

# FOOD SUPPLY SITUATION AND CROP PROSPECTS IN SUB-SAHARAN AFRICA

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*Countries facing exceptional food emergencies:*

*Angola, Burundi, Dem.Rep. of Congo, Republic of Congo, Eritrea, Ethiopia, Guinea-Bissau, Kenya, Liberia, Mauritania, Rwanda, Sierra Leone, Somalia, Sudan, Tanzania, Uganda*



FOOD AND AGRICULTURE ORGANIZATION OF THE UNITED NATIONS

## INTRODUCTION

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

Part I focuses on the food supply difficulties in several countries of the sub-region, particularly in Angola, Somalia, Ethiopia, Sierra Leone and Democratic Republic of Congo, where civil strife and unfavourable weather have intensified food emergencies for the affected populations. It also highlights favourable early prospects in the Sahelian countries where average to above-average rainfall has been recorded so far.

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, including triangular transactions and local purchases, and on expected arrivals, is based on data transmitted to GIEWS as of mid-July 1999 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. For other donors, data are based on field reports from various sources (see Tables 7 and 8).

*Since conditions can change rapidly, and published information may not always represent the most up-to-date basis for action, further 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).*

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### COUNTRIES FACING EXCEPTIONAL FOOD EMERGENCIES

<u>Country</u>	<u>Reasons for emergency</u>
<b>Angola</b>	Civil strife, population displacement
<b>Burundi</b>	Civil strife and insecurity
<b>Congo, Dem.Rep. of</b>	Civil strife, IDPs and refugees
<b>Congo, Rep. of</b>	Civil strife
<b>Eritrea</b>	IDPs and returnees
<b>Ethiopia</b>	Drought, large number of vulnerable people, IDPs
<b>Guinea-Bissau</b>	Civil strife, population displacements
<b>Kenya</b>	Weather adversities in parts
<b>Liberia</b>	Impact of past civil strife, shortage of farm inputs
<b>Mauritania</b>	Localised deficits
<b>Rwanda</b>	Insecurity in parts
<b>Sierra Leone</b>	Civil strife, population displacement
<b>Somalia</b>	Drought, civil strife
<b>Sudan</b>	Civil strife in the south
<b>Tanzania</b>	Food deficits in several regions
<b>Uganda</b>	Civil strife in parts, drought

## HIGHLIGHTS

**The food supply situation has deteriorated in several parts of eastern Africa.** In Somalia the food outlook for 1999 and beyond is extremely grim, due to the cumulative effects of adverse weather, the long-running civil war and uncontrolled crop pests and diseases. The current main season cereal crop has largely failed (the seventh consecutive poor harvest since 1996) due to erratic and insufficient rainfall, armyworm outbreaks and unusually high temperatures. Economic and commercial activities have been severely curtailed by renewed factional fighting, particularly in the south, and traditional coping mechanisms have been virtually exhausted, forcing large numbers of people to move in search of food and safety. It is estimated that over one million people face serious food shortages, with over 400 000 at risk of starvation. In Ethiopia, the magnitude of food shortages has increased due to the failure of the 1999 "Belg" crop caused by inadequate rainfall. More than 5 million people are officially estimated to be in need of emergency food assistance including some 2 million affected by the "Belg" failure in the north-western Amhara Region, and 385 000 displaced by the ongoing war with Eritrea. In Eritrea, despite a good harvest in 1998, the food situation of families displaced by the war and those deported from Ethiopia is very tight. In southern Sudan, despite favourable growing conditions, the food situation continues to be difficult due to persistent civil conflict.

**Elsewhere in eastern Africa, a prolonged drought has affected crop production and livestock** in the western part of Uganda. Large numbers of farmers, particularly cattle producers, are reported to be in need of urgent assistance. Thousands are reported to have moved to northern Tanzania in search of water and pasture. In Kenya, erratic and below-average rainfall during the current "long rains" season has adversely affected crop and livestock production, particularly in the pastoral areas of the north and north-east. In Tanzania, serious localised crop failures are reported in several regions, indicating a significant increase in import requirement not initially foreseen.

**In southern Africa, the food outlook is very bleak in Angola,** reflecting the escalation of the civil war since December last year. Large-scale population displacement in rural areas is reported, with farm families abandoning their farms and homes to take refuge in government-held towns and cities or in neighbouring countries. Although average to above average rainfall was received in the country and overall planting reductions were not too high, significantly reduced yields are estimated in many areas due to abandonment of fields. Emergency food assistance is urgently required for about 1 million newly displaced people, most of whom are in provincial capitals and towns cut off from the rest of the country by road closures due to insecurity and land mines. Distribution of relief assistance is, therefore, problematic and has to be mainly by costly air transport. Elsewhere in southern Africa, a tightening of the food supply situation is anticipated in countries where a reduced 1999 cereal crop was harvested. In South Africa, estimated cereal production is below last year's below-average crop. As a result, the country's exportable surplus has been substantially reduced. In Botswana, Lesotho, Namibia and Zimbabwe, cereal output is below average for the second consecutive year.

**In the Great Lakes region, recovery in food production continues to be hampered by persistent insecurity and sporadic violence.** In the Democratic Republic of Congo (DRC), the food supply situation remains precarious due to persistent insecurity and population displacement. However, there are hopes of improvement following the cease-fire agreement signed on 10 July in Lusaka, Zambia. The number of internally displaced people in DRC is estimated at 660 000, mainly in Kivu and Katanga provinces. In the Republic of Congo, renewed fighting between Government forces and Ninja militia has displaced a large number of people and disrupted economic activities, seriously affecting the food supply situation. In Burundi and Rwanda, inadequate rainfall and armyworm infestation in some areas affected the recently harvested 1999 B season crops, while insecurity in parts continues to disrupt food production activities.

**In western Africa, crop prospects are generally favourable so far,** notably in the Sahel, and the food supply situation is expected to remain satisfactory until the next harvest, except in Sierra Leone where food supply difficulties persist. Implementation of the peace accord signed recently should improve the situation.

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## PART I: OVERVIEW

A severe drought, persistent civil strife, insecurity and pest outbreaks have seriously undermined food production in several parts of sub-Saharan Africa. In eastern Africa, Somalia faces a grim food outlook as result of the failure of the main "gu" season, and an escalation of factional fighting. Similarly, the failure of the "belg" season in Ethiopia has drastically increased the number of people in need of food assistance. In southern Africa, the food outlook in Angola is very bleak, as a result of intensified civil conflict. In the Great Lakes, civil strife, particularly in the Democratic Republic of Congo and the Republic of Congo, continues to displace large numbers of people displaced and to disrupt farming activities.

### SERIOUS FOOD SUPPLY DIFFICULTIES HAVE EMERGED IN EASTERN AFRICA

In **Somalia**, a serious food crisis prevails. The cumulative effects of adverse weather, the long-running civil war and uncontrolled crop pests and diseases have precipitated famine conditions in the country, particularly in the southern regions. The current main "Gu" season has largely failed due to erratic and insufficient rains, armyworm outbreaks, and unusually high temperatures. Intensified inter-factional fighting has compounded the problem. The failure of the current crop follows six consecutive poor harvests since 1996, resulting from droughts and the unprecedented floods of early 1998 associated with the El Niño phenomenon.

The food outlook for 1999 and beyond is extremely grim. Water levels in the Shabelle River are reported to be below normal, reflecting below-average precipitation and reducing irrigation possibilities. An outbreak of armyworms has been reported in Lower and Middle Juba, Lower Shebelle, Bakool and Hiran regions. Traditional coping strategies for most households have been virtually exhausted, while commercial and economic activities have been severely curtailed by factional fighting and insecurity, forcing large numbers of people to move in search of food and safety. Cereal prices are on the increase while prices of livestock continue to fall. It is estimated that more than 1 million people face serious food shortages, with over 400 000 at risk of starvation.

For the 1998/99 marketing year (August/July) total food aid requirements were estimated by FAO at 125 000 tonnes, including about 52 000 tonnes of emergency food aid. As of early July, only a quarter of the emergency food aid need had been delivered. With the failure of the main season, however, continued large scale food assistance will be required well into 2000. Most households will also need seeds and other inputs for planting during the next growing season.

In **Ethiopia**, the 1999 "Belg" crop, normally harvested from June, has largely failed due to inadequate rainfall. The magnitude of food shortages in the country has, therefore, increased in terms of numbers and areas affected. The worst hit area is the north-western Amhara Region, where some 2 million people face severe food shortages. The Government has recently appealed for 425 000 tonnes of food aid for an estimated 5.3 million vulnerable people, including those affected by the failure of the Belg season, as well as 385 000 internally displaced people due to the ongoing conflict with Eritrea. Despite some rains in recent months, the southern and eastern pastoral areas are yet to recover from consecutive years of drought and the shortages of water. An Emergency Operation worth US\$40.5 million to provide food assistance to 1.2 million people was jointly approved by FAO and WFP on 31 May 1999.

Early prospects for the 1999 "Meher" season crops are uncertain, despite beneficial rains in June and July. Inadequate rains in April and May delayed land preparation and planting of long-cycle crops in some parts of the country. Furthermore, about 350 000 hectares have so far been treated for armyworm infestations but the extent of crop damage is not yet known.

In **Tanzania**, recent official reports indicate that there are serious localised crop failures in several regions, particularly in Shinyanga Region, where cash and food crop production is anticipated to fall by as much as 40 percent from last year's. Preliminary estimates indicate total cereal production (maize, rice, wheat, sorghum and millet) in 1999 at 3.76 million tonnes, about 9 percent below last year's output due to erratic rains, reduced use of improved seeds and fertilisers and an outbreak of armyworms. However, prospects for non-cereal crops (pulses, potatoes, cassava and plantains) are reported to be satisfactory.

With the onset of the dry season in central and northern parts of the country, the outlook for pastoralists is unfavourable due to reduced pasture and water supplies. In Dodoma and Singida Regions, where many households have been receiving food assistance since October 1998, the food supply situation has improved

with the new harvest. Nationally, maize prices have declined since April with the harvest and arrival of cereal imports, but still remain much higher than at the same time last year. The Government is building up stocks, with import plans of 175 000 tonnes, of which 50 000 tonnes have already arrived.

In **Eritrea**, despite a satisfactory harvest in 1998, the food situation is very tight for the displaced people from the areas of conflict with neighbouring Ethiopia. Farmers displaced from border areas of Gash-Barka and Debub will not be able to grow crops in the current season, exacerbating the food supply problem. Under an Emergency Operation jointly approved by FAO and WFP in April 1999, food assistance will be provided to 268 000 people most affected by the war, including 21 500 deportees from Ethiopia, for a period of nine months.

Planting of 1999 crops is underway. Early prospects are uncertain following below average rainfall in June in most parts of the country. First season rains from March to May were erratic and inadequate. An outbreak of army worm was reported in late June in some parts of the country, with Anseba province particularly affected. Control measures are underway, but a further spread is forecast.

In **Kenya**, the 1999 main season maize crop has been affected by erratic rains, inadequate agricultural input supply and armyworm infestation in some parts. Preliminary official estimates indicate a maize output of about 1.95 million tonnes compared to 2.44 million tonnes last year and 2.5 million tonnes average over the previous five years. Significant output reductions are reported for the Eastern, Central and Rift Valley Provinces.

The food supply situation is critical in the northern and north-eastern pastoral districts where rainfall for the current season has been too erratic and insufficient for adequate pasture and water supplies until the next rains in October. Severe food shortages are also reported in parts of Central and Eastern provinces. The Government has provided about 4 000 tonnes of relief food to vulnerable households in Eastern Province and the pastoral districts. The situation is likely to deteriorate in the coming months with the depletion of food stocks and, therefore, further food assistance will be needed for the affected population.

In southern **Sudan**, intensified civil strife, particularly in Bahr El Ghazal, and a recent influx of returnees which coincided with the lean period, has aggravated an already precarious food supply situation. However, crop growing conditions are favourable so far due to abundant rainfall in May and June. Pasture conditions are reported to be satisfactory in most regions, especially in the Upper Nile State which was flooded last year.

Elsewhere in the Sudan, planting of 1999 main season crops is in progress. Early prospects have improved with good rains in July.

In **Uganda**, the western parts of the country are reportedly facing food shortages due to a prolonged drought which has affected crop production and livestock. More than half a million farmers are in need of urgent assistance. Thousands more are reported to be moving to northern Tanzania in search of water and pasture. The worst hit counties are Nyabushozi, Kashari and Ibanda in Mbarara District, and Ruhinda and Ruhaama in Bushenyi and Ntungamo districts respectively. Food difficulties also persist in northern and western areas, where large numbers of people are continuously displaced by insurgency.

Elsewhere, the outlook for the 1999 main season crops is generally favourable. In the Lake Victoria basin and the Eastern Region, a normal harvest is anticipated, despite dry weather in late May and June. In the north, where the rainy season extends through November, crop conditions are reported to be normal. Crop production is expected to increase in Kitgum and Gulu due to abundant rainfall, availability of inputs and improved security that allowed increased access to cultivable land.

## **FOOD OUTLOOK FOR ANGOLA IS VERY BLEAK, WHILE FOOD SUPPLY IS EXPECTED TO TIGHTEN IN SEVERAL PARTS OF SOUTHERN AFRICA**

Despite favourable climatic conditions during the 1998/99 main growing season, serious food difficulties are being experienced in Angola, reflecting the escalation of the civil war since December last year. Emergency food assistance is urgently needed for about 1 million newly displaced people by renewed hostilities. Constant population movements prevented normal agricultural activities and resulted in reduced harvests even for settled farmers. The food situation gives cause for serious concern in the provincial capitals and municipalities which are accommodating huge numbers of IDPs but have become virtually isolated as a result of the closure of most roads. Food prices are on the increase in these urban areas and the situation is

expected to deteriorate in the coming months. Costly air transport of emergency relief food distribution is now the only alternative for most cities.

An Emergency Operation for 180 000 tonnes of food worth US\$38 million was jointly approved by the FAO Director-General and the Executive Director of WFP on 14 June 1999 for 798 000 people.

### **CROP AND FOOD SUPPLY SITUATION IN ANGOLA**

A recent FAO/WFP Crop and Food Supply Assessment Mission to Angola found that renewed fighting in late 1998 had resulted in large-scale population displacement in the rural areas estimated at 1 million people, increasing the total number to 1.7 million, with more expected. This had adversely affected food production, despite very favourable crop growing conditions.

Hostilities were being experienced in virtually all provinces but the areas worst affected were the main maize growing central provinces. The escalation of violence and most of the displacement occurred in December, when planting operations had been completed or were well advanced. Although overall planting reductions were not dramatic, significantly reduced yields were expected in many areas due to abandonment of fields. Even for settled farmers yields were reduced in areas where fighting has been intense. In particular, in the provinces of Bie, Huambo, Malange, eastern Kuanza Sul, north-eastern Moxico and northern Huila, constant population movements prevented normal agricultural activities.

The Mission forecast the 1998/99 cereal production at 533 000 tonnes, which is 11 percent below last year's. Production of cassava, an important staple, was estimated to have declined slightly from last year, while bean production was estimated to have declined by 21 percent.

For the 1999/2000 marketing year (April/March), the Mission concluded that domestic cereal supply, estimated at 562 000 tonnes, would seriously fall short of national consumption requirements. Cereal import requirement was estimated at 505 000 tonnes compared to actual cereal imports of 420 000 tonnes in the previous marketing year. Of the estimated cereal import requirement, the Mission estimated that 325 000 tonnes would be imported commercially, leaving a deficit of 180 000 tonnes to be covered by food aid.

The renewed civil strife had further constrained the already inefficient marketing system. Transfer of surplus produce to deficit areas between and even within provinces is undertaken at high risk and cost, as is the distribution of other basic household necessities. This has resulted in large variations in commodity prices among provincial markets. At the time of the Mission, prices of maize ranged from 150 000 KZR/kg in Malange to 555 000 KZR/kg in Benguela. Similarly, in Huambo, prices were twice those in the adjacent Huila Province. Prices of basic staples are on the increase in urban areas also reflecting isolation of the cities in the interior of the country. The trend in prices in Huambo markets over the past 12 months indicated that prices of basic commodities have increased up to five times, well above the 1998 inflation rate. The rapid increase in prices is seriously affecting access to basic foods for a large segment of the population.

Displaced people are, in most cases, the most food insecure. However, the renewed conflict has had an adverse impact on the food security situation of the majority of the population. The total number of people in need of food assistance, as assessed by the mission, represents an increase of approximately 50 percent over 1998 estimates. In addition, there is need to allocate land for cultivation by IDPs and to provide the necessary agricultural inputs for the next season starting in October. Food distribution by surface transport is severely hampered by the conflict, making costly air transport the only alternative. Urgent additional logistical support is, therefore, needed to accelerate the distribution of humanitarian assistance.

Elsewhere in southern Africa, the food supply situation is anticipated to tighten in several countries where erratic rainfall resulted in reduced cereal harvests. In South Africa production declined below last year's reduced crop, while in Botswana, Lesotho, Namibia and Zimbabwe, estimated cereal outputs are below average for the second consecutive year. However, the overall food position is forecast to remain stable, reflecting the import capacity of these countries.

### **FOOD PRODUCTION IN DEMOCRATIC REPUBLIC OF CONGO CONTINUES TO BE SEVERELY HAMPERED WHILE RECOVERY REMAINS FRAGILE ELSEWHERE IN THE GREAT LAKES REGION**

In the **Democratic Republic of Congo (DRC)**, it was hoped that the cease-fire agreement signed on 10 July in Lusaka would improve the security situation. But with the refusal of the rebel movements to sign the agreement, its effective implementation is in doubt.

Persistent fighting has caused substantial population displacement in various regions, with the number of IDPs currently estimated at 660 000. There are also an estimated 285 000 refugees from neighbouring countries (Angola, Sudan, the Republic of Congo, Rwanda and Burundi). In Katanga province, in the south-east, military activities have forced thousands of people to abandon their homes and seek refuge in Lubumbashi, where limited assistance is available.

In both North and South Kivu province, reports indicate that some 240 000 families (1.2 million persons) have been affected by recent civil strife. Attacks on villages have resulted in a dramatic increase in the number of refugees to Tanzania. In Kivu, the B-season crops have recently been harvested and production is expected to remain well below normal.

In Kinshasa, the food supply situation remains difficult. A recent nutritional survey indicated that almost 10 percent of Kinshasa's population are suffering from acute malnutrition compared to some 6 percent in 1998. As a result of increases in fuel prices, prices of basic food commodities have increased sharply, and insecurity and economic problems limit transportation of food to the capital.

In the **Republic of Congo**, renewed fighting in mid-May between Government forces and Ninja militia resulted in fresh population displacements within Brazzaville. It is estimated that at least 10 000 people have been displaced. Food distribution and marketing systems have been seriously disrupted and the health and nutritional situation of IDPs is reported to be serious.

In **Burundi**, the recently harvested 1999 B season crops were affected by a late start and early cessation of the rains, coupled with armyworm attacks. Most affected crops were pulses, which are estimated to have decreased by 22 percent from the same season last year. Cereal output declined by 10 percent. Production of other basic staples such as roots and tubers, bananas and plantains also decreased but only slightly and, overall, food production is estimated at 6 percent below the 1998B harvest.

The reduced grain output follows a below average harvest in first season early in the year. As a result the supply of cereals and pulses is anticipated to tighten in the coming months. Prices of beans are reported to be on the increase in Bujumbura markets from their already high levels. The suspension of the regional economic embargo in January this year has not yet stimulated a recovery in economic activities. Instead, a further devaluation of the national currency has resulted in increased prices of imported goods, worsening access of a large section of the population to basic food and non-food items.

The security situation has deteriorated in recent months with attacks on staff of humanitarian agencies working in the country. This has led to a temporary suspension of food aid distributions by WFP outside the capital city since early July. The number of displaced people still living in re-groupment camps is estimated at 543 000 people.

In **Rwanda**, the output of the recently harvested 1999B season crops is estimated to have declined compared to 1998B season, particularly cereals and beans. A delay in the start of the rainy season resulted in late plantings, which, combined with an early end of the rains led to yields reductions, particularly for cereals in high altitude areas. Food production has also been negatively affected in some areas by a shortage of agricultural inputs, mainly seeds. A final assessment of the season production is not yet available. Food prices which declined in the first half of the year have recently started to increase.

In the North-western prefectures of Gisenyi and Ruhengeri, as well as in parts of Kibuye and Gitarama, despite improved security conditions food production remains seriously constrained by large-scale population displacement.

## **EARLY PROSPECTS ARE FAVOURABLE IN WESTERN AFRICA BUT FOOD SITUATION REMAINS PRECARIOUS IN SIERRA LEONE**

In the **Sahelian countries**, the rainy season started generally on time and even early in southern Senegal, but after generally above normal rains in early to mid-May, rainfall decreased significantly from early



to mid-June in the centre and east of the Sahel, particularly in Burkina Faso and Niger. However, widespread and above normal rains from late June over most producing areas of the Sahel compensated for the reduced precipitation in the first half of June.

Plantings are well underway. The dry spell in June in Burkina Faso and Niger delayed plantings and necessitated replanting in some areas. This could reduce production if rains do not continue late in the season. The Desert Locust situation remains calm so far.

In **Sierra Leone**, the signing of a peace agreement in early July between the government and the rebels is expected to lead to an improvement in the security situation, facilitating emergency and rehabilitation activities in the country. However, since the agricultural season is well underway, the beneficial impact of the peace agreement on 1999 crop output may be very limited. Current indications are that the output may not change significantly from last year's level despite favourable climatic conditions so far.

Food distributions are underway following the reopening of the main roads from Freetown, but are insufficient for the large number of displaced persons. Food shortages are reported in many areas of the country, notably in the north and east, and food prices are still extremely high. Humanitarian assessment missions are currently evaluating the needs in the areas that could not be entered before the cease fire. However, even in the event of a successful implementation of the peace agreements, the country will continue to rely heavily on food assistance for the next few years.

In **Guinea-Bissau**, the security situation has greatly improved and agricultural activities have resumed under favourable growing conditions. However, seed shortages are likely in some areas following 1998 below average harvest.

A CILSS/Government crop assessment mission in late April estimated aggregate 1998 cereal production at a below average 131 300 tonnes, including 87 200 tonnes of paddy and 44 100 tonnes of coarse grains. Guinea-Bissau normally imports about 40 percent of its cereal consumption requirement, almost totally through the Bissau seaport. The cereal import requirement for the 1998/99 marketing year (November/October) is estimated at 87 000 tonnes against 76 000 tonnes imported in 1997/98.

In **Liberia**, with favourable climatic conditions and improved security, crop prospects are better than last year. Rehabilitation activities and input distributions, as well as food assistance, have improved the food supply situation. However, the country continues to rely heavily on humanitarian food assistance.

## **AREAS OF PRIORITY ACTION**

The grim food supply situation in Somalia gives cause for serious concern; more than a million people are in need of urgent food assistance. In Ethiopia, the magnitude of people facing severe food shortages has increased due to the failure of the "Belg" season. The escalation of the civil conflict in Angola has resulted in large-scale population displacement, seriously disrupting food production. In the Democratic Republic of Congo, the food supply situation remains precarious due to persistent insecurity and violence. In Sierra Leone, food supply difficulties persist, but the peace accord signed recently is expected to improve the situation.

Against this background, the attention of the international community is drawn to the following areas requiring assistance:

First, there is an urgent need for additional pledges of relief assistance to several drought affected countries in eastern Africa, particularly Somalia and Ethiopia, where millions of people are facing severe food shortages.

Second, in Angola large-scale food assistance is needed for the large number of internally displaced persons besieged in cities and municipalities. In particular, logistical support for airlifting food relief supplies is urgently needed.

Third, in the Democratic Republic of Congo a concerted effort is needed to reinforce the cease-fire agreement signed on 10 July in Lusaka, Zambia, so as to facilitate badly needed humanitarian assistance to the affected populations.

Fourth, sustained donor assistance is needed for rehabilitation of the agricultural sector in Sierra Leone, Liberia, Rwanda and Burundi.

