5 percent from the previous year to 535 000 tonnes due to an increase in the area sown and generally favourable weather. However, despite the improvement in domestic production, the food supply situation remains difficult for 2.7 million IDPs and other vulnerable sections of the population. An FAO/WFP Mission in May 2001 estimated that about 1.34 million people were still in need of emergency food aid.

The cereal import requirement in the 2001/02 marketing year (April/March) is estimated at 581 000 tonnes of cereals, including 176 000 tonnes of food aid. Due to resource constraints, WFP is not reaching all the target beneficiaries and has frequently reduced food rations. The currently assisted population amounts to 820 000 beneficiaries. WFP estimates that there will be a critical shortfall of sugar in December and that maize and pulses will be exhausted by February 2002. There is also a shortfall in the funding of transport logistics and non-food items. This funding is crucial for the transport of seeds and tools to support food production during the current cropping season.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	6	525	531
Previous five years average imports	266	95	172	533
<u>2001/02 Domestic Availability</u>	<u>25</u>	<u>7</u>	<u>528</u>	<u>560</u>
2001 Production (rice in paddy terms)	-	7	528	535
2001 Production (rice in milled terms)	-	5	528	533
Possible stock drawdown	25	2	-	27
<u>2001/02 Utilization</u>	<u>275</u>	<u>114</u>	<u>752</u>	<u>1 141</u>
Food use	271	111	662	1 044
of which: local purchase requirement	-	-	5	5
Non-food use	4	3	79	86
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	11	11
<u>2001/02 Import Requirement</u>	<u>250</u>	<u>107</u>	<u>224</u>	<u>581</u>
Anticipated commercial imports	250	107	48	405
Food aid needs	-	-	176	176
<u>Current Aid Position</u>				
Food aid pledges	15	16	93	124
of which: delivered	-	-	87	87
Donor-financed purchases	-	-	5	5
of which: for local use	-	-	5	5
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>20</u>	<u>8</u>	<u>48</u>	<u>76</u>
<u>Indexes</u>				
2001 Production as % of average:				101
2001/02 Import requirement as % of average:				109

BENIN

Area:	111 000 sq.km
Climate:	Tropical wet-dry; two rainy seasons in south (Mar.-Jul. and Oct.) and one in north (May-Oct.)
Population:	6.26 million (2001 estimate); G.N.P. per caput US\$380 (2000)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports, roads, rail adequate; gateway to Niger
Major foodcrops:	Roots and tubers, maize
Marketing year:	January/December; Lean season: April-June
Share of cereals in total calorie intake:	37 percent

CURRENT SITUATION

The rainy season is drawing to a close. Rains ceased in the north in mid-October and millet and sorghum are being harvested. The second maize crop is developing satisfactorily in the south. Crop prospects are generally favourable.

The overall food supply situation is satisfactory. The arrival of the recently harvested cereals on the markets increased supplies and prices started to decrease. Cereal imports for domestic use and re-exports during the 2001 marketing year are estimated at 138 000 tonnes and food aid requirements at 11 000 tonnes.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	27	798	825
Previous five years average imports	48	121	5	174
<u>2001 Domestic Availability</u>	48	148	803	999
2000 Production (rice in paddy terms)	-	52	953	1 006
2000 Production (rice in milled terms)	-	31	953	985
Possible stock drawdown	-	-	-	-
<u>2001 Utilization</u>	55	114	954	1 123
Food use	49	86	625	760
of which: local purchase requirement	-	-	1	1
Non-food use	1	8	234	243
Exports or re-exports	5	20	70	95
Possible stock build up	-	-	25	25
<u>2001 Import Requirement</u>	55	83	1	138^{1/}
Anticipated commercial imports	52	75	-	127
Food aid needs	3	8	1	11
<u>Current Aid Position</u>				
Food aid pledges	3	9	1	13
of which: delivered	1	8	1	9
Donor-financed purchases	-	-	1	1
of which: for local use	-	-	1	1
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	8	14	100	121
<u>Indexes</u>				
2000 Production as % of average:				122
2001 Import requirement as % of average:				79

^{1/} Includes 5 000 tonnes of wheat and 20 000 tonnes of re-exports of rice.

BOTSWANA

Area:	567 000 sq.km
Climate:	South-western part arid (Kalahari desert); rest semi-arid with some rains in Dec.-Feb.
Population:	1.66 million (2001 estimate); G.N.P. per caput: US\$3 300 (2000)
Specific characteristics of the country:	East; swamps in the northern parts; desert in the west
Logistics:	Imports through South Africa
Major foodcrops:	Sorghum, pulses, vegetables
Marketing year:	April/March; Lean season: January-March
Share of cereals in total calorie intake:	55 percent

CURRENT SITUATION

Abundant rains in western crop growing areas in the second and third dekads of October improved soil conditions for planting of the 2002 maize and sorghum crops about to start. The rains also improved pasture and livestock conditions throughout the country.

Production of cereals in 2001, mainly sorghum, is estimated at 10 000 tonnes, only half of last year's crop and well below average, as a result of a mid-season dry spell. However, even in normal years, the country imports the bulk of its cereal consumption requirements. Import requirements in marketing year 2001/02 (April/March) are estimated at 263 000 tonnes, including 197 000 tonnes of coarse grains and 66 000 tonnes of wheat. While these requirements are expected to be covered on commercial basis, food difficulties are anticipated at household level in areas affected by crop loss.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	-	32	32
Previous five years average imports	64	-	163	227
<u>2001/02 Domestic Availability</u>	-	-	15	15
2001 Production (rice in paddy terms)	-	-	10	10
2001 Production (rice in milled terms)	-	-	10	10
Possible stock drawdown	-	-	5	5
<u>2001/02 Utilization</u>	66	-	212	278
Food use	59	-	210	269
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	2	2
Exports or re-exports	7	-	-	7
Possible stock build up	-	-	-	-
<u>2001/02 Import Requirement</u>	66	-	197	263
Anticipated commercial imports	66	-	197	263
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>	36	-	127	162
<u>Indexes</u>				
2001 Production as % of average:				31
2001/02 Import requirement as % of average:				116

BURKINA FASO

Area:	274 000 sq.km
Climate:	Tropical wet-dry in south, semi-arid in north; rainy season: May-October
Population:	11.74 million (2002 estimate); G.N.P. per caput: US\$230 (2000)
Specific characteristics of the country:	Low-income food-deficit country; Sahelian land-locked country
Logistics:	Roads inadequate during rainy season; adequate rail link to Abidjan (Côte d'Ivoire)
Major foodcrops:	Millet, sorghum, pulses, maize
Marketing year:	November/October; Lean season: July-September
Share of cereals in total calorie intake:	73 percent

CURRENT SITUATION

The rainy season is over. Rains ceased somewhat early in late September in the north and the centre, thus reducing yield potential for coarse grains which were in the critical grain-filling/maturation stage. Rains were limited in the west in early October and almost completely ceased in mid-October. In the agro-pastoral areas, pastures are abundant while most dams and water points have been refilled. A joint FAO/CILSS Crop Assessment Mission which visited the country in late October estimated with national services the aggregate output of cereals in 2001 at 2 796 000 tonnes. This is 22 percent above the previous year's level and 15 percent above average.

Following this good harvest, the overall food supply is expected to improve from the precarious situation during the lean season following the 2000 reduced harvest in several areas. The national security stock which was depleted by food aid distributions or sales at subsidized prices, is expected to be reconstituted to its optimal level of 35 000 tonnes. However, localized food supply difficulties may persist in some areas affected by poor crops due to the early end of the season.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	98	2 330	2 428
Previous five years average imports	63	110	19	192
<u>2001/02 Domestic Availability</u>	-	76	2 696	2 772
2001 Production (rice in paddy terms)	-	100	2 696	2 796
2001 Production (rice in milled terms)	-	66	2 696	2 762
Possible stock drawdown	-	10	-	10
<u>2001/02 Utilization</u>	60	186	2 696	2 942
Food use	59	174	2 115	2 348
of which: local purchase requirement	-	-	20	20
Non-food use	1	12	416	429
Exports or re-exports	-	-	45	45
Possible stock build up	-	-	120	120
<u>2001/02 Import Requirement</u>	60	110	-	170
Anticipated commercial imports	50	100	-	150
Food aid needs	10	10	-	20
<u>Current Aid Position</u>				
Food aid pledges	2	11	-	13
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	5	15	180	200
<u>Indexes</u>				
2001 Production as % of average:				115
2001/02 Import requirement as % of average:				89

BURUNDI

Area:	25 700 sq.km
Climate:	Highland rainy climate with moderate temperature (20°C); two rainy seasons: Feb.-May and Sept.-Nov.
Population:	6.66 million (2001 estimate); G.N.P. per caput: US\$110 (2000)
Specific characteristics of the country:	Low-income food-deficit country; land-locked country
Logistics:	Ports: Mombasa (Kenya) and Dar es Salaam (Tanzania); rail and road connections inadequate
Major foodcrops:	Pulses, plantains, roots, tubers, maize and sorghum
Marketing year:	January/December; Lean season: November-December
Share of cereals in total calorie intake:	34 percent

CURRENT SITUATION

Normal to above-normal rainfall in September and October, particularly in northern parts, favoured planting of the 2002 A season crops, to be harvested from January, and benefited earlier planted crops. Future prospects for peace are also good, following the formation of a new power-sharing Government on 1 November.

The outcome of the 2001 B season foodcrops season was satisfactory. Aggregate food production increased by 10 percent from the level of the previous year. Cereal output was 10 percent higher than in 2000 B season, while pulses increased by 24 percent. The outcome reflects generally good rains, improved security conditions at planting and timely distribution of seeds by international agencies. The output of the 2001 A season, harvested early in the year, was also good.

The overall food supply situation has improved with the increase in food production in 2001. However, the food and nutritional situation of 432 000 internally displaced and other vulnerable population remains critical. Emergency food aid will still be required for these populations until the next harvest.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	10	45	237	292
Previous five years average imports	21	4	28	53
<u>2001 Domestic Availability</u>	13	63	183	259
2000 Production (rice in paddy terms)	10	95	181	286
2000 Production (rice in milled terms)	10	63	181	254
Possible stock drawdown	3	-	2	5
<u>2001 Utilization</u>	38	63	264	365
Food use	38	48	230	316
of which: local purchase requirement	-	-	-	-
Non-food use	-	10	34	44
Exports or re-exports	-	-	-	-
Possible stock build up	-	5	-	5
<u>2001 Import Requirement</u>	25	-	81	106
Anticipated commercial imports	20	-	30	50
Food aid needs	5	-	51	56
<u>Current Aid Position</u>				
Food aid pledges	-	-	26	26
of which: delivered	-	-	22	22
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	6	7	35	48
<u>Indexes</u>				
2000 Production as % of average:				98
2001 Import requirement as % of average:				200

CAMEROON

Area:	465 000 sq.km
Climate:	North: tropical wet-dry, south: tropical wet; length of rainy season declines from 11 months in south to 4 months in extreme north
Population:	15.49 million (2001 estimate); G.N.P. per caput: US\$570 (2000)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports and roads adequate; gateway to Chad
Major foodcrops:	Roots and tubers, coarse grains, fruit
Marketing year:	January/December; Lean season: June-August
Share of cereals in total calorie intake:	39 percent

CURRENT SITUATION

Rains ceased in early October in the north. Precipitation was adequate in mid-October in the centre and south but was well below average in the centre in late October. Coarse grains have been harvested in the north and a good output is anticipated. The maize crop is developing satisfactorily in the south.

The overall food supply situation is satisfactory. Cereal imports, including re-exports, during the 2001 marketing year are estimated at 310 000 tonnes, mostly wheat and rice.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	81	1 181	1 262
Previous five years average imports	188	94	13	295
<u>2001 Domestic Availability</u>	<u>0</u>	<u>55</u>	<u>1 211</u>	<u>1 267</u>
2000 Production (rice in paddy terms)	0	81	1 181	1 263
2000 Production (rice in milled terms)	0	55	1 181	1 237
Possible stock drawdown	-	-	30	30
<u>2001 Utilization</u>	<u>200</u>	<u>155</u>	<u>1 221</u>	<u>1 577</u>
Food use	186	145	966	1 298
of which: local purchase requirement	-	-	1	1
Non-food use	4	10	250	264
Exports or re-exports	10	-	5	15
Possible stock build up	-	-	-	-
<u>2001 Import Requirement</u>	<u>200</u>	<u>100</u>	<u>10</u>	<u>310^{1/}</u>
Anticipated commercial imports	200	98	9	307
Food aid needs	-	2	1	3
<u>Current Aid Position</u>				
Food aid pledges	5	-	1	6
of which: delivered	5	-	1	6
Donor-financed purchases	-	-	1	1
of which: for local use	-	-	1	1
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>12</u>	<u>9</u>	<u>62</u>	<u>84</u>
<u>Indexes</u>				
2000 Production as % of average:				100
2001 Import requirement as % of average:				105

^{1/} Includes 10 000 tonnes of re-exports of wheat.

CAPE VERDE

Area:	4 000 sq.km
Climate:	Semi-arid; rainfall increases with altitude; rainy season: July-December
Population:	457 000 (2002 estimate); G.N.P. per caput: US\$1 330 (2000)
Specific characteristics of the country:	Low-income food-deficit country; archipelago
Logistics:	Port capacity and roads adequate
Major foodcrops:	Maize, rice, pulses
Marketing year:	November/October; Lean season: n.a. since 90 percent of requirements covered by imports
Share of cereals in total calorie intake:	57 percent

CURRENT SITUATION

Reduced rains in September severely affected crop development, notably in the two islands of Santo Antao and Sao Nicolau and in the semi-arid zones of Santiago and Fogo islands. A joint FAO/CILSS Crop Assessment Mission in mid-October estimated 2001 production of cereals at 18 680 tonnes against 24 341 tonnes in 2000, a decrease of about 23 percent, but still above the average of the last five years.