## PART II : POSITION BY SUB-REGION

The harvesting of the 1998/99 coarse grain crops is virtually complete in southern Africa. In several countries of eastern Africa, the main season crops are either being harvested or are in the ground, however, the planting season of the main cereal crops has started in Ethiopia, Eritrea and Sudan. Coarse grain crops are maturing in parts of the coastal countries of western Africa and are at flowering or grain formation stages in parts of central Africa. In the Sahelian countries of western Africa main season cereal crops are being planted.

### Cereal Crop Calendar

Sub-Region	Cereal Crops	
	Planting	Harvesting
Eastern Africa <sup>1/</sup>	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 <sup>1/</sup>	April-June	Aug.-Dec.

<sup>1/</sup> 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**, prospects for 1999 foodcrops are unfavourable. In Somalia, the current main "Gu" season has largely failed due to erratic and insufficient rains, armyworm outbreaks, and unusually high temperatures. It is estimated that 1 million people face serious food shortages, with 400 000 at risk of starvation. In Ethiopia, the 1999 "Belg" crop, normally harvested from June, has also failed and early prospects for the 1999 "Meher" season crops are uncertain due to inadequate rainfall so far. In Tanzania, serious localised crop failures are reported in several regions, particularly in Shinyanga Region, where cash and food crop production is anticipated to fall by as much as 40 percent. Total cereal production in 1999 is estimated at 3.76 million tonnes, about 9 percent below last year's output due to erratic rains, reduced use of improved seeds and fertilisers and an outbreak of armyworms. In Uganda, a prolonged drought has severely affected the main season crop production and livestock in the western parts of the country. In Kenya, preliminary official forecasts indicate a reduced 1999 main season maize output of about 1.95 million tonnes compared to last year's output of 2.44 million tonnes and an average of 2.5 million tonnes over the last five years, due to erratic rains, inadequate agricultural input supply and armyworm infestation. Significant output reductions are reported in the Eastern, Central and Rift Valley Provinces. In Eritrea, early prospects for 1999 cereal crops are uncertain following below average rains in June. In Sudan, early prospects for the 1999 main season cereal crops have improved in the central and northern parts due to beneficial rains in July. In the south, crop growing conditions are favourable but agricultural activities continue to be disrupted by civil strife.

The aggregate cereal import requirement of the sub-region in marketing year 1998/99 is estimated at 3.1 million tonnes. Commercial imports are estimated at 2.3 million tonnes and the food aid requirements at some 0.8 million tonnes.

In **southern Africa**, harvesting of 1999 main season cereal crops is complete. Despite abundant rains at the beginning of the season, dry spells and high temperatures from February in some countries reduced yields. Aggregate cereal output is estimated to be below average, as last year's. However, production varied considerably. Malawi, Mozambique and Zambia had good crops, while production in Madagascar and Swaziland is estimated at close to average. In South Africa, cereal output is estimated to be lower than last year's reduced crop due to floods and dry spells. In Botswana, Lesotho, Namibia and Zimbabwe, cereal production is higher than in 1998 but remains below average. In Angola, despite favourable weather during the season cereal production is below last year due to renewed civil war.

The sub-region's aggregate cereal import requirement for 1999/2000 is estimated at 5.5 million tonnes. Commercial imports are expected to reach 5.1 million tonnes, while aggregate food aid requirement is anticipated at 0.4 million tonnes.

In **western Africa**, the rainy season in the coastal countries generally has been normal so far. However, despite good climatic conditions, agricultural activities in Sierra Leone have been disrupted by insecurity and crop output is expected to be reduced. The 1998 aggregate cereal output for the eight coastal countries along the Gulf of Guinea (Benin, Côte d'Ivoire, Ghana, Guinea, Liberia, Nigeria, Sierra Leone and Togo) is estimated at some 26.9 million tonnes compared to 26.2 million tonnes in 1997. Average to above-average harvests were gathered in all the coastal countries, except in Sierra Leone and Togo.

In the Sahel, the growing season is now well established and prospects are generally favourable so far. Following the release of final production estimates in 1998 in most CILSS member countries, the aggregate output of cereals (including rice in milled equivalent) has been revised to 10.5 million tonnes. This is about 35 percent higher than in 1997 and 21 percent above the average for the last five years. Record crops were harvested in Burkina Faso, Chad, Mali and Niger, while output was above average in The Gambia and Mauritania, average in Senegal and below average in Cape Verde and Guinea-Bissau. Seed availability is generally adequate following the good harvests in 1998.

In the countries along the Gulf of Guinea, the food supply situation is expected to remain satisfactory through the 1998/99 marketing year, except in Liberia and Sierra Leone where production was affected by civil strife. In the Sahel, the food supply situation is expected to be stable until the next harvest from October. However, several areas within countries remain at risk of food shortages and may require some assistance, notably in Mauritania and Chad. Localised deficits can be covered by transfers from surplus areas or through triangular transactions. In Guinea-Bissau, the security situation has improved and economic activities have resumed.

The aggregate cereal import requirement of the western Africa sub-region in the 1998/99 marketing year is estimated at 5.3 million tonnes. Commercial imports are estimated at 4.9 million tonnes and food aid requirement at 0.4 million tonnes, mainly wheat and rice.

In **central Africa**, average to above-average harvests were gathered in 1998 in most countries except the Republic of Congo and the Democratic Republic of Congo, affected by civil strife. Crops are currently growing under generally favourable conditions in Cameroon and Central African Republic. In the Democratic Republic of Congo, maize is growing satisfactorily in the centre and south not yet affected by the ongoing civil strife. Intensified civil strife in Republic of Congo has disrupted agricultural and marketing activities, pointing to another reduced harvest in 1999, while prospects in the Democratic Republic of Congo remain uncertain depending on developments in the security situation following the recent cease-fire agreement.

For the current season, the food supply situation remains tight in Democratic Republic of Congo due to insecurity and transport constraints. Despite the cease-fire agreement signed on 10 July in Lusaka between all the countries involved in the war, the food situation is likely to remain very tight for some time, notably in Kivu provinces and in Kinshasa. In the Republic of Congo, population displacements in and out Brazzaville continue. Food prices are very high and the food marketing system has been seriously disrupted.

For the 1999 marketing year, the cereal import requirement for the seven countries of the sub-region is estimated at about 800 000 tonnes, to be met almost entirely through commercial channels.

The table below summarizes sub-Saharan Africa's cereal import and food aid requirements by sub-region. Food aid pledges and deliveries are shown in Tables 1 and 2 .

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

Sub-Region	1998 Production	1998/99 or 1999		
		Cereal import requirements	Anticipated commercial imports	Food aid Requirements
<b>Eastern Africa</b>	<b>22 561</b>	<b>3 116</b>	<b>2 294</b>	<b>822</b>
<b>Southern Africa</b>	<b>18 317</b>	<b>5 554</b>	<b>5 107</b>	<b>447</b>
<b>Western Africa</b>	<b>37 418</b>	<b>5 313</b>	<b>4 885</b>	<b>428</b>
<b>Central Africa</b>	<b>3 127</b>	<b>796</b>	<b>765</b>	<b>31</b>
<b>TOTAL</b>	<b>81 423</b>	<b>14 779</b>	<b>13 051</b>	<b>1 728</b>

**Table 1: Cereal Imports and Food Aid Requirements in 1999/2000 for Sub-Saharan Africa Countries**  
**which have entered their 1999/2000 marketing year ( in thousand tonnes )**

Sub-Region/ Country	Marketing year	1999 Cereal production 1/		Position for 1999/2000							
		Total	As %of average of previous 5 years	Cereal import require- ments 2/	Antici- pated com- mer- cial imports	Food aid requirements		Cereal import position			
						Total	of which: excep- tional	Commer- cial imports already made or contracted	Pledges	of which received so far	Uncov. food aid require- ments
<b>Eastern Africa</b>		<b>4 029</b>	<b>97</b>	<b>1 000</b>	<b>780</b>	<b>220</b>	-	<b>51</b>	<b>2</b>	<b>2</b>	<b>218</b>
Somalia	Aug./July	241	81	330	185	145	-	-	-	-	145
Tanzania	June/May	3 788	98	670	595	75	-	51	2	2	73
<b>Southern Africa</b>		<b>18 389</b>	<b>89</b>	<b>5 482</b>	<b>5 136</b>	<b>346</b>	-	<b>210</b>	<b>148</b>	<b>31</b>	<b>213</b>
Angola	April/March	533	129	505	325	180	-	-	9	9	171
Botswana	April/March	24	63	245	245	-	-	-	-	-	-
Lesotho	April/March	177	95	198	188	10	-	-	-	-	10
Madagascar	April/March	1 907	105	150	135	15	-	-	7	6	8
Malawi	April/March	2 496	150	52	52	-	-	-	14	14	-
Mozambique	April/March	1 625	129	320	180	140	-	63	116	-	24
Namibia	May/April	72	73	142	142	-	-	-	-	-	-
South Africa	May/April	8 109	70	2 948	2 948	-	-	147	-	-	-
Swaziland	May/April	111	108	58	58	-	-	-	-	-	-
Zambia	May/April	1 160	107	314	313	1	-	-	2	2	-
Zimbabwe	April/March	2 175	95	550	550	-	-	-	-	-	-
<b>TOTAL</b>		<b>22 418</b>	<b>91</b>	<b>6 482</b>	<b>5 916</b>	<b>566</b>	-	<b>261</b>	<b>150</b>	<b>33</b>	<b>431</b>

1/ Including rice in milled equivalent.

2/ Excluding re-exports.

Table 2: Cereal Imports and Food Aid Requirements in Sub-Saharan Africa, 1998/1999 or 1999 (in thousand tonnes)

Sub-Region/ Country	Marketing year	1998 Cereal production 1/		1997/98 or 1998 imports			Position for 1998/99 or 1999							
		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 requirements		Commer- cial imports already made or contracted	Food aid		
									Total	of which: excepti- onal		Pledges 3/	of which received so far	Uncov. food aid require- ments
<b>Countries still in 1998/99 or 1999 marketing year</b>														
<b>Eastern Africa</b>		<b>18 229</b>	<b>108</b>	<b>4 001</b>	<b>141</b>	<b>1 020</b>	<b>2 135</b>	<b>1 475</b>	<b>660</b>	<b>0</b>	<b>370</b>	<b>682</b>	<b>577</b>	<b>253</b>
Burundi	Jan./Dec.	271	103	42	70	1	70	20	50	-	-	1	1	49
Comoros	Jan./Dec.	6	100	46	108	4	46	36	10	-	5	1	-	9
Djibouti	Jan./Dec.	-	-	73	76	11	66	56	10	-	3	2	2	8
Eritrea	Jan./Dec.	459	356	327	161	103	109	65	44	-	-	16	-	28
Ethiopia 4/	Jan./Dec.	7 198	100	608	107	546	200	15	185	-	16	359	292	
Kenya	Oct./Sept.	3 041	100	1 951	193	74	790	721	69	-	258	76	67	
Rwanda	Jan./Dec.	221	126	200	79	142	215	-	215	-	-	97	91	118
Seychelles	Jan./Dec.	-	-	33	252	-	13	13	-	-	33	-	-	-
Sudan	Nov./Oct.	5 293	126	573	106	64	500	475	25	-	57	120	120	
Uganda	Jan./Dec.	1 740	93	150	295	75	126	74	52	-	-	12	6	40
<b>Southern Africa</b>		<b>2</b>	<b>100</b>	<b>265</b>	<b>125</b>	<b>-</b>	<b>248</b>	<b>248</b>	<b>-</b>	<b>-</b>	<b>15</b>	<b>-</b>	<b>-</b>	<b>-</b>
Mauritius	Jan./Dec.	2	100	265	125	-	248	248	-	-	15	-	-	-
<b>Western Africa</b>		<b>33 145</b>	<b>99</b>	<b>6 514</b>	<b>132</b>	<b>434</b>	<b>5 333</b>	<b>4 905</b>	<b>428</b>	<b>-</b>	<b>1 190</b>	<b>409</b>	<b>243</b>	<b>174</b>
<b>Coastal countries</b>		<b>26 881</b>	<b>109</b>	<b>4 092</b>	<b>128</b>	<b>288</b>	<b>3 395</b>	<b>3 175</b>	<b>220</b>	<b>-</b>	<b>988</b>	<b>182</b>	<b>116</b>	<b>116</b>
Benin	Jan./Dec.	790	113	124	109	12	125	120	5	-	21	8	8	
Côte d'Ivoire	Jan./Dec.	1 249	113	626	128	23	640	640	-	-	52	1	-	
Ghana	Jan./Dec.	1 722	105	471	135	52	475	450	25	-	83	61	2	
Guinea	Jan./Dec.	687	109	410	124	7	385	385	-	-	3	18	18	
Liberia	Jan./Dec.	141	271	200	92	104	155	105	50	-	3	69	63	
Nigeria	Jan./Dec.	21 458	109	1 845	133	-	1 250	1 250	-	-	780	-	-	-
Sierra Leone	Jan./Dec.	263	87	294	145	88	290	150	140	-	-	24	24	116
Togo	Jan./Dec.	571	101	123	100	3	75	75	-	-	45	-	-	-
<b>Sahelian countries</b>		<b>6 264</b>	<b>72</b>	<b>2 423</b>	<b>139</b>	<b>146</b>	<b>1 938</b>	<b>1 730</b>	<b>208</b>	<b>-</b>	<b>202</b>	<b>227</b>	<b>128</b>	<b>58</b>
Burkina Faso	Nov./Oct.	2 627	113	216	153	21	160	130	30	-	11	51	23	
Cape Verde	Nov./Oct.	5	83	81	97	46	95	40	55	-	1	91	44	
Chad	Nov./Oct.	1 269	142	86	128	22	72	60	12	-	1	3	3	9
Gambia	Nov./Oct.	112	117	122	136	6	124	115	9	-	18	3	3	6
Guinea-Bissau	Nov./Oct.	102	69	104	173	1	87	55	32	-	14	20	10	12
Mali	Nov./Oct.	2 304	111	94	93	10	80	70	10	-	11	6	5	4
Mauritania	Nov./Oct.	161	114	318	118	15	295	260	35	-	23	17	8	18
Niger	Nov./Oct.	2 947	144	504	230	26	220	210	10	-	3	30	26	
Senegal	Nov./Oct.	953	103	898	127	2	805	790	15	-	120	7	7	8
<b>Central Africa</b>		<b>3 127</b>	<b>116</b>	<b>772</b>	<b>36</b>	<b>12</b>	<b>796</b>	<b>765</b>	<b>31</b>	<b>-</b>	<b>68</b>	<b>10</b>	<b>8</b>	<b>22</b>
Cameroon	Jan./Dec.	1 232	113	260	93	3	280	278	2	-	31	3	3	
Cent.Afr.Rep.	Jan./Dec.	140	127	39	114	2	34	33	1	-	-	-	-	1
Congo, Dem. Rep. of	Jan./Dec.	1 726	117	250	111	2	250	240	10	-	16	5	5	5
Congo, Rep. of	Jan./Dec.	4	80	121	117	2	130	115	15	-	8	2	-	13
Equat. Guinea	Jan./Dec.	-	-	9	78	1	9	8	1	-	-	-	-	1
Gabon	Jan./Dec.	25	100	82	129	-	82	82	-	-	10	-	-	-
Sao Tome	Jan./Dec.	-	-	11	103	3	11	9	2	-	2	-	-	2
<b>Sub-total</b>		<b>54 503</b>	<b>103</b>	<b>11 553</b>	<b>132</b>	<b>1 466</b>	<b>8 512</b>	<b>7 393</b>	<b>1 119</b>	<b>-</b>	<b>1 642</b>	<b>1 101</b>	<b>828</b>	<b>449</b>
<b>Countries which have entered their 1999/2000 marketing year</b>														
<b>Eastern Africa</b>		<b>4 332</b>	<b>108</b>	<b>942</b>	<b>701</b>	<b>53</b>	<b>981</b>	<b>819</b>	<b>162</b>	<b>-</b>	<b>258</b>	<b>120</b>	<b>118</b>	<b>87</b>
Somalia	Aug./July	230	81	280	140	17	385	250	135	-	102	48	47	87
Tanzania	June/May	4 102	110	662	562	36	596	569	27	-	156	72	71	
<b>Southern Africa</b>		<b>18 315</b>	<b>85</b>	<b>4 094</b>	<b>77</b>	<b>373</b>	<b>5 306</b>	<b>4 859</b>	<b>447</b>	<b>-</b>	<b>3 625</b>	<b>553</b>	<b>478</b>	<b>268</b>
Angola	April/March	599	168	508	142	157	471	350	121	-	313	143	140	
Botswana	April/March	9	21	233	114	-	256	256	-	-	256	-	-	
Lesotho	April/March	152	82	135	63	8	188	188	-	-	156	6	6	
Madagascar	April/March	1 669	90	214	168	38	205	175	30	-	77	25	19	5
Malawi	April/March	1 872	110	117	35	4	102	102	-	-	165	37	34	
Mozambique	April/March	1 622	150	317	61	165	212	212	-	-	106	223	165	
Namibia	May/April	59	58	93	80	-	155	155	-	-	97	-	-	
South Africa	May/April	9 657	79	1 882	81	-	2 169	2 169	-	-	1 417	-	-	
Swaziland	May/April	110	115	62	75	-	63	63	-	-	75	-	-	
Zambia	May/April	707	55	371	111	2	660	364	296	-	357	33	33	263
Zimbabwe	April/March	1 859	73	164	23	-	825	825	-	-	605	86	81	
<b>Sub-total</b>		<b>22 647</b>	<b>89</b>	<b>5 036</b>	<b>89</b>	<b>426</b>	<b>6 287</b>	<b>5 678</b>	<b>609</b>	<b>-</b>	<b>3 883</b>	<b>673 0</b>	<b>596</b>	<b>355</b>
<b>TOTAL</b>		<b>77 150</b>	<b>98</b>	<b>16 589</b>	<b>115</b>	<b>1 892</b>	<b>14 799</b>	<b>13 071</b>	<b>1 728</b>	<b>-</b>	<b>5 524</b>	<b>1 774</b>	<b>1 424</b>	<b>804</b>

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 1998/99 or 1999 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			Remaining surpluses
	Wheat and rice	Coarse grains			Donor financed local purchases	Exports		
						Commercial	Triangular transactions 1/	
<b>Eastern Africa</b>	<b>1 762</b>	<b>1 354</b>	<b>1 783</b>	<b>388</b>	<b>254</b>	-	<b>29</b>	<b>1 500</b>
Burundi	30	40	-	-	-	-	-	-
Comoros	46	-	-	-	-	-	-	-
Djibouti	63	3	-	-	-	-	-	-
Eritrea	105	4	-	-	-	-	-	-
Ethiopia 2/	200	-	396	216	216	-	-	181
Kenya	420	370	29	6	6	-	23	-
Rwanda	30	185	-	-	-	-	-	-
Seychelles	7	6	-	-	-	-	-	-
Somalia	275	110	1	1	1	-	-	-
Sudan	475	25	869	150	17	-	-	852
Tanzania	35	561	352	9	9	-	-	343
Uganda	76	50	136	6	6	-	6	124
<b>Southern Africa</b>	<b>2 841</b>	<b>2 713</b>	<b>838</b>	<b>17</b>	<b>17</b>	<b>83</b>	<b>139</b>	<b>599</b>
Angola	271	200	-	-	-	-	-	-
Botswana	66	190	-	-	-	-	-	-
Lesotho	43	145	-	-	-	-	-	-
Madagascar	200	5	4	4	4	-	-	-
Malawi	52	50	9	8	8	-	1	-
Mauritius	228	20	-	-	-	-	-	-
Mozambique	212	-	60	1	1	-	-	59
Namibia	35	120	1	1	1	-	-	-
South Africa	1 447	722	710	-	-	34	136	540
Swaziland	48	15	-	-	-	-	-	-
Zambia	64	596	3	3	3	-	-	-
Zimbabwe	175	650	51	-	-	49	2	-
<b>Western Africa</b>	<b>4 855</b>	<b>478</b>	<b>770</b>	<b>100</b>	<b>38</b>	-	-	<b>732</b>
<b>Coastal countries</b>	<b>3 210</b>	<b>185</b>	<b>515</b>	-	-	-	-	<b>515</b>
Benin	125	-	25	-	-	-	-	25
Côte d'Ivoire	620	20	10	-	-	-	-	10
Ghana	440	35	20	-	-	-	-	20
Guinea	375	10	-	-	-	-	-	-
Liberia	135	20	-	-	-	-	-	-
Nigeria	1 200	50	450	-	-	-	-	450
Sierra Leone	240	50	-	-	-	-	-	-
Togo	75	-	10	-	-	-	-	10
<b>Sahelian countries</b>	<b>1 645</b>	<b>293</b>	<b>255</b>	<b>100</b>	<b>38</b>	-	-	<b>217</b>
Burkina Faso	145	15	35	20	18	-	-	17
Cape Verde	45	50	-	-	-	-	-	-
Chad	72	-	40	20	4	-	-	36
Gambia	121	3	5	5	-	-	-	5
Guinea-Bissau	77	10	-	-	-	-	-	-
Mali	80	-	80	20	4	-	-	76
Mauritania	265	30	5	5	-	-	-	5
Niger	100	120	80	20	9	-	-	71
Senegal	740	65	10	10	3	-	-	7
<b>Central Africa</b>	<b>711</b>	<b>85</b>	<b>15</b>	<b>5</b>	-	-	-	<b>15</b>
Cameroon	270	10	10	-	-	-	-	10
Cent.Afr.Rep.	33	1	-	-	-	-	-	-
Congo, Dem.Rep.of	190	60	5	5	-	-	-	5
Congo, Rep. of	120	10	-	-	-	-	-	-
Equat.Guinea	9	-	-	-	-	-	-	-
Gabon	80	2	-	-	-	-	-	-
Sao Tome	9	2	-	-	-	-	-	-
<b>TOTAL</b>	<b>10 169</b>	<b>4 630</b>	<b>3 406</b>	<b>510</b>	<b>308</b>	<b>83</b>	<b>168</b>	<b>2 846</b>

Note: Totals computed from unrounded data.

1/ Referring to supplying countries

2/ Includes refugee needs.



**Table 4 - Triangular Transactions within Sub-Saharan Africa in 1998/99 or 1999  
(in thousand tonnes) 1/**

Donor	Source of supply	Recipient Country	Total by donor
Belgium	South Africa	Rwanda (2.6)	2.6
EC	South Africa	Madagascar (0.3), Malawi (3.0)	3.3
Norway	Uganda	Somalia (0.4)	0.4
WFP	Kenya	Rwanda (0.7), Somalia (9.9), Sudan (12.5)	80.2
	South Africa	Angola (5.1), Ghana (0.3), Lesotho (4.3), Liberia (0.7), Madagascar (0.7), Malawi (0.7), Mozambique (4.7), Namibia (0.2), Rwanda (5.8), Somalia (2.3), Sudan (0.6), Tanzania (11.7), Zambia (10.9)	
	Uganda	Rwanda (6.0)	
	Zambia	Malawi (1.2)	
	Zimbabwe	Malawi (1.2), Mozambique (0.7)	
<b>TOTAL</b>			<b>86.5</b>

1/ Based on information reported by donors to GIEWS as of mid-July 1999.

**Table 5 - Local Purchases within Sub-Saharan Africa in 1998/99 or 1999  
(in thousand tonnes) 1/**

Donor	Recipient Country	Total by donor
Belgium	Burkina Faso (4.2), Kenya (0.5)	4.7
Canada	Niger (3.0)	3.0
EC	Ethiopia (174.2), Madagascar (1.7), Mali (0.5), Sudan (7.4), Tanzania (0.4)	184.2
France	Burkina Faso (9.0), Chad (3.7), Niger (5.5)	18.2
Germany	Congo Dem.Rep. (0.2), Ethiopia (15.4), Kenya (5.2), Malawi (4.5), Mali (3.0), Niger (5.0)	33.3
Netherlands	Ethiopia (15.1)	15.1
NGO	Ethiopia (4.8)	4.8
Sweden	Ethiopia (6.0)	6.0
WFP	Burkina Faso (4.6), Cent.Afr.Rep. (0.2), Chad (0.5), Congo Dem.Rep.(0.2), Ghana (0.2), Kenya (0.6), Madagascar (1.9), Malawi (3.4), Mozambique (1.3), Namibia (0.9), Senegal (3.2), Somalia (0.5), Sudan (9.5), Tanzania (8.3), Uganda (5.5), Zambia (3.3)	44.1
<b>TOTAL</b>		<b>313.4</b>

1/ Based on information reported by donors to GIEWS as of mid-July 1999.

**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 1998/99 or 1999 marketing year</i>				
<b>Eastern Africa</b>	<b>1 052</b>	<b>29</b>	<b>378</b>	<b>245</b>
Ethiopia	180	-	216	216
Kenya	23	23	6	6
Sudan	719	-	150	17
Uganda	130	6	6	6
<b>Western Africa</b>	<b>680</b>	<b>-</b>	<b>100</b>	<b>42</b>
<b>Coastal countries</b>	<b>515</b>	<b>-</b>	<b>-</b>	<b>-</b>
Benin	25	-	-	-
Côte d'Ivoire	10	-	-	-
Ghana	20	-	-	-
Nigeria	450	-	-	-
Togo	10	-	-	-
<b>Sahelian countries</b>	<b>165</b>	<b>-</b>	<b>100</b>	<b>42</b>
Burkina Faso	15	-	20	18
Chad	30	-	20	4
Gambia	-	-	5	-
Mali	60	-	20	4
Mauritania	-	-	5	-
Niger	60	-	20	14
Senegal	-	-	10	3
<b>Central Africa</b>	<b>10</b>	<b>-</b>	<b>5</b>	<b>-</b>
Cameroon	10	-	-	-
Congo, Dem.Rep.of	-	-	5	-
<b>Sub- total</b>	<b>1 742</b>	<b>29</b>	<b>483</b>	<b>287</b>
<i>Countries which have entered their 1999/2000 marketing year</i>				
<b>Eastern Africa</b>	<b>150</b>	<b>-</b>	<b>-</b>	<b>-</b>
Tanzania	150	-	-	-
<b>Southern Africa</b>	<b>792</b>	<b>10</b>	<b>2</b>	<b>2</b>
Madagascar	10	-	1	1
Malawi	400	-	1	1
Mozambique	120	-	-	-
South Africa	260	10	-	-
Swaziland	2	-	-	-
<b>Sub- total</b>	<b>942</b>	<b>10</b>	<b>2</b>	<b>2</b>
<b>TOTAL</b>	<b>2 684</b>	<b>39 1/</b>	<b>485</b>	<b>289</b>

Note: Totals computed from unrounded data.

1/ Refers to triangular transactions only.

**Table 7: Cereal Food Aid Pledges to Sub-Saharan Africa for 1998/99 or 1999 and Triangular Transactions/Local Purchases known to FAO as of mid-July 1999 (in thousand tonnes).**

Donor	Wheat	Rice	Coarse grains	Total cereals	Of which: triangular	Local purchases
Australia	17.7	-	-	17.7	-	-
Canada	66.6	-	-	66.6	-	3.0
EC	187.8	38.4	91.3	317.5	6.3	255.5
of which:						
Community action	142.6	1.1	42.8	186.5	3.3	184.2
National action	45.2	37.3	48.5	131.0	3.0	71.3
Austria	3.0	-	-	3.0	-	-
Belgium	12.5	2.9	6.2	21.6	2.6	4.7
France	19.0	1.0	15.0	35.0	-	18.2
Germany	2.9	0.1	26.9	29.9	-	33.3
Italy	7.8	32.3	-	40.1	-	-
Netherlands	-	-	-	-	-	15.1
Norway	-	-	0.4	0.4	0.4	-
Spain	-	1.0	-	1.0	-	-
Japan	-	66.6	-	66.6	-	-
NGOs	5.7	-	2.4	8.1	-	4.8
Sweden	-	-	-	-	-	6.0
Switzerland	-	6.1	-	6.1	-	-
United States	573.5	32.0	121.1	726.6	-	-
World Food Programme	236.1	13.1	317.1	566.3	80.2	44.1
<b>TOTAL</b>	<b>1 087.4</b>	<b>156.2</b>	<b>531.9</b>	<b>1 775.5</b>	<b>86.5</b>	<b>313.4</b>

Note: Totals computed from unrounded data

Table 8: Food Aid Pledges in Cereals for 1998/99 or 1999 by Donor and by Recipient (in thousand tonnes)

Donor/Recipient	Total	delivered	Australia	Canada	EC	Japan	Switzerland	U.S.A.	WFP	NGOs
<b>Eastern Africa</b>	<b>802.4</b>	<b>695.0</b>	-	<b>10.0</b>	<b>160.9</b>	<b>13.0</b>	-	<b>265.3</b>	<b>347.0</b>	<b>6.2</b>
Burundi	0.7	0.7	-	-	0.7	-	-	-	-	-
Comoros	1.0	-	-	-	1.0	-	-	-	-	-
Djibouti	2.0	2.0	-	-	-	-	-	-	2.0	-
Eritrea	15.6	-	-	-	5.6	-	-	10.0	-	-
Ethiopia 1/	359.0	291.7	-	10.0	122.1	-	-	119.9	101.3	5.7
Kenya	75.8	66.6	-	-	8.9	-	-	28.7	38.2	-
Rwanda	96.8	90.8	-	-	12.7	-	-	1.9	82.2	-
Seychelles	-	-	-	-	-	-	-	-	-	-
Somalia	47.8	47.4	-	-	0.8	-	-	17.0	30.0	-
Sudan	119.6	119.6	-	-	3.2	-	-	51.3	64.6	0.5
Tanzania	72.2	70.7	-	-	5.9	13.0	-	24.6	28.7	-
Uganda	11.9	5.5	-	-	-	-	-	11.9	-	-
<b>Southern Africa</b>	<b>552.7</b>	<b>478.1</b>	<b>17.7</b>	<b>50.4</b>	<b>50.9</b>	<b>16.4</b>	-	<b>327.2</b>	<b>89.0</b>	<b>1.1</b>
Angola	142.5	139.5	-	-	15.3	-	-	75.8	50.8	0.6
Botswana	-	-	-	-	-	-	-	-	-	-
Lesotho	6.0	6.0	-	-	-	-	-	-	6.0	-
Madagascar	24.8	19.0	-	-	2.7	6.4	-	13.1	2.6	-
Malawi	37.1	34.1	-	14.2	19.8	-	-	-	3.1	-
Mauritius	-	-	-	-	-	-	-	-	-	-
Mozambique	222.7	164.9	17.7	21.6	2.0	10.0	-	166.0	5.4	-
Namibia	0.2	0.2	-	-	-	-	-	-	0.2	-
South Africa	-	-	-	-	-	-	-	-	-	-
Swaziland	-	-	-	-	-	-	-	-	-	-
Zambia	33.3	33.3	-	5.8	6.1	-	-	-	20.9	0.5
Zimbabwe	86.1	81.1	-	8.8	5.0	-	-	72.3	-	-
<b>Western Africa</b>	<b>410.7</b>	<b>244.4</b>	-	<b>6.2</b>	<b>99.0</b>	<b>37.2</b>	<b>6.1</b>	<b>134.1</b>	<b>127.3</b>	<b>0.8</b>
<b>Coastal countries</b>	<b>182.4</b>	<b>115.7</b>	-	<b>0.0</b>	<b>4.4</b>	<b>5.1</b>	-	<b>83.9</b>	<b>88.2</b>	<b>0.8</b>
Benin	8.0	8.0	-	-	-	5.1	-	2.9	-	-
Côte d'Ivoire	1.4	-	-	-	1.4	-	-	-	-	-
Ghana	61.4	1.9	-	-	-	-	-	61.1	0.3	-
Guinea	18.1	18.1	-	-	-	-	-	-	17.3	0.8
Liberia	68.8	63.3	-	-	-	-	-	9.9	58.9	-
Nigeria	0.3	-	-	-	0.3	-	-	-	-	-
Sierra Leone	24.4	24.4	-	-	2.7	-	-	10.0	11.7	-
Togo	-	-	-	-	-	-	-	-	-	-
<b>Sahelian countries</b>	<b>228.3</b>	<b>128.7</b>	-	<b>6.2</b>	<b>94.6</b>	<b>32.1</b>	<b>6.1</b>	<b>50.2</b>	<b>39.1</b>	-
Burkina Faso	50.8	22.5	-	-	24.2	7.5	-	15.1	4.0	-
Cape Verde	91.1	44.4	-	-	55.2	6.6	6.1	21.1	2.1	-
Chad	4.1	4.1	-	-	-	-	-	3.5	0.6	-
Gambia	3.0	3.0	-	-	1.0	-	-	2.0	-	-
Guinea-Bissau	19.7	10.1	-	-	-	-	-	-	19.7	-
Mali	5.7	4.7	-	-	-	-	-	3.1	2.6	-
Mauritania	16.9	7.6	-	-	9.5	4.5	-	1.4	1.5	-
Niger	30.4	25.7	-	6.2	4.2	8.0	-	4.0	8.0	-
Senegal	6.6	6.6	-	-	0.5	5.5	-	-	0.6	-
<b>Central Africa</b>	<b>9.7</b>	<b>7.7</b>	-	-	<b>6.7</b>	-	-	-	<b>3.0</b>	-
Cameroon	2.6	2.6	-	-	-	-	-	-	2.6	-
Cent.Afr.Rep.	-	-	-	-	-	-	-	-	-	-
Congo, Dem.Rep.of	4.7	4.7	-	-	4.7	-	-	-	-	-
Congo, Rep.of	2.0	-	-	-	2.0	-	-	-	-	-
Equat. Guinea	-	-	-	-	-	-	-	-	-	-
Gabon	-	-	-	-	-	-	-	-	-	-
Sao Tome	0.4	0.4	-	-	-	-	-	-	0.4	-
<b>TOTAL</b>	<b>1 775.5</b>	<b>1 425.2</b>	<b>17.7</b>	<b>66.6</b>	<b>317.5</b>	<b>66.6</b>	<b>6.1</b>	<b>726.6</b>	<b>566.3</b>	<b>8.1</b>

1/ Includes refugee needs.

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

**(situation as of mid-July 1999)**

ANGOLA

<b>Area:</b>	1 247 000 sq.km
<b>Climate:</b>	Coastal desert, south-west semi-arid, rest tropical wet-dry. Rainy season: Sept.-May
<b>Population:</b>	13.42 million (1999 estimate), G.N.P. per caput US\$ 340 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; infrastructure devastated by prolonged civil strife
<b>Logistics:</b>	Inadequate port, rail and road facilities
<b>Major foodcrops:</b>	Roots, tubers, maize, plantains
<b>Marketing year:</b>	April/March; Lean season: January-April
<b>Share of cereals in total calorie intake:</b>	35 percent

**CURRENT SITUATION**

An FAO/WFP Crop and Food Supply Assessment Mission in May forecast the 1999 cereal production at 533 000 tonnes, which is 11 percent below last year's, mainly reflecting the impact of renewed displacement of rural people. Production of cassava, an important staple, is estimated to have declined slightly from last year, while bean production declined by an estimated 21 percent.

For the 1999/2000 marketing year, domestic cereal supply, estimated at 533 000 tonnes, falls seriously short of national consumption requirements. Cereal import requirement for 1999/2000 marketing year is estimated at 505 000 tonnes, which compares with actual cereal imports of 420 000 tonnes during the previous marketing year. Of the estimated cereal import requirement, the Mission estimated that 325 000 tonnes would be imported commercially, leaving 180 000 tonnes to be covered by food aid.

In addition, the Mission highlighted the need to allocate land for cultivation by IDPs and the provision of the necessary agricultural inputs for the next season starting in October.

**CEREAL SUPPLY/DEMAND BALANCE FOR THE 1999/2000 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	3	3	330	336
Normal Imports	110	100	90	300
of which: Structural food aid	20	15	60	95
<b><u>1999/2000 Domestic Availability</u></b>	<b>3</b>	<b>3</b>	<b>530</b>	<b>533</b>
1999 Production (rice in paddy terms)	-	5	530	535
1999 Production (rice in milled terms)	-	3	530	533
Possible stock drawdown	-	-	-	-
<b><u>1999/2000 Utilization</u></b>	<b>220</b>	<b>73</b>	<b>745</b>	<b>1 038</b>
Food Use	220	73	645	938
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	100	100
Exports or Re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<b><u>1999/2000 Import Requirement</u></b>	<b>220</b>	<b>70</b>	<b>215</b>	<b>505</b>
Anticipated commercial imports	220	70	35	325
Food aid needs	-	-	180	180
<b><u>Current Aid Position</u></b>				
Food aid pledges	-	1	8	9
of which: Delivered	-	1	8	9
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b>16</b>	<b>6</b>	<b>48</b>	<b>70</b>
<b><u>Indexes</u></b>				
1999 production as % of normal:				159
1999/2000 import requirement as % of normal:				168
1999/2000 food aid requirement as % of normal:				189

**BENIN**

<b>Area:</b>	111 000 sq.km
<b>Climate:</b>	Tropical wet-dry; two rainy seasons in south (Mar.-Jul. and Oct.) and one in north (May-Oct.)
<b>Population:</b>	5.68 million (1999 estimate); G.N.P. per caput US\$ 380 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; coastal country
<b>Logistics:</b>	Ports, roads, rail adequate; gateway to Niger
<b>Major foodcrops:</b>	Roots and tubers, maize
<b>Marketing year:</b>	January/December; Lean season: April-June
<b>Share of cereals in total calorie intake:</b>	37 percent

**CURRENT SITUATION**

The rainy season started in early March, with sufficient rainfall over the south to allow planting of the first maize crop. Rainfall decreased in May and early June but remained generally sufficient for adequate crop development, excepted in the north where some replanting may have occurred in localized areas for sorghum and millet. Although rainfall remained widespread over the whole country in June, crop condition is normal to below normal.

The overall food supply situation is satisfactory. The reduced demand from sahelian countries that experimented a good harvest in 1998, is allowing prices to remain at a low level. The cereal import requirement for 1999 (January/December) is estimated at 200 000 tonnes (including re-exports) of wheat and rice.

**CEREAL SUPPLY/DEMAND BALANCE FOR THE 1999 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	-	12	605	617
Normal Imports	50	150	8	208
of which: Structural food aid	4	4	8	16
<b><u>1999 Domestic Availability</u></b>	<b>-</b>	<b>15</b>	<b>775</b>	<b>790</b>
1998 Production (rice in paddy terms)	-	25	775	800
1998 Production (rice in milled terms)	-	15	775	790
Possible stock drawdown	-	-	-	-
<b><u>1999 Utilization</u></b>	<b>60</b>	<b>155</b>	<b>775</b>	<b>990</b>
Food Use	50	74	525	649
of which: local purchase requirement	-	-	-	-
Non-food use	-	4	215	219
Exports or Re-exports	10	75	25	110
Possible stock build up	-	2	10	12
<b><u>1999 Import Requirement</u></b>	<b>60</b>	<b>140<sup>1/</sup></b>	<b>-</b>	<b>200</b>
Anticipated commercial imports	55	140	-	195
Food aid needs	5	-	-	5
<b><u>Current Aid Position</u></b>				
Food aid pledges	2	5	1	8
of which: Delivered	2	5	1	8
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b>9</b>	<b>13</b>	<b>92</b>	<b>114</b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				130
1999 import requirement as % of normal:				96
1999 food aid requirement as % of normal:				31

<sup>1/</sup> Includes 75 000 tonnes of re-exports of rice.

**BOTSWANA**

<b>Area:</b>	567 000 sq.km
<b>Climate:</b>	South-western part arid (Kalahari desert); rest semi-arid with some rains in Dec.-Feb.
<b>Population:</b>	1.585 million (1999 estimate); G.N.P. per caput: US\$ 3 020 (1995)
<b>Specific characteristics of the country:</b>	east; swamps in the northern parts; desert in the west
<b>Logistics:</b>	Imports through South Africa
<b>Major foodcrops:</b>	Sorghum, pulses, vegetables
<b>Marketing year:</b>	April/March; Lean season: January/March
<b>Share of cereals in total calorie intake:</b>	55 percent

**CURRENT SITUATION**

Harvesting of 1999 coarse grains is completed. Prospects are unfavourable. Abundant rains at the beginning of the season allowed an expansion in area planted to cereals and benefited crop establishment. However, a dry spell and high temperatures in February, followed by irregular and below-average precipitation negatively affected crops. Preliminary estimates indicate an output above the poor crop in 1998, but still below average.

Despite the reduced harvest, the overall food supply situation is anticipated to remain stable in 1999/2000 (April/March) reflecting the country's import capacity.

**CEREAL SUPPLY/DEMAND BALANCE FOR THE 1999/2000 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	1	-	59	60
Normal Imports	60	8	116	184
of which: Structural food aid	-	-	20	20
<b><u>1999/2000 Domestic Availability</u></b>	<b><u>2</u></b>	<b><u>-</u></b>	<b><u>24</u></b>	<b><u>26</u></b>
1999 Production (rice in paddy terms)	-	-	24	24
1999 Production (rice in milled terms)	-	-	24	24
Possible stock drawdown	2	-	-	2
<b><u>1999/2000 Utilization</u></b>	<b><u>67</u></b>	<b><u>-</u></b>	<b><u>204</u></b>	<b><u>271</u></b>
Food Use	67	-	200	267
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	4	4
Exports or Re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<b><u>1999/2000 Import Requirement</u></b>	<b><u>65</u></b>	<b><u>-</u></b>	<b><u>180</u></b>	<b><u>245</u></b>
Anticipated commercial imports	65	-	180	245
Food aid needs	-	-	-	-
<b><u>Current Aid Position</u></b>				
Food aid pledges	-	-	-	-
of which: Delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>42</u></b>	<b><u>-</u></b>	<b><u>126</u></b>	<b><u>169</u></b>
<b><u>Indexes</u></b>				
1999 production as % of normal:				40
1999/2000 import requirement as % of normal:				133
1999/2000 food aid requirement as % of normal:				-



**BURKINA FASO**

<b>Area:</b>	274 000 sq.km
<b>Climate:</b>	Tropical wet-dry in south, semi-arid in north; rainy season: May-October
<b>Population:</b>	10.91 million (1999 estimate); G.N.P. per caput: US\$ 240 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; sahelian land-locked country
<b>Logistics:</b>	Roads inadequate during rainy season; adequate rail link to Abidjan (Côte d'Ivoire)
<b>Major foodcrops:</b>	Millet, sorghum, pulses, maize
<b>Marketing year:</b>	November/October; Lean season: July-September
<b>Share of cereals in total calorie intake:</b>	73 percent

**CURRENT SITUATION**

Improved rains in late June and early July compensated for the very limited precipitation of early June. Following first rains in April in the south-west and the south-east and over the centre and centre-north in May, precipitation decreased significantly in early June over the entire country. Rainfall recovered somewhat during the second dekad of June and became widespread, regular and above normal during the third dekad, notably in the centre and the north. These good rains continued during the first dekad of July over the entire country, except the extreme north where they were more limited and permitted widespread sowing of millet and sorghum in the centre and the north. Crops are emerging satisfactorily in the south and west where, following dry spell in early June, replantings were undertaken late for long cycle varieties (140-150 days) used in these regions. Rains will be needed late in the season.

No significant pest activity is reported. Seed availability is generally adequate following the 1998 record harvest.

Aggregate 1998 cereal production is officially estimated at a record 2.65 million tonnes, some 32 percent above 1997 and 12 percent above average. As a result, the overall food supply situation is satisfactory. Markets are well supplied and prices of cereals are stable. However, some deficit areas remain vulnerable and may need some assistance during the lean season, notably in the provinces of Bazéga, Boulgou, Boulikiemdé, Kouritenga, Oubritenga and Sanguié.

**CEREAL SUPPLY/DEMAND BALANCE FOR THE 1998/99 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	-	83	2 290	2 373
Normal Imports	50	80	25	155
of which: Structural food aid	7	6	15	28
<b><u>1998/99 Domestic Availability</u></b>	<b>57</b>	<b>169</b>	<b>2 568</b>	<b>2 647</b>
1998 Production (rice in paddy terms)	-	89	2 568	2 657
1998 Production (rice in milled terms)	-	59	2 568	2 627
Possible stock drawdown	-	20	-	20
<b><u>1998/99 Utilization</u></b>	<b>55</b>	<b>169</b>	<b>2 583</b>	<b>2 807</b>
Food Use	52	158	2 042	2 252
of which: local purchase requirement	-	-	20	20
Non-food use	1	11	396	408
Exports or Re-exports	-	-	15	15
Possible stock build up	2	-	130	132
<b><u>1998/99 Import Requirement</u></b>	<b>55</b>	<b>90</b>	<b>15</b>	<b>160</b>
Anticipated commercial imports	45	80	5	130
Food aid needs	10	10	10	30
<b><u>Current Aid Position</u></b>				
Food aid pledges	34	14	3	51
of which: Delivered	11	8	3	23
Donor-financed purchases	-	-	18	18
of which: for local use	-	-	18	18
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b>5</b>	<b>15</b>	<b>187</b>	<b>206</b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				112
1998/99 import requirement as % of normal:				103
1998/99 food aid requirement as % of normal:				107

**BURUNDI**

<b>Area:</b>	25 700 sq.km
<b>Climate:</b>	Highland rainy climate with moderate temperature (20°C); two rainy seasons: Feb.-May and Sept.-Nov.
<b>Population:</b>	6.47 million (1999 estimate); G.N.P. per caput: US\$ 180 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; land-locked country
<b>Logistics:</b>	Ports: Mombasa (Kenya) and Dar es Salaam (Tanzania); rail and road connections inadequate
<b>Major foodcrops:</b>	Pulses, plantains, roots, tubers, maize and sorghum
<b>Marketing year:</b>	January/December; Lean season: November-December
<b>Share of cereals in total calorie intake:</b>	34 percent

**CURRENT SITUATION**

Harvest of 1999 second (B) season foodcrops is well advanced. Prospects are unfavourable as rains started one month late and ceased earlier than normal. Beans in highland areas were particularly affected. Frosts in March and armyworms in parts, particularly in the north, also negatively affected maize yields.

As a result, production is anticipated to decline compared to last year's B season. Preliminary estimates indicate a decline of 10 percent in cereal production and of 22 percent in that of pulses. Since most of the annual cereal and beans production is obtained in this season, the supply of grains is anticipated to be tight in the second half of the year. The 1999 A season crops, harvested earlier, was also reduced by dry weather.

**CEREAL SUPPLY/DEMAND BALANCE FOR THE 1999 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	7	41	253	301
Normal Imports	20	2	7	29
of which: Structural food aid	-	-	-	-
<b><u>1999 Domestic Availability</u></b>	<b><u>10</u></b>	<b><u>38</u></b>	<b><u>233</u></b>	<b><u>281</u></b>
1999 Production (rice in paddy terms)	10	50	233	293
1999 Production (rice in milled terms)	10	33	233	276
Possible stock drawdown	-	5	-	5
<b><u>1999 Utilization</u></b>	<b><u>35</u></b>	<b><u>43</u></b>	<b><u>273</u></b>	<b><u>351</u></b>
Food Use	35	41	244	320
of which: local purchase requirement	-	-	-	-
Non-food use	-	2	24	26
Exports or Re-exports	-	0	-	0
Possible stock build up	-	-	5	5
<b><u>1999 Import Requirement</u></b>	<b><u>25</u></b>	<b><u>5</u></b>	<b><u>40</u></b>	<b><u>70</u></b>
Anticipated commercial imports	10	5	5	20
Food aid needs	15	-	35	50
<b><u>Current Aid Position</u></b>				
Food aid pledges	-	1	-	1
Of which: Delivered	-	1	-	1
Donor-financed purchases	-	-	-	-
Of which: for local use	-	-	-	-
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>5</u></b>	<b><u>6</u></b>	<b><u>38</u></b>	<b><u>50</u></b>
<b><u>Indexes</u></b>				
1999 production as % of normal:				97
1999 import requirement as % of normal:				241
1999 food aid requirement as % of normal:				-

CAMEROON

<b>Area:</b>	465 000 sq.km
<b>Climate:</b>	North: tropical wet-dry, south: tropical wet; length of rainy season declines from 11 months in south to 4 months in extreme north
<b>Population:</b>	13.86 million (1999 estimate); G.N.P. per caput: US\$ 650 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; coastal country
<b>Logistics:</b>	Ports and roads adequate; gateway to Chad
<b>Major foodcrops:</b>	Roots and tubers, coarse grains, fruit
<b>Marketing year:</b>	Jan./Dec.; Lean season: June-August
<b>Share of cereals in total calorie intake:</b>	39 percent

**CURRENT SITUATION**

Rains started in February in the south. They progressed northwards in March and became abundant and widespread in April and May, been well above average in mid-May. They decreased in June but remained widespread. The main maize, rainfed rice, millet and sorghum crops are growing under generally favourable conditions. However, infestations of army worms have been reported in the north and extreme north where they caused damage to recently planted maize, millet and sorghum crops.