As a result of this reduced production, the overall food supply situation will remain tight in several areas. The government has launched an appeal for international food assistance as well as for agricultural inputs.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	-	14	14
Previous five years average imports	21	29	37	87
<u>2001/02 Domestic Availability</u>	-	-	19	19
2001 Production (rice in paddy terms)	-	-	19	19
2001 Production (rice in milled terms)	-	-	19	19
Possible stock drawdown	-	-	-	-
<u>2001/02 Utilization</u>	23	30	59	112
Food use	23	30	51	104
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	3	3
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	5	5
<u>2001/02 Import Requirement</u>	23	30	40	93
Anticipated commercial imports	5	20	20	45
Food aid needs	18	10	20	48
<u>Current Aid Position</u>				
Food aid pledges	-	5	2	7
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	50	66	111	227
<u>Indexes</u>				
2001 Production as % of average:				130
2001/02 Import requirement as % of average:				107

CENTRAL AFRICAN REPUBLIC

Area:	623 000 sq.km
Climate:	North: tropical wet-dry, south: tropical wet; rainy season: March-November
Population:	3.68 million (2001 estimate); G.N.P. per caput: US\$290 (2000)
Specific characteristics of the country:	Low-income food-deficit country; land-locked country
Logistics:	Roads inadequate during rainy season; river transport important
Major foodcrops:	Roots and tubers, tree nuts, coarse grain, fruit
Marketing year:	January/December; Lean season: May-July
Share of cereals in total calorie intake:	21 percent

CURRENT SITUATION

Precipitation remained generally widespread and regular up to mid-October. In late October, rains ceased in the north but remained above normal in the south.

The food supply situation remains satisfactory. However, civil disturbances in the capital, Bangui, in early November may have affected marketing activities. The cereal import requirement for the 2001 marketing year is estimated at 33 000 tonnes, mainly wheat.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	16	121	137
Previous five years average imports	27	4	3	34
<u>2001 Domestic Availability</u>	<u>5</u>	<u>10</u>	<u>123</u>	<u>139</u>
2000 Production (rice in paddy terms)	-	16	121	137
2000 Production (rice in milled terms)	-	10	121	132
Possible stock drawdown	5	-	2	7
<u>2001 Utilization</u>	<u>30</u>	<u>15</u>	<u>126</u>	<u>172</u>
Food use	29	13	108	151
of which: local purchase requirement	-	-	-	-
Non-food use	1	2	18	21
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2001 Import Requirement</u>	<u>25</u>	<u>5</u>	<u>3</u>	<u>33</u>
Anticipated commercial imports	25	5	1	31
Food aid needs	-	-	2	2
<u>Current Aid Position</u>				
Food aid pledges	-	-	1	1
of which: delivered	-	-	1	1
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>8</u>	<u>4</u>	<u>29</u>	<u>41</u>
<u>Indexes</u>				
2000 Production as % of average:				100
2001 Import requirement as % of average:				97

CHAD

Area:	1 259 000 sq.km
Climate:	From north to south: arid, semi-arid and tropical wet-dry; rainy season: May-Oct.
Population:	7.75 million (2002 estimate); G.N.P. per caput: US\$200 (2000)
Specific characteristics of the country:	Low-income food-deficit country; land-locked Sahelian country.
Logistics:	Roads inadequate during rainy season
Major foodcrops:	Millet and sorghum, roots and tubers, tree nuts
Marketing year:	November/October; Lean season: August-September
Share of cereals in total calorie intake:	52 percent

CURRENT SITUATION

After generally above-average precipitation in September, rains ceased in the Sahelian zone in early October and in the Sudanian zone in late October. Pastures are abundant. Prospects for sorghum recession crops are good. A joint FAO/CILSS Crop Assessment Mission which visited the country in mid-October estimated the aggregate output of cereals at a record level of 1 237 250 tonnes, 33 percent above the previous year's level and 15 percent above average.

As a result of this anticipated good harvest, the food supply situation will improve, notably in the deficit areas of the Sahelian zone affected by poor crops in 2000. Prices of cereals decreased significantly in September and October. However, about 143 000 people have been identified as at risk of food difficulties following flooding in areas of the Sudanian zone which caused damage to houses and about 144 000 hectares of farm land. An influx of expellees from Lybia and population displacement from Tibesti are reported in the north. During the lean season, a WFP Emergency Operation provided 27 000 tonnes of food aid to 375 000 beneficiaries in eight departments of the Sahelian zone.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	3	112	959	1 074
Previous five years average imports	55	11	11	77
<u>2001/02 Domestic Availability</u>	<u>9</u>	<u>77</u>	<u>1 122</u>	<u>1 207</u>
2001 Production (rice in paddy terms)	4	112	1 122	1 237
2001 Production (rice in milled terms)	4	77	1 122	1 202
Possible stock drawdown	5	-	-	5
<u>2001/02 Utilization</u>	<u>59</u>	<u>92</u>	<u>1 122</u>	<u>1 272</u>
Food use	58	78	871	1 007
of which: local purchase requirement	-	-	20	20
Non-food use	1	13	211	225
Exports or re-exports	-	-	20	20
Possible stock build up	-	-	20	20
<u>2001/02 Import Requirement</u>	<u>50</u>	<u>15</u>	<u>-</u>	<u>65</u>
Anticipated commercial imports	45	10	-	55
Food aid needs	5	5	-	10
<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>	<u>7</u>	<u>10</u>	<u>112</u>	<u>130</u>
<u>Indexes</u>				
2001 Production as % of average:				115
2001/02 Import requirement as % of average:				84

COMOROS

Area:	2 200 sq.km
Climate:	Tropical wet-dry; one hot rainy season with cyclone probability; June-October dry and cool
Population:	0.785 million (2001 estimate); G.N.P. per caput: US\$380 (2000)
Specific characteristics of the country:	Low-income food-deficit country; archipelago of four small islands
Logistics:	-
Major foodcrops:	Rice, roots, tubers, bananas and coconuts
Marketing year:	January/December
Share of cereals in total calorie intake:	44 percent

CURRENT SITUATION

Most of the country's agricultural land is planted to cash crops, bananas and root crops. Only one-quarter of the cereal requirement is produced locally and, consequently, there is a structural deficit of some 46 000 tonnes of cereals, largely covered by commercial imports.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	3	4	7
Previous five years average imports	6	39	-	45
<u>2001 Domestic Availability</u>	<u>6</u>	<u>42</u>	<u>4</u>	<u>52</u>
2000 Production (rice in paddy terms)	-	3	4	7
2000 Production (rice in milled terms)	-	2	4	6
Possible stock drawdown	-	-	-	-
<u>2001 Utilization</u>	<u>6</u>	<u>42</u>	<u>4</u>	<u>52</u>
Food use	6	40	2	48
of which: local purchase requirement	-	-	-	-
Non-food use	-	2	2	4
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2001 Import Requirement</u>	<u>6</u>	<u>40</u>	<u>-</u>	<u>46</u>
Anticipated commercial imports	6	40	-	46
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>	<u>8</u>	<u>51</u>	<u>3</u>	<u>61</u>
<u>Indexes</u>				
2000 Production as % of average:				100
2001 Import requirement as % of average:				102

CONGO, DEMOCRATIC REPUBLIC OF

Area:	2 268 000 sq.km
Climate:	Tropical wet climate in the central basin, tropical wet-dry in the extreme north and south
Population:	47.12 million (2001 estimate); G.N.P. per caput: US \$ 100 (1998)
Specific characteristics of the country:	Low-income food-deficit country; tropical country with access to sea
Logistics:	Roads inadequate
Major foodcrops:	Roots and tubers, coarse grains, fruit
Marketing year:	January/December; Lean season: October (north), November-December (south)
Share of cereals in total calorie intake:	15 percent

CURRENT SITUATION

Civil strife intensified in eastern parts during the past month. Planting of the 2002 A season crops is underway in the Kivu region but insecurity is hindering farming activities. Serious insecurity incidents have been reported in the Plains of Ruzizi and Uvira in South Kivu province. Systematic looting by armed groups is reported in Kalonge, while movements of troops to Bunyakiri, Hombo and Nyabibwe have resulted in new population displacements. Insecurity is also hampering distribution of humanitarian assistance.

Elsewhere in the country, insecurity has also hindered distribution of food assistance in the southeastern province of Katanga, where the food supply situation is reported to be extremely serious. WFP is currently airlifting food to the districts of Nyunzu, Manono, Kabalo, Kongolo, Kiambi and Mulongo. There is particular concern for the food situation in Kiambi, where WFP reports malnutrition rates among the highest in DRC at 32 percent, and mortality rates among children under five years are also very high. While food aid in the pipeline is adequate for emergency operations, additional assistance is needed for funding transport of humanitarian workers to the worst affected areas.

The food situation in large cities in the west is also critical, particularly in Kinshasa and surrounding areas. In general, all the economic activities of the country have been affected by the conflict and it is estimated that more than one-third of the population, or 16 million people, have critical food needs. A recent study by the Ministry of Agriculture indicates that as a result of the political and economic crisis, agricultural production in the country has declined by 2.8 percent annually in the last four years, with production of maize decreasing 13 percent. On average, the caloric deficit of the population is estimated at 20.3 percent.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	18	375	1 259	1 652
Previous five years average imports	143	46	45	234
<u>2001 Domestic Availability</u>	<u>18</u>	<u>240</u>	<u>1 194</u>	<u>1 452</u>
2000 Production (rice in paddy terms)	18	360	1 194	1 572
2000 Production (rice in milled terms)	18	240	1 194	1 452
Possible stock drawdown	-	-	-	-
<u>2001 Utilization</u>	<u>158</u>	<u>290</u>	<u>1 254</u>	<u>1 702</u>
Food use	150	247	980	1 377
of which: local purchase requirement	-	-	1	1
Non-food use	8	43	264	315
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	10	10
<u>2001 Import Requirement</u>	<u>140</u>	<u>50</u>	<u>60</u>	<u>250</u>
Anticipated commercial imports	140	50	54	244
Food aid needs	-	-	6	6
<u>Current Aid Position</u>				
Food aid pledges	-	-	21	21
of which: delivered	-	-	21	21
Donor-financed purchases	-	-	1	1
of which: for local use	-	-	1	1
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>3</u>	<u>5</u>	<u>21</u>	<u>29</u>
<u>Indexes</u>				
2000 Production as % of average:				95
2001 Import requirement as % of average:				107

CONGO, REPUBLIC OF

Area:	342 000 sq.km
Climate:	Tropical wet climate in north, tropical wet-dry in south with main rainy season in October-April
Population:	3.02 million (2001 estimate); G.N.P. per caput: US\$630 (2000)
Specific characteristics of the country:	Low-income food-deficit country; tropical coastal country
Logistics:	Ports adequate; roads inadequate during rainy season
Major foodcrops:	Roots and tubers, fruit
Marketing year:	January/December; Lean season: September-November
Share of cereals in total calorie intake:	19 percent

CURRENT SITUATION

The overall food supply situation has improved. All areas are now accessible to humanitarian agencies. Most persons displaced by the civil war have returned to their homes. There are about 100 000 refugees from the Equator Province of DRC in northern areas, notably in Betou, near the border with the Central African Republic. There are also refugees from Angola, Burundi and Rwanda. A WFP relief and recovery operation is underway for population groups affected by the conflict and will provide 134 000 tonnes of food products over the years 2001 and 2002. Food assistance is also provided to some 120 000 persons in Brazzaville, Pointe Noire and other main towns.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	1	3	4
Previous five years average imports	110	33	5	148
<u>2001 Domestic Availability</u>	<u>110</u>	<u>34</u>	<u>8</u>	<u>152</u>
2000 Production (rice in paddy terms)	-	1	4	5
2000 Production (rice in milled terms)	-	-	4	4
Possible stock drawdown	-	2	-	2
<u>2001 Utilization</u>	<u>120</u>	<u>32</u>	<u>9</u>	<u>161</u>
Food use	115	30	7	152
of which: local purchase requirement	-	-	1	1
Non-food use	5	2	2	9
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2001 Import Requirement</u>	<u>120</u>	<u>30</u>	<u>5</u>	<u>155</u>
Anticipated commercial imports	100	23	5	128
Food aid needs	20	7	-	27
<u>Current Aid Position</u>				
Food aid pledges	23	8	2	33
of which: delivered	21	7	-	28
Donor-financed purchases	-	-	1	1
of which: for local use	-	-	1	1
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>38</u>	<u>10</u>	<u>2</u>	<u>50</u>
<u>Indexes</u>				
2000 Production as % of average:				125
2001 Import requirement as % of average:				105

COTE D'IVOIRE

Area:	318 000 sq.km
Climate:	Tropical wet-dry; two rainy seasons (March-July and September-December) in south and one in north (May-Oct.)
Population:	15.1 million (2001 estimate); G.N.P. per caput: US\$660 (2000)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports and roads adequate; gateway to Burkina Faso and Mali
Major foodcrops:	Roots and tubers, fruit, rice, maize
Marketing year:	January/December; Lean season: April-July
Share of cereals in total calorie intake:	40 percent

CURRENT SITUATION

Precipitation was generally average in September and below-average in October, except in the extreme south. This may have affected yield potential of the millet and sorghum crops which are being harvested in the north. The second maize crop is due to be harvested in December in the south.