Food supply difficulties are likely in northern areas affected by poor crops in 1998. A WFP Emergency Operation will provide 9 500 tonnes of food to 660 000 affected persons in northern parts.

**CEREAL SUPPLY/DEMAND BALANCE FOR THE 1999 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	-	80	1 106	1 186
Normal Imports	200	50	10	260
of which: Structural food aid	-	2	2	4
<b><u>1999 Domestic Availability</u></b>	<b><u>0</u></b>	<b><u>61</u></b>	<b><u>1 170</u></b>	<b><u>1 232</u></b>
1998 Production (rice in paddy terms)	0	90	1 170	1 260
1998/99 Production (rice in milled terms)	0	61	1 170	1 232
Possible stock drawdown	-	-	-	-
<b><u>1999 Utilization</u></b>	<b><u>220</u></b>	<b><u>111</u></b>	<b><u>1 180</u></b>	<b><u>1 512</u></b>
Food Use	206	100	933	1 239
of which: local purchase requirement	-	-	-	-
Non-food use	4	11	238	252
Exports or Re-exports	10	-	10	20
Possible stock build up	-	-	-	-
<b><u>1999 Import Requirement</u></b>	<b><u>220</u></b>	<b><u>50</u></b>	<b><u>10</u></b>	<b><u>280</u></b>
Anticipated commercial imports	220	48	10	278
Food aid needs	-	2	-	2
<b><u>Current Aid Position</u></b>				
Food aid pledges	3	-	-	3
of which: Delivered	3	-	-	3
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>14</u></b>	<b><u>7</u></b>	<b><u>65</u></b>	<b><u>86</u></b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				106
1999 import requirement as % of normal:				108
1999 food aid requirement as % of normal:				50

CAPE VERDE

<b>Area:</b>	4 000 sq.km
<b>Climate:</b>	Semi-arid; rainfall increases with altitude; rainy season: July-December
<b>Population:</b>	428 000 (1999 estimate); G.N.P. per caput: US\$ 960 (1995)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; archipelago
<b>Logistics:</b>	Port capacity and roads adequate
<b>Major foodcrops:</b>	Maize, rice, pulses
<b>Marketing year:</b>	November/October; Lean season: n.a. since 90 percent of requirements covered by imports
<b>Share of cereals in total calorie intake:</b>	57 percent

**CURRENT SITUATION**

First rains have been registered in early July on Santiago and Fogo islands. However, these early rains remained insufficient to allow widespread plantings of maize. Due to poor maize harvests in recent years, seed availability is likely to be a problem in some areas.

The final production figure has been estimated at 4 900 tonnes, which is equal to the 1997 level but below average. Following successive poor harvests, some sections of the rural population may need assistance in food and/or seeds for the next season. The overall food supply situation, however, remains satisfactory as the bulk of food is imported. The cereal import requirement for 1998/99 amounts to 95 000 tonnes. 91 000 tonnes have been pledged of which 44 000 tonnes have been delivered so far.

**CEREAL SUPPLY/DEMAND BALANCE FOR THE 1998/99 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	-	-	6	6
Normal Imports	20	20	45	85
of which: Structural food aid	15	15	25	55
<b>1998/99 Domestic Availability</b>	<b>2</b>	<b>-</b>	<b>8</b>	<b>10</b>
1998 Production (rice in paddy terms)	-	-	5	5
1998 Production (rice in milled terms)	-	-	5	5
Possible stock drawdown	2	-	3	5
<b>1998/99 Utilization</b>	<b>22</b>	<b>25</b>	<b>58</b>	<b>105</b>
Food Use	21	24	57	102
of which: local purchase requirement	-	-	-	-
Non-food use	1	1	1	3
Exports or Re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<b>1998/99 Import Requirement</b>	<b>20</b>	<b>25</b>	<b>50</b>	<b>95</b>
Anticipated commercial imports	5	10	25	40
Food aid needs	15	15	25	55
<b>Current Aid Position</b>				
Food aid pledges	33	18	41	91
of which: Delivered	8	14	23	44
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b>Estimated Per Caput Consumption (kg/Year)</b>	<b>49</b>	<b>56</b>	<b>134</b>	<b>239</b>
<b>Indexes</b>				
1998 production as % of normal:				82
1998/99 import requirement as % of normal:				112
1998/99 food aid requirement as % of normal:				100

CENTRAL AFRICAN REPUBLIC

<b>Area:</b>	623 000 sq.km
<b>Climate:</b>	North: tropical wet-dry, south: tropical wet; rainy season: March-November
<b>Population:</b>	3.57 million (1999 estimate); G.N.P. per caput: US\$ 320 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; land-locked country
<b>Logistics:</b>	Roads inadequate during rainy season; river transport important
<b>Major foodcrops:</b>	Roots and tubers, tree nuts, coarse grain, fruits
<b>Marketing year:</b>	January/December; Lean season: May-July
<b>Share of cereals in total calorie intake:</b>	21 percent

**CURRENT SITUATION**

Rains began early in February. They remained generally below normal in March and April but improved significantly in May, notably over the eastern half of the country, benefiting recently planted coarse grains.

Following a good cereal harvest in 1998, the food supply situation is satisfactory. For the 1999 marketing year (January/December), the cereal import requirement is estimated at 34 000 tonnes, mainly wheat.

**CEREAL SUPPLY/DEMAND BALANCE FOR THE 1999 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	-	12	103	115
Normal Imports	30	3	2	35
of which: Structural food aid	-	-	1	1
<b>1999 Domestic Availability</b>	<b>30</b>	<b>15</b>	<b>105</b>	<b>150</b>
1998 Production (rice in paddy terms)	-	19	128	147
1998 Production (rice in milled terms)	-	12	128	140
Possible stock drawdown	-	-	-	-
<b>1999 Utilization</b>	<b>30</b>	<b>15</b>	<b>129</b>	<b>174</b>
Food Use	29	13	104	146
of which: local purchase requirement	-	-	-	-
Non-food use	1	2	19	22
Exports or Re-exports	-	-	-	-
Possible stock build up	-	-	6	6
<b>1999 Import Requirement</b>	<b>30</b>	<b>3</b>	<b>1</b>	<b>34</b>
Anticipated commercial imports	29	3	1	33
Food aid needs	1	-	-	1
<b>Current Aid Position</b>				
Food aid pledges	-	-	-	-
of which: Delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b>Estimated Per Caput Consumption (kg/Year)</b>	<b>8</b>	<b>4</b>	<b>29</b>	<b>41</b>
<b>Indexes</b>				
1998 production as % of normal:				127
1999 import requirement as % of normal:				97
1999 food aid requirement as % of normal:				100

<b>Area:</b>	1 259 000 sq.km
<b>Climate:</b>	From north to south: arid, semi-arid and tropical wet-dry; rainy season: May-Oct.
<b>Population:</b>	7.23 million (1999 estimate); G.N.P. per caput: US\$ 240 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; land-locked sahelian country.
<b>Logistics:</b>	Roads inadequate during rainy season
<b>Major foodcrops:</b>	Millet and sorghum, roots and tubers, tree nuts
<b>Marketing year:</b>	November/October; Lean season: August-September
<b>Share of cereals in total calorie intake:</b>	52 percent

### CURRENT SITUATION

Growing conditions improved following above normal rains in late June and early July. Following first sporadic rains in mid-March and April in the extreme south, the rainy season really started in May in the south. Rains progressed northwards through late May but decreased in early June, remaining below normal during the first two dekads of June. Precipitation resumed in late June and above normal rainfall has been received during the third dekad of June. During the first dekad of July, satellite imagery indicates that precipitation remained generally above normal in the Sahelian zone but below normal in the south, in the Sudanian zone. Planting of coarse grains is underway in the Sahelian zone, while in the Sudanian zone crops are emerging but may suffer water stress if rains do not resume soon.

Pastures are regenerating following recent rains. Grasshopper infestations are reported in Guéra, Salamat and Tandjilé regions. They caused damage to emerging sorghum in Bitkine and Mongo areas in Guéra region. Army worm infestations reported in May in the Sudanian zone have decreased. No Desert Locust activity is reported.

Final 1998 cereal production figures have recently been published. The aggregate output of cereal is estimated at a record 1.3 million tonnes, some 37 percent above 1997 and 48 percent above the last five-year average. The overall food supply situation is satisfactory, notably in the Sahelian zone which harvested well above average production. However, food supply difficulties are likely in areas of the Sudanian zone affected by flooding and/or poor crops in 1998, notably in Logone oriental and occidental and in Tandjilé, where a WFP Assessment Mission in May undertook nutritional surveys and recommended about 4 000 tonnes of food aid for 255 700 persons.

### **CEREAL SUPPLY/DEMAND BALANCE FOR THE 1998/99 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	3	83	828	914
Normal Imports	50	10	10	70
of which: Structural food aid	4	1	10	15
<b><u>1998/99 Domestic Availability</u></b>	<b><u>5</u></b>	<b><u>74</u></b>	<b><u>1 195</u></b>	<b><u>1 274</u></b>
<i>1998 Production (rice in paddy terms)</i>	<i>5</i>	<i>100</i>	<i>1 195</i>	<i>1 300</i>
1998 Production (rice in milled terms)	5	69	1 195	1 269
Possible stock drawdown	-	5	-	5
<b><u>1998/99 Utilization</u></b>	<b><u>65</u></b>	<b><u>86</u></b>	<b><u>1 195</u></b>	<b><u>1 346</u></b>
Food Use	64	74	826	963
of which: local purchase requirement	-	-	20	20
Non-food use	1	12	189	202
Exports or Re-exports	-	-	20	20
Possible stock build up	-	-	160	160
<b><u>1998/99 Import Requirement</u></b>	<b><u>60</u></b>	<b><u>12</u></b>	<b><u>-</u></b>	<b><u>72</u></b>
Anticipated commercial imports	50	10	-	60
Food aid needs	10	2	-	12
<b><u>Current Aid Position</u></b>				
Food aid pledges	2	-	1	3
of which: Delivered	2	-	1	3
Donor-financed purchases	-	-	4	4
of which: for local use	-	-	4	4
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>9</u></b>	<b><u>10</u></b>	<b><u>114</u></b>	<b><u>133</u></b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				142
1998/99 import requirement as % of normal:				103
1998/99 food aid requirement as % of normal:				80

COMOROS

<b>Area:</b>	2 200 sq.km
<b>Climate:</b>	Tropical wet-dry; one hot rainy season with cyclone probability; June-October dry and cool
<b>Population:</b>	0.73 million (1999 estimate); G.N.P. per caput: US\$ 470 (1995)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; archipelago of four small islands
<b>Logistics:</b>	-
<b>Major foodcrops:</b>	Rice, roots, tubers, bananas and coconuts
<b>Marketing year:</b>	January/December
<b>Share of cereals in total calorie intake:</b>	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. Food aid needs are estimated at 10 000 tonnes.

**CEREAL SUPPLY/DEMAND BALANCE FOR THE 1999 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	-	17	4	21
Normal Imports	5	35	-	40
of which: Structural food aid	1	5	-	6
<b>1999 Domestic Availability</b>	<b>5</b>	<b>44</b>	<b>4</b>	<b>53</b>
1998 Production (rice in paddy terms)	-	3	4	7
1998 Production (rice in milled terms)	-	2	4	6
Possible stock drawdown	-	2	-	2
<b>1999 Utilization</b>	<b>6</b>	<b>44</b>	<b>4</b>	<b>54</b>
Food Use	6	42	2	50
of which: local purchase requirement	-	-	-	-
Non-food use	-	2	2	4
Exports or Re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<b>1999 Import Requirement</b>	<b>6</b>	<b>40</b>	<b>-</b>	<b>46</b>
Anticipated commercial imports	5	31	-	36
Food aid needs	1	9	-	10
<b>Current Aid Position</b>				
Food aid pledges	-	1	-	1
of which: Delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b>Estimated Per Caput Consumption (kg/Year)</b>	<b>8</b>	<b>58</b>	<b>3</b>	<b>69</b>
<b>Indexes</b>				
1999 production as % of normal:				33
1999 import requirement as % of normal:				115
1999 food aid requirement as % of normal:				167

**CONGO, DEMOCRATIC REPUBLIC OF**

<b>Area:</b>	2 268 000 sq.km
<b>Climate:</b>	Tropical wet climate in the central basin, tropical wet-dry in the extreme north and south
<b>Population:</b>	46.19 million (1999 estimate); G.N.P. per caput: US \$ 110 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; tropical country with access to sea
<b>Logistics:</b>	Roads inadequate
<b>Major foodcrops:</b>	Roots and tubers, coarse grains, fruit
<b>Marketing year:</b>	January/December; Lean season: October (north), November-December (south)
<b>Share of cereals in total calorie intake:</b>	15 percent

**CURRENT SITUATION**

The security situation remains tense in North and South Kivu provinces following bombing of Goma and Uvira on 11 May. People in Uvira region have been living in fear following devastation of entire villages. Despite peace negotiations, violence and attacks on villages have resulted in a dramatic increase in the number of refugees to Tanzania. Reports indicate that some 240 000 families (1.2 million persons) have been affected by recent civil strife in North and South Kivu.

In Kasai Oriental, some 80 000 residents of Luambo town are reported to have fled into surrounding forests due to fighting. Less than 10 000 have returned home since the town was captured by rebels on 7 June, but food and medicines are in short supply. The total number of internally displaced people is estimated at 660 000, of which 220 000 in southern Kivu and 150 000 in Katanga. About 285 000 refugees from neighbouring countries are also present in DRC: 146 000 from Angola, 61 000 from Sudan, 32 000 from Republic of Congo, 25 000 from Rwanda and 20 000 from Burundi.

In Kinshasa, the food supply situation remains difficult. A recent nutritional survey indicated that almost 10 percent of Kinshasa's population suffered from acute malnutrition compared to 6.2 percent in 1998. As a result of increases in fuel prices, prices of basic food commodities have increased sharply. Insecurity and other economic problems limit transportation of goods to the capital.

In Bas-Congo, there are about 30 000 refugees who fled fighting between the government forces and the "Ninja" militia in the Pool region of the Republic of Congo.

**CEREAL SUPPLY/DEMAND BALANCE FOR THE 1999 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	18	445	1 279	1 742
Normal Imports	130	45	45	220
of which: Structural food aid	5	-	5	10
<b><u>1999 Domestic Availability</u></b>	<b><u>18</u></b>	<b><u>320</u></b>	<b><u>1 388</u></b>	<b><u>1 726</u></b>
1998 Production (rice in paddy terms)	18	480	1 388	1 886
1998 Production (rice in milled terms)	18	320	1 388	1 726
Possible stock drawdown	-	-	-	-
<b><u>1999 Utilization</u></b>	<b><u>158</u></b>	<b><u>370</u></b>	<b><u>1 448</u></b>	<b><u>1 976</u></b>
Food Use	151	313	1 140	1 604
of which: local purchase requirement	-	-	5	5
Non-food use	7	57	308	372
Exports or Re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<b><u>1999 Import Requirement</u></b>	<b><u>140</u></b>	<b><u>50</u></b>	<b><u>60</u></b>	<b><u>250</u></b>
Anticipated commercial imports	135	50	55	240
Food aid needs	5	-	5	10
<b><u>Current Aid Position</u></b>				
Food aid pledges	1	3	-	5
of which: Delivered	1	3	-	5
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>3</u></b>	<b><u>7</u></b>	<b><u>25</u></b>	<b><u>35</u></b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				108
1999 import requirement as % of normal:				114
1999 food aid requirement as % of normal:				100



CONGO, REPUBLIC OF

<b>Area:</b>	342 000 sq.km
<b>Climate:</b>	Tropical wet climate in north, tropical wet-dry in south with main rainy season in October-April
<b>Population:</b>	3.20 million (1999 estimate); G.N.P. per caput: US\$ 660 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; tropical coastal country
<b>Logistics:</b>	Ports adequate; roads inadequate during rainy season
<b>Major foodcrops:</b>	Roots and tubers, fruit
<b>Marketing year:</b>	Jan./Dec.; Lean season: September-November
<b>Share of cereals in total calorie intake:</b>	19 percent

**CURRENT SITUATION**

Renewed fighting in mid-May between Government forces and Ninja militia resulted in fresh population displacements within Brazzaville. It is estimated that at least 10 000 people have been displaced from the Mukundu residential area near the airport to the north. Heightened insecurity has also displaced residents from the Mikalou and Talangai areas of Brazzaville. The displacement of people and disruption of marketing activities have seriously affected the food supply situation.

An estimated 60 000 of the 200 000 residents of southern Brazzaville's Bacongo and Makelekele districts displaced by conflict in December have returned from Pool region and northern Brazzaville since 1 May. The health and nutritional situation of IDPs is reported to be "serious". A new influx of refugees is now reported in DRC following renewed fighting in Congo.

**CEREAL SUPPLY/DEMAND BALANCE FOR THE 1999 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	-	1	5	6
Normal Imports	80	30	4	114
of which: Structural food aid	-	7	1	8
<b>1999 Domestic Availability</b>	<b>10</b>	<b>-</b>	<b>4</b>	<b>14</b>
1998 Production (rice in paddy terms)	-	1	4	5
1998 Production (rice in milled terms)	-	-	4	4
Possible stock drawdown	10	-	-	10
<b>1999 Utilization</b>	<b>100</b>	<b>30</b>	<b>14</b>	<b>144</b>
Food Use	98	28	12	138
of which: local purchase requirement	-	-	-	-
Non-food use	2	2	2	6
Exports or Re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<b>1999 Import Requirement</b>	<b>90</b>	<b>30</b>	<b>10</b>	<b>130</b>
Anticipated commercial imports	90	20	5	115
Food aid needs	-	10	5	15
<b>Current Aid Position</b>				
Food aid pledges	2	-	-	2
of which: Delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b>Estimated Per Caput Consumption (kg/Year)</b>	<b>31</b>	<b>9</b>	<b>4</b>	<b>43</b>
<b>Indexes</b>				
1998 production as % of normal:				83
1999 import requirement as % of normal:				114
1999 food aid requirement as % of normal:				188

COTE D'IVOIRE

<b>Area:</b>	318 000 sq.km
<b>Climate:</b>	Tropical wet-dry; two rainy seasons (March-July and September-December) in south and one in north (May-Oct.)
<b>Population:</b>	15.05 million (1999 estimate); G.N.P. per caput: US\$ 690 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; coastal country
<b>Logistics:</b>	Ports and roads adequate; gateway to Burkina Faso and Mali
<b>Major foodcrops:</b>	Roots and tubers, fruit, rice, maize
<b>Marketing year:</b>	January/December; Lean season: April to July
<b>Share of cereals in total calorie intake:</b>	40 percent

**CURRENT SITUATION**

The rainy season really started in early March over the south, and in late March in the north. Although it was below average, rainfall remained widespread and globally adequate to keep sufficient soil moisture for good crop development in April and May. Rains increased to become abundant from mid May to early July and should benefit to most crops. Current crop output prospects are good.

The overall food supply situation is satisfactory following the marketing of the 1998 crops. Organised repatriation is underway for about 80 000 Liberian refugees which are remaining in the western departments. Estimates for the 1998/99 cereal production point to about 1.6 million tonnes and the cereal import requirement for 1999 (January/December), is estimated at 640 000 tonnes, mostly wheat and rice.

**CEREAL SUPPLY/DEMAND BALANCE FOR THE 1999 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	-	950	700	1 650
Normal Imports	220	280	20	520
of which: Structural food aid	-	-	-	-
<b>1999 Domestic Availability</b>	<b>220</b>	<b>525</b>	<b>724</b>	<b>1 249</b>
1998 Production (rice in paddy terms)	-	875	724	1 599
1998 Production (rice in milled terms)	-	525	724	1 249
Possible stock drawdown	-	-	-	-
<b>1999 Utilization</b>	<b>255</b>	<b>890</b>	<b>744</b>	<b>1 889</b>
Food Use	250	759	568	1 577
of which: local purchase requirement	-	-	-	-
Non-food use	5	131	166	302
Exports or Re-exports	-	-	10	10
Possible stock build up	-	-	-	-
<b>1999 Import Requirement</b>	<b>255</b>	<b>365</b>	<b>20</b>	<b>640</b>
Anticipated commercial imports	255	365	20	640
Food aid needs	-	-	-	-
<b>Current Aid Position</b>				
Food aid pledges	-	-	1	1
of which: Delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b>Estimated Per Caput Consumption (kg/Year)</b>	<b>17</b>	<b>50</b>	<b>38</b>	<b>105</b>
<b>Indexes</b>				
1998 production as % of normal:				97
1999 import requirement as % of normal:				123
1999 food aid requirement as % of normal:				-

<b>Area:</b>	23 000 sq.km
<b>Climate:</b>	Arid climate
<b>Population:</b>	0.617 million (1998 estimate); G.N.P. per caput: n.a.
<b>Specific characteristics of the country:</b>	Low-income food-deficit country
<b>Logistics:</b>	Djibouti is one of the three gateways of Ethiopia
<b>Major foodcrops:</b>	Vegetables
<b>Marketing year:</b>	January/December
<b>Share of cereals in total calorie intake:</b>	52

### CURRENT SITUATION

Because of a lack of natural resources, the agriculture 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. Agriculture production is marginal and most of the food is imported. The economy of the country is dominated by its trade activity based on a solid port and airport infrastructure.

### CEREAL SUPPLY/DEMAND BALANCE FOR THE 1999 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Normal Production	-	-	-	-
Normal Imports	37	24	2	63
of which: Structural food aid	5	5	1	11
<b><u>1999 Domestic Availability</u></b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
1998 Production (rice in paddy terms)	-	-	-	-
1998 Production (rice in milled terms)	-	-	-	-
Possible stock drawdown	-	-	-	-
<b><u>1999 Utilization</u></b>	<b>39</b>	<b>26</b>	<b>3</b>	<b>68</b>
Food Use	39	26	2	67
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	-	-
Exports or Re-exports	-	-	-	-
Possible stock build up	-	-	1	1
<b><u>1999 Import Requirement</u></b>	<b>38</b>	<b>25</b>	<b>3</b>	<b>66</b>
Anticipated commercial imports	33	20	3	56
Food aid needs	5	5	-	10
<b><u>Current Aid Position</u></b>				
Food aid pledges	2	-	-	2
of which: Delivered	2	-	-	2
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b>63</b>	<b>42</b>	<b>3</b>	<b>109</b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				-
1999 import requirement as % of normal:				105
1999 food aid requirement as % of normal:				91

EQUATORIAL GUINEA

<b>Area:</b>	28 000 sq.km
<b>Climate:</b>	Tropical wet climate
<b>Population:</b>	433 000 (1999 estimate); G.N.P. per caput: US\$ 380 (1995)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; coastal country
<b>Logistics:</b>	Ports and roads inadequate
<b>Major foodcrops:</b>	Cassava, sweet potatoes, bananas
<b>Marketing year:</b>	January/December; Lean season: September-November
<b>Share of cereals in total calorie intake:</b>	12 percent

**CURRENT SITUATION**

In addition to staples like sweet potatoes, cassava and plantains, the annual cereal import requirement is some 10 000 tonnes. Food aid requirement in 1999 (January/December) is estimated at 1 000 tonnes of wheat.

**CEREAL SUPPLY/DEMAND BALANCE FOR THE 1999 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	-	-	-	-
Normal Imports	4	5	-	9
of which: Structural food aid	1	-	-	1
<b>1999 Domestic Availability</b>	<b>4</b>	<b>5</b>	<b>-</b>	<b>9</b>
1998 Production (rice in paddy terms)	-	-	-	-
1998 Production (rice in milled terms)	-	-	-	-
Possible stock drawdown	-	-	-	-
<b>1999 Utilization</b>	<b>4</b>	<b>5</b>	<b>-</b>	<b>9</b>
Food Use	4	5	-	9
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	-	-
Exports or Re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<b>1999 Import Requirement</b>	<b>4</b>	<b>5</b>	<b>-</b>	<b>9</b>
Anticipated commercial imports	3	5	-	8
Food aid needs	1	-	-	1
<b>Current Aid Position</b>				
Food aid pledges	-	-	-	-
of which: Delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b>Estimated Per Caput Consumption (kg/Year)</b>	<b>9</b>	<b>12</b>	<b>-</b>	<b>21</b>
<b>Indexes</b>				
1998 production as % of normal:				-
1999 import requirement as % of normal:				100
1999 food aid requirement as % of normal:				100

<b>Area:</b>	124 320 sq.km
<b>Climate:</b>	Highland areas: tropical wet/dry with unreliable rains. Lowlands: semi-arid to arid
<b>Population:</b>	3.0 million (1999 estimate); G.N.P. per caput: n.a.
<b>Specific characteristics of the country:</b>	Low-income food-deficit country
<b>Logistics:</b>	Roads inadequate, gateway to northern Ethiopia
<b>Major foodcrops:</b>	Sorghum, teff, millet, maize, pulses
<b>Marketing year:</b>	January/December; Lean season: August-November
<b>Share of cereals in total calorie intake:</b>	73 percent

### CURRENT SITUATION

Planting of 1999 cereal crops is underway. Early prospects are uncertain following below average rainfall in June in most parts of the country. Spring rains from March to May were also reported to have been erratic and inadequate. An armyworm outbreak is reported in late June, with Anseba province particularly affected. Control measures are underway but further spread is forecast.

Despite the overall good harvest in 1998, the food situation is very tight for people in border areas of Gash-Barka and Debub affected by the war with Ethiopia. Furthermore, the failure of the 1998/99 winter rains known as Keremti Bahri rain (October to March), over the Red Sea coastal areas and the adjoining coastal escarpments has resulted in serious shortages of grains and forage in the Semenawi and Keih Bahri provinces.

Under an Emergency Operation recently approved by FAO and WFP, international food assistance will be provided to 268 000 people most affected by the war, including 246 500 displaced and 21 500 deportees from Ethiopia, for a period of nine months.

### **CEREAL SUPPLY/DEMAND BALANCE FOR THE 1999 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	-	-	-	-
Normal Imports	-	-	-	-
of which: Structural food aid	-	-	-	-
<b><u>1999 Domestic Availability</u></b>	<b><u>33</u></b>	<b><u>-</u></b>	<b><u>436</u></b>	<b><u>469</u></b>
1998 Production (rice in paddy terms)	23	-	436	459
1998 Production (rice in milled terms)	23	-	436	459
Possible stock drawdown	10	-	-	10
<b><u>1999 Utilization</u></b>	<b><u>138</u></b>	<b><u>-</u></b>	<b><u>440</u></b>	<b><u>578</u></b>
Food Use	133	-	295	428
of which: local purchase requirement	-	-	-	-
Non-food use	5	-	80	85
Exports or Re-exports	-	-	-	-
Possible stock build up	-	-	65	65
<b><u>1999 Import Requirement</u></b>	<b><u>105</u></b>	<b><u>-</u></b>	<b><u>4</u></b>	<b><u>109</u></b>
Anticipated commercial imports	65	-	-	65
Food aid needs	40	-	4	44
<b><u>Current Aid Position</u></b>				
Food aid pledges	12	-	4	16
of which: Delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>44</u></b>	<b><u>-</u></b>	<b><u>98</u></b>	<b><u>143</u></b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				-
1999 import requirement as % of normal:				-
1999 food aid requirement as % of normal:				-

**ETHIOPIA**

<b>Area:</b>	976 680 sq.km
<b>Climate:</b>	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.
<b>Population:</b>	61.67 million (1999 estimate); G.N.P. per caput: US\$ 110 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country
<b>Logistics:</b>	Land-locked country, roads inadequate
<b>Major foodcrops:</b>	Maize, teff, barley, sorghum, wheat, pulses, enset (false banana)
<b>Marketing year:</b>	January/December; Lean season: August-November
<b>Share of cereals in total calorie intake:</b>	69 percent

**CURRENT SITUATION**

The 1999 "Belg" crop, normally harvested from June, has largely failed due to inadequate rainfall. Although Belg production accounts for only 7 percent of total cereal production, it is important in several areas where it provides the bulk of annual food supplies. The magnitude of food shortages has, therefore, increased in terms of numbers and areas affected. The worst hit area is the north-western Amhara Region, where some 2 million people face severe food shortages. The Government has recently appealed for 425 144 tonnes of food aid for an estimated 5.3 million vulnerable people, including those affected by the failure of the Belg season, as well as 385 000 internally displaced people due to the ongoing conflict with Eritrea.

Despite some beneficial rains in recent months, southern and eastern pastoral areas are yet to recover from consecutive years of drought and the severe shortages of water. The recent lifting of the ban on livestock imports from the Horn by Saudi Arabia is expected to increase incomes in pastoral areas. An Emergency Operation for food assistance to 1.2 million people, worth some US\$40.5 million was jointly approved by FAO and WFP on 31 May 1999. Against total food aid requirement of 551 271 tonnes food aid, pledges as of June 1999 amounted to about 360 000 tonnes, of which 195 000 tonnes have been delivered.

Planting of the 1999 Meher (main season) cereal crops is underway. Early prospects are uncertain, despite beneficial rains in June and July. Inadequate rains in April and May have delayed land preparation and planting of long-cycle crops in some parts of the country. Furthermore, about 350 000 hectares have so far been treated for armyworm infestations and the extent of crop damage is not yet known.

**CEREAL SUPPLY/DEMAND BALANCE FOR THE 1999 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	950	-	5 600	6 550
Normal Imports	700	5	75	780
of which: Structural food aid	380	5	65	450
<b><u>1999 Domestic Availability</u></b>	<b><u>1 500</u></b>	<b><u>-</u></b>	<b><u>9 465</u></b>	<b><u>10 965</u></b>
1998/99 Production (rice in paddy terms)	1 450	-	9 465	10 915
1998/99 Production (rice in milled terms)	1 450	-	9 465	10 915
Possible stock drawdown	50	-	-	50
<b><u>1999 Utilization</u></b>	<b><u>1 685</u></b>	<b><u>15</u></b>	<b><u>9 465</u></b>	<b><u>11 165</u></b>
Food Use	1 435	15	6 470	7 920
of which: local purchase requirement	-	-	216	216
Non-food use	250	-	2 375	2 625
Exports or Re-exports	-	-	180	180
Possible stock build up	-	-	440	440
<b><u>1999 Import Requirement</u></b>	<b><u>185</u></b>	<b><u>15</u></b>	<b><u>-</u></b>	<b><u>200</u></b>
Anticipated commercial imports	-	15	-	15
Food aid needs	185	-	-	185
<b><u>Current Aid Position</u></b>				
Food aid pledges	352	1	7	359
Of which: Delivered	287	1	5	292
Donor-financed purchases	-	-	35	35
Of which: for local use	-	-	216	216
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>23</u></b>	<b><u>0</u></b>	<b><u>105</u></b>	<b><u>128</u></b>
<b><u>Indexes</u></b>				
1998/99 production as % of normal:				167
1999 import requirement as % of normal:				26
1999 food aid requirement as % of normal:				41

<b>Area:</b>	258 000 sq.km
<b>Climate:</b>	Tropical wet climate; most rainfall: October-May
<b>Population:</b>	1.44 million (1999 estimate); G.N.P. per caput: US\$ 4 230 (1997)
<b>Specific characteristics of the country:</b>	Coastal country
<b>Logistics:</b>	Ports and roads adequate
<b>Major foodcrops:</b>	Roots and tubers
<b>Marketing year:</b>	January/December; Lean season: September-November
<b>Share of cereals in total calorie intake:</b>	19 percent

### CURRENT SITUATION

Production of main foodcrops (cassava and plantains) is estimated at about 330 000 tonnes. The country commercially imports the bulk of its cereal requirement, estimated at around 82 000 tonnes in 1999.

### CEREAL SUPPLY/DEMAND BALANCE FOR THE 1999 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Normal Production	-	-	25	25
Normal Imports	40	35	2	77
of which: Structural food aid	0	-	-	0
<b><u>1999 Domestic Availability</u></b>	<b><u>40</u></b>	<b><u>35</u></b>	<b><u>27</u></b>	<b><u>102</u></b>
1998 Production (rice in paddy terms)	-	-	25	25
1998 Production (rice in milled terms)	-	-	25	25
Possible stock drawdown	-	-	-	-
<b><u>1999 Utilization</u></b>	<b><u>45</u></b>	<b><u>35</u></b>	<b><u>27</u></b>	<b><u>107</u></b>
Food Use	44	35	19	98
of which: local purchase requirement	-	-	-	-
Non-food use	1	-	8	9
Exports or Re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<b><u>1999 Import Requirement</u></b>	<b><u>45</u></b>	<b><u>35</u></b>	<b><u>2</u></b>	<b><u>82</u></b>
Anticipated commercial imports	45	35	2	82
Food aid needs	-	-	-	-
<b><u>Current Aid Position</u></b>				
Food aid pledges	-	-	-	-
of which: Delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>31</u></b>	<b><u>24</u></b>	<b><u>13</u></b>	<b><u>68</u></b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				100
1999 import requirement as % of normal:				106
1999 food aid requirement as % of normal:				-

THE GAMBIA

<b>Area:</b>	10 000 sq.km
<b>Climate:</b>	Tropical wet-dry climate; rainy season: May-October
<b>Population:</b>	1.34 million (1999 estimate); G.N.P. per caput: US\$ 320 (1995)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; coastal sahelian country
<b>Logistics:</b>	Port capacity and roads adequate
<b>Major foodcrops:</b>	Rice, millet and sorghum
<b>Marketing year:</b>	November/October; Lean season: July-September
<b>Share of cereals in total calorie intake:</b>	63 percent

**CURRENT SITUATION**

The rainy season is now well established countrywide. Rains started in early June in the east and the centre and in late June in the west where they were above normal. They remained widespread and well above normal during the first dekad of July. Plantings are underway in the west and crops are emerging satisfactorily in the east and the centre. Grasshopper attacks have been reported in the centre.

Aggregate 1998 cereal output is officially estimated at an above-average level of 121 000 tonnes. The overall food supply situation is satisfactory given present rice stocks and planned imports. Markets are generally well supplied. However, some areas where millet production was poor may be at-risk of shortages during the next lean season, notably in the Lower and Upper Nuimis districts in the North Bank Division, Kiang West and Central in the Lower River Division and parts of Fonis of the Western Division. A WFP Rapid Rural Appraisal mission visited 15 villages in the affected areas in late April/early May and estimated the number of affected people at 110 000, who need 2 671 tonnes of cereals, 400 tonnes of pulses and 167 tonnes of oil.

**CEREAL SUPPLY/DEMAND BALANCE FOR THE 1998/99 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	-	21	82	103
Normal Imports	20	90	4	114
of which: Structural food aid	1	2	4	7
<b><u>1998/99 Domestic Availability</u></b>	<b><u>2</u></b>	<b><u>17</u></b>	<b><u>95</u></b>	<b><u>114</u></b>
1998 Production (rice in paddy terms)	-	26	95	121
1998 Production (rice in milled terms)	-	17	95	112
Possible stock drawdown	2	-	-	2
<b><u>1998/99 Utilization</u></b>	<b><u>28</u></b>	<b><u>112</u></b>	<b><u>98</u></b>	<b><u>238</u></b>
Food Use	21	93	81	195
of which: local purchase requirement	-	-	5	5
Non-food use	1	3	16	20
Exports or Re-exports	6	16	-	22
Possible stock build up	-	-	-	-
<b><u>1998/99 Import Requirement</u></b>	<b><u>26</u></b>	<b><u>95</u></b>	<b><u>3</u></b>	<b><u>124</u></b>
Anticipated commercial imports	25	90	-	115
Food aid needs	1	5	3	9
<b><u>Current Aid Position</u></b>				
Food aid pledges	1	-	2	3
of which: Delivered	1	-	2	3
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>16</u></b>	<b><u>70</u></b>	<b><u>61</u></b>	<b><u>146</u></b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				117
1998/99 import requirement as % of normal:				109
1998/99 food aid requirement as % of normal:				129



<b>Area:</b>	230 000 sq.km
<b>Climate:</b>	Tropical wet-dry; two rainy seasons in south and one in north
<b>Population:</b>	18.50 million (1999 estimate); G.N.P. per caput: US\$ 370 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; coastal country
<b>Logistics:</b>	Ports and roads inadequate
<b>Major foodcrops:</b>	Roots and tubers, coarse grain, rice
<b>Marketing year:</b>	January/December; Lean season: April-June
<b>Share of cereals in total calorie intake:</b>	27 percent

### CURRENT SITUATION

The rainy season started in early March over the south and in late March in the centre. Rains decreased in late March and remained limited but widespread in April and May. Vegetation images in June showed below normal vegetation in the centre and the north, but the crop condition should improve following good rainfall in June and early July. Army worms infestations have been reported in the Upper East region and are threatening millet and sorghum crops.

The overall food supply situation is satisfactory. About 20 000 Liberian refugees are remaining in the country and are receiving food assistance. The 1999 cereal import requirement is estimated at 475 000 tonnes, mostly wheat and rice.

### **CEREAL SUPPLY/DEMAND BALANCE FOR THE 1999 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	-	165	1 410	1 575
Normal Imports	175	200	15	390
of which: Structural food aid	60	40	12	112
<b><u>1999 Domestic Availability</u></b>	<b><u>-</u></b>	<b><u>129</u></b>	<b><u>1 593</u></b>	<b><u>1 722</u></b>
1998 Production (rice in paddy terms)	-	193	1 593	1 786
1998 Production (rice in milled terms)	-	129	1 593	1 722
Possible stock drawdown	-	-	-	-
<b><u>1999 Utilization</u></b>	<b><u>210</u></b>	<b><u>359</u></b>	<b><u>1 628</u></b>	<b><u>2 197</u></b>
Food Use	207	321	1 279	1 807
of which: local purchase requirement	-	-	-	-
Non-food use	3	23	329	355
Exports or Re-exports	-	-	20	20
Possible stock build up	-	15	-	15
<b><u>1999 Import Requirement</u></b>	<b><u>210</u></b>	<b><u>230</u></b>	<b><u>35</u></b>	<b><u>475</u></b>
Anticipated commercial imports	210	210	30	450
Food aid needs	-	20	5	25
<b><u>Current Aid Position</u></b>				
Food aid pledges	53	3	5	61
of which: Delivered	0	-	2	2
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>11</u></b>	<b><u>17</u></b>	<b><u>69</u></b>	<b><u>98</u></b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				113
1999 import requirement as % of normal:				122
1999 food aid requirement as % of normal:				22

GUINEA

<b>Area:</b>	246 000 sq.km
<b>Climate:</b>	Tropical wet-dry; rainy season: March/June to October/November
<b>Population:</b>	7.04 million (1999 estimate); G.N.P. per caput: US\$ 570 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; mountainous coastal country
<b>Logistics:</b>	Ports and roads inadequate
<b>Major foodcrops:</b>	Rice, roots and tubers, coarse grains
<b>Marketing year:</b>	January/December; Lean season: July-September
<b>Share of cereals in total calorie intake:</b>	52 percent

**CURRENT SITUATION**

Rains started in mid April over the south, which is slightly later than normal. They reached the north of the country by the end of the month and remained widespread in May and June, allowing adequate soil moisture for good crop development. The main crops have been planted in May and are developing satisfactorily.

Estimates put the total number of Liberian and Sierra Leonean refugees in Guinea at 470 000, of which about 350 000 sierra leoneans and 120 000 Liberians. They are mainly in the south of the country, putting a high pressure on natural resources and reducing food availability in these areas. The 1999 cereal import requirement is estimated at 385 000 tonnes, mostly wheat and rice.

**CEREAL SUPPLY/DEMAND BALANCE FOR THE 1999 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	-	720	200	920
Normal Imports	-	110	260	370
of which: Structural food aid	1	32	2	35
<b>1999 Domestic Availability</b>	<b>1</b>	<b>478</b>	<b>214</b>	<b>692</b>
1998 Production (rice in paddy terms)	-	716	209	925
1998 Production (rice in milled terms)	-	478	209	687
Possible stock drawdown	-	-	5	5
<b>1999 Utilization</b>	<b>115</b>	<b>738</b>	<b>224</b>	<b>1 077</b>
Food Use	115	631	183	929
of which: local purchase requirement	-	-	-	-
Non-food use	-	107	41	148
Exports or Re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<b>1999 Import Requirement</b>	<b>115</b>	<b>260</b>	<b>10</b>	<b>385</b>
Anticipated commercial imports	115	260	10	385
Food aid needs	-	-	-	-
<b>Current Aid Position</b>				
Food aid pledges	13	3	1	18
of which: Delivered	13	3	1	18
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b>Estimated Per Caput Consumption (kg/Year)</b>	<b>16</b>	<b>90</b>	<b>26</b>	<b>132</b>
<b>Indexes</b>				
1998 production as % of normal:				101
1999 import requirement as % of normal:				104
1999 food aid requirement as % of normal:				-

<b>Area:</b>	28 000 sq.km
<b>Climate:</b>	Tropical wet-dry; rainy season: May-October
<b>Population:</b>	1.13 million (1999 estimate); G.N.P. per caput: US\$ 240 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; coastal country
<b>Logistics:</b>	Roads inadequate, particularly during the rainy season; river transport important
<b>Major foodcrops:</b>	Rice, coarse grains, oils and fats, roots and tubers
<b>Marketing year:</b>	November/October; Lean season: May-August
<b>Share of cereals in total calorie intake:</b>	64 percent

### CURRENT SITUATION

Following reduced rains in mid-June, precipitation became widespread and abundant in late June and early July. The growing season started in mid-May over most parts of the country. Rains decreased in late May, picked up in early June but remained well below normal in mid-June. By contrast, they were above normal in late June and early July, permitting widespread plantings of coarse grains and the desalination of swamp rice fields where the rice seedlings, now in seedbeds, will be transplanted in July/August.

The security situation remains calm following a coup on 7 May. Most displaced people following earlier fighting have returned home. A CILSS/Government crop Assessment Mission in late April estimated aggregate 1998 cereal production at a below average 131 300 tonnes, including 87 200 tonnes of rice (in paddy) and 44 100 tonnes of coarse grains. In order to avoid wide fluctuations of the price of rice, the Government decided on 28 May to impose price controls. The price is tentatively fixed at 11 000 to 12 000 CFA per 50 kg bag until 28 November. Food distributions are underway in the Oio and Cacheu regions for more than 100 000 beneficiaries. In Bissau, they have reached almost 200 000 beneficiaries.

### CEREAL SUPPLY/DEMAND BALANCE FOR THE 1998/99 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Normal Production	-	117	62	179
Normal Imports	7	60	-	67
of which: Structural food aid	1	3	-	4
<b><u>1998/99 Domestic Availability</u></b>	<b><u>7</u></b>	<b><u>63</u></b>	<b><u>53</u></b>	<b><u>116</u></b>
1998 Production (rice in paddy terms)	-	87	44	131
1998 Production (rice in milled terms)	-	58	44	102
Possible stock drawdown	-	5	9	14
<b><u>1998/99 Utilization</u></b>	<b><u>7</u></b>	<b><u>133</u></b>	<b><u>74</u></b>	<b><u>214</u></b>
Food Use	7	118	57	182
of which: local purchase requirement	-	-	-	-
Non-food use	-	10	17	27
Exports or Re-exports	-	5	-	5
Possible stock build up	-	-	-	-
<b><u>1998/99 Import Requirement</u></b>	<b><u>7</u></b>	<b><u>70</u></b>	<b><u>10</u></b>	<b><u>87</u></b>
Anticipated commercial imports	5	50	-	55
Food aid needs	2	20	10	32
<b><u>Current Aid Position</u></b>				
Food aid pledges	10	3	7	20
of which: Delivered	-	3	7	10
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>6</u></b>	<b><u>104</u></b>	<b><u>50</u></b>	<b><u>161</u></b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				73
1998/99 import requirement as % of normal:				130
1998/99 food aid requirement as % of normal:				800

KENYA

<b>Area:</b>	570 000 sq.km
<b>Climate:</b>	North-east is semi-arid to arid; mountainous central and south-western areas have two rainy seasons: March-May and November-December.
<b>Population:</b>	31.10 million (1999 estimate), GNP per caput US\$ 330 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; regular importer and occasional exporter of grain.
<b>Logistics:</b>	Good port (Mombasa) and extensive rail and road network. Gateway to Burundi, Rwanda and Uganda
<b>Major foodcrops:</b>	Maize, wheat, pulses, roots and tubers
<b>Marketing year:</b>	October/September
<b>Lean season:</b>	June-July
<b>Share of cereals in total calorie intake:</b>	56 percent

**CURRENT SITUATION**

The 1999 main season maize crop, currently nearing maturity, has been affected by the scarcity and increasingly expensive agricultural inputs, erratic rains and armyworm infestation of some 50 000 hectares. Although area planted is similar to 1998, preliminary official estimates for the long rains season indicate a maize output of about 1.95 million tonnes compared to the previous five-year average of over 2.1 million tonnes. Significant output reductions were reported for the Eastern, Central and Rift Valley Provinces.

The food supply situation is critical in the northern and eastern pastoral districts where rainfall for this season has been erratic and insufficient to ensure that pastures and water supplies last until the next rains in October. Many herders have been forced to move their livestock several months earlier than usual to remote and insecure pastures. High and rising child malnutrition rates were reported for most of the pastoral districts. Severe food shortages were also reported, particularly from Kiambu, Kirinyaga, Maragua, Thika and Nyeri districts in Central Provinces. In response, the Government provided about 4 000 tonnes of relief food to vulnerable households in Eastern Province and the pastoral districts. The situation is likely to deteriorate in the coming months with the depletion of food stocks. Additional food aid is urgently needed for the affected population.

**CEREAL SUPPLY/DEMAND BALANCE FOR THE 1998/99 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	241	49	2 587	2 877
Normal Imports	311	57	312	680
of which: Structural food aid	74	-	-	74
<b>1998/99 Domestic Availability</b>	<b>465</b>	<b>161</b>	<b>3 175</b>	<b>3 801</b>
1998 Production (rice in paddy terms)	315	48	2 695	3 058
1998 Production (rice in milled terms)	315	31	2 695	3 041
Possible stock drawdown	150	130	480	760
<b>1998/99 Utilization</b>	<b>765</b>	<b>281</b>	<b>3 545</b>	<b>4 591</b>
Food Use	715	241	3 021	3 977
of which: local purchase requirement	-	-	6	6
Non-food use	50	40	501	591
Exports or Re-exports	-	-	23	23
Possible stock build up	-	-	-	-
<b>1998/99 Import Requirement</b>	<b>300</b>	<b>120</b>	<b>370</b>	<b>790</b>
Anticipated commercial imports	251	120	350	721
Food aid needs	49	-	20	69
<b>Current Aid Position</b>				
Food aid pledges	53	-	23	76
of which: Delivered	45	-	22	67
Donor-financed purchases	-	-	29	29
of which: for local use	-	-	6	6
for export	-	-	23	23
<b>Estimated Per Caput Consumption (kg/Year)</b>	<b>23</b>	<b>8</b>	<b>97</b>	<b>128</b>
<b>Indexes</b>				
1998 production as % of normal:				106
1998/99 import requirement as % of normal:				116
1998/99 food aid requirement as % of normal:				93

LESOTHO

<b>Area:</b>	30 000 sq.km
<b>Climate:</b>	Highland rainy climate with mild winter. Rainy season: Oct.-April. Cool temperatures in May-September with frost hazard
<b>Population:</b>	2.24 million (1999 estimate); G.N.P. per caput: US\$ 670 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; land-locked
<b>Logistics:</b>	All imports through South Africa
<b>Major foodcrops:</b>	Maize, sorghum, vegetables
<b>Marketing year:</b>	April/March; Lean season: February-April
<b>Share of cereals in total calorie intake:</b>	75 percent

**CURRENT SITUATION**

Harvesting of 1999 cereal crops is completed. Abundant rains from October to January pointed to a marked recovery in cereal production this year. However, below-average precipitation and high temperatures from February to mid-April, mainly in March at the critical growth stage, negatively affected crops. Favourable rains from late April could not prevent a reduction in yields, particularly of maize. As a result, cereal production is preliminarily estimated to be below average though higher than the reduced harvest last year.