The overall food supply situation is satisfactory. In addition to the 120 000 Liberian refugees already in the west of the country, an influx of new refugees has been reported following fighting in Lofa county in Liberia.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	1 000	748	1 748
Previous five years average imports	275	477	13	765
<u>2001 Domestic Availability</u>	<u>5</u>	<u>710</u>	<u>748</u>	<u>1 463</u>
2000 Production (rice in paddy terms)	-	1 100	748	1 848
2000 Production (rice in milled terms)	-	660	748	1 408
Possible stock drawdown	5	50	-	55
<u>2001 Utilization</u>	<u>275</u>	<u>1 290</u>	<u>756</u>	<u>2 320</u>
Food use	265	1 125	582	1 972
of which: local purchase requirement	-	-	-	-
Non-food use	5	165	164	334
Exports or re-exports	5	-	10	15
Possible stock build up	-	-	-	-
<u>2001 Import Requirement</u>	<u>270</u>	<u>580</u>	<u>8</u>	<u>858</u>
Anticipated commercial imports	270	575	6	851
Food aid needs	-	5	2	7
<u>Current Aid Position</u>				
Food aid pledges	-	5	-	5
of which: delivered	-	5	-	5
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>18</u>	<u>75</u>	<u>39</u>	<u>131</u>
<u>Indexes</u>				
2000 Production as % of average:				106
2001 Import requirement as % of average:				112

DJIBOUTI

Area:	23 000 sq.km
Climate:	Arid climate
Population:	0.635 million (2000 estimate); G.N.P. per caput: US\$840 (2000)
Specific characteristics of the country:	Low-income food-deficit country
Logistics:	Djibouti is one of the three gateways of Ethiopia
Major foodcrops:	Vegetables
Marketing year:	January/December
Share of cereals in total calorie intake:	52 percent

CURRENT SITUATION

The agricultural sector in Djibouti accounts for less than 3 percent of the gross domestic product. The population is mostly urban and is concentrated in the capital. Agricultural production is marginal and most of the food is imported. The economy of the country is dominated by its trade activity based on a port and airport infrastructure.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	-	-	-
Previous five years average imports	38	23	3	64
<u>2001 Domestic Availability</u>	=	=	=	=
2000 Production (rice in paddy terms)	-	-	-	-
2000 Production (rice in milled terms)	-	-	-	-
Possible stock drawdown	-	-	-	-
<u>2001 Utilization</u>	40	25	3	68
Food use	40	25	2	67
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	1	1
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2001 Import Requirement</u>	40	25	3	68
Anticipated commercial imports	35	20	-	55
Food aid needs	5	5	3	13
<u>Current Aid Position</u>				
Food aid pledges	4	4	-	8
of which: delivered	4	4	-	8
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	63	39	3	106
<u>Indexes</u>				
2000 Production as % of average:				-
2001 Import requirement as % of average:				106

EQUATORIAL GUINEA

Area:	28 000 sq.km
Climate:	Tropical wet climate
Population:	464 000 (2001 estimate); G.N.P. per caput: US\$1 170 (1999)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports and roads inadequate
Major foodcrops:	Cassava, sweet potatoes, bananas
Marketing year:	January/December; Lean season: September-November
Share of cereals in total calorie intake:	12 percent

CURRENT SITUATION

Following below-normal rains in September and early October, rains increased in mid-October and became abundant in late October. The staple crops are sweet potatoes, cassava and plantains. The cereal import requirement for the 2001 marketing year is estimated at 10 000 tonnes of rice and wheat.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	-	-	-
Previous five years average imports	6	6	-	12
<u>2001 Domestic Availability</u>	=	=	=	=
2000 Production (rice in paddy terms)	-	-	-	-
2000 Production (rice in milled terms)	-	-	-	-
Possible stock drawdown	-	-	-	-
<u>2001 Utilization</u>	5	5	=	10
Food use	5	5	-	10
<i>of which: local purchase requirement</i>	-	-	-	-
Non-food use	-	-	-	-
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2001 Import Requirement</u>	5	5	=	10
Anticipated commercial imports	5	5	-	10
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	2	-	2
<i>of which: delivered</i>	-	-	-	-
Donor-financed purchases	-	-	-	-
<i>of which: for local use</i>	-	-	-	-
<i>for export</i>	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	11	11	=	22
<u>Indexes</u>				
2000 Production as % of average:				-
2001 Import requirement as % of average:				83

ERITREA

Area:	124 320 sq.km
Climate:	Highland areas: tropical wet/dry with unreliable rains. Lowlands: semi-arid to arid
Population:	3.2 million (2001 estimate); G.N.P. per caput: US\$170 (2000)
Specific characteristics of the country:	Low-income food-deficit country
Logistics:	Roads inadequate, gateway to northern Ethiopia
Major foodcrops:	Sorghum, teff, millet, maize, pulses
Marketing year:	January/December; Lean season: August-November
Share of cereals in total calorie intake:	73 percent

CURRENT SITUATION

Harvesting of the 2001 cereal and pulse crops is about to start. Prospects for a good cereal crop in 2001 were somewhat dampened following below normal rains in September which are important for crops at flowering and seed setting stages. Field assessments for the Consolidated Appeal Process (CAP) during September indicate lower expected production than the preliminary crop estimates given by the Ministry of Agriculture in early August. However, the revised cereal production estimate, put at 203 000 tonnes, is still about 3 times more than last year's well below average crop.

The overall food situation remains tight following population displacement by the war with Ethiopia and drought last year. Last year's cereal crop was sharply reduced due mainly to the displacement of hundreds of thousands of farmers from the agriculturally rich regions of Gash Barka and Debub, which account for more than 70 percent of cereal production. The total number of internally displaced persons (IDPs) has declined from 70 000 to about 58 000 in September.

Two Emergency Operations were jointly approved in April and May 2001 by FAO and WFP for food assistance to about 1.8 million people affected by war and drought, worth a total sum of US\$77 million for a period of 10 months (May 2001 to February 2002). The balance of WFP food stocks as of end-September stood at 66 000 tonnes which is expected to meet emergency food requirements until the end of the first quarter or mid-2002. Although the number of IDPs in camps is gradually declining, further food assistance is required as more refugees are returning from Sudan.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	13	-	201	214
Previous five years average imports	189	7	89	285
<u>2001 Domestic Availability</u>	<u>8</u>	<u>-</u>	<u>196</u>	<u>204</u>
2000 Production (rice in paddy terms)	8	-	63	71
2000 Production (rice in milled terms)	8	-	63	71
Possible stock drawdown	-	-	133	133
<u>2001 Utilization</u>	<u>228</u>	<u>8</u>	<u>249</u>	<u>485</u>
Food use	163	8	227	398
of which: local purchase requirement	-	-	3	3
Non-food use	15	-	22	37
Exports or re-exports	-	-	-	-
Possible stock build up	50	-	-	50
<u>2001 Import Requirement</u>	<u>220</u>	<u>8</u>	<u>53</u>	<u>281</u>
Anticipated commercial imports	40	8	20	68
Food aid needs	180	-	33	213
<u>Current Aid Position</u>				
Food aid pledges	198	-	34	232
of which: delivered	128	-	14	142
Donor-financed purchases	-	-	3	3
of which: for local use	-	-	3	3
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>51</u>	<u>3</u>	<u>71</u>	<u>124</u>
<u>Indexes</u>				
2000 Production as % of average:				33
2001 Import requirement as % of average:				99

ETHIOPIA

Area:	976 680 sq.km
Climate:	Northern coastal area and lowlands in south and east are semi-arid to arid; rest of country has a highland rainy climate with mild winter.
Population:	65.0 million (2001 estimate); G.N.P. per caput: US\$100 (2000)
Specific characteristics of the country:	Low-income food-deficit country
Logistics:	Land-locked country, roads inadequate
Major foodcrops:	Maize, teff, barley, sorghum, wheat, pulses, enset (false banana)
Marketing year:	January/December; Lean season: August-November
Share of cereals in total calorie intake:	69 percent

CURRENT SITUATION

Harvesting of the 2001 main "Meher" cereal crop is about to start. Overall prospects are favourable reflecting abundant rains during the growing season in major producing areas. The 2001 secondary "Belg" crop, normally harvested from June, was also good and a substantial recovery from last year's poor harvest. Although Belg production accounts for only 8 to 10 percent of total cereal production, it is important in several areas where it provides the bulk of annual food supplies.

By contrast, below-normal rains in the pastoral areas of southern and eastern Ethiopia continue to undermine any recovery from the devastating drought in the last three years. Poor rainfall in parts of Gode, Liban, Werder and Afder Zones, sites of last year's severe food shortages, is particularly worrying. Recent rains in parts may have eased some of the water shortages but continued and widespread rains are needed to improve pastures.

The overall food supply situation in the country is stable as a result of last year's bumper main "meher" season grain production and this year's good secondary "belg" season harvest. However, the sharp decline in grain prices in main producing areas has severely affected household income in rural areas. The Government and donors have made some attempt to support local markets through purchases of grain.

An FAO/WFP Crop and Food Supply Assessment Mission is in the country since mid-November to assess the "Meher" production and estimate food assistance requirements in 2002.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	1 154	-	7 306	8 460
Previous five years average imports	545	12	45	602
<u>2001 Domestic Availability</u>	<u>1 369</u>	<u>-</u>	<u>7 569</u>	<u>8 938</u>
2000 Production (rice in paddy terms)	1 369	-	7 569	8 938
2000 Production (rice in milled terms)	1 369	-	7 569	8 938
Possible stock drawdown	-	-	-	-
<u>2001 Utilization</u>	<u>1 999</u>	<u>15</u>	<u>7 614</u>	<u>9 628</u>
Food use	1 762	15	6 348	8 125
of which: local purchase requirement	-	-	300	300
Non-food use	137	-	956	1 093
Exports or re-exports	-	-	200	200
Possible stock build up	100	-	110	210
<u>2001 Import Requirement</u>	<u>630</u>	<u>15</u>	<u>45</u>	<u>690</u>
Anticipated commercial imports	30	15	-	45
Food aid needs	600	-	45	645
<u>Current Aid Position</u>				
Food aid pledges	783	1	49	832
of which: delivered	626	1	45	672
Donor-financed purchases	-	-	60	60
of which: for local use	-	-	60	60
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>27</u>	<u>-</u>	<u>98</u>	<u>125</u>
<u>Indexes</u>				
2000 Production as % of average:				106
2001 Import requirement as % of average:				115

GABON

Area:	258 000 sq.km
Climate:	Tropical wet climate; most rainfall: October-May
Population:	1.26 million (2001 estimate); G.N.P. per caput: US\$3 180 (2000)
Specific characteristics of the country:	Coastal country
Logistics:	Ports and roads adequate
Major foodcrops:	Roots and tubers
Marketing year:	January/December; Lean season: September-November
Share of cereals in total calorie intake:	19 percent

CURRENT SITUATION

The main food crops are cassava and plantains but some maize is also produced (around 32 000 tonnes). The country imports commercially the bulk of its cereal requirement, estimated at around 87 000 tonnes in 2001.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	1	30	31
Previous five years average imports	44	34	2	80
<u>2001 Domestic Availability</u>	-	1	32	33
2000 Production (rice in paddy terms)	-	1	32	33
2000 Production (rice in milled terms)	-	1	32	33
Possible stock drawdown	-	-	-	-
<u>2001 Utilization</u>	50	36	34	120
Food use	49	36	26	110
of which: local purchase requirement	-	-	-	-
Non-food use	1	-	8	9
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2001 Import Requirement</u>	50	35	2	87
Anticipated commercial imports	50	35	2	87
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>	39	28	20	88
<u>Indexes</u>				
2000 Production as % of average:				106
2001 Import requirement as % of average:				109

GAMBIA

Area:	10 000 sq.km
Climate:	Tropical wet-dry climate; rainy season: May-October
Population:	1.50 million (2002 estimate); G.N.P. per caput: US\$330 (2000)
Specific characteristics of the country:	Low-income food-deficit country; coastal Sahelian country
Logistics:	Port capacity and roads adequate
Major foodcrops:	Rice, millet and sorghum
Marketing year:	November/October; Lean season: July-September
Share of cereals in total calorie intake:	63 percent

CURRENT SITUATION

Precipitation was average or below average from mid-September to early October but improved significantly during the second dekad of October. The rainy season ended in late October. A joint FAO/CILSS Crop Assessment Mission visited the country in late October and estimated with national services the aggregate output of cereals (including rice) at 198 200 tonnes, against 175 900 tonnes last year, which was already a record level. This year's output is about 13 percent above last year and 49 percent above the last five-year average. Total coarse grain output increased by 15 percent over 2000 and 56 percent over the five-year average. The total harvested area under cereals is estimated at 152 800 hectares which is 14 percent above the previous year and 36 percent above the last five-year average. Major cash crops such as groundnut and sesame also performed well. Groundnut production is estimated at 149 640 tonnes, 8 percent above last year and 54 percent above the five-year average. Sesame production, estimated at 1 361 tonnes, is gaining importance.

Following successive bumper harvests, the overall food supply situation is satisfactory. Only Kantora district experienced poor germination and crop production is expected to decline, especially for early millet and maize. Part of the population in this district may experience food difficulties and may be food insecure, particularly during the lean season. The situation needs to be monitored carefully.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	29	104	133
Previous five years average imports	42	84	2	128
<u>2001/02 Domestic Availability</u>	<u>5</u>	<u>23</u>	<u>163</u>	<u>191</u>
2001 Production (rice in paddy terms)	-	35	163	198
2001 Production (rice in milled terms)	-	23	163	186
Possible stock drawdown	5	-	-	5
<u>2001/02 Utilization</u>	<u>45</u>	<u>105</u>	<u>164</u>	<u>314</u>
Food use	29	90	121	241
of which: local purchase requirement	-	-	-	-
Non-food use	1	4	28	33
Exports or re-exports	15	10	-	25
Possible stock build up	-	-	15	15
<u>2001/02 Import Requirement</u>	<u>40</u>	<u>82</u>	<u>1</u>	<u>123</u>
Anticipated commercial imports	40	80	-	120
Food aid needs	-	2	1	3
<u>Current Aid Position</u>				
Food aid pledges	-	-	2	2
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>19</u>	<u>60</u>	<u>81</u>	<u>160</u>
<u>Indexes</u>				
2001 Production as % of average:				149
2001/02 Import requirement as % of average:				96

Area:	230 000 sq.km
Climate:	Tropical wet-dry; two rainy seasons in south and one in north
Population:	20.75 million (2001 estimate); G.N.P. per caput: US\$350 (2000)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports and roads inadequate
Major foodcrops:	Roots and tubers, coarse grain, rice
Marketing year:	January/December; Lean season: April-June
Share of cereals in total calorie intake:	27 percent

CURRENT SITUATION

Rains were below average in late August, generally widespread and average in September but well below average in October. Therefore, crop development is likely to have been affected and harvest prospects are mixed.