The food supply situation is satisfactory following adequate commercial imports in 1998/99, estimated at 109 000 tonnes of maize and 47 000 tonnes of wheat.

**CEREAL SUPPLY/DEMAND BALANCE FOR THE 1999/2000 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	23	-	155	178
Normal Imports	55	10	150	215
of which: Structural food aid	15	2	20	37
<b><u>1999/2000 Domestic Availability</u></b>	<b><u>30</u></b>	<b><u>-</u></b>	<b><u>156</u></b>	<b><u>186</u></b>
1999 Production (rice in paddy terms)	27	-	150	177
1999 Production (rice in milled terms)	27	-	150	177
Possible stock drawdown	3	-	6	9
<b><u>1999/2000 Utilization</u></b>	<b><u>75</u></b>	<b><u>3</u></b>	<b><u>306</u></b>	<b><u>384</u></b>
Food Use	74	3	287	364
of which: local purchase requirement	-	-	-	-
Non-food use	1	-	19	20
Exports or Re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<b><u>1999/2000 Import Requirement</u></b>	<b><u>45</u></b>	<b><u>3</u></b>	<b><u>150</u></b>	<b><u>198</u></b>
Anticipated commercial imports	45	3	140	188
Food aid needs	-	-	10	10
<b><u>Current Aid Position</u></b>				
Food aid pledges	-	-	-	-
of which: Delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>33</u></b>	<b><u>1</u></b>	<b><u>128</u></b>	<b><u>163</u></b>
<b><u>Indexes</u></b>				
1999 production as % of normal:				99
1999/2000 import requirement as % of normal:				92
1999/2000 food aid requirement as % of normal:				27

**LIBERIA**

<b>Area:</b>	96 000 sq.km
<b>Climate:</b>	Southern half tropical wet, northern half tropical wet-dry; rainy season: March-November
<b>Population:</b>	2.83 million (1999 estimate); G.N.P. per caput: n.a.
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; coastal country
<b>Logistics:</b>	Ports and roads adequate
<b>Major foodcrops:</b>	Rice, roots and tubers, oils
<b>Marketing year:</b>	January/December; Lean season: July-August
<b>Share of cereals in total calorie intake:</b>	48 percent

**CURRENT SITUATION**

Growing conditions are adequate since the beginning of the rainy season, and allow a good development of rice crop and tubers. Some occasional fighting occurred in the north of the country and hampered agricultural activities and food aid deliveries. However, following improving security conditions, the 1999 crop is expected to be close or above last year's level.

Food assistance is delivered throughout almost the entire country and an improvement in the nutritional status of the population is reported but the country continues to rely mostly on humanitarian assistance. Food assistance is provided to about 250 000 IDPs and 95 000 refugees from Sierra Leone, out of an estimated 750 000 displaced people. Organised repatriation is underway for about 220 000 Liberian refugees remaining in neighbouring countries, and should be completed by the end of the year. On the basis of an estimated population of about 2.8 million in 1999, FAO estimates that Liberia will need to import 155 000 tonnes of cereals to meet its consumption requirements. Commercial imports are anticipated at 100 000 tonnes of rice and 5 000 tonnes of wheat. The remaining 50 000 tonnes will need to be covered by food aid, estimated at 30 000 tonnes of wheat and 20 000 tonnes of maize products such as maize meal and CSB for distribution to vulnerable displaced people. In mid July, 69 000 tonnes of food aid had been pledged, of which 63 000 tonnes had been delivered.

**CEREAL SUPPLY/DEMAND BALANCE FOR THE 1999 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	-	78	1	79
Normal Imports	35	70	40	145
of which: Structural food aid	25	5	40	70
<b><u>1999 Domestic Availability</u></b>	<b><u>11</u></b>	<b><u>148</u></b>	<b><u>1</u></b>	<b><u>160</u></b>
1998 Production (rice in paddy terms)	-	210	1	211
1998 Production (rice in milled terms)	-	140	1	141
Possible stock drawdown	11	8	-	19
<b><u>1999 Utilization</u></b>	<b><u>46</u></b>	<b><u>248</u></b>	<b><u>21</u></b>	<b><u>315</u></b>
Food Use	44	223	20	287
of which: local purchase requirement	-	-	-	-
Non-food use	2	25	0	27
Exports or Re-exports	-	-	-	-
Possible stock build up	-	-	1	1
<b><u>1999 Import Requirement</u></b>	<b><u>35</u></b>	<b><u>100</u></b>	<b><u>20</u></b>	<b><u>155</u></b>
Anticipated commercial imports	5	100	-	105
Food aid needs	30	-	20	50
<b><u>Current Aid Position</u></b>				
Food aid pledges	57	-	12	69
of which: Delivered	53	-	11	63
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>15</u></b>	<b><u>79</u></b>	<b><u>7</u></b>	<b><u>101</u></b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				267
1999 import requirement as % of normal:				107
1999 food aid requirement as % of normal:				71

**MADAGASCAR**

<b>Area:</b>	582 000 sq.km
<b>Climate:</b>	Eastern coast is tropical wet, the rest tropical wet-dry. Rainy season: October-March; tropical cyclones
<b>Population:</b>	14.78 million (1999 estimate); G.N.P. per caput: US\$ 250 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country
<b>Logistics:</b>	Dilapidated roads and lack of spare parts and tyres
<b>Major foodcrops:</b>	Rice, roots, tubers, maize, fruit
<b>Marketing year:</b>	April/March; Lean season: February/March
<b>Share of cereals in total calorie intake:</b>	60 percent

**CURRENT SITUATION**

Harvesting of the 1999 main rice crop is completed. Despite delayed rains and prolonged dry spells in some central areas, rainfall has been generally abundant during the season. Heavy rains in southwestern parts resulted in localized floods but overall benefited crop development. The incidence and negative impact of cyclones have been limited this season. Similarly, the locust situation has been generally calm. Control measures, coordinated by the Government and FAO teams, considerably restricted the impact of locust on crops. 1999 rice output is expected to be higher than last year.

The food supply situation is expected to improve during the 1999/2000 marketing year (April/March), particularly in drought-prone southern areas, where the price of rice increased last year. For the first time in recent years no department in the south will be classified as being in serious food supply difficulty.

**CEREAL SUPPLY/DEMAND BALANCE FOR THE 1999/2000 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	7	2 476	152	2 635
Normal Imports	48	53	10	111
of which: Structural food aid	13	11	10	34
<b><u>1999/2000 Domestic Availability</u></b>	<b><u>12</u></b>	<b><u>1 734</u></b>	<b><u>164</u></b>	<b><u>1 910</u></b>
1999 Production (rice in paddy terms)	12	2 550	161	2 723
1999 Production (rice in milled terms)	12	1 734	161	1 907
Possible stock drawdown	-	-	3	3
<b><u>1999/2000 Utilization</u></b>	<b><u>72</u></b>	<b><u>1 819</u></b>	<b><u>169</u></b>	<b><u>2 060</u></b>
Food Use	71	1 804	136	2 011
of which: local purchase requirement	-	1	-	-
Non-food use	1	10	23	34
Exports or Re-exports	-	-	10	10
Possible stock build up	-	5	-	5
<b><u>1999/2000 Import Requirement</u></b>	<b><u>60</u></b>	<b><u>85</u></b>	<b><u>5</u></b>	<b><u>150</u></b>
Anticipated commercial imports	55	75	5	135
Food aid needs	5	10	-	15
<b><u>Current Aid Position</u></b>				
Food aid pledges	6	-	2	7
of which: Delivered	6	-	1	6
Donor-financed purchases	-	1	-	1
of which: for local use	-	1	-	1
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>5</u></b>	<b><u>122</u></b>	<b><u>9</u></b>	<b><u>136</u></b>
<b><u>Indexes</u></b>				
1999 production as % of normal:				103
1999/2000 import requirement as % of normal:				135
1999/2000 food aid requirement as % of normal:				44

**MALAWI**

<b>Area:</b>	94 000 sq.km
<b>Climate:</b>	Tropical wet-dry climate; rainy season: November-May
<b>Population</b>	12.58 million (1999 estimate); G.N.P. per caput: US\$ 220 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; land-locked country; importer and exporter of grain
<b>Logistics:</b>	Imports/exports through Beira (Mozambique) or Dar es Salaam (Tanzania)
<b>Major foodcrops:</b>	Maize, pulses, roots, tubers, rice
<b>Marketing year:</b>	April/March; Lean season: February-March
<b>Share of cereals in total calorie intake:</b>	70 percent

**CURRENT SITUATION**

A bumper 1999 cereal crop has been harvested. This reflects generally abundant rains during the season, particularly in southern areas. In northern parts, despite a delay in the rainy season, precipitation was above average allowing some recovery of crops. Improved input availability also contributed to a sharp increase in yields.

Latest official forecast indicate a maize crop close to 2.4 million tonnes, one-third higher than last year's normal level. Cassava output is expected to increase by 12 percent to 944 000 tonnes. Production of other cereal and non-cereal crops is also anticipated to be good.

The country, which has been importing maize in recent years, is expected to have some 400 000 tonnes of exportable maize surpluses in marketing year 1999/2000 (April/March).

**CEREAL SUPPLY/DEMAND BALANCE FOR THE 1999/2000 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	2	35	1 330	1 367
Normal Imports	40	3	40	83
of which: Structural food aid	-	-	40	40
<b><u>1999/2000 Domestic Availability</u></b>	<b><u>2</u></b>	<b><u>56</u></b>	<b><u>2 438</u></b>	<b><u>2 496</u></b>
1999 Production (rice in paddy terms)	2	87	2 438	2 527
1999 Production (rice in milled terms)	2	56	2 438	2 496
Possible stock drawdown	-	-	-	-
<b><u>1999/2000 Utilization</u></b>	<b><u>54</u></b>	<b><u>56</u></b>	<b><u>2 438</u></b>	<b><u>2 548</u></b>
Food Use	54	45	1 848	1 947
of which: local purchase requirement	-	-	1	1
Non-food use	-	8	170	178
Exports or Re-exports	-	1	400	401
Possible stock build up	-	2	20	22
<b><u>1999/2000 Import Requirement</u></b>	<b><u>52</u></b>	<b><u>-</u></b>	<b><u>-</u></b>	<b><u>52</u></b>
Anticipated commercial imports	52	-	-	52
Food aid needs	-	-	-	-
<b><u>Current Aid Position</u></b>				
Food aid pledges	-	-	14	14
of which: Delivered	-	-	14	14
Donor-financed purchases	-	-	1	1
of which: for local use	-	-	1	1
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>4</u></b>	<b><u>4</u></b>	<b><u>147</u></b>	<b><u>155</u></b>
<b><u>Indexes</u></b>				
1999 production as % of normal:				185
1999/2000 import requirement as % of normal:				63
1999/2000 food aid requirement as % of normal:				-



MALI

<b>Area:</b>	1 220 000 sq.km
<b>Climate:</b>	From north to south: arid, semi-arid and tropical wet-dry; rainy season: May-October
<b>Population:</b>	10.0 million (1999 estimate); G.N.P. per caput: US\$ 260 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; land-locked sahelian country
<b>Logistics:</b>	Roads inadequate during rainy season; river transport important; rail link to Dakar (Senegal)
<b>Major foodcrops:</b>	Millet, sorghum, rice, maize
<b>Marketing year:</b>	November/October; Lean season: July-September
<b>Share of cereals in total calorie intake:</b>	75 percent

### CURRENT SITUATION

Abundant rains in early July benefitted crop development. Rains started in April in the extreme south and progressed northwards in May and June. They became widespread and abundant in the west in late June and over most producing areas in early July. Plantings are well underway and pastures are regenerating. Seed availability is adequate following the 1998 record harvest.

Control operations against grain eating birds have been undertaken in the Office du Niger area. Isolated Desert Locusts may be present in a few areas in the Adrar des Iforas.

1998 cereal production is estimated at a record 2.5 million tonnes, 13 percent above average and 3 percent over the record in 1994. The food supply situation is satisfactory and prices of cereals are stable. The early warning system (SAP) classified the arrondissements of Farach, Gargarde and Raz El Mâ (in Goundam area), Bourem central and Bamba (in Bourem area) and Gao central as at risk of economic difficulties, but no food aid distributions are required.

### **CEREAL SUPPLY/DEMAND BALANCE FOR THE 1998/99 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	4	505	1 703	2 212
Normal Imports	50	40	5	95
of which: Structural food aid	15	-	2	17
<b><u>1998/99 Domestic Availability</u></b>	<b><u>9</u></b>	<b><u>478</u></b>	<b><u>1 827</u></b>	<b><u>2 314</u></b>
<i>1998 Production (rice in paddy terms)</i>	<i>9</i>	<i>688</i>	<i>1 827</i>	<i>2 524</i>
1998 Production (rice in milled terms)	9	468	1 827	2 304
Possible stock drawdown	-	10	-	10
<b><u>1998/99 Utilization</u></b>	<b><u>59</u></b>	<b><u>508</u></b>	<b><u>1 827</u></b>	<b><u>2 394</u></b>
Food Use	58	395	1 497	1 950
of which: local purchase requirement	-	-	20	20
Non-food use	1	83	280	364
Exports or Re-exports	-	30	30	60
Possible stock build up	1	-	20	21
<b><u>1998/99 Import Requirement</u></b>	<b><u>50</u></b>	<b><u>30</u></b>	<b><u>-</u></b>	<b><u>80</u></b>
Anticipated commercial imports	40	30	-	70
Food aid needs	10	-	-	10
<b><u>Current Aid Position</u></b>				
Food aid pledges	3	-	3	6
of which: Delivered	2	-	3	5
Donor-financed purchases	-	-	4	4
of which: for local use	-	-	4	4
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>6</u></b>	<b><u>40</u></b>	<b><u>150</u></b>	<b><u>195</u></b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				114
1998/99 import requirement as % of normal:				84
1998/99 food aid requirement as % of normal:				59

**MAURITANIA**

<b>Area:</b>	1 025 000 sq.km
<b>Climate:</b>	Mostly a Saharian country; semi-arid fringe in extreme south with rains in June-September
<b>Population:</b>	2.57 million (1999 estimate); G.N.P. per caput: US\$ 450 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; coastal country
<b>Logistics:</b>	Port capacity adequate, though storms during January-March sometimes cause difficulties
<b>Major foodcrops:</b>	Wheat, rice, millet and sorghum
<b>Marketing year:</b>	November/October; Lean season: July-September
<b>Share of cereals in total calorie intake:</b>	54 percent

**CURRENT SITUATION**

Widespread rains in early July permitted plantings to start in the south. The weather was mostly dry up to late June. Widespread and above normal rains covered the south and the south-east in early July where they permitted land preparation and wet plantings to start. The good rains will also favour regeneration of pastures.

Low numbers of solitary Desert Locusts adults are likely to appear in central and southern areas where they will eventually lay eggs once the seasonal rains commence. No significant developments are likely.

1998 cereal production is estimated at 195 400 tonnes, 14 percent above average. The overall food supply situation is satisfactory. Prices of rice are stable and below the 1998 level. Localised shortages are likely following reduced crops in some areas. The most vulnerable areas are Aftout and Affolé where WFP has undertaken a rapid rural appraisal mission in late March and estimated the food aid needs at 6 897 tonnes for 161 692 persons. A recent FEWS Assessment Mission in late May confirmed the seriousness of food supply difficulties in Aftout and Affolé. The cereal import requirement (including re-exports) for 1998/99 (November/October) is estimated at 310 000 tonnes and the food aid requirement at 35 000 tonnes.

**CEREAL SUPPLY/DEMAND BALANCE FOR THE 1998/99 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	-	64	107	171
Normal Imports	180	80	15	275
of which: Structural food aid	18	7	5	30
<b><u>1998/99 Domestic Availability</u></b>	<b><u>20</u></b>	<b><u>68</u></b>	<b><u>94</u></b>	<b><u>181</u></b>
1998 Production (rice in paddy terms)	-	102	94	195
1998 Production (rice in milled terms)	-	68	94	161
Possible stock drawdown	20	-	-	20
<b><u>1998/99 Utilization</u></b>	<b><u>220</u></b>	<b><u>148</u></b>	<b><u>124</u></b>	<b><u>491</u></b>
Food Use	180	121	107	408
of which: local purchase requirement	-	-	5	5
Non-food use	25	12	15	52
Exports or Re-exports	15	5	1	21
Possible stock build up	-	10	-	10
<b><u>1998/99 Import Requirement</u></b>	<b><u>200 1/</u></b>	<b><u>80</u></b>	<b><u>30</u></b>	<b><u>310</u></b>
Anticipated commercial imports	185	70	20	175
Food aid needs	15	10	10	35
<b><u>Current Aid Position</u></b>				
Food aid pledges	5	10	1	17
of which: Delivered	2	4	1	8
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>70</u></b>	<b><u>47</u></b>	<b><u>42</u></b>	<b><u>159</u></b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				114
1998/99 import requirement as % of normal:				113
1998/99 food aid requirement as % of normal:				117

1/ Including 15 000 tonnes for re-export.

<b>Area:</b>	1 850 sq.km
<b>Climate:</b>	No dry months, most rainfall in November-July; tropical cyclones
<b>Population:</b>	1.15 million (1999 estimate); G.N.P. per caput: US\$ 3 800 (1997)
<b>Specific characteristics of the country:</b>	Cereal consumption covered almost entirely by imports
<b>Logistics:</b>	Inadequate port handling capacity; road system good
<b>Major foodcrops:</b>	Vegetables
<b>Marketing year:</b>	January/December
<b>Share of cereals in total calorie intake:</b>	48 percent

### CURRENT SITUATION

The bulk of the cultivated area is normally devoted to sugar cane and most of the remainder to fruits 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 1999 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Normal Production	-	-	2	2
Normal Imports	72	75	25	172
of which: Structural food aid	5	1	-	6
<b><u>1999 Domestic Availability</u></b>	<b><u>72</u></b>	<b><u>76</u></b>	<b><u>2</u></b>	<b><u>150</u></b>
1998 Production (rice in paddy terms)	-	-	2	2
1999 Production (rice in milled terms)	-	-	2	2
Possible stock drawdown	-	10	-	10
<b><u>1999 Utilization</u></b>	<b><u>150</u></b>	<b><u>88</u></b>	<b><u>22</u></b>	<b><u>260</u></b>
Food Use	104	88	2	194
of which: local purchase requirement	-	-	-	-
Non-food use	6	-	20	26
Exports or Re-exports	40	-	-	40
Possible stock build up	-	-	-	-
<b><u>1999 Import Requirement</u></b>	<b><u>150</u></b>	<b><u>78</u></b>	<b><u>20</u></b>	<b><u>248</u></b>
Anticipated commercial imports	150	78	20	248
Food aid needs	-	-	-	-
<b><u>Current Aid Position</u></b>				
Food aid pledges	-	-	-	-
of which: Delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>90</u></b>	<b><u>76</u></b>	<b><u>2</u></b>	<b><u>168</u></b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				100
1999 import requirement as % of normal:				144
1999 food aid requirement as % of normal:				-

MOZAMBIQUE

<b>Area:</b>	784 000 sq.km
<b>Climate:</b>	Tropical wet-dry; coast is semi-arid
<b>Population:</b>	19.57 million (1999 estimate); G.N.P. per caput: US\$ 90 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; exposed to tropical storms and cyclones
<b>Logistics:</b>	Dilapidated rail and road transport fleet; lack of fuel and spares; poor roads; substantial deliveries by coastal vessels
<b>Major foodcrops:</b>	Roots, tubers, maize
<b>Marketing year:</b>	March/April; Lean season: February-April
<b>Share of cereals in total calorie intake:</b>	53 percent

**CURRENT SITUATION**

Harvesting of the 1999 coarse grains is completed. Abundant rains during the growing season resulted in localized floods and crop losses in central and southern parts, but overall benefited crop development. Production of the main maize crop is estimated to have increased for the fifth consecutive year, also reflecting a slight increase in the area planted. Exportable surplus of maize are anticipated. Outputs of beans, cassava, groundnuts and vegetables are also estimated to be good.

Reflecting the good harvest, prices of basic staple are declining. The overall food supply situation is to remain stable in marketing year 1999/2000. However, in several districts of the Inhambane Province, where excessive rains resulted in losses of crops, housing and infrastructure, food aid is required for some 70 000 most affected population. The Government has asked for international assistance. Continued assistance is also needed for large groups of vulnerable population.

**CEREAL SUPPLY/DEMAND BALANCE FOR THE 1999/2000 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	-	50	458	508
Normal Imports	102	60	244	406
of which: Structural food aid	102	52	140	294
<b><u>1999/2000 Domestic Availability</u></b>	<b><u>10</u></b>	<b><u>77</u></b>	<b><u>1 592</u></b>	<b><u>1 679</u></b>
1999 Production (rice in paddy terms)	-	116	1 548	1 664
1999 Production (rice in milled terms)	-	77	1 548	1 625
Possible stock drawdown	10	-	44	54
<b><u>1999/2000 Utilization</u></b>	<b><u>180</u></b>	<b><u>227</u></b>	<b><u>1 592</u></b>	<b><u>1 999</u></b>
Food Use	173	214	1 300	1 687
of which: local purchase requirement	-	-	-	-
Non-food use	7	13	172	192
Exports or Re-exports	-	-	120	120
Possible stock build up	-	-	-	-
<b><u>1999/2000 Import Requirement</u></b>	<b><u>170</u></b>	<b><u>150</u></b>	<b><u>-</u></b>	<b><u>320</u></b>
Anticipated commercial imports	50	130	-	180
Food aid needs	120	20	-	140
<b><u>Current Aid Position</u></b>				
Food aid pledges	116	-	-	116
of which: Delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>9</u></b>	<b><u>11</u></b>	<b><u>66</u></b>	<b><u>86</u></b>
<b><u>Indexes</u></b>				
1999 production as % of normal:				328
1999/2000 import requirement as % of normal:				79
1999/2000 food aid requirement as % of normal:				48

**NAMIBIA**

<b>Area:</b>	823 000 sq.km
<b>Climate:</b>	Mostly arid (south-west and coast) or semi-arid. Only north and north-east gets regular rainfall in November-April
<b>Population:</b>	1.81 million (1999 estimate); G.N.P. per caput: US\$ 2 220 (1997)
<b>Specific characteristics of the country:</b>	Arid to semi-arid country; cereal production mainly in the north
<b>Logistics:</b>	Good road and railway network
<b>Major foodcrops:</b>	Millet, maize, sorghum, wheat
<b>Marketing year:</b>	May/April;
<b>Share of cereals in total calorie intake:</b>	48 percent

**CURRENT SITUATION**

Harvesting of the 1999 coarse grains is completed. Provisional forecasts point to an output 25 percent higher than last year's poor level but still below average. Output of millet and sorghum is forecast to double to 60 000 tonnes but that of maize, at 7 000 tonnes, is just half that of 1998. The area planted and yields were affected by erratic and poorly distributed rains from the beginning of the season. Prolonged dry spells and high temperatures in January, February and March lowered yields.

The tight food supply situation, following the drought-reduced 1998 cereal crop, has eased somewhat with the arrival of the new harvest. Cereal import requirements are forecast to decline to some 142 000 tonnes in the 1999/2000 marketing year (May/April).