The food supply situation is tight in some areas. Heavy rains in July caused flooding in the south and the capital, hampering marketing activities. About 10 000 Liberian and about 2 500 Sierra Leonean refugees remain in the country.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	213	1 536	1 749
Previous five years average imports	214	207	32	453
<u>2001 Domestic Availability</u>	<u>20</u>	<u>152</u>	<u>1 536</u>	<u>1 709</u>
2000 Production (rice in paddy terms)	-	213	1 536	1 750
2000 Production (rice in milled terms)	-	142	1 536	1 679
Possible stock drawdown	20	10	-	30
<u>2001 Utilization</u>	<u>230</u>	<u>382</u>	<u>1 586</u>	<u>2 199</u>
Food use	227	352	1 210	1 788
of which: local purchase requirement	-	-	-	-
Non-food use	3	26	342	370
Exports or re-exports	-	5	5	10
Possible stock build up	-	-	30	30
<u>2001 Import Requirement</u>	<u>210</u>	<u>230</u>	<u>50</u>	<u>490</u>
Anticipated commercial imports	200	220	40	460
Food aid needs	10	10	10	30
<u>Current Aid Position</u>				
Food aid pledges	67	9	11	86
of which: delivered	1	-	4	6
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>11</u>	<u>17</u>	<u>58</u>	<u>86</u>
<u>Indexes</u>				
2000 Production as % of average:				100
2001 Import requirement as % of average:				108

GUINEA

Area:	246 000 sq.km
Climate:	Tropical wet-dry; rainy season: March/June to October/November
Population:	7.18 million (2001 estimate); G.N.P. per caput: US\$450 (2000)
Specific characteristics of the country:	Low-income food-deficit country; mountainous coastal country
Logistics:	Ports and roads inadequate
Major foodcrops:	Rice, roots and tubers, coarse grains
Marketing year:	January/December; Lean season: July-September
Share of cereals in total calorie intake:	52 percent

CURRENT SITUATION

Rains were abundant countrywide in late August and remained adequate in September and October. Cumulative rainfall is generally above normal. Floods which occurred in August and September in Haute Guinée affected some 220 000 people and destroyed over 20 000 hectares of farm land. Harvest prospects are generally good, except in Nandiana prefecture following reduced precipitation in late September/early October.

The overall food supply situation is satisfactory and markets are generally well supplied, except in the flooded areas and in the southeast where recurrent rebel incursions from Sierra Leone have severely affected agriculture and marketing activities. The overall nutritional situation is reported to be "quite stable" in Upper Guinea in the new camps of Boreah, Kountaya and Telikoro in the Prefectures of Albadaria and Sembakounya where refugees have been relocated from the Parrot's Beak.

The outbreak of violence in neighbouring Lofa County in Liberia has forced many Liberians to become refugees in Guinean border areas near Macenta and N'Zerekore. In addition, there are about 180 000 IDPs in the country, but with the improved security many IDPs have begun to move back to their homes.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	721	207	928
Previous five years average imports	114	235	1	350
<u>2001 Domestic Availability</u>	<u>114</u>	<u>956</u>	<u>208</u>	<u>1318</u>
2000 Production (rice in paddy terms)	-	871	230	1 100
2000 Production (rice in milled terms)	-	581	230	810
Possible stock drawdown	-	-	-	-
<u>2001 Utilization</u>	<u>110</u>	<u>806</u>	<u>241</u>	<u>1 157</u>
Food use	107	635	195	937
of which: local purchase requirement	-	-	-	-
Non-food use	3	131	44	178
Exports or re-exports	-	10	-	10
Possible stock build up	-	30	2	32
<u>2001 Import Requirement</u>	<u>110</u>	<u>225</u>	<u>12</u>	<u>347</u>
Anticipated commercial imports	97	220	-	317
Food aid needs	13	5	12	30
<u>Current Aid Position</u>				
Food aid pledges	13	6	12	31
of which: delivered	13	-	12	24
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>14</u>	<u>85</u>	<u>26</u>	<u>125</u>
<u>Indexes</u>				
2000 Production as % of average:				119
2001 Import requirement as % of average:				99

GUINEA-BISSAU

Area:	28 000 sq.km
Climate:	Tropical wet-dry; rainy season: May-October
Population:	1.20 million (2002 estimate); G.N.P. per caput: US\$180 (2000)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Roads inadequate, particularly during the rainy season; river transport important
Major foodcrops:	Rice, coarse grains, oils and fats, roots and tubers
Marketing year:	November/October; Lean season: May-August
Share of cereals in total calorie intake:	64 percent

CURRENT SITUATION

After reduced rains in mid-September, precipitation improved in late September, decreased somewhat in early October but remained well above average in mid-October. Rice is elongating while millet, sorghum and upland rice are being harvested. Crop prospects are generally favourable.

A joint FAO/CILSS assessment of the 2001 crop season estimated the aggregate output of cereals at 164 300 tonnes, which is 3 percent lower than the 2000 level and 8 percent above average. The food supply situation along the border with Senegal was tight due to insecurity.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	91	60	151
Previous five years average imports	9	60	2	71
<u>2001/02 Domestic Availability</u>	-	60	77	137
2001 Production (rice in paddy terms)	-	88	77	164
2001 Production (rice in milled terms)	-	58	77	135
Possible stock drawdown	-	2	-	2
<u>2001/02 Utilization</u>	10	120	77	207
Food use	10	105	65	180
of which: local purchase requirement	-	-	-	-
Non-food use	-	11	12	22
Exports or re-exports	-	5	-	5
Possible stock build up	-	-	-	-
<u>2001/02 Import Requirement</u>	10	60	-	70
Anticipated commercial imports	5	55	-	60
Food aid needs	5	5	-	10
<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>	8	87	54	149
<u>Indexes</u>				
2001 Production as % of average:				109
2001/02 Import requirement as % of average:				99

KENYA

Area:	570 000 sq.km
Climate:	North-east is semi-arid to arid; mountainous central and south-western areas have two rainy seasons: March-May and November-December.
Population:	31.61 million (2002 estimate), GNP per caput US\$360 (2000)
Specific characteristics of the country:	Low-income food-deficit country; regular importer and occasional exporter of grain.
Logistics:	Good port (Mombasa) and extensive rail and road network. Gateway to Burundi, Rwanda and Uganda
Major foodcrops:	Maize, wheat, pulses, roots and tubers
Marketing year:	October/September; Lean season: June-July
Share of cereals in total calorie intake:	56 percent

CURRENT SITUATION

Harvesting of the 2001 main "long rains" cereal crops is complete in the main growing areas of the Rift Valley, Western and Nyanza Provinces. The main rainy season (March-May), which normally accounts for 80 percent of total annual food production, has largely been favourable resulting in improved food supply in most parts of the country. Preliminary official estimates indicate a maize output of about 2.31 million tonnes for the season, an increase of about 20 percent over the reduced harvest last year. With forecast of normal secondary season rains, the 2001/02 aggregate maize output is forecast at 2.7 million tonnes, well above average.

Following the good cereal harvest and adequate stock levels, prices of maize, the staple crop, have declined considerably prompting the Government to appeal to donors to increase local purchases to support the producers.

However, despite the improvement in the overall food supply situation, pastoralists in northern and eastern parts of the country continue to face serious food supply difficulties. Water and pasture conditions remain poor and with below-normal rainfall forecast in the September to December season the situation is anticipated to deteriorate further. This has already led to long distance trekking in search of grazing which in turn has increased the likelihood of large-scale livestock mortality.

In September 2001 WFP distributed food aid to about 1.56 million people in 13 pastoral and agro-pastoral districts.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	230	51	2 357	2 638
Previous five years average imports	539	207	940	1 686
<u>2001/02 Domestic Availability</u>	<u>230</u>	<u>33</u>	<u>3 129</u>	<u>3 392</u>
2001 Production (rice in paddy terms)	230	50	2 939	3 219
2001 Production (rice in milled terms)	230	33	2 939	3 202
Possible stock drawdown	-	-	190	190
<u>2001/02 Utilization</u>	<u>830</u>	<u>233</u>	<u>3 529</u>	<u>4 592</u>
Food use	797	213	3 129	4 139
of which: local purchase requirement	-	-	1	1
Non-food use	33	20	400	453
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2001/02 Import Requirement</u>	<u>600</u>	<u>200</u>	<u>400</u>	<u>1 200</u>
Anticipated commercial imports	451	200	100	751
Food aid needs	149	-	300	449
<u>Current Aid Position</u>				
Food aid pledges	37	-	56	93
of which: delivered	-	-	56	56
Donor-financed purchases	-	-	1	1
of which: for local use	-	-	1	1
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>25</u>	<u>7</u>	<u>99</u>	<u>131</u>
<u>Indexes</u>				
2001 Production as % of average:				122
2001/02 Import requirement as % of average:				71

LESOTHO

Area:	30 000 sq.km
Climate:	Highland rainy climate with mild winter. Rainy season: Oct.-April. Cool temperatures in May-September with frost hazard
Population:	2.13 million (2001 estimate); G.N.P. per caput: US\$540 (2000)
Specific characteristics of the country:	Low-income food-deficit country; land-locked
Logistics:	All imports through South Africa
Major foodcrops:	Maize, sorghum, vegetables
Marketing year:	April/March; Lean season: February-April
Share of cereals in total calorie intake:	75 percent

CURRENT SITUATION

Above-average rains in the second and third dekads of October improved soil moisture for planting of the 2002 maize and sorghum crops, currently underway. The early outlook is promising. The 2001 cereal harvest was poor due to unfavourable weather conditions. The output was estimated by an FAO/WFP Crop and Food Supply Assessment Mission at 80 000 tonnes, 47 percent lower than in the previous year and 60 percent below the average of the past five years. The cereal import requirement has increased sharply to 332 000 tonnes of cereals, mostly maize. While most of this requirement is expected to be covered on commercial basis, assistance is needed in the worst affected districts of Mokhotlong, Thaba-Tseka, Mohale's Hoek and Quthing, where farmers lost their crops and a significant number do not have adequate means to access food.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	26	-	164	190
Previous five years average imports	61	3	148	212
<u>2001/02 Domestic Availability</u>	<u>11</u>	<u>=</u>	<u>69</u>	<u>80</u>
2001 Production (rice in paddy terms)	11	-	69	80
2001 Production (rice in milled terms)	11	-	69	80
Possible stock drawdown	-	-	-	-
<u>2001/02 Utilization</u>	<u>104</u>	<u>3</u>	<u>305</u>	<u>412</u>
Food use	103	3	299	405
of which: local purchase requirement	-	-	2	2
Non-food use	1	-	4	5
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	2	2
<u>2001/02 Import Requirement</u>	<u>93</u>	<u>3</u>	<u>236</u>	<u>332</u>
Anticipated commercial imports	93	3	231	327
Food aid needs	-	-	5	5
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	2	2
of which: for local use	-	-	2	2
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>47</u>	<u>1</u>	<u>136</u>	<u>185</u>
<u>Indexes</u>				
2001 Production as % of average:				42
2001/02 Import requirement as % of average:				157

LIBERIA

Area:	96 000 sq.km
Climate:	Southern half tropical wet, northern half tropical wet-dry; rainy season: March-November
Population:	2.95 million (2001 estimate); G.N.P. per caput: n.a.
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports and roads adequate
Major foodcrops:	Rice, roots and tubers, oils
Marketing year:	January/December; Lean season: July-August
Share of cereals in total calorie intake:	48 percent

CURRENT SITUATION

Following below average rains in early September, precipitation improved in late September and early October except in the south. Rains remained abundant in mid and late October in the north. Growing conditions are generally good allowing satisfactory rice crop development. Rice is about to be harvested and prospects are generally favourable.

Food supply difficulties persist, as domestic production has not fully recovered from several years of civil war. It is estimated that there are a total of about 70 000 Sierra Leonean refugees in Liberia, mainly in Lofa county, one of Liberia's main rice producing areas, where recent fighting has disrupted farming and displaced thousands of people. Food distributions are underway in IDPs camps but some areas remain inaccessible to relief agencies, notably in Gbarpolu County, near the Sierra Leone border.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	98	-	98
Previous five years average imports	63	80	31	174
<u>2001 Domestic Availability</u>	=	94	=	94
2000 Production (rice in paddy terms)	-	144	-	144
2000 Production (rice in milled terms)	-	94	-	94
Possible stock drawdown	-	-	-	-
<u>2001 Utilization</u>	50	234	10	294
Food use	50	212	10	272
of which: local purchase requirement	-	-	-	-
Non-food use	-	22	-	22
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2001 Import Requirement</u>	50	140	10	200
Anticipated commercial imports	40	120	-	160
Food aid needs	10	20	10	40
<u>Current Aid Position</u>				
Food aid pledges	6	-	6	12
of which: delivered	5	-	6	11
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	17	72	3	92
<u>Indexes</u>				
2000 Production as % of average:				147
2001 Import requirement as % of average:				115

MADAGASCAR

Area:	582 000 sq.km
Climate:	Eastern coast is tropical wet, the rest tropical wet-dry. Rainy season: October-March; tropical cyclones
Population:	13.98 million (2001 estimate); G.N.P. per caput: US\$260 (2000)
Specific characteristics of the country:	Low-income food-deficit country
Logistics:	Dilapidated roads and lack of spare parts and tyres
Major foodcrops:	Rice, roots, tubers, maize, fruit
Marketing year:	April/March; Lean season: February/March
Share of cereals in total calorie intake:	60 percent

CURRENT SITUATION

Planting of the 2002 paddy and coarse grain crops has started. Normal rains in October benefited land preparation for sowing. However, the outlook is uncertain reflecting an expected decline in the area planted in response to a sharp decline in domestic prices.

The 2001 paddy output is estimated 10 to 15 percent higher than in the previous year at around 2.6 million tonnes, the highest in ten years. This is the result of generally favourable growing conditions and the absence of locusts during the growing season. The bumper crop, coupled with large carry-over stocks, have resulted in a decrease of 50 percent in the price of paddy from its level prior to the harvest.

The overall food supply situation in the 2001/02 marketing year (April/March) is anticipated to remain satisfactory, including in the drought-prone southern areas. Prices of food staples, rice, maize, cassava and Irish potato, declined in July in southern areas and the number of people in need of food assistance has declined to 117 150. Food aid requirements for these areas are estimated at 3 163 tonnes of maize.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	7	2 475	168	2 650
Previous five years average imports	83	100	10	193
<u>2001/02 Domestic Availability</u>	<u>9</u>	<u>1 768</u>	<u>165</u>	<u>1 942</u>
2001 Production (rice in paddy terms)	9	2 600	160	2 769
2001 Production (rice in milled terms)	9	1 768	160	1 937
Possible stock drawdown	-	-	5	5
<u>2001/02 Utilization</u>	<u>79</u>	<u>1 880</u>	<u>178</u>	<u>2 137</u>
Food use	79	1 750	157	1 986
of which: local purchase requirement	-	-	3	3
Non-food use	-	130	21	151
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2001/02 Import Requirement</u>	<u>70</u>	<u>112</u>	<u>13</u>	<u>195</u>
Anticipated commercial imports	68	110	10	188
Food aid needs	2	2	3	7
<u>Current Aid Position</u>				
Food aid pledges	13	13	8	34
of which: delivered	2	2	2	6
Donor-financed purchases	-	-	3	3
of which: for local use	-	-	3	3
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>5</u>	<u>107</u>	<u>10</u>	<u>122</u>
<u>Indexes</u>				
2001 Production as % of average:				104
2001/02 Import requirement as % of average:				101

MALAWI

Area:	94 000 sq.km
Climate:	Tropical wet-dry climate; rainy season: November-May
Population:	11.86 million (2001 estimate); G.N.P. per caput: US\$170 (2000)
Specific characteristics of the country:	Low-income food-deficit country; land-locked country; importer and exporter of grain
Logistics:	Imports/exports through Beira (Mozambique) or Dar es Salaam (Tanzania)
Major foodcrops:	Maize, pulses, roots, tubers, rice
Marketing year:	April/March; Lean season: February-March
Share of cereals in total calorie intake:	70 percent

CURRENT SITUATION

Planting of the 2002 cereal crops, to be harvested from April next year, is well advanced. Normal rains in October, which were above average in northern and southern parts, favoured sowing operations and benefited earlier planted crops. The Government's programme of free inputs to vulnerable farmers is underway in southern parts. One million households are expected to receive agricultural inputs under the programme.

Reflecting widespread excessive rains during the growing season, the 2001 cereal production was sharply reduced. The maize crops was estimated at 1.7 million tonnes, 32 percent below the bumper crops of the previous two years, when an export surplus was available. As a result, the food supply situation is extremely tight. Official stocks, which were low at the beginning of the 2001/02 marketing year (April/March) have been depleted. Prices of maize in local markets have increased some 400 percent from their levels of a year ago. By October, a kilogram of maize was quoted at 18 Kawacha, against 2 to 5 Kawacha at the same time last year. Food shortages are being experienced in localized parts, particularly in the southern districts worst affected by floods. The Government has made arrangements to import 150 000 tonnes of maize from South Africa, but only 10 000 tonnes had arrived in the country by mid-October. However, most of these imports will be sold on the open market where prices have increased beyond the reach of large sections of the population. The Government is considering free distribution of maize to the most vulnerable people. Emergency food assistance distributed by WFP to 208 500 people worst affected by the floods until October, will be extended for further two months until the end of December in view of the serious food supply situation.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	2	78	2 085	2 165
Previous five years average imports	41	1	79	121
<u>2001/02 Domestic Availability</u>	<u>2</u>	<u>58</u>	<u>1 827</u>	<u>1 887</u>
2001 Production (rice in paddy terms)	2	89	1 763	1 854
2001 Production (rice in milled terms)	2	58	1 763	1 823
Possible stock drawdown	-	-	64	64
<u>2001/02 Utilization</u>	<u>47</u>	<u>58</u>	<u>2 056</u>	<u>2 161</u>
Food use	46	45	1 818	1 909
of which: local purchase requirement	-	-	15	15
Non-food use	-	12	238	250
Exports or re-exports	-	1	-	1
Possible stock build up	1	-	-	1
<u>2001/02 Import Requirement</u>	<u>45</u>	<u>-</u>	<u>229</u>	<u>274</u>
Anticipated commercial imports	35	-	220	255
Food aid needs	10	-	9	19
<u>Current Aid Position</u>				
Food aid pledges	2	1	3	6
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	15	15
of which: for local use	-	-	15	15
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>3</u>	<u>3</u>	<u>136</u>	<u>143</u>
<u>Indexes</u>				
2001 Production as % of average:				86
2001/02 Import requirement as % of average:				226

MALI

Area:	1 220 000 sq.km
Climate:	From north to south: arid, semi-arid and tropical wet-dry; rainy season: May-October
Population:	10.68 million (2002 estimate); G.N.P. per caput: US\$240 (2000)
Specific characteristics of the country:	Low-income food-deficit country; land-locked Sahelian country
Logistics:	Roads inadequate during rainy season; river transport important; rail link to Dakar (Senegal)
Major foodcrops:	Millet, sorghum, rice, maize
Marketing year:	November/October; Lean season: July-September
Share of cereals in total calorie intake:	75 percent

CURRENT SITUATION

The rainy season is over. Rains ceased somewhat early in the north and the centre, thus reducing yield potential. Cumulative rainfall has generally been normal to above normal and up from last year. Pastures are abundant. A joint FAO/CILSS Crop Assessment Mission which visited the country in late October gave a provisional estimate of the aggregate output of cereals at around 2.86 million tonnes, 20 percent above 2000 level and well above average.

The overall food situation is satisfactory. Overall cereal prices started to decrease significantly in October, reflecting the good cereal prospects in 2001. The reconstitution of the National Security Stock to its optimum level of 35 000 tonnes will require the purchase of 15 000 tonnes in 2001/02.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	5	678	1 752	2 435
Previous five years average imports	49	59	3	111
<u>2001/02 Domestic Availability</u>	<u>11</u>	<u>571</u>	<u>2 016</u>	<u>2 599</u>
2001 Production (rice in paddy terms)	9	840	2 016	2 866
2001 Production (rice in milled terms)	9	571	2 016	2 597
Possible stock drawdown	2	-	-	2
<u>2001/02 Utilization</u>	<u>61</u>	<u>611</u>	<u>2 016</u>	<u>2 689</u>
Food use	60	436	1 635	2 131
of which: local purchase requirement	-	-	10	10
Non-food use	1	105	306	413
Exports or re-exports	-	50	75	125
Possible stock build up	-	20	-	20
<u>2001/02 Import Requirement</u>	<u>50</u>	<u>40</u>	<u>-</u>	<u>90</u>
Anticipated commercial imports	45	40	-	85
Food aid needs	5	-	-	5
<u>Current Aid Position</u>				
Food aid pledges	-	1	1	2
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>6</u>	<u>41</u>	<u>153</u>	<u>200</u>
<u>Indexes</u>				
2001 Production as % of average:				118
2001/02 Import requirement as % of average:				81

MAURITANIA

Area:	1 025 000 sq.km
Climate:	Mostly a Saharian country; semi-arid fringe in extreme south with rains in June-September
Population:	2.80 million (2002 estimate); G.N.P. per caput: US\$370 (2000)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Port capacity adequate, though storms during January-March sometimes cause difficulties
Major foodcrops:	Wheat, rice, millet and sorghum
Marketing year:	November/October; Lean season: July-September
Share of cereals in total calorie intake:	54 percent

CURRENT SITUATION

Above-normal precipitation were received in September, but rains ceased in October. The area planted to rainfed ("dieri") and lowland ("bas-fonds") crops is estimated to be lower than in 2000 as many farmers chose not to plant rainfed highland crops or abandoned fields following short dry spells during the months of July and August. The Senegal River did not reach flood stage until early September, which is late in the season. A joint FAO/CILSS Crop Assessment Mission which visited the country in mid-October estimated the aggregate output of cereals in 2001/02 at 161 800 tonnes. This is 9 percent below 2000/01 level and 4 percent above average. This decrease is due to lower irrigated and walo/recession crop production and to lower yields for rainfed crops. By contrast, production in low-lying areas is expected to increase by 23 percent from the 2000 level as all operational dams are over 70 percent full.

The food supply situation will remain tight in several areas, notably in the Senegal river valley and in the Aftout. Already 79 communes in Gorgol, Brakna, Tagant, Adrar, Trarza and Hodh El Chargui have been identified as at risk of food shortages.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	82	86	168
Previous five years average imports	245	59	9	313
<u>2001/02 Domestic Availability</u>	<u>50</u>	<u>39</u>	<u>102</u>	<u>191</u>
2001 Production (rice in paddy terms)	-	58	102	160
2001 Production (rice in milled terms)	-	39	102	141
Possible stock drawdown	50	-	-	50
<u>2001/02 Utilization</u>	<u>230</u>	<u>109</u>	<u>131</u>	<u>470</u>
Food use	195	101	114	410
of which: local purchase requirement	-	-	-	-
Non-food use	20	7	16	43
Exports or re-exports	15	1	1	17
Possible stock build up	-	-	-	-
<u>2001/02 Import Requirement</u>	<u>180</u>	<u>70</u>	<u>29</u>	<u>279</u>
Anticipated commercial imports	170	60	27	257
Food aid needs	10	10	2	22
<u>Current Aid Position</u>				
Food aid pledges	3	7	1	11
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>70</u>	<u>36</u>	<u>41</u>	<u>146</u>
<u>Indexes</u>				
2001 Production as % of average:				95
2001/02 Import requirement as % of average:				89

1/ Including 15 000 tonnes for re-export.

MAURITIUS

Area:	1 850 sq.km
Climate:	No dry months, most rainfall in November-July; tropical cyclones
Population:	1.15 million (2001 estimate); G.N.P. per caput: US\$3 800 (2000)
Specific characteristics of the country:	Cereal consumption covered almost entirely by imports
Logistics:	Inadequate port handling capacity; road system good
Major foodcrops:	Vegetables
Marketing year:	January/December
Share of cereals in total calorie intake:	48 percent

CURRENT SITUATION

The bulk of the cultivated area is normally devoted to sugar cane and most of the remainder to fruit and vegetables. As a consequence, the country is virtually dependent on imports to meet its cereal needs. Cereal import requirements estimated at 248 000 tonnes, will continue to be met through commercial channels.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	-	2	2
Previous five years average imports	149	80	30	259
<u>2001 Domestic Availability</u>	<u>149</u>	<u>80</u>	<u>2</u>	<u>231</u>
2000 Production (rice in paddy terms)	-	-	2	2
2000 Production (rice in milled terms)	-	-	2	2
Possible stock drawdown	-	-	-	-
<u>2001 Utilization</u>	<u>150</u>	<u>78</u>	<u>22</u>	<u>250</u>
Food use	104	78	2	184
of which: local purchase requirement	-	-	-	-
Non-food use	6	-	20	26
Exports or re-exports	40	-	-	40
Possible stock build up	-	-	-	-
<u>2001 Import Requirement</u>	<u>150</u>	<u>78</u>	<u>20</u>	<u>248</u>
Anticipated commercial imports	150	78	20	248
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>	<u>90</u>	<u>68</u>	<u>2</u>	<u>160</u>
<u>Indexes</u>				
2000 Production as % of average:				100
2001 Import requirement as % of average:				96

MOZAMBIQUE

Area:	784 000 sq.km
Climate:	Tropical wet-dry; coast is semi-arid
Population:	18.53 million (2001 estimate); G.N.P. per caput: US\$210 (2000)
Specific characteristics of the country:	Low-income food-deficit country; exposed to tropical storms and cyclones
Logistics:	Dilapidated rail and road transport fleet; lack of fuel and spares; poor roads; substantial Deliveries by coastal vessels
Major foodcrops:	Roots, tubers, maize
Marketing year:	April/March; Lean season: February-April
Share of cereals in total calorie intake:	53 percent

CURRENT SITUATION

Planting of the 2002 cereal crops, to be harvested from April next year, has just started. Generally normal rains during October, which were above average in southern parts, favoured land preparation and early planting of crops.

The 2001 cereal production increased by 7 percent on last year's level mainly due to higher plantings. Despite severe floods in central provinces and dry weather in southern provinces, abundant rains in the main growing areas of the north benefited the maize crop, estimated 12 percent up at 1.14 million tonnes. At this level of production, the country will have an exportable surplus of 100 000 tonnes of maize in marketing year 2001/02 (April/March).

However, real prices of maize are well above their levels of a year ago, particularly in the Beira, Tete and Nampula provinces. In Tete, prices by the end of September were over 200 percent higher than a year ago in real terms. This reflects strong demand from neighbouring Malawi where production decreased significantly. In the capital Maputo, maize prices are about one-third higher. Prices of other food staples such as rice and beans have also increased markedly during October.

Despite a satisfactory food supply situation at national level, the increased prices are restricting access to food for the most vulnerable sections of the population. There have been reports of food shortages in the southern provinces of Maputo, Gaza and Inhambane. Recent assessments undertaken by the Government and international agencies in the country indicate that 80 000 to 100 000 most vulnerable people are in need of emergency food aid until the next harvest.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	170	1 407	1 577
Previous five years average imports	180	73	53	306
<u>2001/02 Domestic Availability</u>	=	118	1 406	1 524
2001 Production (rice in paddy terms)	-	165	1 406	1 571
2001 Production (rice in milled terms)	-	110	1 406	1 516
Possible stock drawdown	-	8	-	8
<u>2001/02 Utilization</u>	227	258	1 538	2 023
Food use	212	242	1 142	1 596
of which: local purchase requirement	-	-	8	8
Non-food use	10	16	264	290
Exports or re-exports	-	-	100	100
Possible stock build up	5	-	32	37
<u>2001/02 Import Requirement</u>	227	140	132	499
Anticipated commercial imports	165	130	92	387
Food aid needs	62	10	40	112
<u>Current Aid Position</u>				
Food aid pledges	93	20	-	113
of which: delivered	-	6	-	6
Donor-financed purchases	-	-	8	8
of which: for local use	-	-	8	8
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	12	14	65	90
<u>Indexes</u>				
2001 Production as % of average:				100
2001/02 Import requirement as % of average:				163

NAMIBIA

Area:	823 000 sq.km
Climate:	Mostly arid (south-west and coast) or semi-arid. Only north and north-east gets regular rainfall in November-April
Population:	1.69 million (2001 estimate); G.N.P. per caput: US\$2 050 (2000)
Specific characteristics of the country:	Arid to semi-arid country; cereal production mainly in the north
Logistics:	Good road and railway network
Major foodcrops:	Millet, maize, sorghum, wheat
Marketing year:	May/April;
Share of cereals in total calorie intake:	48 percent

CURRENT SITUATION

Harvesting of the 2001 irrigated wheat crop is well advanced. An average output of 5 000 tonnes is anticipated. The aggregate cereal output is estimated one-quarter lower than in the previous year at 106 000 tonnes. Production was affected by dry weather followed by excessive rains. As a result, the overall food supply situation in marketing year 2001/02 is tight. Imports of cereals are expected to rise sharply up at 125 000 tonnes (50 000 tonnes of wheat and 75 000 tonnes of maize). While most of this requirement is expected to be covered commercially, food supply difficulties are reported in communities where the harvest was poor and for vulnerable people in urban areas without adequate purchasing power.