**CEREAL SUPPLY/DEMAND BALANCE FOR THE 1999/2000 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	4	-	88	92
Normal Imports	30	-	31	61
of which: Structural food aid	1	-	2	3
<b><u>1999/2000 Domestic Availability</u></b>	<b><u>5</u></b>	<b><u>-</u></b>	<b><u>69</u></b>	<b><u>74</u></b>
1999 Production (rice in paddy terms)	5	-	67	72
1999 Production (rice in milled terms)	5	-	67	72
Possible stock drawdown	-	-	2	2
<b><u>1999/2000 Utilization</u></b>	<b><u>47</u></b>	<b><u>-</u></b>	<b><u>169</u></b>	<b><u>216</u></b>
Food Use	47	-	157	204
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	12	12
Exports or Re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<b><u>1999/2000 Import Requirement</u></b>	<b><u>42</u></b>	<b><u>-</u></b>	<b><u>100</u></b>	<b><u>142</u></b>
Anticipated commercial imports	42	-	100	142
Food aid needs	-	-	-	-
<b><u>Current Aid Position</u></b>				
Food aid pledges	-	-	-	-
of which: Delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>26</u></b>	<b><u>-</u></b>	<b><u>87</u></b>	<b><u>113</u></b>
<b><u>Indexes</u></b>				
1999 production as % of normal:				78
1999/2000 import requirement as % of normal:				233
1999/2000 food aid requirement as % of normal:				-

<b>Area:</b>	1 267 000 sq.km
<b>Climate:</b>	Northern part arid, southern part semi-arid with rains in June-October
<b>Population:</b>	9.80 million (1999 estimate); G.N.P. per caput: US\$ 200 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; land-locked sahelian country
<b>Logistics:</b>	Roads inadequate during rainy season
<b>Major foodcrops:</b>	Millet and sorghum, pulses, roots and tubers
<b>Marketing year:</b>	November/October; Lean season: July-September
<b>Share of cereals in total calorie intake:</b>	70 percent

### CURRENT SITUATION

Following mostly dry weather in early to mid-June, substantial rains in late June and early July covered most of the agricultural zone. Plantings started in late May following first showers over most producing zones. However, the weather remained mostly dry during the first two dekads of June. Rains became widespread and above normal over the western and central producing areas but remained limited in the east during the third dekad of June. They started in the east in early July. Plantings and replantings are underway with satisfactory seed availability following 1998 record harvest.

Rodents are reported to be attacking recent sowings in Tahoua and Zinder departments. Grasshoppers have also been seen in Diffa and Tillabery departments but crop damage is negligible. Grain eating birds are also reported in Diffa department. Unconfirmed reports suggest that isolated Desert Locusts were present in eastern Air and Irhazer during the first dekad of June. Small scale breeding could occur once the seasonal rains commence in Air and Tamesna.

1998 aggregate cereal production has been estimated at a record 2.97 million tonnes, about 72 percent higher than 1997 and about 44 percent above the five-year average. The overall food supply situation is satisfactory. Low cereal prices following record crops in late 1998 should facilitate local purchases for the reconstitution of the national security stock for which external assistance is required. However, the food supply situation is likely to be tight in some areas which are chronically food deficit, notably in the arrondissements of Bouza, Illela, Konni, Matameye, centre-Madaoua, centre-Mayahi, north-Mirriah, south-Ouallam, north-Tanout (Belbedji), north-Tillabery (Aiorou), south-Diffa and south-N'Guigmi.

### CEREAL SUPPLY/DEMAND BALANCE FOR THE 1998/99 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Normal Production	4	66	1 991	2 061
Normal Imports	15	60	220	295
of which: Structural food aid	5	5	10	20
<b><u>1998/99 Domestic Availability</u></b>	<b><u>12</u></b>	<b><u>36</u></b>	<b><u>2 903</u></b>	<b><u>2 952</u></b>
1998 Production (rice in paddy terms)	7	56	2 903	2 966
1998 Production (rice in milled terms)	7	36	2 903	2 947
Possible stock drawdown	5	-	-	5
<b><u>1998/99 Utilization</u></b>	<b><u>27</u></b>	<b><u>121</u></b>	<b><u>3 023</u></b>	<b><u>3 172</u></b>
Food Use	26	105	2 267	2 398
of which: local purchase requirement	-	-	20	20
Non-food use	1	7	445	453
Exports or Re-exports	-	-	60	60
Possible stock build up	-	10	250	260
<b><u>1998/99 Import Requirement</u></b>	<b><u>15</u></b>	<b><u>85</u></b>	<b><u>120</u></b>	<b><u>220</u></b>
Anticipated commercial imports	10	80	120	210
Food aid needs	5	5	-	10
<b><u>Current Aid Position</u></b>				
Food aid pledges	6	11	13	30
of which: Delivered	2	11	13	26
Donor-financed purchases	-	-	9	9
of which: for local use	-	-	9	9
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>3</u></b>	<b><u>11</u></b>	<b><u>231</u></b>	<b><u>245</u></b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				144
1998/99 import requirement as % of normal:				75
1998/99 food aid requirement as % of normal:				50

<b>Area:</b>	911 000 sq.km
<b>Climate:</b>	Mostly tropical wet-dry, south-west tropical wet, extreme north semi-arid
<b>Population:</b>	117 million (1999 estimate); G.N.P. per caput: US\$ 260 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; coastal country
<b>Logistics:</b>	Ports adequate, roads inadequate during rainy season
<b>Major foodcrops:</b>	Roots and tubers, coarse grains, rice
<b>Marketing year:</b>	January/December; Lean season: April-May
<b>Share of cereals in total calorie intake:</b>	43 percent

### CURRENT SITUATION

Limited rainfall started in mid February in the south and increased in March, allowing the planting of the first maize crop and land preparation for rainfed rice planting. Rains remained limited in the north and reached the extreme north only in late May, being about one month late. This has led to a late planting and hampered the development of millet and sorghum crops in the northern states, which is reflected by satellite imagery showing below normal vegetation in these areas.

Food supply is still constrained by high levels of post-harvest losses and high distribution costs. The cereal import requirement for 1999 is estimated at 1 250 000 tonnes, including 1.05 million tonnes of wheat and 150 000 tonnes of rice.

### **CEREAL SUPPLY/DEMAND BALANCE FOR THE 1999 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	45	2 800	16 970	19 815
Normal Imports	850	350	80	1 280
of which: Structural food aid	-	-	-	-
<b><u>1999 Domestic Availability</u></b>	<b><u>98</u></b>	<b><u>2 025</u></b>	<b><u>19 345</u></b>	<b><u>21 468</u></b>
1998 Production (rice in paddy terms)	98	3 375	19 335	22 808
1998 Production (rice in milled terms)	98	2 025	19 335	21 458
Possible stock drawdown	-	-	10	10
<b><u>1999 Utilization</u></b>	<b><u>1 148</u></b>	<b><u>2 175</u></b>	<b><u>19 395</u></b>	<b><u>22 718</u></b>
Food Use	1 108	1 775	15 016	17 899
of which: local purchase requirement	-	-	-	-
Non-food use	40	400	3 929	4 369
Exports or Re-exports	-	-	450	450
Possible stock build up	-	-	-	-
<b><u>1999 Import Requirement</u></b>	<b><u>1 050</u></b>	<b><u>150</u></b>	<b><u>50</u></b>	<b><u>1 250</u></b>
Anticipated commercial imports	1 050	150	50	1 250
Food aid needs	-	-	-	-
<b><u>Current Aid Position</u></b>				
Food aid pledges	-	-	-	-
of which: Delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>9</u></b>	<b><u>15</u></b>	<b><u>128</u></b>	<b><u>153</u></b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				115
1999 import requirement as % of normal:				98
1999 food aid requirement as % of normal:				-

RWANDA

<b>Area:</b>	25 000 sq.km
<b>Climate:</b>	Highland rainy climate with moderate temperature (20°C); two rainy seasons: February-May and September-November
<b>Population:</b>	8.11 million (1999 estimate); G.N.P. per caput: US\$ 210 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; land-locked country
<b>Logistics:</b>	Ports: Mombasa (Kenya) and Dar es Salaam (Tanzania); roads and railway inadequate
<b>Major foodcrops:</b>	Roots, tubers, pulses, plantains, sorghum, maize
<b>Marketing year:</b>	January/December; Lean season: November-December
<b>Share of cereals in total calorie intake:</b>	25 percent

**CURRENT SITUATION**

Harvest of the 1999 second season foodcrops is underway. The outlook is uncertain. A delay in the start of the rainy season was followed by abundant and well distributed precipitation in March. However, rains were below average in April and ceased early than normal, particularly in eastern parts. As a result, yield reductions are anticipated in several areas. The negative impact on cereal crops of armyworms attacks this season, was limited by control measures undertaken by the Government with the assistance of FAO and donors. The overall impact of the irregular rains on this season's production is currently being assessed by an FAO/WFP/Ministry of Agriculture Crop Assessment Mission at local level.

In Northwestern prefectures, a relative improvement in security conditions has allowed agricultural activities this season together with better access of about 600 000 displaced people to food assistance. However, shortages of pipeline food aid restricted distributions in May and June. In the absence of additional contributions, operations will cease by the end of July.

**CEREAL SUPPLY/DEMAND BALANCE FOR THE 1999 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	10	9	276	295
Normal Imports	10	6	3	19
of which: Structural food aid	3	1	3	7
<b><u>1999 Domestic Availability</u></b>	<b><u>7</u></b>	<b><u>8</u></b>	<b><u>194</u></b>	<b><u>209</u></b>
1999 Production (rice in paddy terms)	6	7	189	202
1999 Production (rice in milled terms)	6	5	189	200
Possible stock drawdown	1	3	5	9
<b><u>1999 Utilization</u></b>	<b><u>27</u></b>	<b><u>18</u></b>	<b><u>379</u></b>	<b><u>424</u></b>
Food Use	27	17	358	402
of which: local purchase requirement	-	-	-	-
Non-food use	-	1	21	22
Exports or Re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<b><u>1999 Import Requirement</u></b>	<b><u>20</u></b>	<b><u>10</u></b>	<b><u>185</u></b>	<b><u>215</u></b>
Anticipated commercial imports	-	-	-	-
Food aid needs	20	10	185	215
<b><u>Current Aid Position</u></b>				
Food aid pledges	1	0	96	97
Of which: Delivered	1	0	90	91
Donor-financed purchases	-	-	-	-
Of which: for local use	-	-	-	-
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>3</u></b>	<b><u>2</u></b>	<b><u>44</u></b>	<b><u>50</u></b>
<b><u>Indexes</u></b>				
1999 production as % of normal:				68
1999 import requirement as % of normal:				1132
1999 food aid requirement as % of normal:				3071



SAO TOME AND PRINCIPE

<b>Area:</b>	960 sq.km
<b>Climate:</b>	Tropical wet; rainfall increases with altitude and towards southern parts of the islands
<b>Population:</b>	140 000 (1999 estimate); G.N.P. per caput: US\$ 350 (1995)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; archipelago
<b>Logistics:</b>	Ports and roads adequate
<b>Major foodcrops:</b>	Bananas, breadfruit, cocoyam
<b>Marketing year:</b>	January/December
<b>Share of cereals in total calorie intake:</b>	36 percent

**CURRENT SITUATION**

The staple foodcrops are roots, tubers and plantains. The country imports around 10 000 tonnes of wheat and rice annually. The cereal import requirement in 1999 is estimated at 11 000 tonnes, including some 2 000 tonnes as food aid.

**CEREAL SUPPLY/DEMAND BALANCE FOR THE 1999 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	-	-	-	-
Normal Imports	4	5	2	11
of which: Structural food aid	1	1	-	2
<b>1999 Domestic Availability</b>	<b>4</b>	<b>5</b>	<b>2</b>	<b>11</b>
1998 Production (rice in paddy terms)	-	-	-	-
1998 Production (rice in milled terms)	-	-	-	-
Possible stock drawdown	-	-	-	-
<b>1999 Utilization</b>	<b>4</b>	<b>5</b>	<b>2</b>	<b>11</b>
Food Use	4	5	2	11
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	-	-
Exports or Re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<b>1999 Import Requirement</b>	<b>4</b>	<b>5</b>	<b>2</b>	<b>11</b>
Anticipated commercial imports	3	4	2	9
Food aid needs	1	1	-	2
<b>Current Aid Position</b>				
Food aid pledges	-	-	-	-
of which: Delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b>Estimated Per Caput Consumption (kg/Year)</b>	<b>29</b>	<b>36</b>	<b>14</b>	<b>78</b>
<b>Indexes</b>				
1998 production as % of normal:				-
1999 import requirement as % of normal:				100
1999 food aid requirement as % of normal:				100

SENEGAL

<b>Area:</b>	193 000 sq.km
<b>Climate:</b>	Semi-arid in north, tropical wet-dry in south, with rains in June-October
<b>Population:</b>	9.23 million (1999 estimate); G.N.P. per caput: US\$ 550 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; coastal sahelian country
<b>Logistics:</b>	Port capacity adequate; gateway to Mali.
<b>Major foodcrops:</b>	Millet and sorghum, rice, maize, wheat
<b>Marketing year:</b>	November/October; Lean season: August-September
<b>Share of cereals in total calorie intake:</b>	61 percent

**CURRENT SITUATION**

Generally above normal rains permitted widespread plantings in the south and the centre. Following substantial early rains in the south-east in mid-May, rains progressed northwards in June and were above last year's level and generally above normal. The weather remained dry up to late June in the north where rains started in early July, permitting plantings to start. Plantings of coarse grains are now well underway in the centre, while crops are emerging satisfactorily in the south and the east.

Pastures have started to regenerate in the centre. No pest activity has been reported. The government has distributed 73 273 tonnes of phosphate fertilizers at farmers level in the framework of its programme "phosphatage de fond".

The overall food supply situation is satisfactory. Food markets are well supplied and the price of rice remains generally stable. The prices of millet and sorghum are also stable and 20-25 percent lower than in 1998. However, some localized food supply difficulties are expected for vulnerable groups affected by successive poor harvests in Louga, Tivaouane and M'Backé and in the regions of Fatick, Thiès, and Ziguinchor. The cereal import requirement for the 1998/99 marketing year (November/October) is estimated at about 800 000 tonnes, mainly rice and wheat.

**CEREAL SUPPLY/DEMAND BALANCE FOR THE 1998/99 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	-	180	816	996
Normal Imports	190	425	70	685
of which: Structural food aid	3	5	4	12
<b>1998/99 Domestic Availability</b>	<b>-</b>	<b>126</b>	<b>827</b>	<b>953</b>
1998 Production (rice in paddy terms)	-	181	827	1008
1998 Production (rice in milled terms)	-	126	827	953
Possible stock drawdown	-	-	-	-
<b>1998/99 Utilization</b>	<b>235</b>	<b>631</b>	<b>892</b>	<b>1 758</b>
Food Use	230	610	746	1 586
of which: local purchase requirement	-	-	10	10
Non-food use	5	22	131	157
Exports or Re-exports	-	-	-	-
Possible stock build up	-	-	15	15
<b>1998/99 Import Requirement</b>	<b>235</b>	<b>505</b>	<b>65</b>	<b>805</b>
Anticipated commercial imports	230	500	60	790
Food aid needs	5	5	5	15
<b>Current Aid Position</b>				
Food aid pledges	-	7	-	7
of which: Delivered	-	7	-	7
Donor-financed purchases	-	-	3	3
of which: for local use	-	-	3	3
for export	-	-	-	-
<b>Estimated Per Caput Consumption (kg/Year)</b>	<b>25</b>	<b>66</b>	<b>81</b>	<b>172</b>
<b>Indexes</b>				
1998 production as % of normal:				101
1998/99 import requirement as % of normal:				118
1998/99 food aid requirement as % of normal:				125

SEYCHELLES

<b>Area:</b>	455 sq.km
<b>Climate:</b>	Tropical wet; rains throughout the year, peaking in October-May
<b>Population:</b>	76 000 (1999 estimate); G.N.P. per caput: US\$ 6 620 (1995)
<b>Specific characteristics of the country:</b>	Consists of about 100 islands scattered over more than 1 million sq.km. Tourism provides 50 percent of G.D.P.
<b>Logistics:</b>	-
<b>Major foodcrops:</b>	Coconuts, fruit, vegetables
<b>Marketing year:</b>	January/December
<b>Share of cereals in total calorie intake:</b>	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. For 1999, the cereal import requirement is estimated at 13 000 tonnes.

**CEREAL SUPPLY/DEMAND BALANCE FOR THE 1999 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	-	-	-	-
Normal Imports	2	5	5	12
of which: Structural food aid	-	-	-	-
<b>1999 Domestic Availability</b>	<b>2</b>	<b>5</b>	<b>5</b>	<b>12</b>
1998 Production (rice in paddy terms)	-	-	-	-
1998 Production (rice in milled terms)	-	-	-	-
Possible stock drawdown	-	-	-	-
<b>1999 Utilization</b>	<b>2</b>	<b>5</b>	<b>6</b>	<b>13</b>
Food Use	2	5	1	8
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	5	5
Exports or Re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<b>1999 Import Requirement</b>	<b>2</b>	<b>5</b>	<b>6</b>	<b>13</b>
Anticipated commercial imports	2	5	6	13
Food aid needs	-	-	-	-
<b>Current Aid Position</b>				
Food aid pledges	-	-	-	-
of which: Delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b>Estimated Per Caput Consumption (kg/Year)</b>	<b>27</b>	<b>66</b>	<b>13</b>	<b>106</b>
<b>Indexes</b>				
1998 production as % of normal:				-
1999 import requirement as % of normal:				108
1999 food aid requirement as % of normal:				-

SIERRA LEONE

<b>Area:</b>	72 000 sq.km
<b>Climate:</b>	Mostly tropical wet-dry; extreme south tropical wet; rainy season: March-October
<b>Population:</b>	4.84 million (1999 estimate); G.N.P. per caput: US\$ 200 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; coastal country
<b>Logistics:</b>	Roads inadequate
<b>Major foodcrops:</b>	Rice, roots and tubers
<b>Marketing year:</b>	January/December; Lean season: July-August
<b>Share of cereals in total calorie intake:</b>	57 percent

**CURRENT SITUATION**

Growing conditions are adequate and allow a good development of rice crop and tubers. However, despite the recent peace agreement, insecurity in the major part of the country during the beginning of the growing season has prevented the delivery of agricultural inputs, and disrupted most agricultural activities. The implementation of the recently signed peace plan could allow emergency distributions of seeds and tools but might not be sufficient to allow a real recovery of the agricultural production.

Food distributions are underway but are insufficient to cover the needs of the large number of displaced persons. Current estimates point to about 700 000 to 1 million people displaced within the country, including an estimated 150 000 in Freetown, 25 000 in Waterloo, 30 000 in Lungi, 55 000 in Kenema, 4 000 in Bo, 13 000 in Blama, 17 000 in Kambia. The nutritional status of IDPs remains precarious and food shortages have been reported in various places in the country, including in the areas of Kambia, Bo, Kenema, Makeni and Daru. Food prices are still extremely high. Despite the recently signed cease fire and the control by ECOWAS forces of the main roads to Bo and Kenema areas, poor infrastructures and the start of the rainy season have made road travels very difficult and are hampering the delivery of substantial quantities of food in these areas where large numbers of internally displaced persons have settled. Food aid deliveries to the north of the country are organized from neighbouring Guinea. Significant improvement of the food supply situation is expected as a result of the implementation of the peace process and the desarming of fighters, which allows humanitarian agencies to reach regions where no assistance could be provided during the last six months. FAO estimates Sierra Leone's cereal import requirement for 1999 at about 290 000 tonnes, including 140 000 tonnes of food aid. As of mid-July, only 24 000 tonnes of food aid, mainly in the form of bulgur wheat, had been delivered.

**CEREAL SUPPLY/DEMAND BALANCE FOR THE 1999 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	-	390	57	447
Normal Imports	60	110	15	185
of which: Structural food aid	40	10	15	65
<b><u>1999 Domestic Availability</u></b>	<b><u>-</u></b>	<b><u>210</u></b>	<b><u>53</u></b>	<b><u>263</u></b>
1998 Production (rice in paddy terms)	-	350	53	403
1998 Production (rice in milled terms)	-	210	53	263
Possible stock drawdown	-	-	-	-
<b><u>1999 Utilization</u></b>	<b><u>100</u></b>	<b><u>350</u></b>	<b><u>103</u></b>	<b><u>553</u></b>
Food Use	94	280	93	467
of which: local purchase requirement	-	-	-	-
Non-food use	-	70	10	80
Exports or Re-exports	-	-	-	-
Possible stock build up	6	-	-	6
<b><u>1999 Import Requirement</u></b>	<b><u>100</u></b>	<b><u>140</u></b>	<b><u>50</u></b>	<b><u>290</u></b>
Anticipated commercial imports	40	110	-	150
Food aid needs	60	30	50	140
<b><u>Current Aid Position</u></b>				
Food aid pledges	16	3	6	24
of which: Delivered	16	3	6	24
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>19</u></b>	<b><u>58</u></b>	<b><u>19</u></b>	<b><u>96</u></b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				90
1999 import requirement as % of normal:				157
1999 food aid requirement as % of normal:				215

<b>Area:</b>	627 000 sq.km
<b>Climate:</b>	Semi-arid in the south; rest arid
<b>Population:</b>	6.40 million (2000 estimate); G.N.P. per caput; n.a.
<b>Specific characteristics of the country:</b>	Low-income food-deficit country
<b>Logistics:</b>	Inadequate port facilities; serious shortage of fuel and spare parts
<b>Major foodcrops:</b>	Maize, sorghum, sesame
<b>Marketing year:</b>	August/July; Lean season: June-August
<b>Share of cereals in total calorie intake:</b>	45 percent

### CURRENT SITUATION

The current main "Gu" season has largely failed due to erratic and insufficient rains, armyworm outbreaks, and unusually high temperatures. Water levels in the Shabelle River are reported to be below normal, reflecting below-average precipitation and reducing irrigation possibilities. Recent reports indicate a "Gu" cereal output of about 168 000 tonnes, about 11 percent below the post-war average. This follows six consecutive poor harvests since 1996, resulting from droughts and the unprecedented floods of early 1998 associated with the El Niño.

The food outlook for 1999 and beyond is extremely grim. The cumulative effects of adverse weather, the long-running civil war and uncontrolled crop pests and diseases have precipitated famine conditions in the country, particularly in the southern regions. Intensified inter-factional fighting has compounded the problem. Traditional coping strategies for most households have been virtually exhausted, while commercial and economic activities have been severely curtailed by factional fighting and insecurity, forcing large numbers of people to move in search of food and safety.

The recent lifting by Saudi Arabia of an import ban on livestock in some eastern African countries, imposed because of an outbreak of animal diseases, was expected to bring much needed relief to livestock producers. However, livestock prices are reported to be falling due to weight loss caused by a shortage of grazing and water, and probably distress selling. Malnutrition is reported to be high and increasing. The already precarious food supply situation is set to deteriorate further in the coming months with renewed fighting in parts, and more population displacement. Current estimates indicate that some 70 000 people have been displaced by food shortages and insecurity. It is estimated that more than 1 million people face serious food shortages, with over 400 000 at risk of starvation.

The international community needs to devise ways of reaching and assisting the increasingly desperate populations, despite the serious obstacles hampering food relief distributions, failing which starvation on a large scale cannot be ruled out. Most households will also need seeds and other inputs for planting during the next growing season.

### **CEREAL SUPPLY/DEMAND BALANCE FOR THE 1999/2000 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	-	13	550	563
Normal Imports	70	60	10	140
of which: Structural food aid	40	20	10	70
<b><u>1999/2000 Domestic Availability</u></b>	<b>70</b>	<b>93</b>	<b>560</b>	<b>723</b>
1999 Production (rice in paddy terms)	-	2	240	242
1999 Production (rice in milled terms)	-	1	240	241
Possible stock drawdown	-	5	-	5
<b><u>1999/2000 Utilization</u></b>	<b>130</b>	<b>96</b>	<b>350</b>	<b>576</b>
Food Use	130	96	286	512
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	50	50
Exports or Re-exports	-	-	-	-
Possible stock build up	-	-	14	14
<b><u>1999/2000 Import Requirement</u></b>	<b>130</b>	<b>90</b>	<b>110</b>	<b>330</b>
Anticipated commercial imports	70	75	40	185
Food aid needs	60	15	70	145
<b><u>Current Aid Position</u></b>				
Food aid pledges	-	-	-	-
of which: Delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b>20</b>	<b>15</b>	<b>45</b>	<b>80</b>
<b><u>Indexes</u></b>				
1999 production as % of normal:				43
1999/2000 import requirement as % of normal:				236
1999/2000 food aid requirement as % of normal:				178

**SOUTH AFRICA**

<b>Area:</b>	1.22 million sq.km
<b>Climate:</b>	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
<b>Population:</b>	45.28 million (1999 estimate); GNP per caput US\$ 3 400 (1997)
<b>Specific characteristics of the country:</b>	Normally net food exporter, notably maize
<b>Logistics:</b>	Adequate port, rail and road facilities
<b>Major foodcrops:</b>	Maize, wheat
<b>Marketing year:</b>	May/April; Lean season: February-April
<b>Share of cereals in total calorie intake:</b>	54 percent

**CURRENT SITUATION**

Harvesting of 1999 coarse grains is completed. Official estimates indicate maize production at 6.8 million tonnes, some 16 percent lower than last year and below average. Rains during the season were abundant but irregular. Heavy rains and floods in mid- February coupled with a dry spell in late February/early March negatively affected yields. The decline in production also reflects a slight reduction in the area planted, due to diversion of land to the more profitable sunflower, production of which is estimated at 945 000 tonnes.