Planting of the 2002 coarse grain crops is scheduled from next month.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	5	-	101	106
Previous five years average imports	48	-	87	135
<u>2001/02 Domestic Availability</u>	<u>8</u>	<u>=</u>	<u>110</u>	<u>118</u>
2001 Production (rice in paddy terms)	5	-	102	107
2001 Production (rice in milled terms)	5	-	102	107
Possible stock drawdown	3	-	8	11
<u>2001/02 Utilization</u>	<u>58</u>	<u>=</u>	<u>185</u>	<u>243</u>
Food use	55	-	174	229
of which: local purchase requirement	-	-	2	2
Non-food use	3	-	11	14
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2001/02 Import Requirement</u>	<u>50</u>	<u>=</u>	<u>75</u>	<u>125</u>
Anticipated commercial imports	50	-	75	125
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	2	2
of which: for local use	-	-	2	2
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>29</u>	<u>=</u>	<u>91</u>	<u>119</u>
<u>Indexes</u>				
2001 Production as % of average:				101
2001/02 Import requirement as % of average:				93

NIGER

Area:	1 267 000 sq.km
Climate:	Northern part arid, southern part semi-arid with rains in June-October
Population:	10.67 million (2002 estimate); G.N.P. per caput: US\$180 (2000)
Specific characteristics of the country:	Low-income food-deficit country; land-locked Sahelian country
Logistics:	Roads inadequate during rainy season
Major foodcrops:	Millet and sorghum, pulses, roots and tubers
Marketing year:	November/October; Lean season: July-September
Share of cereals in total calorie intake:	70 percent

CURRENT SITUATION

Above-normal precipitation was received in early September, but rains decreased in mid and late September, ceasing altogether in October. A joint FAO/CILSS Crop Assessment Mission in late October gave a provisional estimate of the aggregate output of cereals at around 2.8 million tonnes. This is well above the previous year's level and above average.

Following this good harvest, the food supply situation should improve significantly. Prices of cereals decreased significantly in September and October. Farmers should be able to reconstitute their stocks as well as the government the national security stock to its optimum level of 35 000 tonnes.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	8	65	2 316	2 389
Previous five years average imports	49	109	278	436
<u>2001/02 Domestic Availability</u>	<u>6</u>	<u>50</u>	<u>3 077</u>	<u>3 132</u>
2001 Production (rice in paddy terms)	6	76	3 077	3 159
2001 Production (rice in milled terms)	6	50	3 077	3 132
Possible stock drawdown	-	-	-	-
<u>2001/02 Utilization</u>	<u>56</u>	<u>150</u>	<u>3 247</u>	<u>3 452</u>
Food use	50	140	2 530	2 720
of which: local purchase requirement	-	-	-	-
Non-food use	1	9	472	482
Exports or re-exports	5	-	15	20
Possible stock build up	-	-	230	230
<u>2001/02 Import Requirement</u>	<u>50</u>	<u>100</u>	<u>170</u>	<u>320</u>
Anticipated commercial imports	50	95	170	315
Food aid needs	-	5	-	5
<u>Current Aid Position</u>				
Food aid pledges	5	17	-	21
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>5</u>	<u>13</u>	<u>237</u>	<u>255</u>
<u>Indexes</u>				
2001 Production as % of average:				132
2001/02 Import requirement as % of average:				73

NIGERIA

Area:	911 000 sq.km
Climate:	Mostly tropical wet-dry, south-west tropical wet, extreme north semi-arid
Population:	114.2 million (2001 estimate); G.N.P. per caput: US\$260 (2000)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports adequate, roads inadequate during rainy season
Major foodcrops:	Roots and tubers, coarse grains, rice
Marketing year:	January/December; Lean season: April-May
Share of cereals in total calorie intake:	43 percent

CURRENT SITUATION

The rainy season is over in the north and drawing to a close in the south. Harvest prospects are mixed.

The food supply situation is tight in several areas. Up to 550 000 people are currently displaced in the Benue, Nasarawa and Taraba states, in central region, as a result of recent clashes and attacks launched against several communities by the army. Large numbers of displaced persons are staying in ten camps, notably around the Benue State capital, Makurdi, where they joined others who had fled earlier fighting in June in nearby Nasarawa State. Conflict in the region, which is one of Nigeria's major food producing areas, is likely to undermine the country's food security. Zaki-Biam, a rural town of 50 000 people, which bore the main brunt of recent fighting is reputed to be the biggest yam market in Nigeria.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	48	3 134	18 602	21 784
Previous five years average imports	1 396	553	85	2 034
<u>2001 Domestic Availability</u>	<u>40</u>	<u>2 000</u>	<u>19 341</u>	<u>21 381</u>
2000 Production (rice in paddy terms)	40	3 333	19 341	22 714
2000 Production (rice in milled terms)	40	2 000	19 341	21 381
Possible stock drawdown	-	-	-	-
<u>2001 Utilization</u>	<u>1 790</u>	<u>3 000</u>	<u>19 411</u>	<u>24 201</u>
Food use	1 738	2 450	15 207	19 394
of which: local purchase requirement	-	-	-	-
Non-food use	52	400	3 804	4 257
Exports or re-exports	-	50	200	250
Possible stock build up	-	100	200	300
<u>2001 Import Requirement</u>	<u>1 750</u>	<u>1 000</u>	<u>70</u>	<u>2 820</u>
Anticipated commercial imports	1 750	1 000	70	2 820
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>	<u>15</u>	<u>22</u>	<u>133</u>	<u>170</u>
<u>Indexes</u>				
2000 Production as % of average:				104
2001 Import requirement as % of average:				139

RWANDA

Area:	25 000 sq.km
Climate:	Highland rainy climate with moderate temperature (20°C); two rainy seasons: February-May and September-November
Population:	8.34 million (2001 estimate); G.N.P. per caput: US\$230 (2000)
Specific characteristics of the country:	Low-income food-deficit country; land-locked country
Logistics:	Ports: Mombasa (Kenya) and Dar es Salaam (Tanzania); roads and railway inadequate
Major foodcrops:	Roots, tubers, pulses, plantains, sorghum, maize
Marketing year:	January/December; Lean season: November-December
Share of cereals in total calorie intake:	25 percent

CURRENT SITUATION

Heavy rains in September resulted in localized floods in the Gisenyi, Gitarama and Gikongoro Provinces, causing loss of life, housing and infrastructure damage, and crop losses. Worst affected are the districts of Kabagali and Mushubi where losses of banana and roots and tubers are high and soil erosion considerable. Overall however, abundant rains in the past two months favoured planting of the 2002 season A foodcrops and benefited crop establishment. Availability of seed of cereals and pulses - the main crop of the season - and cuttings of sweet potatoes was timely and their prices were stable. Crops are reported in good condition and early prospects for the harvest from January are favourable.

Food production in the 2001 B season was estimated at 2.7 million tonnes, reflecting higher plantings and favourable weather conditions. Although this is 10 percent less than in the same season last year, in cereal-equivalent the output is 9 percent higher. Import requirements in the second half of the year have decreased, compared to the same period last year, to 143 000 tonnes of cereal-equivalent, which is expected to be fully covered by commercial imports.

The overall food supply position is satisfactory following the increased aggregate 2001 food production. Prices of staple crops remain stable or are decreasing as a result of the good domestic and cross-border supply to markets. In particular, food supply in areas previously affected by a succession of droughts has improved.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	5	8	172	185
Previous five years average imports	15	13	182	210
<u>2001 Domestic Availability</u>	<u>6</u>	<u>8</u>	<u>222</u>	<u>236</u>
2000 Production (rice in paddy terms)	6	12	222	240
2000 Production (rice in milled terms)	6	8	222	236
Possible stock drawdown	-	-	-	-
<u>2001 Utilization</u>	<u>21</u>	<u>18</u>	<u>372</u>	<u>411</u>
Food use	21	17	351	389
of which: local purchase requirement	-	-	2	2
Non-food use	-	1	21	22
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2001 Import Requirement</u>	<u>15</u>	<u>10</u>	<u>150</u>	<u>175</u>
Anticipated commercial imports	15	10	90	115
Food aid needs	-	-	60	60
<u>Current Aid Position</u>				
Food aid pledges	-	-	28	28
of which: delivered	-	-	25	25
Donor-financed purchases	-	-	2	2
of which: for local use	-	-	2	2
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>3</u>	<u>2</u>	<u>42</u>	<u>47</u>
<u>Indexes</u>				
2000 Production as % of average:				130
2001 Import requirement as % of average:				83

SAO TOME AND PRINCIPE

Area:	960 sq.km
Climate:	Tropical wet; rainfall increases with altitude and towards southern parts of the islands
Population:	150 000 (2001 estimate); G.N.P. per caput: US\$290 (2000)
Specific characteristics of the country:	Low-income food-deficit country; archipelago
Logistics:	Ports and roads adequate
Major foodcrops:	Bananas, breadfruit, cocoyam
Marketing year:	January/December
Share of cereals in total calorie intake:	36 percent

CURRENT SITUATION

The staple foodcrops are roots, plantains and tubers. The country will import 11 000 tonnes of cereals in 2001.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	-	-	-
Previous five years average imports	3	5	2	10
<u>2001 Domestic Availability</u>	3	5	2	10
2000 Production (rice in paddy terms)	-	-	-	-
2000 Production (rice in milled terms)	-	-	-	-
Possible stock drawdown	-	-	-	-
<u>2001 Utilization</u>	3	6	2	11
Food use	3	6	2	11
<i>of which: local purchase requirement</i>	-	-	-	-
Non-food use	-	-	-	-
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2001 Import Requirement</u>	3	6	2	11
Anticipated commercial imports	3	4	2	9
Food aid needs	-	2	-	2
<u>Current Aid Position</u>				
Food aid pledges	-	3	1	4
<i>of which: delivered</i>	-	-	1	1
Donor-financed purchases	-	-	-	-
<i>of which: for local use</i>	-	-	-	-
<i>for export</i>	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	20	40	13	73
<u>Indexes</u>				
2000 Production as % of average:				-
2001 Import requirement as % of average:				110

SENEGAL

Area:	193 000 sq.km
Climate:	Semi-arid in north, tropical wet-dry in south, with rains in June-October
Population:	10.00 million (2002 estimate); G.N.P. per caput: US\$500 (2000)
Specific characteristics of the country:	Low-income food-deficit country; coastal Sahelian country
Logistics:	Port capacity adequate; gateway to Mali.
Major foodcrops:	Millet and sorghum, rice, maize, wheat
Marketing year:	November/October; Lean season: August-September
Share of cereals in total calorie intake:	61 percent

CURRENT SITUATION

The rainy season is over. Following well above-average rains in early and mid-September, precipitation decreased in late September. Good rains were still registered in the south in mid-October but they ceased in late October. Following a joint FAO/CILSS Crop Assessment Mission which visited the country in mid-October, national services estimated from the annual production survey the aggregate output of cereals at around 1.1 million tonnes. This is 4 percent above the 2000 level and 18 percent above average.

The overall food supply situation is satisfactory. Markets are well supplied and prices of millet and sorghum have decreased following the arrival of fresh products on the market.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	200	737	937
Previous five years average imports	224	517	47	788
<u>2001/02 Domestic Availability</u>	<u>3</u>	<u>187</u>	<u>860</u>	<u>1 049</u>
2001 Production (rice in paddy terms)	-	267	840	1 107
2001 Production (rice in milled terms)	-	187	840	1 026
Possible stock drawdown	3	-	20	23
<u>2001/02 Utilization</u>	<u>253</u>	<u>757</u>	<u>880</u>	<u>1 889</u>
Food use	248	675	750	1 673
of which: local purchase requirement	-	-	-	-
Non-food use	5	32	129	166
Exports or re-exports	-	-	-	-
Possible stock build up	-	50	-	50
<u>2001/02 Import Requirement</u>	<u>250</u>	<u>570</u>	<u>20</u>	<u>840</u>
Anticipated commercial imports	250	560	20	830
Food aid needs	-	10	-	10
<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>	<u>25</u>	<u>68</u>	<u>75</u>	<u>167</u>
<u>Indexes</u>				
2001 Production as % of average:				118
2001/02 Import requirement as % of average:				107

SEYCHELLES

Area:	455 sq.km
Climate:	Tropical wet; rains throughout the year, peaking in October-May
Population:	78 000 (2001 estimate); G.N.P. per caput: US\$7 310 (2000)
Specific characteristics of the country:	Consists of about 100 islands scattered over more than 1 million sq.km. Tourism provides 50 percent of G.D.P.
Logistics:	-
Major foodcrops:	Coconuts, fruit, vegetables
Marketing year:	January/December
Share of cereals in total calorie intake:	49 percent

CURRENT SITUATION

The cultivated area of only some 6 000 hectares is used mainly for coconuts, cinnamon and tea. Other crops, of secondary importance, include fruit and vegetables. The cereal needs for human consumption and feed are all imported commercially. Cereal import requirements estimated at 13 000 tonnes, will continue to be met through commercial channels.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	-	-	-
Previous five years average imports	2	5	6	13
<u>2001 Domestic Availability</u>	-	-	-	-
2000 Production (rice in paddy terms)	-	-	-	-
2000 Production (rice in milled terms)	-	-	-	-
Possible stock drawdown	-	-	-	-
<u>2001 Utilization</u>	2	5	6	13
Food use	2	5	1	8
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	5	5
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2001 Import Requirement</u>	2	5	6	13
Anticipated commercial imports	2	5	6	13
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>	26	65	13	103
<u>Indexes</u>				
2000 Production as % of average:				-
2001 Import requirement as % of average:				100

SIERRA LEONE

Area:	72 000 sq.km
Climate:	Mostly tropical wet-dry; extreme south tropical wet; rainy season: March-October
Population:	5.03 million (2001 estimate); G.N.P. per caput: US\$130 (2000)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Roads inadequate
Major foodcrops:	Rice, roots and tubers
Marketing year:	January/December; Lean season: July-August
Share of cereals in total calorie intake:	57 percent

CURRENT SITUATION

Following somewhat reduced precipitation in early to mid-September, rains increased in late September and remained abundant and above average during the entire month of October. Rice production is expected to be above last year's level reflecting increased plantings by returning farmers and improved conditions for distribution of inputs.

The security situation is reported to be calm. Disarmament and demobilization activities continue in Bo district. The food supply situation remains tight. About 400 000 IDPs and returnees are in various camps but mostly in the main towns and in Tonkili and Port Loko districts. The improvement of the security situation facilitated access to vulnerable populations. WFP planned to distribute more than 50 000 tonnes of food to an estimated 544 000 people during 2001. NGOs planned also to distribute around 37 000 tonnes in the same period. The country continues to rely heavily on international food assistance

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	347	45	392
Previous five years average imports	78	109	30	217
<u>2001 Domestic Availability</u>	<u>-</u>	<u>119</u>	<u>23</u>	<u>142</u>
2000 Production (rice in paddy terms)	-	198	23	221
2000 Production (rice in milled terms)	-	119	23	142
Possible stock drawdown	-	-	-	-
<u>2001 Utilization</u>	<u>80</u>	<u>369</u>	<u>53</u>	<u>502</u>
Food use	80	339	48	467
of which: local purchase requirement	-	-	-	-
Non-food use	-	30	5	35
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2001 Import Requirement</u>	<u>80</u>	<u>250</u>	<u>30</u>	<u>360</u>
Anticipated commercial imports	50	200	-	250
Food aid needs	30	50	30	110
<u>Current Aid Position</u>				
Food aid pledges	39	-	14	53
of which: delivered	26	-	14	40
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>16</u>	<u>67</u>	<u>10</u>	<u>93</u>
<u>Indexes</u>				
2000 Production as % of average:				56
2001 Import requirement as % of average:				166

SOMALIA

Area:	627 000 sq.km
Climate:	Semi-arid in the south; rest arid
Population:	6.37 million (2001 estimate); G.N.P. per caput; n.a.
Specific characteristics of the country:	Low-income food-deficit country
Logistics:	Inadequate port facilities; serious shortage of fuel and spare parts
Major foodcrops:	Maize, sorghum, sesame
Marketing year:	August/July; Lean season: June-August
Share of cereals in total calorie intake:	45 percent

CURRENT SITUATION

The food situation in Somalia is rapidly deteriorating following the drought-reduced 2001 main "Gu" season harvest, the lowest in the last seven years. Recent heavy rains in neighbouring Ethiopian highlands have caused an overflow of rivers in parts of southern Somalia displacing a large number of people thus aggravating the already serious food supply situation.

More than a decade of civil strife has left Somalia impoverished and mired in an extended humanitarian crisis. Basic infrastructure and Government services, including the ability to deliver the most basic health, education, and other social services, have collapsed. A recovery in food production in the previous two cropping seasons had eased to some extent the food supply difficulties. However, the current poor harvest has offset the temporary respite due to weakened coping mechanisms by a succession of droughts earlier and the long-term effects of years of insecurity. Furthermore, the continuing ban on livestock imports from eastern Africa by countries along the Arabian Peninsula due to Rift Valley fever is causing substantial loss of income, particularly in northern Somalia. The ban imposed in September 2000 is estimated to have cost the country hard currency earnings estimated at US\$120 million. Reflecting a grim food outlook, cereal prices are expected to rise, seriously eroding the purchasing power of a large section of the population. Moreover, the value of the Somali/Somaliland shilling has fallen dramatically. Between August 2000 and August 2001, the value of the Somali shilling in Mogadishu dropped from Ssh 9 500 to Ssh 20 500 for one US dollar, a depreciation of nearly 116 percent, while the value of the Somaliland shilling in Hargeysa fell from SLsh 3 000 to SLsh 6 000 to a US dollar - a fall of 100 percent.

As a result of the global economic downturn, remittances which normally contribute up to an estimated US\$500 million to the economy per year compared to about US\$60 million from foreign aid, are expected to dwindle significantly. Access to food for large numbers of households who depend on remittances is expected to be affected seriously. In view of the rapidly deteriorating food supply situation, rural people are leaving their villages, many with their livestock in search of food and water, moving into urban areas and crowding around feeding centres where assistance is being provided by the international community. Recent reports indicate that some 800 000 people have been affected and will require 70 000 tonnes of emergency food assistance until the next "Gu" season harvest in August 2002. Of particular concern are some 300 000 vulnerable people threatened by starvation, particularly in Gedo Region in south-eastern Somalia, as well as in Hiran, Bay and Bakool. Despite recent rainfall that enabled some plantings, prospects for the "Deyr" secondary season, which runs from October to February, are uncertain, due to the delayed onset of rains.

The Somalia Aid Co-ordination Body (SACB) - which groups United Nations agencies, non-governmental organizations and donor partners - has appealed for urgent food assistance to the affected population. Non-food assistance, such as water and medical supplies, is also required for thousands of children who are at the risk of disease and malnutrition. Earlier in the year a UN Inter-Agency Consolidated Appeal was launched for US\$130 million, to support livelihoods and assist the country's recovery. The international donor community is urged to make urgent pledges and contributions, failing which there is increased likelihood of large-scale starvation in the most affected areas.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	1	2	264	267
Previous five years average imports	113	94	56	263
<u>2001/02 Domestic Availability</u>	<u>10</u>	<u>1</u>	<u>230</u>	<u>241</u>
2001 Production (rice in paddy terms)	-	2	190	192
2001 Production (rice in milled terms)	-	1	190	191
Possible stock drawdown	10	-	40	50
<u>2001/02 Utilization</u>	<u>110</u>	<u>91</u>	<u>350</u>	<u>551</u>
Food use	110	81	320	511
of which: local purchase requirement	-	-	-	-
Non-food use	-	10	30	40
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2001/02 Import Requirement</u>	<u>100</u>	<u>90</u>	<u>120</u>	<u>310</u>
Anticipated commercial imports	100	75	50	225
Food aid needs	-	15	70	85
<u>Current Aid Position</u>				
Food aid pledges	-	-	14	14
of which: delivered	-	-	6	6
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>17</u>	<u>13</u>	<u>50</u>	<u>80</u>
<u>Indexes</u>				
2001 Production as % of average:				72
2001/02 Import requirement as % of average:				118

SOUTH AFRICA

Area:	1.22 million sq.km
Climate:	Sub-tropical with rains concentrated in the summer months (November-April); occasional snow in winter over higher parts of plateau and Cape ranges; an average of 120 days frost in the interior plateau
Population:	40.86 million (2001 estimate); GNP per caput US\$3 020 (2000)
Specific characteristics of the country:	Normally net food exporter, notably maize
Logistics:	Adequate port, rail and road facilities
Major foodcrops:	Maize, wheat
Marketing year:	May/April; Lean season: February-April
Share of cereals in total calorie intake:	54 percent

CURRENT SITUATION

Planting of the 2002 maize crop is underway in the main maize growing areas of the east. Below average rains in the first dekad of October were followed by abundant precipitation in the second and third dekads. The above-average rains provided good soil moisture for planting the 2002 maize crop and benefited earlier sowed crops. Planting prospects are favourable reflecting also expectations of a 6 percent rise in the area planted to 2.878 million hectares. This is in response to increasing prices of maize due to this year's reduced harvest and higher exports to neighbouring countries. The 2001 maize output was estimated at 7.5 million tonnes, a substantial decline from the previous year's good output of 10.6 million tonnes, due to a decrease of 17 percent in the area planted and a prolonged mid-season dry spell that reduced yields.

Harvesting of the 2001 wheat crop is advanced. Production forecasts have been revised upwards to 2.3 million tonnes. At this level, the output is 4 percent higher than the average of the past five years. The outcome reflects an increase of 4 percent in the area planted and adequate irrigation water supplies.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	2 221	3	9 882	12 106
Previous five years average exports	166	-	1 219	1 385
<u>2001/02 Domestic Availability</u>	<u>2 370</u>	<u>100</u>	<u>9 978</u>	<u>12 448</u>
2001 Production (rice in paddy terms)	2 317	-	7 947	10 264
2001 Production (rice in milled terms)	2 317	-	7 947	10 264
Possible stock drawdown	53	100	2 031	2 184
<u>2001/02 Utilization</u>	<u>2 820</u>	<u>100</u>	<u>10 834</u>	<u>13 754</u>
Food Use	2 475	100	4 572	7 147
of which: local purchase requirement	-	-	-	-
Non-food use	195	-	4 312	4 507
Exports or Re-exports	150	-	1 950	2 100
Possible stock build up	-	-	-	-
<u>2001/02 Import Requirement</u>	<u>450</u>	<u>-</u>	<u>856</u>	<u>1 306</u>
Anticipated commercial imports	450	-	856	1 306
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>	<u>61</u>	<u>2</u>	<u>112</u>	<u>175</u>
<u>Indexes</u>				
2001 production as % of average:				85
2001/02 import requirement as % of average:				94

SUDAN

Area:	2.4 million sq.km
Climate:	From north to south, arid, semi-arid and tropical wet-dry. Rainy season: May-October
Population:	32.81 million (2002 estimate); GNP per caput: US\$320 (2000)
Specific characteristics of the country:	Low-income food-deficit country; cereal production mainly in eastern and central areas.
Logistics:	Roads, railway and river transport inadequate
Major foodcrops:	Sorghum, millet, wheat, roots and tubers, oils
Marketing year:	November/October; Lean season: September-October
Share of cereals in total calorie intake:	51 percent

CURRENT SITUATION

A recent FAO/WFP Crop and Food Supply Assessment Mission to southern Sudan indicated a generally improved food supply situation compared to last year but estimated an overall deficit in cereal production. Heavy rains in August caused localized flooding and water-logging in low-lying areas, particularly in the east. However the overall advantages of the rainfall, to date, are noted to outweigh the disadvantages.

Despite the improved food supply situation, pockets of food insecurity remain and food assistance requirements will be greater as the fragmentation of the regions and absence of normal trade routes exclude easy movement of grain or cassava flour from surplus to deficit areas.

In central and northern Sudan, harvesting of the 2001 main season cereal crops has just started. Despite the extensive floods that displaced large numbers of people and destroyed crops, overall harvest prospects have improved with some good rains and increased cereal production in the irrigated schemes. An FAO/WFP Crop and Food Supply Assessment Mission is in the country since mid-November to assess the 2001 main season cereal production and estimate overall commercial imports/exports and food aid requirements in 2002.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	386	3	3 838	4 227
Previous five years average imports	963	28	113	1 104
<u>2001/02 Domestic Availability</u>	<u>560</u>	<u>3</u>	<u>4 630</u>	<u>5 193</u>
2001 Production (rice in paddy terms)	560	5	4 630	5 195
2001 Production (rice in milled terms)	560	3	4 630	5 193
Possible stock drawdown	-	-	-	-
<u>2001/02 Utilization</u>	<u>1 860</u>	<u>28</u>	<u>4 720</u>	<u>6 608</u>
Food use	1 474	27	3 202	4 703
of which: local purchase requirement	-	-	200	200
Non-food use	56	1	868	925
Exports or re-exports	-	-	150	150
Possible stock build up	330	-	500	830
<u>2001/02 Import Requirement</u>	<u>1 300</u>	<u>25</u>	<u>90</u>	<u>1 415</u>
Anticipated commercial imports	1 250	25	-	1 275
Food aid needs	50	-	90	140
<u>Current Aid Position</u>				
Food aid pledges	-	-	13	13
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>45</u>	<u>1</u>	<u>98</u>	<u>143</u>
<u>Indexes</u>				
2001 Production as % of average:				123
2001/02 Import requirement as % of average:				128

SWAZILAND

Area:	17 000 sq.km
Climate:	Highland rainy climate. Rainy season: October-April; cool temperatures in May- September
Population:	1.03 million (2001 estimate); G.N.P. per caput: US\$1 290 (2000)
Specific characteristics of the country:	Low-income food-deficit country; land-locked country
Logistics:	Good road network; imports through Mozambique or South Africa
Major foodcrops:	Maize
Marketing year:	May/April; Lean season: February-April
Share of cereals in total calorie intake:	55 percent

CURRENT SITUATION

Dry weather in the first dekad of October was followed by normal to above normal precipitation in the remainder of the month, which provided adequate soil moisture for planting of the 2002 cereal crops, mainly maize.

Cereal production in 2001 was estimated at 74 000 tonnes, close to last year's poor harvest, but some 33 percent below the previous five year average, due mainly to a mid-season dry spell and a heat wave. As a result, the food supply situation is expected to remain tight until the end of the 2001/02 marketing year (April/March). The import requirement is estimated at 123 000 tonnes, and is expected to be covered entirely by commercial imports. However, food assistance may be needed by the most affected households, particularly in the Middle and Lowerveld provinces.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	1	110	111
Previous five years average imports	40	7	26	73
<u>2001/02 Domestic Availability</u>	-	-	74	74
2001 Production (rice in paddy terms)	-	-	74	74
2001 Production (rice in milled terms)	-	-	74	74
Possible stock drawdown	-	-	-	-
<u>2001/02 Utilization</u>	48	7	142	197
Food use	48	7	130	185
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	11	11
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	1	1
<u>2001/02 Import Requirement</u>	48	7	68	123
Anticipated commercial imports	48	7	68	123
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>	46	7	126	179
<u>Indexes</u>				
2001 Production as % of average:				67
2001/02 Import requirement as % of average:				168

TANZANIA

Area:	886 000 sq.km
Climate:	Tropical wet-dry climate with two rainy seasons in north (November-December and March-May) and one in south (November-April)
Population:	33.93 million (2001 estimate); G.N.P. per caput: US\$280 (2000)
Specific characteristics of the country:	Low-income food-deficit country; cereal surplus production in south and south-west; cereal deficit in central and north-west. Distribution difficulties
Logistics:	Serious shortage of rolling stock, fuel and spare parts
Major foodcrops:	Maize, roots, tubers, sorghum, pulses, plantains, rice
Marketing year:	June/May; Lean season: February-April
Share of cereals in total calorie intake:	60 percent

CURRENT SITUATION

Planting of the 2002 main season cereal crops in the unimodal central and southern areas, as well as that of 2001/02 short season ("Vuli") crops in bi-modal northern areas, is underway. With normal to above normal rainfall predicted for the period September to December in most parts of the country, prospects are generally favourable.