**CEREAL SUPPLY/DEMAND BALANCE FOR THE 1999/2000 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	-	-	-	-
Normal Imports	-	-	-	-
of which: Structural food aid	-	-	-	-
<b><u>1999/2000 Domestic Availability</u></b>	<b><u>1 320</u></b>	<b><u>2</u></b>	<b><u>7 192</u></b>	<b><u>8 514</u></b>
<i>1999 Production (rice in paddy terms)</i>	<i>1 300</i>	<i>3</i>	<i>6 807</i>	<i>8 110</i>
1999 Production (rice in milled terms)	1 300	2	6 807	8 109
Possible stock drawdown	20	-	385	405
<b><u>1999/2000 Utilization</u></b>	<b><u>2 720</u></b>	<b><u>449</u></b>	<b><u>8 293</u></b>	<b><u>11 462</u></b>
Food Use	2 538	399	4 611	7 548
of which: local purchase requirement	-	-	-	-
Non-food use	102	50	3 502	3 654
Exports or Re-exports	80	-	180	260
Possible stock build up	-	-	-	-
<b><u>1999/2000 Import Requirement</u></b>	<b><u>1 400</u></b>	<b><u>447</u></b>	<b><u>1 101</u></b>	<b><u>2 948</u></b>
Anticipated commercial imports	1 400	447	1 101	2 948
Food aid needs	-	-	-	-
<b><u>Current Aid Position</u></b>				
Food aid pledges	-	-	-	-
of which: Delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>56</u></b>	<b><u>9</u></b>	<b><u>102</u></b>	<b><u>167</u></b>
<b><u>Indexes</u></b>				
1999 production as % of normal:				76
1999/2000 import requirement as % of normal:				117
1999/2000 food aid requirement as % of normal:				

<b>Area:</b>	2.4 million sq.km
<b>Climate:</b>	From north to south, arid, semi-arid and tropical wet-dry. Rainy season: May-October
<b>Population:</b>	30.29 million (1999 estimate); GNP per caput: n.a.
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; cereal production mainly in eastern and central areas.
<b>Logistics:</b>	Roads, railway and river transport inadequate
<b>Major foodcrops:</b>	Sorghum, millet, wheat, roots and tubers, oils
<b>Marketing year:</b>	November/October; Lean season: September-October
<b>Share of cereals in total calorie intake:</b>	51 percent

**CURRENT SITUATION**

Planting of 1999 main season cereal crop is in progress in central and northern growing areas. Early prospects have improved with beneficial rains in July. Surveys on Desert Locust indicate that there were no significant developments and only low number are anticipated to appear in the summer breeding areas of northern Darfur, northern Kordofan, Kassala and northern Provinces.

In Southern Sudan, crop growing conditions are favoured by abundant rainfall in May and June. Pasture conditions are reported to be satisfactory in most regions, especially in the Upper Nile, which was flooded last year. Livestock are being brought back to the villages from seasonal swamps, which increased the availability of livestock products.

Food shortages are reported in a number of locations in southern parts of the country. Intensified civil conflict earlier in the year, particularly in Bahr El Ghazal, and a recent influx of returnees, which coincided with the lean period for local residents, has aggravated an already precarious food supply situation. However, relative peace in most other locations has helped continuing improvements and a decline in admissions to feeding centres. WFP delivered about 8 000 tonnes of food aid to southern areas in May, against a target of 9 500 tonnes. However, distributions were reduced for three months from June due to insufficient donor funding.

**CEREAL SUPPLY/DEMAND BALANCE FOR THE 1998/99 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	460	1	3 189	3 650
Normal Imports	450	10	130	590
of which: Structural food aid	250	-	-	250
<b><u>1998/99 Domestic Availability</u></b>	<b><u>265</u></b>	<b><u>2</u></b>	<b><u>5 126</u></b>	<b><u>5 393</u></b>
1998 Production (rice in paddy terms)	165	3	5 126	5 294
1998 Production (rice in milled terms)	165	2	5 126	5 293
Possible stock drawdown	100	-	-	100
<b><u>1998/99 Utilization</u></b>	<b><u>715</u></b>	<b><u>27</u></b>	<b><u>5 151</u></b>	<b><u>5 893</u></b>
Food Use	645	26	3 447	4 118
of which: local purchase requirement	-	-	150	150
Non-food use	70	1	935	1 006
Exports or Re-exports	-	-	719	719
Possible stock build up	-	-	50	50
<b><u>1998/99 Import Requirement</u></b>	<b><u>450</u></b>	<b><u>25</u></b>	<b><u>25</u></b>	<b><u>500</u></b>
Anticipated commercial imports	450	25	-	475
Food aid needs	-	-	25	25
<b><u>Current Aid Position</u></b>				
Food aid pledges	30	3	87	120
of which: Delivered	30	3	87	120
Donor-financed purchases	-	-	17	17
of which: for local use	-	-	17	17
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>21</u></b>	<b><u>1</u></b>	<b><u>114</u></b>	<b><u>136</u></b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				145
1998/99 import requirement as % of normal:				85
1998/99 food aid requirement as % of normal:				10

SWAZILAND

<b>Area:</b>	17 000 sq.km
<b>Climate:</b>	Highland rainy climate. Rainy season: October-April; cool temperatures in May- September
<b>Population:</b>	0.96 million (1999 estimate); G.N.P. per caput: US\$ 1 170 (1995)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; land-locked country
<b>Logistics:</b>	Good road network; imports through Mozambique or South Africa
<b>Major foodcrops:</b>	Maize
<b>Marketing year:</b>	May/April; Lean season: February-April
<b>Share of cereals in total calorie intake:</b>	55 percent

**CURRENT SITUATION**

Harvest of the 1999 maize crop is completed. Preliminary estimates indicate an output around the normal level of last year. Abundant rains in the first part of the season led to an increase in the area planted but a prolonged dry spell from January to March sharply reduced yield potential. Most affected by the dry weather are the southern parts of the country, where poor harvests have been gathered.

**CEREAL SUPPLY/DEMAND BALANCE FOR THE 1999/2000 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	1	3	116	120
Normal Imports	25	2	20	47
of which: Structural food aid	8	-	1	9
<b>1999/2000 Domestic Availability</b>	<b>26</b>	<b>5</b>	<b>137</b>	<b>168</b>
1999 Production (rice in paddy terms)	-	3	109	112
1999 Production (rice in milled terms)	-	2	109	111
Possible stock drawdown	-	-	13	13
<b>1999/2000 Utilization</b>	<b>40</b>	<b>10</b>	<b>132</b>	<b>182</b>
Food Use	40	10	110	160
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	20	20
Exports or Re-exports	-	-	2	2
Possible stock build up	-	-	-	-
<b>1999/2000 Import Requirement</b>	<b>40</b>	<b>8</b>	<b>10</b>	<b>58</b>
Anticipated commercial imports	40	8	10	58
Food aid needs	-	-	-	-
<b>Current Aid Position</b>				
Food aid pledges	-	-	-	-
of which: Delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b>Estimated Per Caput Consumption (kg/Year)</b>	<b>42</b>	<b>11</b>	<b>115</b>	<b>167</b>
<b>Indexes</b>				
1999 production as % of normal:				93
1999/2000 import requirement as % of normal:				123
1999/2000 food aid requirement as % of normal:				-



TANZANIA

<b>Area:</b>	886 000 sq.km
<b>Climate:</b>	Tropical wet-dry climate with two rainy seasons in north (November-December and March-May) and one in south (November-April)
<b>Population:</b>	32.30 million (1999 estimate); G.N.P. per caput: US\$ 210 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; cereal surplus production in south and south-west; cereal deficit in central and north-west. Distribution difficulties
<b>Logistics:</b>	Serious shortage of rolling stock, fuel and spare parts
<b>Major foodcrops:</b>	Maize, roots, tubers, sorghum, pulses, plantains, rice
<b>Marketing year:</b>	June/May; Lean season: February-April
<b>Share of cereals in total calorie intake:</b>	60 percent

**CURRENT SITUATION**

The harvesting season is near completion and official reports indicate that there are serious localised crop failures in several regions, particularly in Shinyanga Region, where cash and food crop production is anticipated to fall by as much as 40 percent. Preliminary estimates indicate total cereal production (maize, rice, wheat, sorghum and millet) in 1999 at 3.79 million tonnes, about 9 percent below last year's output due to erratic rains, reduced use of improved seeds and fertilizers and an outbreak of armyworms. By contrast, prospects for non-cereal crops (pulses, potatoes, cassava and plantains) are reported to be good.

With the onset of the dry season in central and northern parts of the country, the outlook for pastoralists is unfavorable due to reduced pasture and water supplies. In Dodoma and Singida Regions, where many households have been receiving food assistance since October 1998 the food supply situation has improved with the new harvest. Nationally maize prices have declined since April with the harvest and commercial sale of Government imports, but still remain much higher than at the same period last year. The Government is building stocks, with import plans of 175 000 tonnes, of which 50 000 have already arrived.

**CEREAL SUPPLY/DEMAND BALANCE FOR THE 1999/2000 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	85	607	3 230	3 922
Normal Imports	60	25	-	85
of which: Structural food aid	15	15	-	30
<b><u>1999/2000 Domestic Availability</u></b>	<b><u>100</u></b>	<b><u>598</u></b>	<b><u>3 100</u></b>	<b><u>3 798</u></b>
1999 Production (rice in paddy terms)	90	920	3 100	4 110
1999 Production (rice in milled terms)	90	598	3 100	3 788
Possible stock drawdown	10	-	-	10
<b><u>1999/2000 Utilization</u></b>	<b><u>140</u></b>	<b><u>628</u></b>	<b><u>3 700</u></b>	<b><u>4 468</u></b>
Food Use	135	454	3 114	3 703
of which: local purchase requirement	-	-	2	2
Non-food use	5	24	586	615
Exports or Re-exports	-	150	-	150
Possible stock build up	-	-	-	-
<b><u>1999/2000 Import Requirement</u></b>	<b><u>40</u></b>	<b><u>30</u></b>	<b><u>600</u></b>	<b><u>670</u></b>
Anticipated commercial imports	40	25	530	595
Food aid needs	-	5	70	75
<b><u>Current Aid Position</u></b>				
Food aid pledges	-	-	2	2
of which: Delivered	-	-	2	2
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>4</u></b>	<b><u>14</u></b>	<b><u>96</u></b>	<b><u>115</u></b>
<b><u>Indexes</u></b>				
1999 production as % of normal:				105
1999/2000 import requirement as % of normal:				788
1999/2000 food aid requirement as % of normal:				250

<b>Area:</b>	54 000 sq.km
<b>Climate:</b>	Tropical wet-dry; two rainy seasons in south (March-June and October) and one in North (May-October)
<b>Population:</b>	4.55 million (1999 estimate) G.N.P. per caput: US\$ 330 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; coastal country
<b>Logistics:</b>	Ports and roads adequate; gateway to Burkina Faso and Niger
<b>Major foodcrops:</b>	Roots and tubers, coarse grains, fruit
<b>Marketing year:</b>	January/December; Lean season: April-July
<b>Share of cereals in total calorie intake:</b>	40 percent

### CURRENT SITUATION

The rainy season started in early March in the south, allowing the planting of the first maize crop, and in mid April in the north, allowing land preparation for the planting of millet and sorghum. Climatic conditions have been globally favourable so far.

The food supply situation is satisfactory. The global cereal output for 1998 is estimated at about 590 000 tonnes, which is about average. Production of roots and tubers increased by about 5 percent over last year, reaching 1.29 million tonnes. The cereal import requirement for 1999 (January/December), is estimated at 125 000 tonnes. Due to a good harvest in the sahelian countries, the cereal exports from Togo to the sahelian countries is expected to decrease significantly over the past years.

### **CEREAL SUPPLY/DEMAND BALANCE FOR THE 1999 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	-	32	460	492
Normal Imports	50	60	10	120
of which: Structural food aid	5	-	-	5
<b><u>1999 Domestic Availability</u></b>	<b>-</b>	<b>48</b>	<b>558</b>	<b>606</b>
<i>1998 Production (rice in paddy terms)</i>	-	56	533	589
1998 Production (rice in milled terms)	-	38	533	571
Possible stock drawdown	-	10	25	35
<b><u>1999 Utilization</u></b>	<b>45</b>	<b>128</b>	<b>558</b>	<b>731</b>
Food Use	43	67	380	490
of which: local purchase requirement	-	-	-	-
Non-food use	2	11	168	181
Exports or Re-exports	-	50	10	60
Possible stock build up	-	-	-	-
<b><u>1999 Import Requirement</u></b>	<b>45</b>	<b>80</b>	<b>-</b>	<b>125</b>
Anticipated commercial imports	45	80 <sup>1/</sup>	-	125
Food aid needs	-	-	-	-
<b><u>Current Aid Position</u></b>				
Food aid pledges	-	-	-	-
of which: Delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b>9</b>	<b>15</b>	<b>84</b>	<b>108</b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				120
1999 import requirement as % of normal:				104
1999 food aid requirement as % of normal:				-

<sup>1/</sup> Including 50 000 tonnes for re-export.

**UGANDA**

<b>Area:</b>	200 000 sq.km
<b>Climate:</b>	North-east is semi-arid, rest of the country is tropical wet-dry; main rainy period is March-October
<b>Population:</b>	21.69 million (1999 estimate); G.N.P. per caput: US\$ 320 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country
<b>Logistics:</b>	Ports: Mombasa (Kenya) and Dar es Salaam (Tanzania); roads and railways inadequate
<b>Major foodcrops:</b>	Roots, tubers, plantains, pulses, maize, millet, sorghum
<b>Marketing year:</b>	January/December; Lean season: April-May
<b>Share of cereals in total calorie intake:</b>	35 percent

**CURRENT SITUATION**

Recent reports indicate that western parts of Uganda is faced with severe food shortages due to a prolonged drought which has affected crop production and livestock. More than half a million farmers are reported to be facing severe food shortages and in need of urgent assistance. Thousands more are reported to be moving to northern Tanzania in search of water and pasture. The worst hit counties are Nyabushozi, Kashari and Ibanda in Mbarara, and Ruhinda and Ruhaama in Bushenyi and Ntungamo respectively. Food difficulties also persist in northern areas, where 400 000 people remain displaced by persistent insurgency. International food aid is being provided.

Elsewhere, the outlook for the harvest of the 1999 main season cereal crops, which has started in some parts of the country, is generally favourable. In Lake Victoria basin, including Rakai, and eastern region, a normal harvest is anticipated, despite drier weather in late May and June. In the north, where the rainy season extends from April through November, crop conditions were reported to be normal. Cereal production is expected to increase in Kitgum and Gulu due to abundant rainfall, availability of inputs and improved security that allowed increased access to cultivable land.

**CEREAL SUPPLY/DEMAND BALANCE FOR THE 1999 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	9	78	1 810	1 897
Normal Imports	18	5	10	33
of which: Structural food aid	15	-	10	25
<b><u>1999 Domestic Availability</u></b>	<b><u>14</u></b>	<b><u>51</u></b>	<b><u>1 650</u></b>	<b><u>1 715</u></b>
1999 Production (rice in paddy terms)	9	77	1 630	1 716
1999 Production (rice in milled terms)	9	51	1 630	1 690
Possible stock drawdown	5	-	20	25
<b><u>1999 Utilization</u></b>	<b><u>84</u></b>	<b><u>57</u></b>	<b><u>1 700</u></b>	<b><u>1 841</u></b>
Food Use	83	57	1 245	1 385
of which: local purchase requirement	-	-	-	-
Non-food use	1	-	325	326
Exports or Re-exports	-	-	130	130
Possible stock build up	-	-	-	-
<b><u>1999 Import Requirement</u></b>	<b><u>70</u></b>	<b><u>6</u></b>	<b><u>50</u></b>	<b><u>126</u></b>
Anticipated commercial imports	70	4	-	74
Food aid needs	-	2	50	52
<b><u>Current Aid Position</u></b>				
Food aid pledges	12	-	-	12
Of which: Delivered	6	-	-	6
Donor-financed purchases	-	-	12	12
Of which: for local use	-	-	6	6
for export	-	-	6	6
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>4</u></b>	<b><u>3</u></b>	<b><u>57</u></b>	<b><u>64</u></b>
<b><u>Indexes</u></b>				
1999 production as % of normal:				90
1998 import requirement as % of normal:				382
1998 food aid requirement as % of normal:				208

<b>Area:</b>	741 000 sq.km
<b>Climate:</b>	Tropical wet-dry; rainy season: November-April
<b>Population:</b>	10.44 million (1999 estimate); G.N.P. per caput: US\$ 380 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; land-locked country
<b>Logistics:</b>	Imports through Dar es Salaam (Tanzania); inadequate rail and road connections
<b>Major foodcrops:</b>	Maize, roots, tubers
<b>Marketing year:</b>	May/April; Lean season: March-May
<b>Share of cereals in total calorie intake:</b>	70 percent

### CURRENT SITUATION

Harvesting of the 1999 coarse grains, mainly maize, is completed. The output has recovered from the poor crop of last year. Maize production is estimated at a normal to above-normal level of 1 million tonnes, which is 82 percent higher than in 1998. Abundant rains during the growing season, particularly in southern areas, resulted in localized floods and crop losses but overall benefited crop development. However, in northern areas late and erratic rains have resulted in reduced yields in parts. Production of other basic staples, mainly cassava, is also good this season.

The food supply has eased with the arrival of the new harvest into the markets. Prices of maize are declining and are below their level of a year ago. Maize import requirements in marketing year 1999/2000 (April/March) are forecast to decline sharply from the previous year to about 250 000 tonnes.

### **CEREAL SUPPLY/DEMAND BALANCE FOR THE 1999/2000 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	53	14	1 348	1 415
Normal Imports	35	4	65	104
of which: Structural food aid	25	-	45	70
<b><u>1999/2000 Domestic Availability</u></b>	<b><u>80</u></b>	<b><u>4</u></b>	<b><u>1 086</u></b>	<b><u>1 170</u></b>
1999 Production (rice in paddy terms)	70	6	1 086	1 162
1999 Production (rice in milled terms)	70	4	1 086	1 160
Possible stock drawdown	10	-	-	10
<b><u>1999/2000 Utilization</u></b>	<b><u>121</u></b>	<b><u>27</u></b>	<b><u>1 336</u></b>	<b><u>1 484</u></b>
Food Use	117	25	1 136	1 278
of which: local purchase requirement	-	-	1	1
Non-food use	4	2	190	196
Exports or Re-exports	-	-	-	-
Possible stock build up	-	-	10	10
<b><u>1999/2000 Import Requirement</u></b>	<b><u>41</u></b>	<b><u>23</u></b>	<b><u>250</u></b>	<b><u>314</u></b>
Anticipated commercial imports	41	22	250	313
Food aid needs	-	1	-	1
<b><u>Current Aid Position</u></b>				
Food aid pledges	-	-	2	2
of which: Delivered	-	-	2	2
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>11</u></b>	<b><u>2</u></b>	<b><u>109</u></b>	<b><u>122</u></b>
<b><u>Indexes</u></b>				
1999 production as % of normal:				82
1999/2000 import requirement as % of normal:				302
1999/2000 food aid requirement as % of normal:				1

ZIMBABWE

<b>Area:</b>	387 000 sq.km
<b>Climate:</b>	Centre and north-east tropical wet-dry; south and west semi-arid; rainy season: November-March
<b>Population:</b>	12.25 million (1999 estimate); G.N.P. per caput: US\$ 750 (1997)
<b>Specific characteristics of the country:</b>	Land-locked country; exporter and importer of grain
<b>Logistics:</b>	Exports and imports through Mozambique or South Africa
<b>Major foodcrops:</b>	Maize, wheat, millet, sorghum
<b>Marketing year:</b>	April/March; Lean season: February-April
<b>Share of cereals in total calorie intake:</b>	66 percent

**CURRENT SITUATION**

Harvesting of the 1999 coarse grain crops, mainly maize, is completed. Despite a significant increase in the area planted and good rains at the beginning of the season, crop yields were adversely affected by excessive rains in January and February. Latest estimates indicate a maize output of 1.54 million tonnes, 5 percent above last year, but still below average. Millet and sorghum production is also estimated to have declined.

Prices of basic food commodities have increased sharply since the same period last year, reflecting the unsatisfactory harvest and low carryover stocks. The food supply situation in the 1999/2000 marketing year (April/March) is anticipated to be tight. Maize import requirements are estimated at about 450 000 tonnes.

**CEREAL SUPPLY/DEMAND BALANCE FOR THE 1999/2000 MARKETING YEAR (in thousand tonnes)**

	Wheat	Rice	Coarse grains	Total
Normal Production	240	4	1 880	2 124
Normal Imports	55	20	-	75
of which: Structural food aid	5	-	-	5
<b>1999/2000 Domestic Availability</b>	<b>310</b>	<b>-</b>	<b>1 875</b>	<b>2 185</b>
1999 Production (rice in paddy terms)	300	-	1 875	2 175
1999 Production (rice in milled terms)	300	-	1 875	2 175
Possible stock drawdown	10	-	-	10
<b>1999/2000 Utilization</b>	<b>385</b>	<b>25</b>	<b>2 325</b>	<b>2 735</b>
Food Use	370	25	1 744	2 139
of which: local purchase requirement	-	-	-	-
Non-food use	15	-	491	506
Exports or Re-exports	-	-	-	-
Possible stock build up	-	-	90	90
<b>1999/2000 Import Requirement</b>	<b>75</b>	<b>25</b>	<b>450</b>	<b>550</b>
Anticipated commercial imports	75	25	450	550
Food aid needs	-	-	-	-
<b>Current Aid Position</b>				
Food aid pledges	-	-	-	-
of which: Delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b>Estimated Per Caput Consumption (kg/Year)</b>	<b>30</b>	<b>2</b>	<b>142</b>	<b>175</b>
<b>Indexes</b>				
1999 production as % of normal:				102
1999/2000 import requirement as % of normal:				733
1999/2000 food aid requirement as % of normal:				-

## TERMINOLOGY

**"Normal" production:** "Normal" production of cereals is defined as that level of production which would be harvested in the current year assuming no abnormal climatic conditions and no reductions in area planted or supply of inputs caused by civil disorders or other man-made causes. A substantial deviation of current production from "normal" is one of the main signals used to indicate the need for exceptional food assistance.

Two main methods have been utilised in this report to estimate the level of "normal" production for the current year. One is based on the calculation of linear trends of production for each cereal for the previous ten years. For countries where no statistically significant trends could be established, the level of "normal" production has been established on the basis of the average for a recent period of years when growing conditions were normal.

**"Normal" imports:** "Normal" imports of cereals are defined as those quantities needed to meet domestic requirements in a year of "normal" production, including both commercial imports and food aid.

For countries which are self-sufficient in domestically grown cereals in a normal year the estimate of "normal" cereal imports for those cereals not produced domestically (mainly wheat and rice) has been calculated on the basis of trends which have been fitted to historical import data for these cereals. In general these imports have grown in line with increases in urban population numbers. For other countries, an average of imports during recent "normal" production years, brought forward by applying a trend factor, has been used. If the sum of anticipated commercial imports and structural food aid in the current year falls below estimated "normal" imports because of balance of payments difficulties, the country is considered to need exceptional food assistance.

**"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 (i.e. US\$1 505 in 1996), 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.