The 2001 cereal crop, mainly maize, is estimated at about 4 million tonnes, 14 percent above last year's crop but slightly below the previous five years average. The Strategic Grain Reserve (SGR) has purchased about 56 percent of the target purchase of 25 000 tonnes for the marketing year 2001/02 (June/May) bringing total stocks to 59 000 tonnes. These stocks represent about 84 percent of the total planned reserves of 70 000 tonnes.

The overall food supply situation is satisfactory with stable or declining cereal prices in central, east, 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 Zambia, Democratic Republic of Congo and Malawi, which saw 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.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	87	702	3 256	4 045
Previous five years average imports	167	94	50	311
<u>2001/02 Domestic Availability</u>	<u>140</u>	<u>400</u>	<u>3 453</u>	<u>3 993</u>
2001 Production (rice in paddy terms)	90	615	3 303	4 008
2001 Production (rice in milled terms)	90	400	3 303	3 793
Possible stock drawdown	50	-	150	200
<u>2001/02 Utilization</u>	<u>260</u>	<u>520</u>	<u>3 553</u>	<u>4 333</u>
Food use	251	458	3 174	3 883
of which: local purchase requirement	-	-	30	30
Non-food use	9	62	379	450
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2001/02 Import Requirement</u>	<u>120</u>	<u>120</u>	<u>100</u>	<u>340</u>
Anticipated commercial imports	120	100	80	300
Food aid needs	-	20	20	40
<u>Current Aid Position</u>				
Food aid pledges	-	17	38	55
of which: delivered	-	-	38	38
Donor-financed purchases	-	-	19	19
of which: for local use	-	-	19	19
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>7</u>	<u>14</u>	<u>94</u>	<u>115</u>
<u>Indexes</u>				
2001 Production as % of average:				99
2001/02 Import requirement as % of average:				109

Area:	54 000 sq.km
Climate:	Tropical wet-dry; two rainy seasons in south (March-June and October) and one in North (May-October)
Population:	4.75 million (2001 estimate) G.N.P. per caput: US\$300 (2000)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports and roads adequate; gateway to Burkina Faso and Niger
Major foodcrops:	Roots and tubers, coarse grains, fruit
Marketing year:	January/December; Lean season: April-July
Share of cereals in total calorie intake:	40 percent

CURRENT SITUATION

Following well below-average rains in August, precipitation improved in September. Rains decreased significantly in early October and ceased in late October except in the extreme south. Reflecting these erratic rains, harvest prospects are mixed.

The overall food supply situation is satisfactory.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	62	569	631
Previous five years average imports	52	145	21	218
<u>2001 Domestic Availability</u>	<u>-</u>	<u>55</u>	<u>630</u>	<u>685</u>
2000 Production (rice in paddy terms)	-	81	630	711
2000 Production (rice in milled terms)	-	55	630	685
Possible stock drawdown	-	-	-	-
<u>2001 Utilization</u>	<u>60</u>	<u>135</u>	<u>630</u>	<u>825</u>
Food use	56	73	388	517
of which: local purchase requirement	-	-	-	-
Non-food use	2	12	209	223
Exports or re-exports	2	50	10	62
Possible stock build up	-	-	23	23
<u>2001 Import Requirement</u>	<u>60</u>	<u>80</u>	<u>-</u>	<u>140^{1/}</u>
Anticipated commercial imports	60	76	-	136
Food aid needs	-	4	-	4
<u>Current Aid Position</u>				
Food aid pledges	-	6	-	6
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>12</u>	<u>15</u>	<u>82</u>	<u>109</u>
<u>Indexes</u>				
2000 Production as % of average:				113
2001 Import requirement as % of average:				64

^{1/} Including 50 000 tonnes of rice for re-export.

UGANDA

Area:	200 000 sq.km
Climate:	North-east is semi-arid, rest of the country is tropical wet-dry; main rainy period is March-October
Population:	23.37 million (2001 estimate); G.N.P. per caput: US\$310 (2000)
Specific characteristics of the country:	Low-income food-deficit country
Logistics:	Ports: Mombasa (Kenya) and Dar es Salaam (Tanzania); roads and railways inadequate
Major foodcrops:	Roots, tubers, plantains, pulses, maize, millet, sorghum
Marketing year:	January/December; Lean season: April-May
Share of cereals in total calorie intake:	35 percent

CURRENT SITUATION

Widespread and abundant rains in September and October benefited developing food crops of the 2001 second season. Prospects for the harvest early next year are favourable. The rains in the past months have also improved pasture conditions and water availability for the livestock in pastoral districts of Kotido and Moroto.

The overall food supply situation is satisfactory. However, the situation remains precarious in Katakwi District mainly due to insecurity and loss of cattle to raids. Food assistance also continues to be needed for nearly 112 000 people in Bundibugyo District, in the west, displaced by civil unrest.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	9	86	1 701	1 796
Previous five years average imports	32	32	45	109
<u>2001 Domestic Availability</u>	<u>14</u>	<u>72</u>	<u>1 690</u>	<u>1 776</u>
2000 Production (rice in paddy terms)	14	108	1 510	1 632
2000 Production (rice in milled terms)	14	72	1 510	1 596
Possible stock drawdown	-	-	180	180
<u>2001 Utilization</u>	<u>44</u>	<u>122</u>	<u>1 719</u>	<u>1 885</u>
Food use	43	122	1 453	1 618
of which: local purchase requirement	-	-	11	11
Non-food use	1	-	186	187
Exports or re-exports	-	-	80	80
Possible stock build up	-	-	-	-
<u>2001 Import Requirement</u>	<u>30</u>	<u>50</u>	<u>29</u>	<u>109</u>
Anticipated commercial imports	10	50	-	60
Food aid needs	20	-	29	49
<u>Current Aid Position</u>				
Food aid pledges	25	-	35	60
of which: delivered	21	-	29	50
Donor-financed purchases	-	-	11	11
of which: for local use	-	-	11	11
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>2</u>	<u>6</u>	<u>67</u>	<u>74</u>
<u>Indexes</u>				
2000 Production as % of average:				91
2001 Import requirement as % of average:				100

ZAMBIA

Area:	741 000 sq.km
Climate:	Tropical wet-dry; rainy season: November-April
Population:	10.04 million (2001 estimate); G.N.P. per caput: US\$300 (2000)
Specific characteristics of the country:	Low-income food-deficit country; land-locked country
Logistics:	Imports through Dar es Salaam (Tanzania); inadequate rail and road connections
Major foodcrops:	Maize, roots, tubers
Marketing year:	May/April; Lean season: March-May
Share of cereals in total calorie intake:	70 percent

CURRENT SITUATION

Planting of the 2002 maize crop, to be harvested from April next year, is underway. Above-average rains in October, particularly in southern areas, benefited sowing operations and earlier planted crops. Availability of seeds and fertilizers for the new season is reported to be adequate to meet requirements.

Harvesting of the 2001 irrigated wheat crop is well advanced. The output is forecast at 75 000 tonnes, 17 percent lower than the previous year's level.

The 2001 maize harvest was sharply reduced by excessive rains, coupled with dry weather in southern parts. A final official production estimate has not been released. FAO's preliminary estimates point to a maize crop of 950 000 tonnes, some 28 percent lower than last year. At this level, and taking into account available stocks, there is an estimated deficit of 300 000 tonnes of maize in marketing year 2001/02 (May/April) to be covered through commercial imports and food aid. The Government's Food Reserve Agency has announced tenders for purchase of 150 000 tonnes of maize from South Africa, to be supplied from November 2001 to March 2002. It has also announced a ban on maize exports.

Following reports of emerging food shortages in parts, the Government launched an appeal to the international community in mid-July for 98 000 tonnes of food aid to assist 2 million people in the 42 districts out of the 73 in the country, that had been declared to be in a state of emergency. It has also started distribution of maize in eastern parts of the country. WFP plans to distribute about 42 000 tonnes of food aid to 1.28 million most affected people in 23 districts.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	72	16	1 130	1 218
Previous five years average imports	57	17	204	278
<u>2001/02 Domestic Availability</u>	<u>85</u>	<u>13</u>	<u>1 060</u>	<u>1 158</u>
2001 Production (rice in paddy terms)	75	19	1 045	1 139
2001 Production (rice in milled terms)	75	13	1 045	1 133
Possible stock drawdown	10	-	15	25
<u>2001/02 Utilization</u>	<u>130</u>	<u>36</u>	<u>1 260</u>	<u>1 426</u>
Food use	126	34	1 105	1 265
of which: local purchase requirement	-	-	15	15
Non-food use	4	2	155	161
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2001/02 Import Requirement</u>	<u>45</u>	<u>23</u>	<u>200</u>	<u>268</u>
Anticipated commercial imports	45	22	150	217
Food aid needs	-	1	50	51
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	15	15
of which: for local use	-	-	15	15
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>12</u>	<u>3</u>	<u>102</u>	<u>116</u>
<u>Indexes</u>				
2001 Production as % of average:				94
2001/02 Import requirement as % of average:				96

ZIMBABWE

Area:	387 000 sq.km
Climate:	Centre and north-east tropical wet-dry; south and west semi-arid; rainy season: November-March
Population:	12.70 million (2001 estimate); G.N.P. per caput: US\$480 (2000)
Specific characteristics of the country:	Land-locked country; exporter and importer of grain
Logistics:	Exports and imports through Mozambique or South Africa
Major foodcrops:	Maize, wheat, millet, sorghum
Marketing year:	April/March; Lean season: February-April
Share of cereals in total calorie intake:	66 percent

CURRENT SITUATION

Generally normal rains in October, which were above average in eastern parts, allowed land preparation for planting of the 2002 cereal crops and improved pastures for livestock.

Harvesting of the 2001 irrigated wheat crop is well advanced. Preliminary estimates point to a crop of 275 000 tonnes, some 10 percent higher than last year's reduced crop but still below the average of the past five years. The higher production mainly reflects a rise of 14 percent in the area planted. At the estimated production level, the import requirement of wheat until the next harvest in October 2002 is projected at 80 000 tonnes.

The 2001 coarse grains harvest was sharply reduced. The maize crop, accounting for over 90 percent of the total cereal production, was estimated at 1.5 million tonnes, 28 below last year's level and well below average. This decrease mainly reflected a decline of 54 percent in the area planted on the large-scale commercial farms, due to disruption by land acquisitions activities. In the communal areas, plantings were affected by payment delays by the Grain Marketing Board, while yields were negatively affected by a severe mid-season dry spell followed by excessive rains, particularly in southern areas.

As a result of the sharp decline in production and severe shortage of foreign exchange, the food supply situation is increasingly tight. The Grain Marketing Board has announced tenders to import 150 000 tonnes of maize. Prices of basic food staples, which had increased more than 300 percent from June to August, stabilized or declined after the Government ordered on 12 October price cuts of 5 to 20 percent for maize meal - the basic staple - and bread, meat, vegetables, milk, cooking oil and salt. However, many of the products were unavailable on the markets in the second half of the month. The food supply position is particularly critical in areas where farmers gathered a poor harvest and localized food shortages have been reported. A recent WFP food needs assessment estimated that 706 000 people are in need of assistance in some districts of Midlands, Matebeleland North, Matebeleland South, Masvingo, Mashonaland West, Mashonaland Central and Manicaland Provinces. WFP plans to distribute food aid to over 500 000 people from December.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2001/02 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	293	-	2 148	2 441
Previous five years average imports	109	25	124	258
<u>2001/02 Domestic Availability</u>	<u>289</u>	<u>-</u>	<u>1 584</u>	<u>1 873</u>
2001 Production (rice in paddy terms)	275	-	1 584	1 859
2001 Production (rice in milled terms)	275	-	1 584	1 859
Possible stock drawdown	14	-	-	14
<u>2001/02 Utilization</u>	<u>369</u>	<u>25</u>	<u>2 031</u>	<u>2 425</u>
Food use	355	25	1 669	2 049
of which: local purchase requirement	-	-	-	-
Non-food use	14	-	362	376
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2001/02 Import Requirement</u>	<u>80</u>	<u>25</u>	<u>447</u>	<u>552</u>
Anticipated commercial imports	80	25	447	552
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>	<u>28</u>	<u>2</u>	<u>132</u>	<u>162</u>
<u>Indexes</u>				
2001 Production as % of average:				76
2001/02 Import requirement as % of average:				214

TERMINOLOGY

"Utilisation": 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.

"Unfavourable Crop Prospects": Refer to prospects of a shortfall in production of current crops as a result of a reduction of the area planted and/or adverse weather conditions, plant pests, diseases and other calamities which indicate a need for close monitoring of the crops for the remainder of the growing season.

"Shortfalls in Food Supplies Requiring Exceptional External Assistance": 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, exceptional and/or emergency food aid may be required to cover all or part of the deficit.

"Local and/or Exportable Surpluses Requiring External Assistance": Refers to a situation of an exceptional surplus existing in a particular area of a country which needs to be transported to deficit areas in the same country or the neighbouring countries for which purpose external assistance is required.

"Low-income food deficit countries" (LIFDCs): Includes all food deficit countries with per caput income below the level used by the World Bank to determine eligibility for IDA assistance (e.g. US\$1 445 in 1999), which in accordance with guidelines and criteria agreed to by the CFA should be given priority in the allocation of food aid.

The designations employed and the presentation of material in this bulletin do not imply the expression of any opinion whatsoever on the part of the Food and Agriculture Organization of the United Nations concerning the legal or constitutional status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries.