



Crop Prospects and Food Situation

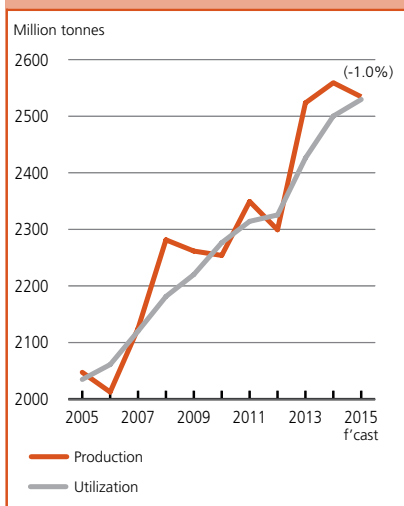
HIGHLIGHTS

- World cereal supply and demand balance in the 2015/16 marketing season is likely to remain in a generally comfortable situation.** While world cereal production is expected to fall below last year's record, supplies will be almost sufficient to meet the projected demand, requiring only a small reduction in global inventories by the end of the season.
- AFRICA:** Aggregate 2015 cereal production is forecast to decline mostly on account of poor prospects in East Africa and an expected reduced output in Southern Africa. Average crops are foreseen in West and Central Africa, while a recovery in North Africa's production averted a sharper regional decline. In East Africa, pockets of starvation have been reported in some conflict-affected areas of South Sudan calling for urgent and concerted efforts to avert a disaster. In addition, food security conditions deteriorated in Southern Africa, while persistent and disruptive conflicts in parts of Central, East and West Africa continue to devastate the agricultural sector and acutely impact on food security conditions.
- ASIA:** Despite a forecast increase in the 2015 aggregate regional cereal harvest, mainly as result of a record output forecast in China, dry weather diminished production in India and several countries of the Far East subregion. In the Near East, a production recovery is foreseen from last year's drought-affected output, but conflicts in Iraq, the Syrian Arab Republic and Yemen continue to aggravate the humanitarian crisis.
- LATIN AMERICA AND THE CARIBBEAN:** El Niño-associated dry weather conditions have sharply reduced crop production forecasts in Central America and the Caribbean. On the other hand, record maize harvests are estimated in South America and Mexico, while a bumper wheat output is also forecast in South America.
- Strong El Niño predicted to persist into early 2016.** El Niño-related dry weather patterns have already adversely impacted on production in parts of Asia and Central America and the Caribbean. The expected prevalence and continuation of El Niño-associated weather patterns into 2016 have raised alarms in many parts of the world where the cropping season has started or is about to start, including parts of Asia and Southern Africa.
- FAO estimates that, globally, 35 countries, including 28 in Africa, are in need of external assistance for food.**

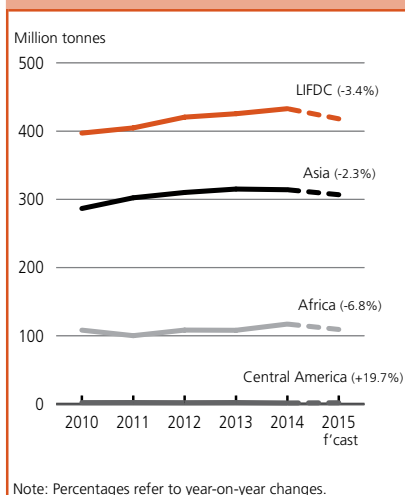
CONTENTS

Countries requiring external assistance for food	2
Global overview	6
LIFDC food situation overview	13
Special feature/box	
El Niño 2015/16	15
Regional reviews	
Africa	17
Asia	26
Latin America and the Caribbean	32
North America, Europe and Oceania	35
Statistical appendix	39

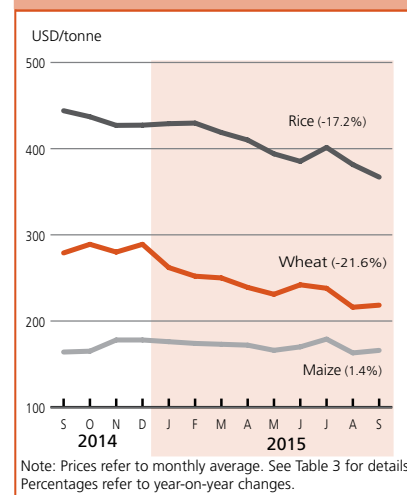
Cereal supply and demand stable, despite fall in 2015 global production



LIFDC 2015 production down, with lower outputs in Asia and Africa

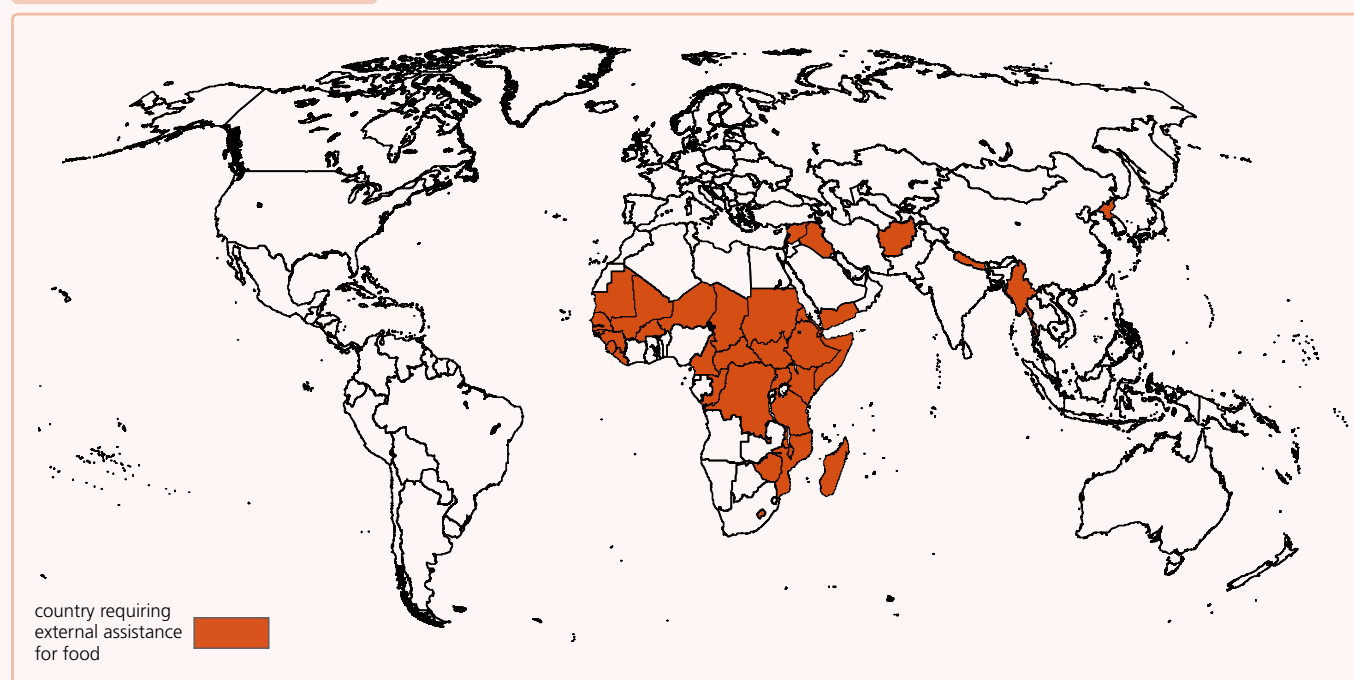


Prices remain relatively low reflecting ample global supplies



Countries requiring external assistance for food¹

World: 35 countries



AFRICA (28 countries)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/SUPPLIES

Central African Republic

Conflict, displacements and constraints in available supplies

- The internally displaced person (IDP) caseload increased from 378 000 in late August to 421 000 in late September due to the resurgence of inter-communal violence. In April 2015, about 1.23 million people, out of a total population of 4.6 million, were estimated to be in need of food assistance.
- The significant tightening of food supplies has driven up prices.

Gambia

Below-average crop production in 2014

- Cereal production is estimated to have decreased by 28 percent in 2014 compared to the previous five-year average.
- Over 178 000 people were estimated to be in Phase 3: "Crisis" and above between June and August in 2015 according to the last "Cadre Harmonisé" analysis. An additional 522 000 people were estimated to be at risk of food insecurity Phase 2: "Stressed".

Guinea-Bissau

Below-average crop production in 2014

- Cereal production was estimated to have decreased by 34 percent in 2014 compared to the previous five-year average.
- Over 126 000 people were estimated to be in Phase 3: "Crisis" and above between June and August in 2015 according to the last "Cadre Harmonisé" analysis. An additional 406 000 people were estimated to be at risk of food insecurity Phase 2: "Stressed".

Senegal

Below-average crop production in 2014

- Cereal production in 2014 was estimated 20 percent below the previous five-year average.
- Over 1 040 000 people were estimated to be in Phase 3: "Crisis" and above between June and August in 2015 according to the last "Cadre Harmonisé" analysis. An additional 3.1 million people were estimated to be at risk of food insecurity Phase 2: "Stressed".

Zimbabwe

Sharply-reduced 2015 maize production

- Maize production is estimated at 742 000 tonnes, 39 percent below the five-year average.
- As a result of a tight domestic supply situation, the number of people estimated to require assistance increased to 1.49 million well above the level of 2014 (564 599 people) but below the 2.2 million estimated in 2013.

WIDESPREAD LACK OF ACCESS

Burkina Faso

Massive influx of refugees from Mali puts additional pressure on local food supplies

- Over 32 000 Malian refugees are estimated to be living in the country as of March 2015.
- About 371 000 people are estimated to be in need of food assistance according to the last "Cadre Harmonisé" analysis.

Chad

Large influx of refugees puts additional pressure on local food supplies

- Over 460 000 people from the Sudan's Darfur Region, the Central African Republic and northern Nigeria, as well as the return of an estimated 340 000 Chadians, have put added pressure on local food supplies negatively affecting food security.
- Over 660 000 people were estimated to be in need of food assistance according to the last "Cadre Harmonisé" analysis.

Djibouti

Inadequate pasture availability due to consecutive unfavourable rainy seasons

- About 120 000 people are severely food insecure, mainly in pastoral southeastern areas and in the Obock Region.

Eritrea

Vulnerability to food insecurity due to economic constraints

Guinea

Impact of the Ebola Virus Disease (EVD) outbreak

- EVD has had a serious negative impact on economic activities and livelihoods, gravely affecting the food security situation of large numbers of people.
- About 393 000 people were estimated to be in need of food assistance according to the last "Cadre Harmonisé" analysis.

Liberia

Impact of the EVD outbreak

- EVD has had a serious negative impact on economic activities and livelihoods, gravely affecting the food security situation of large numbers of people.
- About 722 000 people were estimated to be in need of food assistance according to the last "Cadre Harmonisé" analysis.

Malawi

Reduced crop production and flooding

- Unfavourable weather, including a prolonged dry period and flooding, resulted in a 30 percent maize production decrease in 2015.
- The impact of the floods and reduced maize production caused a significant increase in the number of people requiring assistance in 2015, estimated at 2.8 million, up from 1.3 million in 2014.

Mali

Droughts, floods, population displacements and insecurity in northern areas

- Over 410 000 people were estimated to be in Phase 3: "Crisis" and above according to the last "Cadre Harmonisé" analysis.
- An additional 2.7 million people were estimated to be at risk of food insecurity Phase 2: "Stressed".

Mauritania

Influx of refugees puts additional pressure on local food supplies and high food prices constrain access

- More than 52 000 Malian refugees remain in southeastern Mauritania as of June 2015.
- Over 465 000 people were estimated to be in Phase 3: "Crisis" and above according to the last "Cadre Harmonisé" analysis.

Niger

Recurrent severe food crisis

- About 1.6 million people were estimated to be in Phase 3: "Crisis" and above according to the last "Cadre Harmonisé" analysis.
- Over 49 000 Malian refugees and 105 000 Nigerian refugees are estimated to be living in the country as of June 2015.
- Severe depletion of household assets and high levels of indebtedness.

Sierra Leone

Impact of the EVD outbreak

- Disruption to markets, farming activities and livelihoods, seriously affecting the food security situation of large numbers of people.
- About 1.1 million people were estimated to be in need of food assistance according to the last "Cadre Harmonisé" analysis.

SEVERE LOCALIZED FOOD INSECURITY**Cameroon**

Influx of refugees exacerbating food insecurity of the host communities

- The number of refugees from the Central African Republic (CAR), which mainly entered East, Adamaoua and North regions, was estimated at 253 000 in late August 2015. About 58 000 refugees from Nigeria mainly entered the Far North Region since May 2013.
- In early September 2015, the number of food insecure was estimated at 919 000. The most affected areas are the North and Far North regions.

Displacement

- Insecurity along the borders with Nigeria has led to the internal displacement of 81 700 individuals.

Congo

Influx of refugees straining the already limited resources of host communities

- As of late August 2015, about 30 000 refugees from the CAR are sheltering in the country.

Democratic Republic of the Congo

Conflict and displacements in eastern provinces

- As of June 2015, the total number of IDPs was estimated at 1.5 million.
- In the second quarter of 2015 (April to June), 220 000 people were newly displaced.
- An estimated 6.5 million people are in need of urgent humanitarian assistance (June 2015).

Influx of refugees straining on already limited resources of host communities

- As of late August, refugees from the CAR, mainly hosted in the northern Equateur Province, were estimated at about 97 000.

Ethiopia

Reduced localized crop production

- The estimated number of food insecure people has sharply increased from 2.9 million in January 2015 to 4.5 million in August and to 7.5 million in October, as severe rainfall deficits led to the rapid deterioration of food security conditions in several agro-pastoral and pastoral areas.

Kenya

Reduced second season crop production and worsening pasture conditions

- About 1.1 million people are severely food insecure, mainly located in coastal and northeastern counties.

Lesotho

Reduced crop production

- Reflecting the slightly reduced 2015 maize output, an estimated 463 936 people require assistance, up 3 percent from last year.

Madagascar

Flooding and reduced crop production

- Cyclones and flood damage in early 2015 negatively impacted on livelihoods and crop production, particularly affecting southern regions, where the rate of food insecurity is acute.
- As a result of the erratic weather conditions, the 2015 rice harvest is estimated to have decreased slightly.

Mozambique

Flooding in central provinces and reduced localized crop production

- The number of food insecure persons in 2015 is estimated at about 138 000.

Somalia

Conflict, civil insecurity and reduced localized crop production

- About 855 000 people are estimated to be in need of emergency assistance, mainly IDPs and poor households in southern and central regions.

South Sudan

Conflict, civil insecurity and reduced crop production in conflict-affected areas

- Over 2.2 million people have fled their homes since the conflict erupted at the end of 2013.
- About 3.9 million people, including 30 000 people in the Integrated Food Security Phase Classification (IPC) Household Phase 5: "Catastrophe", are severely food insecure, mainly in conflict-affected states of Jonglei, Unity and Upper Nile.

Sudan

Conflict and civil insecurity

- The number of people estimated to be in need of humanitarian assistance, mainly IDPs in conflict-affected areas, is estimated at 3.3 million.

Uganda

Below-average crop production

- About 295 000 people in Karamoja Region were estimated to be severely food insecure as food stocks were depleted in February, one month earlier than usual.

ASIA (7 countries)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/SUPPLIES

Iraq

Escalation of the conflict and large internal displacement

- Over 2 million people have been displaced since January 2014.
- 1.8 million beneficiaries (IDPs, non-displaced food insecure in conflict areas and food insecure host families) are receiving food assistance.
- Internal trade restrictions and reduced access to stocks held in the areas under ISIL control.



Syrian Arab Republic

Worsening civil conflict

- Agricultural production significantly affected by conflict.
- Over 12 million people are in need of humanitarian assistance, with caseload increasing.
- Although some international food assistance is being provided, Syrian refugees are also putting strain on other host communities in neighbouring countries.
- WFP plans to reach 2 million people with food assistance in neighbouring countries and 4.5 million within the country.



WIDESPREAD LACK OF ACCESS

Democratic People's Republic of Korea

Impact of drought and floods

- Poor rains between mid-April and mid-July, coupled with short supplies of irrigation water, sharply reduced the 2015 early season crops and negatively impacted the main food crops, currently being harvested. Heavy rains from mid-July to early August reportedly caused some localized floods across North Hamgyong and Rason provinces, located in the northeastern part of the country, causing severe damage to housing and infrastructure (including schools, roads and bridges).
- With drought conditions and floods this season, the food security situation is likely to deteriorate compared to the situation of the previous years, when most households were already estimated to have borderline or poor food consumption rates.



Yemen

Conflict, poverty, and high food and fuel prices

- IPC indicative analysis released in June 2015 classified 10 (out of 22) governorates as facing a food insecurity Phase 4: "Emergency", all affected by the ongoing armed conflict. Nine governorates were classified as facing a food security Phase 3: "Crisis".
- Of the 12.9 million food insecure people across the country, about 6.1 million were in Phase 4: "Emergency", while 6.8 million were in Phase 3: "Crisis".
- The level of food insecurity increased by 21 percent compared to the previous year.



SEVERE LOCALIZED FOOD INSECURITY

Afghanistan

Continuing conflict and population displacement

- 2.1 million people are classified as very severely food insecure.
- Over 700 000 people are internally displaced, mostly in Helmand Province.
- 1.7 million people targeted with food assistance.



Myanmar

Impact of July-August floods

- Nearly 1 million people have been affected by heavy rainfall and the passing of Cyclone Komen in July.
- The floods caused severe damage to productive assets and resulted in a reduction of the 2015 main season paddy production.



Nepal

Impact of the April earthquake

- The earthquake that struck in April, mostly impacting central and western parts, resulted in the loss of nearly 9 000 lives. In addition, the consequent damage to the agricultural sector contributed to a reduction in the 2015 cereal output, mainly for rice and maize crops.



Countries with unfavourable prospects for current crops² (total: 10 countries)

AFRICA (6 countries)

Central African Republic

The widespread conflict, which caused large-scale displacements, the loss and the depletion of the households' productive assets and input shortages, is expected to severely affect the outcome of the current cropping season

Ethiopia

Poor and erratically-distributed rains have lowered production prospects for the 2015 minor "belg" season crops

Kenya

Late and erratic rains affected "long-rains" cereal crop production in southern and eastern parts of the country

Somalia

Production of the 2015 "gu" season crops in central and southern areas has been affected by floods in Shabelle Region as well as by the early cessation of rains in May

Uganda

Late and erratic rains affected first season cereal crop production in central and eastern bi-modal rainfall areas of the country

United Republic of Tanzania

Late and erratic rains affected "msimu" crop production in some central uni-modal rainfall areas as well as "masika" crop production in some northern bi-modal rainfall areas

LATIN AMERICA AND THE CARIBBEAN (4 countries)

El Salvador

Prolonged and severe dry weather related to El Niño significantly reduced cereal outputs during the main 2015 first season, ended in September, and may have also reduced sowings during the second season. The Government is directly assisting the most affected populations providing food assistance as well as seeds and fertilizers for the second season

Guatemala

Prolonged and severe dry weather related to El Niño significantly reduced cereal outputs during the main 2015 first season, ended in September, and may have also reduced sowings during the second season. The Government is directly assisting the most affected populations providing food assistance as well as seeds and fertilizers for the second season

Honduras

Prolonged and severe dry weather related to El Niño significantly reduced cereal outputs during the main 2015 first season, ended in September, and may have also reduced sowings during the second season. The Government is directly assisting the most affected populations providing food assistance as well as seeds and fertilizers for the second season

Nicaragua

Prolonged and severe dry weather related to El Niño significantly reduced cereal outputs during the main 2015 first season, ended in September, and may have also reduced sowings during the second season. The Government is directly assisting the most affected populations providing food assistance as well as seeds and fertilizers for the second season

Key - Changes since last report (July 2015)

No change ■ Improving ▲ Deteriorating ▼ New Entry +

Terminology

¹ **Countries requiring external assistance for food** are expected to lack the resources to deal with reported critical problems of food insecurity. Food crises are nearly always due to a combination of factors but for the purpose of response planning, it is important to establish whether the nature of food crises is **predominantly** related to lack of food availability, limited access to food, or severe but localized problems. Accordingly, the list of countries requiring external assistance is organized into three broad, not mutually exclusive, categories:

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

² **Countries facing unfavourable prospects for current crops** are countries where prospects point to a shortfall in production of current crops as a result of a reduction of the area planted and/or yields due to adverse weather conditions, plant pests, diseases and other calamities.

Global overview

CEREALS 2015

World cereal production revised down but supplies remain plentiful¹

Based on latest indications, the world cereal supply and demand balance is likely to remain in a generally comfortable situation in the 2015/16 marketing season. While world production is expected to fall below last year's record, supplies should be almost sufficient to meet the projected demand, requiring only a small reduction in global reserves by the end of the season.

World cereal production in 2015 is currently forecast to reach 2 534 million tonnes, 6 million tonnes less than expected in September and 24 million tonnes (0.9 percent) below the 2014 record. This month's revision results from lower production prospects for coarse grains and rice, which more than offset a higher estimate for wheat. The forecast

for global coarse grains production in 2015 has been lowered by around 4 million tonnes in recent weeks on less buoyant expectations in **the United States of America** and the **European Union (EU)**, more than offsetting improved prospects in **Brazil**. The latest forecast puts this year's global production of coarse grains at 1 306 million tonnes, 1.8 percent below the record of 2014. The forecast for rice production has also been lowered by close to 8 million tonnes, to 493 million tonnes (in milled terms), reflecting the numerous setbacks endured since the onset of the season

and the diminishing scope for recovering losses through larger secondary crops as the season advances. At that level, global rice production would be 1.9 million tonnes, or 0.4 percent, lower than the current estimate for 2014, implying a second year of mute or negative growth. By contrast, world wheat production is now forecast at around 735 million tonnes, 6.4 million tonnes above the previous forecast and slightly (0.3 percent) exceeding last year's record. Higher wheat production forecasts in **China** and the **EU** account for most of this month's upward adjustment.

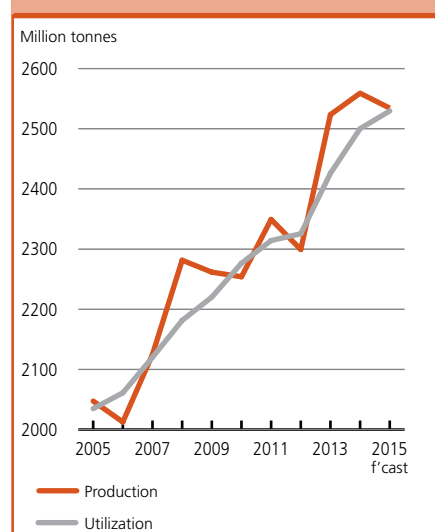
Table 1. World cereal production¹
(million tonnes)

	2013	2014 estimate	2015 forecast	Change: 2015 over 2014 (%)
Asia	1 123.4	1 118.9	1 134.7	1.4
Far East	1 014.7	1 018.7	1 027.4	0.9
Near East	75.3	68.7	74.1	7.9
CIS in Asia	33.3	31.4	33.2	5.5
Africa	163.2	173.1	163.9	-5.3
North Africa	36.0	32.7	37.1	13.5
West Africa	49.9	52.5	52.3	-0.4
Central Africa	4.7	4.7	4.8	2.0
East Africa	43.7	48.6	43.2	-11.0
Southern Africa	28.9	34.6	26.5	-23.3
Central America and Caribbean	41.3	42.0	43.6	3.9
South America	176.9	178.3	183.9	3.1
North America	498.0	490.9	478.2	-2.6
Europe	480.4	519.8	490.5	-5.6
EU	304.3	328.9	305.6	-7.1
CIS in Europe	162.2	177.0	171.5	-3.1
Oceania	40.3	36.2	39.4	9.0
World	2 523.5	2 559.1	2 534.3	-1.0
Developing countries	1 447.6	1 454.5	1 471.3	1.2
Developed countries	1 075.9	1 104.6	1 063.0	-3.8
- wheat	715.6	732.9	734.8	0.3
- coarse grains	1 313.4	1 331.3	1 306.5	-1.9
- rice (milled)	494.5	494.9	493.0	-0.4

Note: Totals and percentage change computed from unrounded data.

¹ Includes rice in milled terms.

Figure 1. World cereal production and utilization



¹ For more detailed global analysis see the **Food Outlook** issue released on 8 October 2015.

WHEAT 2015

Third consecutive year of record production

FAO's latest forecast for 2015 wheat production stands at 735 million tonnes, 1.9 million tonnes (0.3 percent) above the 2014 level, mostly due to higher outputs in Australia, China, Morocco, Turkey, Ukraine and the United States of America.

In **the United States of America**, 2015 wheat production is estimated to have increased by 5 percent (3 million tonnes), to 58 million tonnes. The year-on-year increase is a result of higher yields and a lower abandonment rate, which more than offset a contraction in plantings. In **Canada**, with harvesting of the main 2015 spring crop nearing completion, aggregate production is expected to be 16 percent (4.6 million tonnes) lower than in 2014. The decline reflects reduced yields for both the spring and minor durum wheat crops, although an increase in durum plantings averted a steeper production decline. In *Europe*, with the harvest virtually completed, the aggregate 2015 production is forecast to be 0.3 percent below 2014, mainly due to a contraction in the **EU's** output, estimated at 154.5 million tonnes, 1.6 percent less than the 2014 record. Smaller plantings mostly account for this decline, but increasingly favourable weather over the course of the cropping season raised yields from earlier forecasts and lessened the production decrease. In **the Russian Federation**, despite an unfavourable start to the cropping season, production is put at 59.8 million tonnes, virtually unchanged from the high level of 2014. A mild winter with sufficient rains maintained the high yields, while an expansion in winter plantings compensated for reduced spring sowings. Similarly, in **Ukraine**, beneficial weather during the winter and spring overturned earlier pessimistic prospects and production is now put at 25.8 million tonnes, 7 percent higher than the good 2014 output.

In *Asia*, with the wheat crop harvest complete, the aggregate 2015 output is estimated at 325 million tonnes, marginally above last year. **China** harvested nearly 130 million tonnes, 3 percent more than in 2014, following larger plantings and improved yields. By contrast, the wheat crop in **India** was adversely affected by unfavourable weather in the main producing states of the north and centre, which caused a decline in yields. As a result, production is estimated at around 89 million tonnes, 7 percent below the 2014 record. In **Pakistan**, 2015 wheat production is officially estimated at 27 million tonnes, up 4 percent from the bumper output of 2014, mainly owing to an expansion in the area planted. In the *Near East*, wheat production in **Turkey** rebounded by 18 percent to 22.5 million tonnes from the drought-reduced level of 2014. This increase rests solely on the achievement of well above-average yields that more than compensated for a contraction in plantings. Wheat production in *North Africa*, which accounts for the bulk of *Africa's* output of the crop, is up significantly from the drought-affected harvest of 2014. Beneficial weather accounted for the improved harvests in most countries, except for **Tunisia** where autumn drought resulted in a decrease. **Morocco's** wheat crop more than recovered, reaching a record production of 8 million tonnes, up nearly 3 million tonnes from the previous year.

In the Southern Hemisphere, despite the presence of an El Niño episode that is historically associated with drier weather conditions in parts of Australia, *Asia* and the *Americas*, wheat production in **Australia** is forecast at 25.3 million tonnes, 7 percent higher than the previous year. This increase mainly rests on the projection of good yields, reflecting favourable rains and good soil moisture conditions that are expected to boost output in the main producing states of Western Australia and New South Wales.

In *South America*, aggregate 2015 wheat production is forecast to contract by 8 percent compared to 2014, mostly reflecting the smaller crop foreseen for **Argentina** in view of reduced plantings, as farmers were deterred by lower prices and higher production costs. In **Brazil**, favourable weather over the course of the cropping season resulted in several positive adjustments to the production forecast and, despite lower plantings, the wheat output is expected to reach a record level of 7.2 million tonnes, 17 percent up on the previous year's bumper harvest. In *Central America and the Caribbean*, 2015 production, mostly concentrated in **Mexico**, is forecast to increase by 3 percent. In *Southern Africa*, harvesting of **South Africa's** winter wheat crop is expected to be complete by December and the output is anticipated to decrease due to lower plantings.

COARSE GRAINS 2015

Coarse grains output to fall from last year's record

FAO's forecast for global coarse grains production in 2015 stands at 1 307 million tonnes, about 2 percent lower than the record of 2014, mostly reflecting reduced expectations for maize in **the United States of America** and the **EU**.

Global maize production in 2015, which accounts for nearly 80 percent of the world's coarse grains output, is forecast at 1 007 million tonnes, which is 22 million tonnes or 2.2 percent below the 2014 record. The reduction largely results from lower projections in **the United States of America** and the **EU**, but the overall decline is partly curbed by a larger expected crop in **China**.

Harvesting of the 2015 maize crop in **the United States of America**, the world's largest producer, began in September, and current indications point to an output of 345 million tonnes, 4.4 percent down from the 2014 record. The decline is mostly attributed to a

contraction in plantings, instigated by reduced crop profitability, with yields forecast to decline only marginally from the high levels of 2014. In **Canada**, production is projected to rebound by 7 percent from the low level of 2014, mainly reflecting an increase in the area planted.

In *Asia*, latest information confirms a significant production rise in the *Far East* subregion in 2015. The increase is mostly on account of an improved output in **China**, where supportive Government procurement programmes promoted an expansion in maize plantings. Production is estimated at a record level of 226 million tonnes, 5 percent up on the previous year. Elsewhere in *Asia*, maize production remained similar to the level of 2014, except in **Indonesia**, which registered a 1 million tonne (5 percent) production gain.

In the **EU**, harvesting of the 2015 maize crop is expected to be finalized by the end of the year and prospects remain subdued compared with the bumper output of 2014. Following several negative revisions since the preliminary forecasts made earlier in the year, production is expected to fall by 21 percent to a below-average level of 60 million tonnes. A steep reduction in yields, due to hot and dry weather is mainly behind the sharp decline. In the **Russian Federation**, the 2015 maize production was upgraded to 13 million tonnes, significantly higher than earlier forecasts and 15 percent higher than the above-average level of the previous year. The production gain this year rests on larger plantings and increased yields, following favourable weather conditions. In **Ukraine**, a price induced contraction in plantings is largely behind

an expected 14 percent production decrease from last year's high level. Current forecasts indicate a maize crop of 24.5 million tonnes.

In *South America*, the main 2015 harvest was completed in July and the maize output is forecast to be 5 percent up on last year, mostly based on production gains in the two largest producers, Brazil and Argentina. In **Argentina**, improved yields more than offset a price-induced contraction in the area planted. In **Brazil**, increased crop productivity further augmented the positive impact of a forecast expansion in plantings. As a result, this year's country output is expected at a record level of 84 million tonnes, 6.5 percent higher than in 2014. In *Central America and the Caribbean*, aggregate 2015 maize production is put at 29.7 million tonnes, almost 6 percent higher than last year's output. This mainly reflects a record crop of 25.5 million tonnes in **Mexico**. In the rest of the subregion, prospects for the 2015 maize crop (first and second season) are unfavourable. Prolonged dry weather associated with El Niño significantly reduced maize outputs during the main first season which concluded in September, particularly impacting the "Dry Corridor" of **El Salvador, Guatemala, Honduras and Nicaragua**. Prospects for the second season maize crop, planted by mid-September, are uncertain, mainly based on an expected continuation of below-average rains.

In *Southern Africa*, drought conditions at the beginning of 2015 resulted in a steep yield reduction, notably in the largest producer, **South Africa**, where production is estimated to have fallen 30 percent from the high level of 2014. Dry weather conditions also caused depressed outputs in most countries of the subregion compared with the 2014 bumper levels. In aggregate, the subregion's 2015 output is estimated at 20.5 million tonnes, 27 percent down from the previous year's good level.

Table 2. Basic facts of world cereal situation

(million tonnes)

	2013/14	2014/15 estimate	2015/16 forecast	Change: 2015/16 over 2014/15 (%)
PRODUCTION¹				
World	2 523.5	2 559.1	2 534.3	-1.0
Developing countries	1 447.6	1 454.5	1 471.3	1.2
Developed countries	1 075.9	1 104.6	1 063.0	-3.8
TRADE²				
World	361.9	375.0	364.0	-2.9
Developing countries	113.7	113.4	117.5	3.6
Developed countries	248.2	261.7	246.5	-5.8
UTILIZATION				
World	2 426.0	2 500.2	2 529.6	1.2
Developing countries	1 557.9	1 613.7	1 638.8	1.6
Developed countries	868.2	886.5	890.7	0.5
Per caput cereal food use (kg per year)	149.5	149.9	149.9	0.0
STOCKS³				
World	595.0	642.1	637.8	-0.7
Developing countries	453.1	472.9	470.6	-0.5
Developed countries	141.9	169.2	167.2	-1.2
WORLD STOCK-TO-USE RATIO (%)	23.8	25.4	24.8	-2.1

Note: Totals and percentage change computed from unrounded data.

¹ Data refer to calendar year of the first year shown and include rice in milled terms.

² For wheat and coarse grains, trade refers to exports based on July/June marketing season. For rice, trade refers to exports based on the calendar year of the second year shown.

³ Data are based on an aggregate of carryovers level at the end of national crop years and, therefore, do not represent world stock levels at any point in time.

The forecast for 2015 world barley production stands at 144 million tonnes, virtually unchanged from 2014. Production declines in the **EU** and the **Russian Federation** were compensated by larger outputs in **Argentina, Morocco** and **Turkey**.

World sorghum production in 2015 is forecast at about 66 million tonnes, 0.5 million tonnes (2 percent) higher than the previous year. The expected rise is attributed to higher projected outputs in **the United States of America** and **Australia** more than offsetting an anticipated fall in **the Sudan**.

RICE 2015

Since its onset, the 2015 paddy season has been marred by unfavourable climatic conditions that have been associated with the prevalence of an El Niño weather anomaly, a situation predicted to continue until next year. As scope for recovering losses through larger secondary crops diminishes with the advancement of the season, the 2015 world rice production forecast has been downgraded to some 493 million tonnes, now suggesting a second year of mute or negative growth. In *Asia*, large absolute gains in **Bangladesh, China, Indonesia** and **Sri Lanka** only partly compensated for expected shortfalls in many of the countries in the region that endured abnormal weather conditions, including **India, the Democratic Republic of Korea, Myanmar, the Philippines** and **Thailand**. Contractions in **Egypt, Madagascar** and **Nigeria** are largely responsible for an expected decline in *Africa's* output. In *North America* and *Oceania*, the latest official forecasts for **the United States of America** and **Australia** would imply a 15 and 12 percent production drop, respectively, partly due to prolonged drought problems that affected important rice cultivation areas in the two countries. By contrast, production prospects remain positive for *Europe* and for *Latin America and*

the Caribbean. In this region, good crop outturns in the southern cone will make up for declines in the central part of the continent, where countries have been severely hit by precipitation deficits.

Global rice production in 2015 beset by abnormal weather conditions

At this time of the year, the 2015 paddy season is already well advanced, with only the secondary crops in the Northern Hemisphere pending cultivation. The season has virtually closed in the Southern Hemisphere and is about to conclude in those Northern Hemisphere countries growing a single paddy crop.

Since August, FAO has scaled back its forecast for global rice production in 2015 by close to 7 million tonnes, much on account of *Asian* countries, where the season has been marred by erratic climatic conditions, attributed to the prevalence of an El Niño weather anomaly since early 2015. The phenomenon, which has been mostly associated with delayed and deficient precipitation, has been predicted to intensify in the coming months, before waning in the second quarter of 2016. If confirmed, its effects would bear heavily on those crops that are sown in the last quarter of 2015 and early next year. Against this background, 2015 production prospects in the region deteriorated somewhat in **Indonesia**, currently in the grip of a drought that could impair crops due for harvest in the coming months. Production forecasts in **Cambodia, India, Thailand** and **Viet Nam**, were also downgraded, on insufficient or untimely rainfall, and in **Myanmar**, following excessive rains and floods in July. In the other regions, anomalous weather conditions also called for a lowering of the 2015 production forecasts in *North America* (**the United States of America**) and *Africa* (**Madagascar** and **Ghana**). By contrast, prospects for 2015 crops have improved since last month in *Europe* (**EU**) and in *Latin America and the Caribbean*.

In the latter, the upgrade ensued from more buoyant crop results than originally foreseen in *South America* (**Brazil, Colombia, Guyana** and **Peru**), which compensated for worsening expectations in *Central America and the Caribbean* (**Cuba, Honduras** and **Nicaragua**), where late and poor rainfall affected crops for the second consecutive season.

At the current forecast of 493 million tonnes, global rice production (milled basis) would be 1.9 million tonnes, or 0.4 percent, lower than the current estimate for 2014, implying a second year of mute or negative growth. In *Asia*, about 446.2 million tonnes are forecast to be garnered, marginally below the already poor outcome of the 2014 season. Indeed, many countries in the region have endured adverse climatic conditions since the onset of the season. Particularly affected has been **Thailand**, where the main crop has been hindered by the late arrival and insufficient precipitation. The deficient rainfall, which resulted in a low filling of reservoirs, is also likely to jeopardize the largely irrigated secondary crop due for planting in the next few months, especially as the Government is considering to ban its cultivation. In **India**, an erratic unfolding of the monsoon rains may curb production somewhat below the already poor 2014 performance, bringing it to its lowest level since 2010. A contraction is also forecast for **the Democratic Republic of Korea, Nepal, Pakistan, the Philippines, the Republic of Korea** and **Viet Nam**, because of abnormal weather conditions and/or unremunerative producer prices. On the other hand, widespread flood problems in July are anticipated to depress **Myanmar's** production by 1.7 percent, a relatively small decline that assumes a large part of the damaged fields will be replanted. These countries' shortfalls are anticipated to be partly offset by sizeable production gains in **Bangladesh, China, Indonesia** and **Sri Lanka**. In **China**, notwithstanding

some dry spells depressing the first (early) crop, a good outturn under the main (intermediate) crop is expected to sustain a modest 0.4 percent expansion in overall production. Crops in the southern parts of **Indonesia** are currently suffering from an extensive drought problem. Nonetheless, the Government is predicting the country to achieve a record output in 2015, as the bulk of the crops has been already collected with excellent results. A strengthening of El Niño in the coming months would most likely impact the 2016 crops, soon to be planted, by limiting the availability of water in reservoirs for the mostly irrigated rice fields. Owing to a favourable weather pattern, production in **Sri Lanka** is forecast to recover from the 2014 drought-induced shortfall, possibly reaching a record high this season. Prospects for 2015 production also point to a decline in *Africa*, where 18.5 million tonnes are expected to be mustered, 1.5 percent less than the excellent 2014 season result. Much of the contraction

would stem from production drops in **Egypt** and **Madagascar**, two of the most important producers in the region, the former allegedly because of excessively high temperatures damaging yields, the latter because of an erratic distribution of rainfall and flood damage. Poor and irregular precipitation is also behind expectations of declines in **Nigeria** and **Ghana**. Only part of these falls will be compensated for by increases elsewhere, especially in *West Africa*, spearheaded by gains in **Mali** and **Guinea**. In *North America*, the harvest is about to be concluded in **the United States of America**. According to the latest United States Department of Agriculture (USDA) forecast, a reduction in both plantings and yields is to bring milled production in the country down by a marked 15 percent to 6.0 million tonnes. The decline, which mostly concerned long grain rice varieties, is largely attributed to low domestic prices, erratic rainfall and restrictions on the use of irrigation water in California.

In *Oceania*, the 2015 crop was already harvested in the first half of the year in **Australia**. Official forecasts for the country confirm a 12 percent production decline, as producers reacted to the high prices charged for irrigation by cutting plantings. Prospects for production are more positive in the other regions. In *Latin America and the Caribbean*, good crops in *South America*, especially in **Brazil**, **Colombia** and **Peru**, are expected to foster a 2.6 percent increase in the region's total to 19.2 million tonnes. This would be notwithstanding a 4 percent contraction in *Central America and the Caribbean*, where most producers have been negatively affected by droughts, especially in **Cuba** and **Nicaragua**. In *Europe*, excellent crop results in **Italy**, but also **Spain** and **Greece**, are expected to boost output in the **EU** by 4.5 percent to 1.8 million tonnes. Prospects for **the Russian Federation**, where the harvest is underway, point to an average crop, little changed from last season.

UTILIZATION 2015/16

World cereal utilization in 2015/16 is expected to approach 2 530 million tonnes, down 6 million tonnes from the previous forecast but still 1.2 percent (31 million tonnes) above 2014/15. The lower forecast mostly reflects downward adjustments to world food consumption estimates of rice, which more than offset the lifting of coarse grains global feed use. Total food consumption of cereals is currently put at 1 097 million tonnes, down 21 million tonnes from the previous forecast, but still 1.1 percent higher than the revised estimate for 2014/15. Historical revisions to rice utilization estimates in several countries lie behind the reduced food use estimates. Total feed utilization of cereals is projected at 904 million

tonnes, 6.4 million tonnes higher than last reported and 1.8 percent above 2014/15. Higher forecasts for feed use in **China, Canada** and the **EU** account for most of the revision. Total industrial use of cereals (for production of ethanol, starch and brewing) is projected to increase marginally from 2014/15 as demand by the grain-based fuel ethanol industry is predicted to remain almost flat, mostly reflecting a sluggish growth in the maize intake in **the United States of America**. By contrast, a strong demand for starch is seen to boost the use of grains for starch production, with most of the increase concentrated in **China**.

STOCKS 2015/16

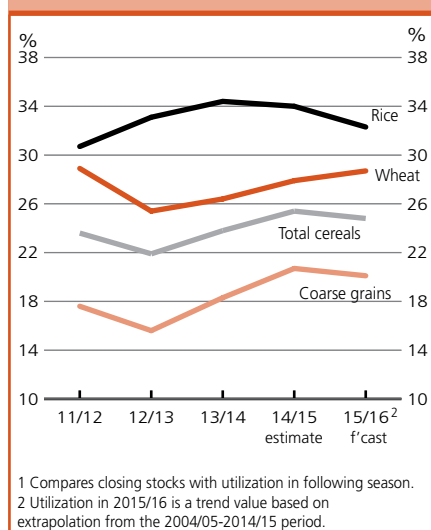
The latest FAO forecast for world cereal stocks by the close of seasons in 2016 stands at 638 million tonnes, 5.4 million tonnes below the forecast in September and down 4 million tonnes from their revised opening levels. The main revisions since the previous report mostly concern rice. The projected drop in world inventories is estimated to bring the global cereal stock-to-use ratio down in 2015/16, albeit slightly, from 25.4 percent in 2014/15 to 24.8 percent in 2015/16. Given record crop prospects this year, world wheat inventories are forecast to approach 206 million tonnes, 4 million tonnes more than forecast in September and 3.3 million tonnes above 2015. End-of-season coarse grain stocks are projected at 267.6 million tonnes, down marginally (1.6 million tonnes) from their

all-time high opening levels. On the other hand, with global production expected to fall short of utilization, world rice stocks are forecast to drop by 6 million tonnes to 164.3 million tonnes in 2016, 5.3 million tonnes less than foreseen in September.

TRADE 2015/16

World cereal trade in 2015/16 is forecast at nearly 364 million tonnes, 3.3 million tonnes more than last reported, but still 11 million tonnes (2.9 percent) below the 2014/15 record. Most of this season's contraction stems from sharp expected drops in wheat and coarse grains shipments, while trade in rice is anticipated to rebound in 2016. Based on the latest indications, international wheat trade in 2015/16 (July/June) could reach 150 million tonnes, down almost 6 million tonnes from 2014/15, as **Morocco** and several countries in *Asia* are predicted to import less. Total coarse grains trade is expected to hover around 169 million tonnes in 2015/16 (July/June), about 4 percent from the last season, mostly on lower expected imports by **Mexico** and several *Asian* countries. Rice trade in 2016 (January/December) is now forecast at nearly 45 million tonnes, 1 million tonnes, or 2.2 percent more than last year and almost 3 percent above the precedent forecast. Besides reassessing trade availabilities and requirements in light of more pessimistic 2015 crop prospects, the new figures take unrecorded trade flows (especially to **China**) into better consideration.

Figure 2. Ratio of world cereal stocks to utilization¹



MAIZE

Export prices of maize from the United States of America, the world's largest maize producer and exporter, increased slightly in September. The international benchmark US maize (No.2, Yellow) price averaged USD 166 per tonne, 2 percent up from August. The recent strengthening follows the slight downward revision of the 2015 production forecast in the United States of America and the EU. However, the ongoing harvest, which is expected to be at near-record levels, and large carryover stocks limited the upward pressure and kept prices close to their low

values in September last year. In South America, maize export prices in September were supported by strong export demand, while quotations in Ukraine declined sharply on seasonal harvest pressure.

WHEAT

Export prices of wheat firmed up in September with the benchmark US wheat (No.2 Hard Red Winter) price averaging USD 218 per tonne, up 1 percent from August but still more than 20 percent below the corresponding period last year. Concerns about dry weather conditions affecting winter wheat plantings in the

Black Sea region and in some areas of the United States of America put upward pressure on prices; however, abundant global supplies and strong export competition limited further increases. Export quotations from other origins declined in September and were in general well below their year-earlier levels.

RICE

In September, the FAO Rice Price Index fell 4 points or 1.7 percent, marking the 13th consecutive monthly drop of the Index. Despite prospects for falling production in several major exporting countries, international rice prices have continued to slide, as import demand remained sluggish, with buyers delaying purchases until the expected new harvests come to the market. The decrease was most evident in the aromatic rice segment, which saw the corresponding price sub-index subside almost 5 percent compared to August. In September, the white rice benchmark quotation (Thai 100%B) was down by 4 percent to USD 367 per tonne, a level not seen since November 2007. Prices in other Asian origins and in South America were also under downward pressure, but they tended to increase in the United States of America, underpinned by new demand from countries in Central America and the Caribbean, amid prospects for tighter domestic supplies.

Table 3. Cereal export prices*

(USD/tonne)

	2014			2015			
	Sept	Apr	May	Jun	Jul	Aug	Sept
United States							
Wheat ¹	279	239	231	242	238	216	218
Maize ²	164	172	166	170	179	163	166
Sorghum ²	174	223	217	224	223	180	177
Argentina³							
Wheat	248	225	228	226	229	227	223
Maize	166	168	168	173	176	160	161
Thailand⁴							
Rice, white ⁵	444	410	394	385	401	382	367
Rice, broken ⁶	336	333	326	327	321	324	316

*Prices refer to the monthly average.

¹ No.2 Hard Red Winter (Ordinary Protein) f.o.b. Gulf.

² No.2 Yellow, Gulf.

³ Up river, f.o.b.

⁴ Indicative traded prices.

⁵ 100% second grade, f.o.b. Bangkok.

⁶ A1 super, f.o.b. Bangkok.

Low-Income Food-Deficit Countries food situation overview²

Lower LIFDCs' 2015 cereal production forecast, reflecting reduced outputs in Africa and the Far East mainly due to adverse weather

FAO's latest 2015 cereal production forecast for Low-Income Food-Deficit Countries (LIFDCs) stands at 418 million tonnes, lower than expectations earlier in the year and 3.4 percent below the 2014 bumper output. This year's decrease largely reflects anticipated reductions in **India**, the largest LIFDC producer, and in *East* and *Southern Africa*.

In *Asia*, latest indications point to a 2 percent drop in the aggregate 2015 cereal output, although at 307 million tonnes, production is still forecast at an above-average level. The bulk of this decline is attributed to a lower cereal (mainly wheat) output in **India** on account of unfavourable weather, particularly over the main producing northern and central states, resulting in an anticipated 7 million-tonne (3 percent) contraction compared to the previous year's bumper output. Elsewhere in the *Far East*, reductions are forecast in **Nepal**, the **Democratic People's Republic of Korea** and **Mongolia**. Offsetting some of this decline at the regional level is a larger expected crop in the *Near East*, mostly on account of favourable weather in the **Syrian Arab Republic**, although the devastating impact of the conflict on the agricultural sector has limited the gains. Similarly, in *CIS in Asia*, the 2015 cereal crop is estimated close to the above-average 2014 output.

In sub-Saharan *Africa*, with harvesting completed in *Southern Africa* and expected to be concluded in *West*, *Central* and *East Africa* by the end of the year, 2015 production is currently forecast at 109 million tonnes, about 7 percent down from 2014. Most of this decline reflects steep decreases in *Southern Africa*, following a severe dry period in early 2015, with notable production declines in **Malawi** and **Zimbabwe**. Similarly, in *East Africa*, adverse weather conditions negatively impacted on crop development and the aggregate production is expected to fall by 11 percent. The bulk of this decrease rests on an expected 3 million-tonne production fall in the **Sudan**. By contrast, production prospects in *West Africa* are generally favourable and the 2015 harvest is expected at an above-average level, following beneficial rains since July that boosted

harvest expectations in the Sahelian countries. In *Central Africa*, weather conditions have been overall favourable and production is anticipated at an average level. However, persistent insecurity in parts of the subregion continues to adversely affect the agricultural sector restraining production gains.

In *Central America and the Caribbean*, cereal production is set to remain at a below-average level of 1.9 million tonnes on account of unfavourable weather conditions associated with the prevailing El Niño episode.

Aggregate cereal imports of LIFDCs to remain close to last year's record

The aggregate cereal import requirement of LIFDCs in the 2015/16 marketing year (July/June) is forecast at 53.4 million

Table 4. Basic facts of the Low-Income Food-Deficit Countries (LIFDCs) cereal situation (million tonnes, rice in milled basis)

	2013/14	2014/15 estimate	2015/16 forecast	Change: 2015/16 over 2014/15 (%)
Cereal production¹	425.5	432.9	418.0	-3.4
<i>excluding India</i>	182.1	190.2	182.6	-4.0
Utilization	449.0	461.0	463.9	0.6
Food use	364.2	371.7	376.8	1.4
<i>excluding India</i>	174.7	179.2	181.3	1.1
Per caput cereal food use (kg per year)	148.6	149.0	149.1	0.1
<i>excluding India</i>	145.6	146.0	145.7	-0.2
Feed	32.6	34.3	34.3	-0.1
<i>excluding India</i>	19.5	20.7	20.3	-2.0
End of season stocks²	92.4	93.8	81.9	-12.6
<i>excluding India</i>	38.5	40.2	35.5	-11.6

¹ Data refer to calendar year of the first year shown.

² May not equal the difference between supply and utilization because of differences in individual country marketing years.

² The Low-Income Food-Deficit Countries (LIFDCs) group includes net food deficit countries with annual per caput income below the level used by World Bank to determine eligibility for IDA assistance (i.e. USD 1 945 in 2011). The new list of the LIFDCs stands at 54 countries, one less than in 2014 list but with some changes. These are: the Republic of the Congo, the Philippines and Sri Lanka, which all graduated out based on income criterion (for the Philippines in particular this is part due to the World Bank revision of income data). The 2015 list of LIFDCs now also includes South Sudan, for which data had previously been unavailable, and Syrian Arab Republic, which had previously been taken off the list, but now fails to satisfy the tree criteria for exclusion. For full details see: <http://www.fao.org/countryprofiles/lifdc/en/>

Table 5. Cereal production¹ of LIFDCs
(million tonnes)

	2013	2014 estimate	2015 forecast	Change: 2015 over 2014 (%)
Africa (37 countries)	108.1	117.2	109.3	-6.8
East Africa	43.6	48.6	43.2	-11.0
Southern Africa	9.9	11.5	9.1	-21.1
West Africa	49.9	52.5	52.3	-0.4
Central Africa	4.7	4.6	4.7	2.0
Asia (12 countries)	315.1	314.1	306.8	-2.3
CIS in Asia	10.3	10.2	10.3	0.9
Far East	294.1	293.9	285.7	-2.8
- India	243.4	242.6	235.4	-3.0
Near East	10.7	10.0	10.9	9.2
Central America (3 countries)	2.2	1.6	1.9	19.7
Oceania (2 countries)	0.0	0.0	0.0	0.0
LIFDC (54 countries)	425.5	432.9	418.0	-3.4

Note: Totals and percentage change computed from unrounded data.

¹ Includes rice in milled terms.

tonnes (including rice in milled terms), close to last year's high level. Although the aggregate volume has remained nearly unchanged, variations exist at the subregional level, mainly in *Africa*.

The largest subregional increase is forecast in *Southern Africa*, mostly on account of higher import requirements for **Zimbabwe** following a steep decline in the 2015 cereal harvest. In *East Africa*,

aggregate cereal imports are expected to decline marginally, largely reflecting a lower import forecast for **the United Republic of Tanzania**, which more than offset anticipated increases in the rest of subregion. Similarly, in *West Africa*, imports are foreseen to decrease compared to the previous year, mostly on account of an expected increase in the 2015 subregional harvest. Cereal imports in *Central Africa* are projected to rise, as increasing national requirements continue to out-pace domestic production.

In *Asia*, total imports in 2015/16 are anticipated to remain virtually unchanged from the previous year's high level. This reflects lower foreseen imports in the *Far East*, mostly emanating from a reduced forecast in **Bangladesh**, that were offset by a higher import projection in the *Near East*. Elsewhere, in *Central America and the Caribbean*, *CIS in Asia* and *Oceania*, cereal imports are expected to remain close to their levels of the previous year.

Table 6. Cereal import position of LIFDCs
(thousand tonnes)

	2013/14 or 2014	2014/15 or 2015				2015/16 or 2016	
		Requirements ¹		Import position ²		Requirements ¹	
		Actual imports	Total imports:	of which food aid	Total imports:	of which food aid pledges	Total imports:
Africa (37 countries)	30 645	30 601	1 233	15 633	592	29 984	1 367
East Africa	9 784	9 684	749	5 387	428	8 942	918
Southern Africa	3 027	2 652	67	2 672	37	3 141	39
West Africa	16 082	16 555	268	6 890	84	16 080	260
Central Africa	1 752	1 710	149	684	44	1 821	149
Asia (12 countries)	18 260	20 831	515	20 358	404	20 876	713
CIS in Asia	4 002	4 109	1	3 936	0	4 096	1
Far East	4 346	6 545	171	6 245	31	6 438	281
Near East	9 912	10 177	343	10 177	373	10 342	431
Central America (3 countries)	1 905	2 029	98	2 029	8	2 105	98
Oceania (2 countries)	455	463	0	164	0	467	0
Total (54 countries)	51 265	53 924	1 846	38 184	1 004	53 432	2 178

Note: Totals computed from unrounded data.

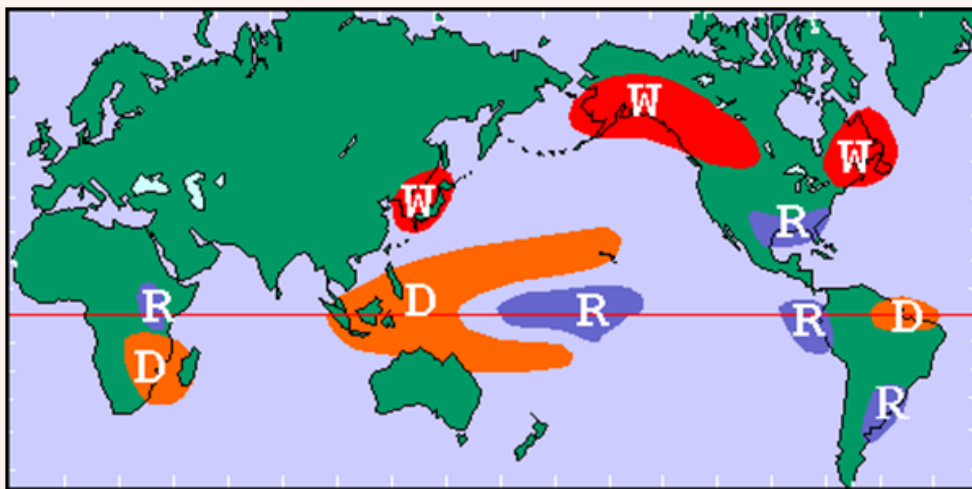
¹ The import requirement is the difference between utilization (food, feed, other uses, export plus closing stocks) and domestic availability (production plus opening stocks).

² Estimates based on information available as of early September 2015.

EL NIÑO 2015/16

Current meteorological forecasts indicate the continuation of a strong El Niño episode into early 2016. Previous episodes have caused climatic variations with significant impacts on agriculture and consequent implications for food security. However, there is no deterministic trend between the occurrence of El Niño and changes in agricultural production and it is, therefore, difficult to accurately map its impact. The effect on agriculture depends on the timing and severity of the event, as well as the crop calendar in a particular region. However, taking into account historical incidents during previous events, it is possible to infer potential impacts on crop production during the forthcoming months (October-March).

**Map: Possible climatic variations and impacts
October-March**



KEY:

R = Above-average rains

D = Drier-than-average

W = Warmer-than-average

ASIA: Increased chance of below-average precipitation, historically concentrated in southeastern areas, Indonesia and the Philippines in particular. As rice production across the region is virtually continuous throughout the year, the occurrence of an El Niño event would be expected to have some effects on crop production, although the exact impact would still depend on its timing, intensity and duration. With current forecasts predicting a continuation of a strong El Niño into early 2016, this raises the possibility of an adverse impact on the 2015/16 secondary rice and maize crops, as well as the main wheat crop in Northern Hemisphere countries, the bulk of which is planted in October-December and harvested from March onwards. By contrast, in Southern Hemisphere countries (including Indonesia, Sri Lanka and Timor-Leste), any below-average rains associated with the event could adversely affect the 2016 main rice and maize crops, with planting to commence in late 2015. India has already experienced an erratic monsoon season, resulting in a reduced forecast for the 2015 cereal production. Furthermore, below-average reservoir levels for irrigation supplies could limit plantings for the 2016 wheat and secondary cereal crops.

EL NIÑO 2015/16

EAST AFRICA: Higher probability of above-normal rainfall; on the one hand this has the potential to benefit the secondary season crops (harvested in February-March), but exceptionally heavy rains could increase the potential for flooding, negatively affecting food production and livestock. Heavy rains may also disrupt harvesting of the main 2015 season cereal crops between October and November; latest indications already point to a decrease in the 2015 cereal output following erratic weather conditions earlier this year.

SOUTHERN AFRICA: An increased probability of below-normal precipitation during the main rainy season between October and March; however, the intensity and area affected has varied during preceding El Niño events. In general, below-average rains during this period coincide with the main cropping season (crops planted in November and harvested from March), and could therefore result in stressed vegetation conditions, retarding crop development and negatively impacting yields. Current meteorological forecasts indicate an increased likelihood of below-average rains over most of the subregion during the 2015/16 rainy season (October-March). Cereal supplies in the subregion are already tight, following a sharply reduced 2015 harvest as a result of poor rains.

LATIN AMERICA AND THE CARIBBEAN: Already severe dry weather associated with El Niño has caused a reduction in the 2015 main first season maize outputs in Central American countries, excluding Mexico. Planting of the second season crops was also affected by dry weather, particularly delaying sowings, and with the El Niño episode predicted to persist into early 2016, rains could be further affected during the remainder of the second cropping season, up until the harvest which commences the first quarter of 2016. Southern parts of South America have tended to receive heavier rains, which include the major cereal-growing areas of Argentina, southern Brazil and Uruguay. The 2015 wheat crop, to be harvested from November, is expected to decline from last year but remain above average. This mostly reflects a forecast decrease in the largest subregional producer, Argentina, as a result of lower plantings.

OCEANIA: There is a tendency for below-normal rains in October, at the start of the winter wheat harvest; latest information for the 2015 wheat production indicates an increase compared to the previous year. Past events have caused wetter-than-normal conditions in Western Australia during the first quarter of the year, prior to the planting period in April for the 2016 crops and, therefore, the impact on cereal production is likely to be limited.

NORTH AMERICA: The October-March period corresponds to the first part of the winter wheat cropping season (crops planted in September/October and harvested from May). Strong El Niño conditions are generally correlated with above-normal precipitation in the South and the West. While in Midwestern areas, dry weather conditions, which have been prevalent since September this year, tend to occur with an El Niño episode. As of 28 September, 31 percent of the expected national winter wheat area had been planted, slightly below the average for this time of the year due to the reduced rains. In the South and West, short-term periods of excessive rains may delay plantings but would be expected to have a limited negative impact or possibly be beneficial for winter crop production.

Regional reviews

NORTH AFRICA

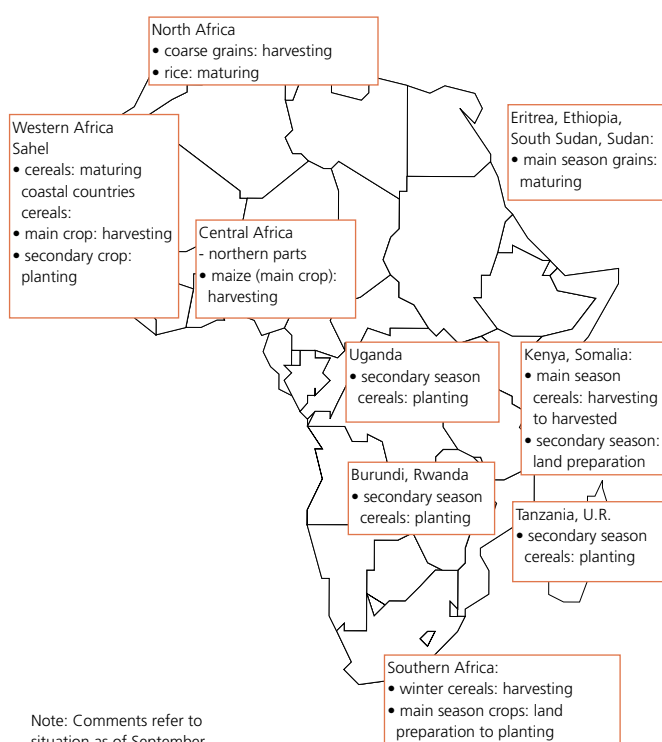
Above-average cereal output gathered in 2015

Harvesting of the 2015 wheat and barley crops was completed in the subregion in July, while harvesting of maize and rice in **Egypt** is ongoing. Although favourable weather conditions prevailed in the subregion for most of the season, excessive hot weather (up to 45 degrees Celsius) in **Tunisia** in early May 2015 damaged late developing wheat in early grain-filling stages lowering the total cereal harvest by 1 million tonnes compared to 2014. However, lower production in **Tunisia** was more than offset by increases in **Morocco** (over 4 million tonnes) and to a lesser extent in **Algeria** (600 000 tonnes). **Egypt's** production remained on par with last year's harvest.

Provisional estimates indicate an aggregate subregional cereal output (including paddy rice) of 39 million tonnes, an increase of about 13 percent on last year's output and 9 percent on the five-year average. Total wheat production, which accounts for just over half of the aggregate cereal output, increased by almost 17 percent over 2014 to 20.6 million tonnes. The coarse grains harvest is provisionally estimated at 12.5 million tonnes, about 5 percent above the five-year average and about 15 percent higher than last year.

Cereal import requirements remain above average

Even in good harvest years, North African countries rely heavily on cereal imports to cover their consumption needs, with **Egypt** being the world's largest wheat importer. On average, in the last five years, 45 percent of total domestic cereal requirements (including food and feed) in **Egypt** and **Morocco** were met through imports. The share of imports is even higher in **Tunisia** (an average of 65 percent), **Algeria** (68 percent) and **Libya** (90 percent). With a slightly above-average harvest in



2015, the subregion's aggregate cereal import requirement for the 2015/16 marketing year (July/June) is estimated at approximately 43 million tonnes, slightly below last year's level but some 9 percent above the average of the previous five years. Wheat accounts for almost 60 percent of cereal imports. At 19 and 12 million tonnes, cereal import requirements in 2015/16 in **Egypt** and **Algeria**, respectively, are about the same as in the previous year. The above-average 2015 harvest in **Morocco** lowered the forecasted cereal imports to 4.7 million tonnes (26 percent below 2014/15 imports) while a reduced crop increased the import requirement in **Tunisia** by about one-quarter compared to last year.

Table 7. North Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	Change: 2015/2014 (%)
North Africa	20.3	17.6	20.6	11.5	10.8	12.5	6.1	6.3	6.0	37.9	34.7	39.0	12.5
Algeria	3.3	2.0	2.4	1.6	1.3	1.5	0.0	0.0	0.0	4.9	3.3	3.9	18.0
Egypt	8.8	8.8	9.0	6.5	6.6	6.8	6.1	6.2	5.9	21.4	21.6	21.7	0.3
Morocco	7.0	5.1	8.0	2.9	1.9	3.7	0.0	0.0	0.1	9.9	7.1	11.8	66.6
Tunisia	1.0	1.5	1.0	0.3	0.8	0.3	0.0	0.0	0.0	1.3	2.3	1.3	-42.7

Note: Totals and percentage change computed from unrounded data.

Food price inflation generally eases but high levels prevail in Libya

Food price inflation in the subregion decreased in **Algeria, Egypt** and **Tunisia**, while it remained relatively stable in **Morocco**. In **Algeria**, the August 2015 food and beverage inflation rate stood at 3.6 percent on a yearly basis easing from over 7 percent recorded in the spring, partly on account supported by decreases in potato prices. In **Egypt**, the annual food and beverage inflation rate in August 2015 reached about 8 percent, compared to 15 percent in May 2015 owing to a sharp decline in poultry prices. In **Tunisia**, the year-on-year food and beverage price inflation rate in August 2015 was recorded at 3.7 percent compared to 8 percent in May 2015. In **Morocco**, the annual food inflation rate remained relatively stable at 3.4 percent in August 2015, compared to 2.3 percent in May 2015.

In **Libya**, overall yearly inflation is estimated at over 12 percent, driven by supply chain disruptions offsetting the impact of high fuel and food subsidies. Civil insecurity, fuelled by the presence of armed groups, brought about the destruction of public infrastructure, disrupted procurement and distribution systems that resulted in food shortages, mainly in urban areas and in loss of income for farmers that were unable to market their production.

WEST AFRICA

Mixed prospects for 2015 cereal crops

In the Sahel, irregular and insufficient rains at the beginning of the cropping season in May/June delayed plantings of coarse grains in several parts of the subregion. However, a significant increase in precipitation and soil water reserves from July over the main producing areas has improved crop prospects. Satellite imagery analysis for September indicates that good rains continued to fall over most of the Sahel. Hence, the outlook for the harvest

to start from October is generally favourable despite the need for continued rains in the following weeks to allow crops to reach full maturity. Specifically, production is expected to recover significantly in the Sahelian countries that were affected by irregular rains in 2014 and experienced a steep drop in production last year. These countries include **Cabo Verde, the Gambia, Guinea-Bissau, Mauritania** and **Senegal**. An above-average harvest is also anticipated in **Burkina Faso** and **Mali**.

In the coastal countries of the Gulf of Guinea, harvesting of the first maize crop has started in the south, while harvesting of cereals will begin in October in the north which only has one rainy season. Precipitation has remained irregular in several regions, notably in the southern and parts of **Benin, Côte d'Ivoire, Ghana, Nigeria** and **Togo** adversely affecting maize yields in parts. Although rainfall has been more favourable in the northern parts of these countries, overall crop prospects remain uncertain.

In the countries affected by last year's Ebola Virus Disease (EVD) outbreak, **Guinea, Liberia** and **Sierra Leone**, harvesting of rice and coarse grain crops will begin in October. Overall, crop prospects are favourable. Data obtained from satellite images show that the crops benefited from favourable climatic conditions during the sowing season and the vegetation/vegetative period. Moreover, the EVD that significantly affected farming activities last year, has been largely controlled. No confirmed cases of EVD were reported in the week to 4 October, which is the first time that a complete epidemiological week has elapsed with zero confirmed cases since March 2014. Liberia was already declared free of Ebola virus transmission in the human population on 3 September 2015. Overall, crop prospects are favourable.

Coarse grain prices showed mixed trends in coastal countries, but remained generally stable in the Sahel

In coastal countries along the Gulf of Guinea, in spite of uncertain prospects for the 2015 cereal crops, harvesting of the first season crops has put significant downward pressure on prices in some countries, particularly in **Nigeria**, where millet and sorghum prices dropped by 7 percent in August. By contrast, in **Benin** and **Togo**, maize prices have been following an upward trend in recent months in most markets, and were well above their year-earlier levels in September. The increasing prices are due to irregular rainfall in the southern part of these countries, which lowered crop prospects and

Table 8. West Africa cereal production
(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals ¹			
	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	Change: 2015/2014 (%)
West Africa	41.1	43.5	43.2	13.8	14.0	14.2	55.0	57.6	57.5	-0.3
Burkina Faso	4.6	4.1	4.2	0.3	0.3	0.4	4.9	4.5	4.5	1.7
Chad	2.2	2.4	2.5	0.4	0.3	0.3	2.6	2.7	2.7	-0.1
Ghana	2.2	2.2	2.2	0.6	0.6	0.6	2.7	2.8	2.7	-2.8
Mali	3.5	4.8	4.5	2.2	2.2	2.3	5.7	7.0	6.8	-2.2
Niger	4.3	4.8	4.7	0.0	0.1	0.1	4.3	4.9	4.8	-1.0
Nigeria	18.4	19.5	19.2	4.7	4.9	4.8	23.2	24.4	24.1	-1.4

Note: Totals and percentage change computed from unrounded data.

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

raised concerns over the food supply outlook. The most significant price increase was observed in Anie market in Togo, where maize prices have soared by 127 percent compared to last year.

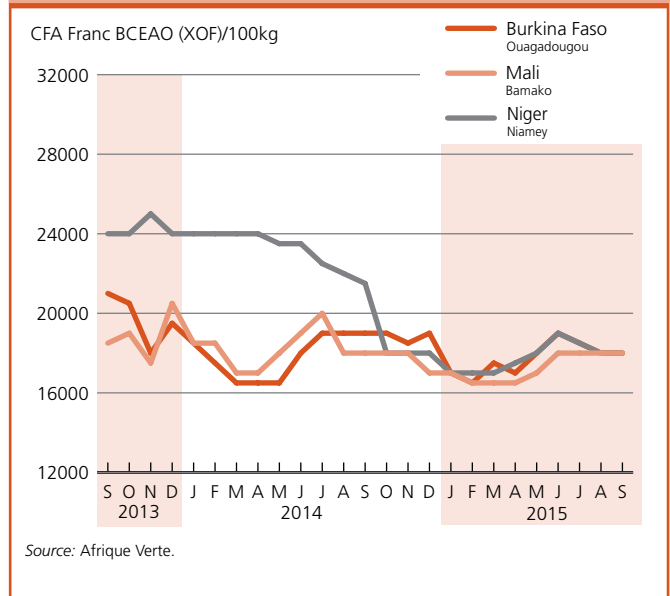
In the Sahel belt, coarse grain prices remained unchanged in September in **Burkina Faso**, **Niger** and **Mali** after two consecutive months of decline. Similarly, in **Chad**, coarse grain prices have stabilized in recent months in most parts of the country, notably in N'Djamena, reflecting adequate supplies following last year's above-average production. Although sorghum prices increased seasonally in August (the peak of the lean season), coarse grain prices were still generally below their year-earlier levels, with the exception of sorghum prices in Moundou and Sahr located in the Sudanian zone.

Food security affected by civil insecurity and infectious disease outbreaks

In spite of the above-average 2014 cereal harvest and improved prospects for the 2015 harvest, humanitarian assistance is still needed in several parts, mostly due to the continuing civil conflict in northern **Nigeria** and the **Central African Republic (CAR)** that has resulted in large population displacement in the subregion. Specifically, the escalation of the conflict in northern **Nigeria** has resulted in increasing population displacements internally and in the neighbouring countries of **Cameroon**, **Chad** and **Niger**. Nearly 1.5 million people have been displaced in northeast Nigeria. In addition, over 105 500 people are estimated to have left Nigeria for the Diffa Region of Niger, while nearly 57 000 people have taken refuge in northern Cameroon, as of August 2015. Moreover, according to the Office of the United Nations High Commissioner for Refugees (UNHCR), an additional 15 000 Nigerians fled to Chad. Similarly, in **Chad**, civil conflict in the Sudan, the CAR, Nigeria and Libya, has increased the number of refugees and returnees. Overall, over 460 000 refugees are estimated to be currently living in Chad, while about 340 000 Chadians have returned to their country. The refugee crisis has exacerbated an already fragile food situation.

The second most significant shock to the agriculture and food sectors has been the EVD outbreak, which has severely affected **Guinea**, **Liberia** and **Sierra Leone**. In spite of the relatively low impact of EVD on 2014 agricultural production at the national level, its impact on economic activities and livelihoods has severely affected household food security. Overall, according to the latest "Cadre Harmonisé" analysis, about 2.2 million people, including 395 000 in Guinea, 720 000 in Liberia and 1.1 million in Sierra Leone, were estimated to be in Phase 3: "Crisis" and above between June and August. Preliminary results of a food security assessment in Liberia, indicate that agricultural casual labourers, hunters/gatherers and people involved in rubber tapping are the most food insecure and are in need of urgent assistance.

Figure 3. Millet prices in selected West African markets



Moreover, since December 2014, HPAI (avian influenza) has been affecting several poultry farms and live bird markets in **Nigeria**, **Burkina Faso**, **Niger**, **Côte d'Ivoire** and **Ghana**. As of mid-September, over 1.5 million chickens were culled in Nigeria as a result of the disease, which is already causing major economic losses in the poultry sector. This could severely impact on the livelihoods of the local communities and threaten hundreds of thousands of poultry farmers and sellers, thus jeopardizing commercial poultry production and seriously impeding regional and international trade and market opportunities.

In addition, **Cabo Verde**, **Gambia**, **Guinea-Bissau** and **Senegal** experienced increased food insecurity during the lean season of 2015 due to last year's steep decline in cereal production. As a result of the various shocks mentioned above, over 7.3 million people were estimated to be in Phase 3: "Crisis" and above in West Africa (excluding Nigeria) between June and August according to the latest "Cadre Harmonisé" analysis. An additional 26.6 million people were estimated to be at risk of food insecurity Phase 2: "Stressed".

CENTRAL AFRICA

Average prospects for 2015 crops affected by continued conflict in parts

In **Cameroon** and in the **Central African Republic (CAR)**, harvesting of the 2015 main maize crop in southern parts is well underway, while in the northern uni-modal rainfall areas,

harvesting of millet and sorghum crops has just started. In **Cameroon**, crop growing conditions have been favourable in most central and southern cropping areas following well-distributed rainfall. By contrast, in the uni-modal north, sorghum and millet crops have been affected by unfavourable growing conditions due to erratic rainfall, which caused a delay in planting operations and negatively impacted on crop development. In addition, in the Far North Region, agricultural activities are disrupted by conflict causing sharp reductions in the planted area: according to an Emergency Food Security Assessment (EFSA) carried out by WFP in June 2015, 60 percent of farmers in the region indicated major land access constraints on account of insecurity. In **the CAR**, the rainy season has been erratic in parts, with a negative impact on crop conditions; in addition, continuing civil insecurity continues to negatively affect the prospects of the current cropping season, following a significant reduction in planted area due to the abandonment of a substantial number of farms; a reduced crop output for the third consecutive year is, therefore, highly likely. In **the Democratic Republic of the Congo (DRC)**, the main season maize crop is currently reaching maturity in the northern Equateur and Oriental provinces, and will be harvested from October. According to remote sensing analysis, rainfall levels have been average. In central regions, harvesting of the main maize crop, sown in July/August, will begin in November. Precipitation at the start of the cropping season was below average in most areas, and the performance of rainfall in the coming weeks will be crucial for crop development. Earlier in the year, the second season maize crop was affected in several areas by a delayed onset of seasonal rains; however, adequate rainfall was received for the remainder of the cropping season. In **the Republic of the Congo** and **Gabon**, the second season maize crop, harvested in June-July, benefited from adequate precipitation; however, in both of these countries, the bulk of the national cereal requirement is imported.

FAO's provisional forecast for the subregion points to a 2015 cereal production of 1.9 percent above the levels of 2014.

High food prices and inflation in the CAR

In **the CAR**, the average inflation rate, which surged from a low 1.5 percent in 2013 to 15 percent in 2014, mainly as a result of increased food price inflation and trade disruption, declined to 8 percent in 2015, mostly due to a slight improvement in security and falling oil prices. However, constraints to crop production and

the livestock and fishing sectors due to insecurity will continue to underpin high food prices and general inflation. In August 2015, prices of groundnuts and palm oil in villages of Basse-Kotto and Nana-Mambéré prefectures in the south were on average about 50 percent above their pre-crisis levels. In **the DRC**, rates of inflation, which were at a low 1 percent in 2013 and 2014, increased to 2.4 percent in 2015, owing to domestic demand pressure, reflecting sustained economic growth. In **the Republic of the Congo**, the inflation rate increased from 1 percent to 3 percent in 2015, due to a slight devaluation of the local currency. In **Gabon**, the inflation rate, which increased from a low 0.5 percent in 2013 to 4.5 percent in 2014 on account of increasing food prices, declined in 2015 to 2.5 percent due to lower oil prices and a reduction in Government spending. In **Cameroon**, the inflation rate remained around a low of 2 percent in 2015.

Grave food security situation in the CAR and parts of Cameroon and the DRC due to conflict

Continued civil insecurity in **the CAR** and in eastern **the DRC** has resulted in massive population displacements and hindered access to food for the affected population. As of late August, about 464 000 refugees from **the CAR** have sought refuge in neighbouring Cameroon (253 000), the DRC (97 000), Chad (84 000) and the Republic of the Congo (30 000) straining on the already limited resources of the hosting communities. The IDP caseload in the CAR, which decreased to 378 000 in late August from 400 000 in May due to a relative improvement in security in some areas of the country, sharply increased again to 421 000 in late September due to the resurgence of inter-communal violence in the capital, Bangui, and in other areas of the country. The recent violence has worsened an already dire humanitarian situation, impeding the ability of humanitarian agencies and aid partners to gain access and assist the thousands of internally-displaced people. Since 2013, in **the DRC**, the escalation of civil conflict, especially in the eastern provinces, severely damaged local livelihood systems and caused massive displacement. As of June 2015, the IDP caseload was estimated at 1.5 million, with more than half of the displaced being located in North Kivu Province and the rest mainly in South Kivu and

Table 9. Central Africa cereal production
(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals ¹			
	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	Change: 2015/2014 (%)
Central Africa	4.4	4.3	4.4	0.5	0.6	0.5	4.9	4.9	5.0	1.9
Cameroon	2.9	2.8	2.9	0.2	0.2	0.2	3.1	3.0	3.1	3.0
Central African Rep. Dem.Rep.of the Congo	0.1	0.1	0.1	0.0	0.0	0.0	0.2	0.1	0.1	0.0
Congo	1.3	1.3	1.3	0.3	0.3	0.3	1.6	1.6	1.6	0.0

Note: Totals and percentage change computed from unrounded data.

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

Katanga provinces. In addition, about 15 000 individuals moved to **the DRC** from Burundi since mid-April due to the election-related conflict. In **Cameroon**, as of late August, the Far North Region is hosting about 58 000 refugees fleeing from civil unrest in Nigeria, which has spread into the region and has also resulted in the displacement of 81 700 Cameroonians. In **the CAR**, according to the last Integrated Food Security Phase Classification (IPC)³ exercise, conducted in April 2015, about 1.267 million people (out of a total population of 4.6 million), are in need of urgent assistance Phase 3: "Crisis" and Phase 4: "Emergency". About 19 percent of the people in rural areas are in Phase 3: "Crisis" and about 12 percent are in Phase 4: "Emergency". In **the DRC**, according to the latest available IPC food security analysis, that covers the period from December 2014 to June 2015, the number of people in acute food insecurity and livelihood crisis Phase 3: "Crisis" and Phase 4: "Emergency" was estimated at about 6.5 million. The IPC analysis of this current cycle compared to those of June 2014 (zones in the east) and December 2013 (the entire country), shows that there was an overall reduction of 0.5 million people classified under Phase 3: "Crisis" and an increase by about 523 000 people for those under Phase 4: "Emergency". In early September 2015, the number of food insecure in **Cameroon** was estimated at 919 000, three times higher than in 2012. The most affected regions are the North and Far North, where about 25 and 50 percent of the food insecure, respectively, reside. The food security situation is particularly worrying in the Far North Region, where, according to the recently conducted EFSA, 32 percent of IDPs and 22 percent of the local population have exhausted their food stocks and the percentage of households relying on humanitarian assistance increased from 6 percent in 2014 to 33 percent in 2015.

EAST AFRICA

Erratic rainfall affecting 2015 crop production

Harvesting of the 2015 first season cereal crops has recently been completed in southern parts of the subregion with mixed outcomes. In **Somalia**, the main "gu" season coarse grain crops were affected by erratic rainfall, with torrential rains and floods in the Shabelle Valley in March and an early cessation of the rains in May in most central and southern regions, including Bay, Bakool, Hiraan, Middle Juba and Middle Shabelle. As a result, crop production is estimated at below-average levels. Similarly, erratic rains affected maize production in southeastern and coastal marginal agricultural areas of **Kenya**, with very low yields estimated in Kitui, Makeni, Tharaka Nithi, Nyeri, Taita Taveta and Kilifi counties. In

Rwanda and **Burundi**, the 2015B season crops were harvested in July. In both countries, after a dry spell in March, average to above-average precipitation in April and May in most cropping areas favoured crop development. However, in Burundi, harvesting operations have been disrupted in parts due to civil insecurity and displacements. In the bi-modal rainfall areas of **Uganda**, after a late start, rainfall was adequate, except in some central and southern parts where crops were affected by below-average precipitation in June. In **the United Republic of Tanzania**, dry conditions in March-April negatively impacted crops in central uni-modal rainfall regions (Dodoma, Singida, Tabora, Shinyanga) and in some coastal bi-modal areas (Arusha, Tanga). In **South Sudan**, harvesting of first season crops is complete in southern bi-modal rainfall areas and production prospects are mixed due to dry conditions in July in eastern parts which negatively impacted on yields.

In central and northern parts of the subregion, main season cereal crops are at vegetative or near harvesting stages. Abnormally dry conditions in July negatively impacted crop establishment and development in several cropping areas and, despite improved rainfall in August, significant moisture deficits and poor vegetation conditions still persist. In **Kenya**, in the key-growing areas of Rift Valley and Western provinces, abundant rainfall from March to June was followed in parts by an early cessation of the rains in July, with a negative impact on yields. In **Ethiopia**, the outlook for the main "meher" season harvest is mixed, as the June to September "kiremt" rainy season was erratic in parts. Crop growing conditions were favourable in main cropping areas in western Oromia and western Amhara, while a prolonged dry spell in July had a negative impact on crop establishment and development in eastern Amhara, eastern Oromia and Tigray. The June to September rainy season also has so far performed poorly in several pastoral areas in Ethiopia, especially in Afar and northern Somali regions, with worsening availability of pasture and water as well as poor livestock conditions and unusual livestock deaths. Similarly, in **Eritrea**, rainfall was erratic over most cropping areas and severe drought conditions prevailed in coastal pastoral areas. In **the Sudan**, severe rainfall deficits in June and July negatively impacted crop germination and establishment; despite above-average rainfall in August, poor vegetation conditions persisted in southeastern key growing areas of Gadarif, Sennar and Kassala states, and a reduced harvest is anticipated. In central and northern uni-modal areas of **South Sudan**, prolonged dry spells in June/July required frequent replanting activities, but, as rains resumed in August, the current outlook of crops to be harvested by November is generally favourable. In agro-pastoral areas of the Karamoja Region of **Uganda**, cereal crop production is forecast at below-average levels following dry conditions and above-average temperatures in July and August.

³ The **Integrated Food Security Phase Classification (IPC)** brings together a set of standardized tools that aims at providing a universal measure to classify the severity and magnitude of food insecurity. For further information please visit: <http://www.ipcinfo.org/>

Table 10. East Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Total cereals ¹			
	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	Change: 2015/2014 (%)
East Africa	4.9	5.3	5.1	36.8	41.1	36.0	44.6	49.8	44.4	-10.7
Ethiopia	4.0	4.2	4.0	18.5	19.2	17.9	22.6	23.6	22.1	-6.4
Kenya	0.5	0.4	0.4	3.7	3.0	3.4	4.3	3.5	4.0	12.5
Sudan	0.2	0.5	0.4	2.6	7.4	4.2	2.9	7.9	4.7	-41.0
Tanzania U.R.	0.1	0.1	0.1	6.5	6.2	6.0	8.8	8.9	8.7	-2.4
Uganda	0.0	0.0	0.0	3.3	3.3	3.1	3.5	3.5	3.4	-3.8

Note: Totals and percentage change computed from unrounded data.

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

Planting of the second season crops is about to start in southeastern and coastal areas of Kenya ("short-rains" crops), southern and central **Somalia** ("deyr" crops), southern Greenbelt states of **South Sudan** as well as in bi-modal rainfall areas of **Uganda** and **the United Republic of Tanzania** ("vuli" crops). Under the threat of a strong El Niño episode, which is likely to continue into the first months of next year, the September-December rains are forecast at average to above-average levels, with high risks of floods, in central southern Somalia, southern Ethiopia, southern South Sudan, Kenya, Uganda, Rwanda, Burundi and the United Republic of Tanzania. Conversely, drier weather conditions are expected in the Sudan, northern Ethiopia, northern Somalia and northern South Sudan.

The overall 2015 cereal production in the subregion, including an expected average production for the secondary season crops to be harvested early next year, is tentatively forecast at an average level of 44.4 million tonnes, about 11 percent below the output of 2014.

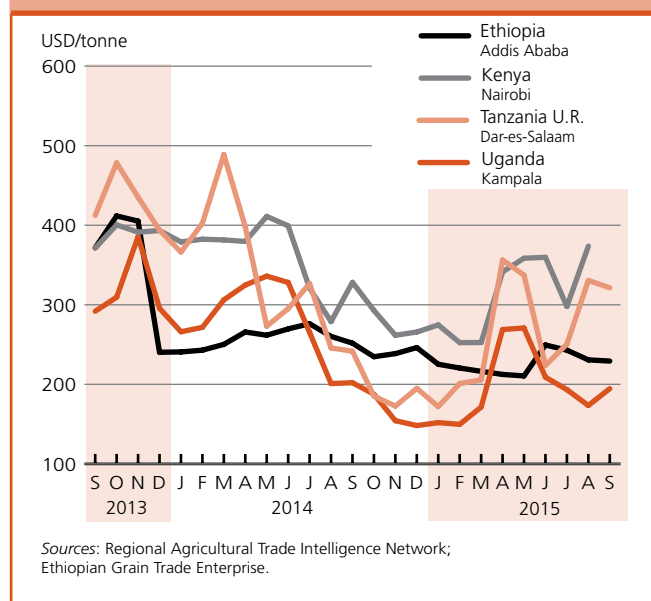
Coarse grain prices on the increase in several countries

Prices of locally-produced coarse grains increased sharply in several countries of the subregion in August, due to the reduced output of the recently gathered crops and uncertain prospects for the forthcoming harvests. In **the United Republic of Tanzania**, maize prices surged in August by up to 40 percent despite the recent completion of the 2015 harvests in both uni-modal and bi-modal areas, and in Dar Es Salaam, the main urban centre, prices of maize in August were about 70 percent above their year-earlier levels, despite the release of public stocks from the National Food Reserve Agency. Similarly, in **Kenya**, prices of maize increased by up to 33 percent in August, despite the harvest in coastal and southeastern areas, due to a reduced crop output. Concerns over the performance of the 2015 "long-rains" season harvest and reduced exportable surpluses in neighbouring United Republic of Tanzania intensified price increases. In the capital, Nairobi, the price of maize in August was more than 50 percent higher

than in the same month of the previous year. In **the Sudan**, prices of locally-produced millet and sorghum began to seasonally increase in August in several markets, rising in the capital, Khartoum, by 40 and 13 percent, respectively. Unfavourable prospects for the 2015 harvest exerted additional pressure on prices. However, despite the recent increases, August prices

were still lower than their year-earlier levels, due to the ample availabilities from last year's bumper crop. In **South Sudan**, in markets located in areas not directly affected by the conflict, prices of locally-produced coarse grains continued to soar in July, reaching near-record to record levels, despite the ongoing first season harvest in southern bi-modal rainfall areas, due to the depreciation of the local currency, uncertainty about the macro-economic situation and high fuel costs. In the capital, Juba, prices of sorghum and maize increased in July by 23 percent and 7 percent, respectively from the previous month, and were more than twice their levels of 12 months earlier. Prices of wheat flour, mostly imported, declined by 14 percent in July compared to June's levels, but they were still twice their levels of the same month of the previous year. In conflict-affected areas, widespread violence continued to disrupt marketing operations, and in Bor market prices of sorghum increased on a month-on-month basis

Figure 4. Maize prices in selected East African markets



by 21 percent in July. In **Ethiopia**, prices of maize, wheat, red sorghum and “teff” remained relatively stable in most markets in August, despite the ongoing “belg” harvest, due to a reduced crop output. Maize prices in August were well below their year-earlier levels, due to the ample carryover stocks from the above-average 2014 cereal output. In **Somalia**, prices of maize declined in most key markets in August 2015 as newly-harvested main “gu” season crops increased supplies, while prices of sorghum remained firm. In **Uganda**, prices of maize declined by up to 27 percent between June and August, as crops from the 2015 first season harvest increased supplies. Maize prices in August were below their year-earlier levels, except in the capital, Kampala.

Pockets of starvation reported in some conflict-affected areas of South Sudan

The lean season is at its peak in **Ethiopia, Eritrea, the Sudan**, western **Kenya, Somalia**, northern bi-modal areas of **South Sudan** and the Karamoja Region in **Uganda**, while food security conditions are generally improving in southern **Somalia**, southern **Kenya, Uganda, Rwanda, Burundi** and **the United Republic of Tanzania**, where recently-harvested crops supplied local markets and are available for household consumption.

In **South Sudan**, despite the availability of recently-harvested first season crops in southern areas and the start of green crop consumption in the rest of the country, the access to food for most households is significantly hampered by skyrocketing prices and very limited money-earning options as a consequence of the current dramatic economic downturn. In the conflict-affected states of Greater Upper Nile, particularly in southern counties of Unity State, food security conditions have significantly deteriorated since last May. Here, most displaced people were not able to plant any crops due to insecurity, had their livestock looted and are often cut-off from humanitarian assistance. Some extreme cases of starvation have been recently reported in southern Unity State among displaced households whose livelihood systems and resilience strategies have been totally disrupted by the conflict and they currently rely almost exclusively on wild fruit collection and fish caught in swamps for their subsistence. In **the Sudan**, food insecurity remains of great concern among IDPs in conflict-affected states of Darfur, South Kordofan, Blue Nile and West Kordofan. In **Ethiopia**, the estimated number of food insecure people increased from 2.9 million in January 2015 to 4.5 million in August and to 7.5 million in October, as severe rainfall deficits during the March-May and June-September rainy seasons led to the rapid deterioration of food security conditions in almost all belg-dependent areas, as well as in northern and northeastern pastoral areas.

In **Burundi**, despite improved food availability due to the 2015B season harvest, the food security situation is a concern in the provinces most affected by the ongoing civil unrest and

insecurity as a consequence of reduced harvests and labour opportunities as well as disrupted trade flows.

Overall, the number of people in need of humanitarian assistance is currently estimated at about 17 million (including 7.5 million in Ethiopia, 3.3 million in the Sudan, 3.9 million in South Sudan, 1.1 million in Kenya, 855 000 in Somalia, 295 000 in Uganda and 120 000 in Djibouti), up 47 percent compared to the July estimate of 11.6 million people. The situation is expected to gradually improve until the end of the year when the bulk of main season crops will be harvested in meher-dependant areas of Ethiopia, western Kenya, the Sudan and South Sudan.

SOUTHERN AFRICA

The 2015/16 main cropping season is about to start; presence of El Niño raises serious concerns

Land preparation for the 2016 cereal crops is underway across most of the subregion, with the bulk of planting activities expected to commence in November. The presence of an El Niño episode (that has, in previous episodes, been associated with drier conditions during the cropping season, notably in parts of South Africa, southern parts of Angola, Zambia and Zimbabwe, northern Namibia and Botswana) has raised serious concerns over the performance of the forthcoming cropping season. Meteorological models indicate a strengthening El Niño between October and December 2015, which is predicted to continue into the first quarter of 2016. Regional weather forecasts for the October 2015–March 2016 period already point to an increased likelihood of drier and warmer conditions over much of Southern Africa, which could adversely affect yields. However, it is important to note that, although previous events have been associated with lower maize production in some parts of the subregion, there is not a deterministic trend between the occurrence of El Niño and the impact on agricultural production.

Planting estimates for the 2016 cereal crop in most countries of the subregion will only be available in early 2016, which will provide a better indication of 2016 production prospects.

Sharp cereal production decreases in 2015

The aggregate 2015 maize crop, harvested earlier this year, which accounts for nearly 80 percent of the subregional cereal output, was estimated at 20.5 million tonnes about 27 percent (7.5 million tonnes) below the bumper 2014 output and down 16 percent from the five-year average. All countries were estimated to have reduced harvests, with notable declines in the large producing countries of **South Africa, Malawi** and **Zambia**. The decrease was mainly the result of irregular rains

Table 11. Southern Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	Change: 2015/2014 (%)
Southern Africa	2.2	2.0	2.0	23.9	29.5	21.7	4.2	4.6	4.2	30.3	36.1	27.9	-22.7
- excl. South Africa	0.4	0.3	0.3	10.9	13.9	10.6	4.2	4.6	4.2	15.4	18.8	15.2	-19.3
Madagascar	0.0	0.0	0.0	0.4	0.4	0.4	3.6	4.0	3.7	4.0	4.3	4.1	-5.8
Malawi	0.0	0.0	0.0	3.8	4.1	2.9	0.1	0.1	0.1	3.9	4.2	3.0	-29.4
Mozambique	0.0	0.0	0.0	1.8	2.2	2.0	0.3	0.4	0.4	2.2	2.6	2.4	-5.1
South Africa	1.9	1.8	1.7	13.0	15.6	11.1	0.0	0.0	0.0	14.9	17.3	12.8	-26.3
Zambia	0.3	0.2	0.2	2.6	3.4	2.7	0.0	0.0	0.0	2.9	3.7	3.0	-19.3
Zimbabwe	0.0	0.0	0.0	1.0	1.7	0.8	0.0	0.0	0.0	1.0	1.8	0.9	-50.4

Note: Totals and percentage change computed from unrounded data.

during the 2014/15 cropping season and an extended dry spell in February and March 2015 that adversely impacted on yields and the area harvested. **South Africa's** 2015 maize harvest, estimated at 10.5 million tonnes (4.4 million below the above-average 2014 output) accounts for the bulk of the subregional decline. Maize production in **Zimbabwe** was also estimated at a significantly reduced level of 0.74 million tonnes, approximately 50 percent lower than the good harvest of 2014. **Zambia** and **Malawi's** 2015 maize harvests were estimated to be 21 and 30 percent, respectively, below the record outputs of 2014, with extended dry spells in southern parts adversely impacting on yields, while localized flooding in early 2015 also contributed to crop losses, particularly in southern Malawi. In **Mozambique**, the maize crop fared better than in neighbouring countries, reflecting comparatively more favourable weather conditions and, as a result, production is estimated at about 1.8 million tonnes, only 5 percent below 2014's level. In **Angola**, maize production was estimated at an above-average level, but below the good 2014 output, owing to generally favourable rains in the main maize-producing central regions. However, poor rains in southern provinces resulted in reduced millet and sorghum harvests.

The rainfall deficits also had a severe impact on maize production in the import-dependent countries of **Lesotho**, **Namibia**, **Botswana** and **Swaziland**, with declines ranging from 13 to 43 percent compared to the previous year's good harvests. Rice production in **Madagascar**, pending the full results from the FAOWFP Crop and Food Security Assessment Mission (CFSAM), is provisionally estimated to have decreased moderately, owing to dry weather in southern parts and irregular rains in large producing central regions, including flooding caused by Cyclone Chedza.

Maize imports forecast to double in 2015/16

Reflecting the well below-average 2015 production, maize import requirements in the 2015/16 marketing year (generally May/April) are forecast to double compared to the below-

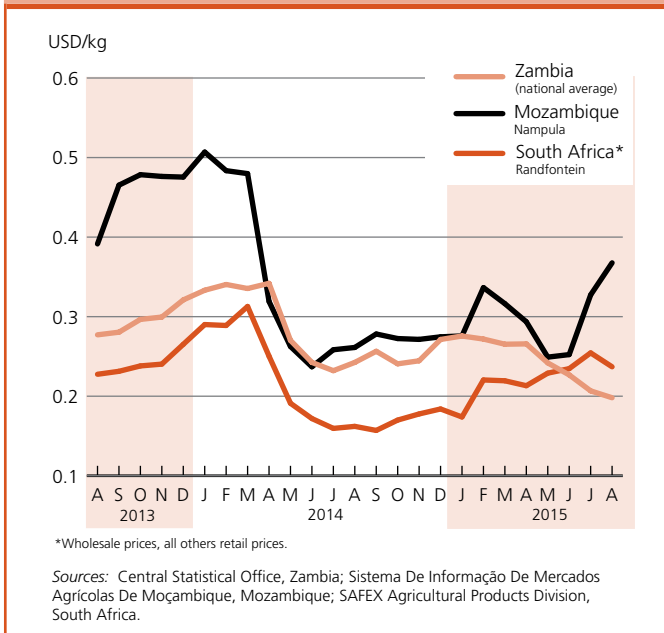
average level of 2014/15. The bulk of this year's increase is expected from **South Africa**, where approximately 600 000 tonnes, mainly consisting of yellow maize used in the feed industry, is forecast to be imported; about 244 000 tonnes have already been imported since May. In **Zimbabwe**, maize imports are forecast at around 0.7 million tonnes. **Malawi** is also expected to increase imports that will help to bolster national supplies. Larger import volumes are similarly forecast in the deficit-producing countries of **Botswana**, **Lesotho**, **Namibia** and **Swaziland**.

South Africa normally covers the bulk of the subregion's import requirement, however, South African maize exports, mostly yellow maize, are forecast to decline in 2015/16 on account of the low 2015 harvest. The export rate this year has been sluggish on account of the tighter domestic supplies, with about 212 000 tonnes exported during the May-August period, compared to 1.2 million tonnes over the same period in 2014. Large carryover stocks, however, from the bumper 2014 output have partly offset the impact of low 2015 production and helped maintain sufficient export quantities that are expected to still satisfy the needs of Botswana, Lesotho, Namibia and Swaziland. Given the reduced export availabilities in South Africa, importing countries within the subregion will require alternative supplies. Zambia is forecast to export about 0.8 million tonnes in 2015/16, mostly owing to the large carryover stocks from the record 2014 harvest, with Zimbabwe likely to be the main destination for the bulk of this volume.

Prices of maize significantly higher

The reduced 2015 subregional cereal output has exerted strong upward price pressure this year, resulting in sharply higher year-on-year maize grain prices in most countries, notably in South Africa and Mozambique. In **South Africa**, strong gains between May and September, punctured by a small decrease in August reflecting falling international prices and a slight upward revision in the 2015 production estimate, pushed prices

Figure 5. White maize prices in selected Southern African markets



of white maize up to 81 percent higher than their year-earlier levels. Uncertainty over the forthcoming 2015/16 cropping season, due to the presence of El Niño, and the persistent weakening of the Rand against the US dollar, provided further upward support. In **Mozambique** and **Malawi**, similarly steep maize price gains were registered, mainly as a result of tighter supplies following production decreases this year, with prices reaching near-record levels in Malawi. In **Zambia**, despite the lower harvest in 2015, overall good supplies, due mostly to large carryover stocks from 2014's output, have contributed to generally stable prices in recent months; the national average price is slightly higher compared to its level in August 2014.

In the import-dependent countries of **Lesotho**, **Namibia** and **Swaziland**, maize prices were dragged higher by rising South African prices.

Reduced 2015 harvests acutely worsen food security conditions

Reflecting the reduced cereal output, the number of vulnerable people in 2015 jumped to an estimated 6.3 million, compared to 3.2 million in 2014⁴, according to the results from the national Vulnerability Assessment Committee's (VAC) 2015 evaluations. All countries of the subregion, except for Mozambique and Swaziland, registered an increase in the number of persons requiring assistance. In **Malawi**, damage to crops and livelihoods following floods and a dry spell early this year resulted in an estimated 2.8 million people (double the level of the previous year) requiring humanitarian assistance for a period between three to eight months. In **Namibia**, just over 370 000 people require food assistance reflecting the steep cereal production decline, particularly in the subsistence sector. While in **Zimbabwe**, the national VAC estimates that nearly 1.5 million persons, up from a low of 0.56 million in 2014, will require assistance during the peak lean period between January and March 2016. Most of the vulnerable households in Zimbabwe are located in the southern and western parts, which suffered the sharpest cereal production decreases this year.

With food supplies becoming increasingly tighter until the start of the 2016 harvest (expected to begin in February/March), food security conditions will remain stressed for the next several months and will require continuous monitoring. The reduced household supplies compared to the previous year are expected to lead to an increased reliance on market supplies and imported foods to meet consumption needs. If prices, particularly of the main staple maize, continue to increase this could further aggravate the food security situation.

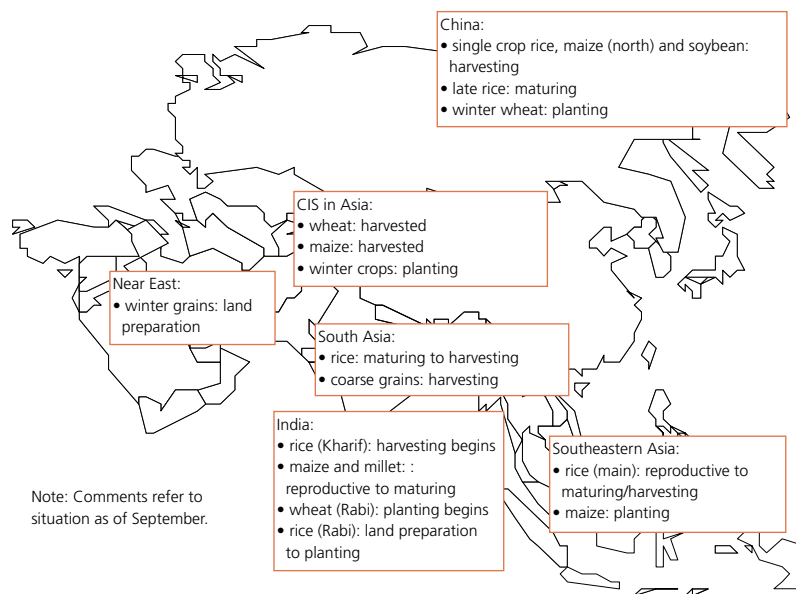
⁴ This figure excludes Angola, Madagascar and South Africa.

FAR EAST

Aggregate cereal production in 2015 expected to increase marginally to a new record level, with mixed results at country level

Harvesting of the 2015 main season rice and maize crops, which make up the bulk of the subregion's cereal crops, is underway in Northern Hemisphere countries. Southern countries of the continent, namely **Indonesia, Sri Lanka and Timor-Leste** as well as **Viet Nam** are currently gathering the 2015 secondary season crops. FAO's latest forecast for 2015 aggregate cereal output stands at 1 251 million tonnes, 1 percent above the 2014 record, with declines for wheat (India) and rice (India and Thailand) expected to more than offset by an anticipated record maize harvest (China). However, at the country level, outlooks are mixed. Delayed and insufficient precipitation during the cropping season has compromised crop prospects in **India, Cambodia, the Democratic People's Republic of Korea (DPRK), Mongolia, Lao People's Democratic Republic, the Philippines, Thailand and Viet Nam**. By contrast, larger plantings and higher yields, reflecting generally good weather, are expected to boost cereal production to a record high in **China**, while a recovery from the drought-reduced 2014 harvest is anticipated in **Sri Lanka**.

Prospects for 2015 rice production have deteriorated in most countries of the subregion, mainly as a result of delayed and inadequate seasonal rains throughout the cropping season.



The reduced precipitation this season may be attributed to the prevailing global El Niño event, which is often associated with dry weather in the subregion.

Currently, reports from the main meteorological and oceanic institutions indicate a strong El Niño level that is expected to continue in the coming months and persist into the 2016 Northern Hemisphere spring. This may affect the 2015/16 secondary season rice crop in the Northern Hemisphere and the 2016 main season crops in Southern Hemisphere countries. Accordingly, FAO has downgraded its forecast for the subregion's 2015 paddy rice production by 5.5 million tonnes to 667 million tonnes, implying a second consecutive poor result. At the country level, most of the projected contraction, in absolute terms, is expected to come

Table 12. Far East cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	Change: 2015/2014 (%)
Far East	244.3	252.9	250.5	325.3	322.0	334.3	670.4	668.4	666.6	1 240.0	1 243.3	1 251.4	0.7
Bangladesh	1.3	1.3	1.4	2.6	2.6	2.7	51.2	51.8	51.9	55.1	55.7	55.9	0.4
Cambodia	0.0	0.0	0.0	0.9	0.5	0.5	9.4	9.3	9.2	10.3	9.9	9.7	-2.0
China	121.9	126.2	129.9	228.0	225.2	236.0	205.2	208.2	209.0	555.1	559.6	574.9	2.7
India	93.5	95.9	88.9	43.2	42.0	42.6	160.0	157.2	155.7	296.7	295.0	287.2	-2.6
Indonesia	0.0	0.0	0.0	18.5	19.0	20.0	71.3	70.8	73.0	89.8	89.9	93.0	3.5
Japan	0.8	0.9	0.9	0.2	0.2	0.2	10.9	10.8	10.7	11.9	11.8	11.8	-0.3
Korea Rep. of	0.0	0.0	0.0	0.2	0.2	0.2	5.6	5.6	5.4	5.8	5.9	5.7	-3.9
Myanmar	0.2	0.2	0.2	2.0	2.1	2.2	28.3	28.9	28.4	30.5	31.2	30.8	-1.3
Nepal	1.9	2.0	1.9	2.6	2.6	2.5	5.0	4.8	4.6	9.6	9.4	9.0	-4.4
Pakistan	24.2	26.0	27.0	5.6	5.2	5.4	10.2	10.5	10.3	40.0	41.7	42.6	2.2
Philippines	0.0	0.0	0.0	7.3	7.8	7.6	18.8	18.9	18.3	26.2	26.7	25.9	-2.8
Thailand	0.0	0.0	0.0	5.0	5.0	5.1	36.8	34.3	32.3	41.8	39.3	37.3	-4.9
Viet Nam	0.0	0.0	0.0	5.2	5.2	5.4	44.0	45.0	44.7	49.2	50.2	50.1	-0.2

Note: Totals and percentage change computed from unrounded data.

from **Thailand**, where the 2015 aggregate paddy production is anticipated to fall by 6 percent to 32.3 million tonnes, due to both planting reductions and lower yields as a result of prolonged dry weather. Similarly, in **India**, the 2015 main “*khariif*” production is officially forecast at 90.6 million tonnes (milled basis), a decrease of 1.5 million tonnes or 1 percent, compared with last year’s “*khariif*” harvest, following an irregular pattern of the monsoon rains. Including the forthcoming 2015/16 secondary season rice crop, to be planted in November-December, FAO now forecasts the 2015 aggregate paddy production in India at 155.7 million tonnes. Dry weather during the cropping period is also expected to result in reduced output in **Cambodia, Laos, Viet Nam and the Philippines**. In **Myanmar**, heavy rainfall and the passing of Cyclone Komen in July and August, caused severe flooding, mainly impacting 12 regions/states, most notably Ayeerwady, Sagaing, Magway, Bago, Rakhine, Yangon and Chin. The flood damage contributed to a reduction of the 2015 main season paddy production. In **the DPRK**, severe rainfall deficits between mid-April and mid-July, coupled with short supplies of irrigation water, resulted in an area reduction of the 2015 paddy crop and undermined yields. As a result, FAO currently forecasts **the DPRK** production at 2.3 million tonnes, 12 percent below last year’s drought-reduced output. In **Indonesia**, due to ongoing dry conditions which are expected to negatively affect the secondary season paddy crop, currently being harvested, FAO has revised downward its forecast for the country’s aggregate 2015 rice production by 2.6 million tonnes to 73 million tonnes. Nevertheless, this level would still be 3 percent up from last year’s reduced crop, mainly due to the gains already achieved with the main harvest, concluded earlier this year.

The 2015 subregional aggregate wheat production, harvested earlier this year, is estimated at 250.5 million tonnes, 1 percent below the record of 2014. Most of this decrease reflects a 7 million-tonne decline in production in **India**, where heavy rains and hail in the final stages of crop development reduced yields. By contrast, the 2015 wheat production in **China** has been revised upwards to a record level of 129.9 million tonnes, an improvement of 3 percent over the bumper 2014 production.

The subregion’s 2015 aggregate maize production is forecast at 303 million tonnes, 4 percent up from last year’s record level. The bulk of the increase is attributed to higher maize output in **China**, where a record crop of 226 million tonnes is anticipated, 5 percent or 10.4 million tonnes up from the previous year’s level, driven by a considerable increase in the area planted and higher yields, following favourable weather conditions.

Planting of the mostly irrigated winter wheat crop for harvest in 2016 is underway in **China** and will begin in October in **India** and **Pakistan**. Favourable rainfall in August and September helped replenish water reserves for irrigation in China and Pakistan. In **India**, reduced irrigation supplies in the main reservoirs compared to last year and the ten-year average, particularly in the important northwestern producing states, such as Punjab and Uttar Pradesh, could have a negative impact on planting activities.

Cereal trade seen falling from last year’s record

Due to the estimated overall increase in cereal production in 2015, aggregate cereal imports for the 2015/16 marketing year are forecast to decrease by 5 percent compared to 2014/15, but remain 17 percent above the five-year average. The contraction mainly reflects reduced demand for feed cereals, namely barley, maize and sorghum from **China**, whose imports are currently foreseen to fall by 16 percent, 25 percent and 20 percent, respectively, compared with the previous year’s exceptionally high level, given the record domestic harvests and large carryover stocks. Aggregate rice imports in the subregion are forecast at 14.8 million tonnes, similar to the 2015 level. Lower import demand from **Bangladesh, China and Sri Lanka**, is expected to more than offset increased shipments to **Indonesia, the DPRK and the Philippines**.

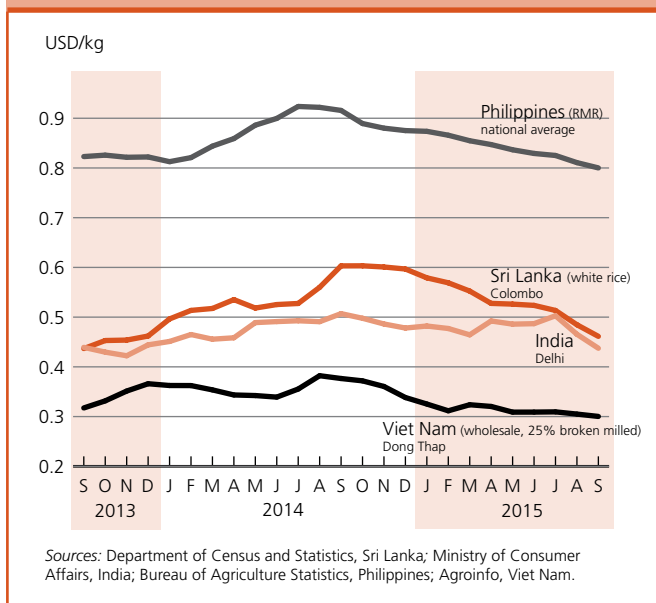
Aggregate cereal exports in 2015/16 are forecast to reach 42.4 million tonnes, down as much as 9 percent, or 4 million tonnes, from the record volume registered in 2014/15. Most of this decrease reflects a 21 percent drop in the exportable surplus in **India** (mainly wheat), as a result of the estimated decrease in this year’s production and rising domestic requirements under the ongoing National Food Security Act. With regards to rice, the subregion’s largest exported cereal, exports in 2016 are forecast to increase by 3 percent compared to the previous year.

Table 13. Far East cereal production and anticipated trade in 2015/16¹
(thousand tonnes)

	Avg 5-yrs (2010/11 to 2014/15)	2014/15	2015/16	2015/16 over 2014/15 (%)	2015/16 over 5-yr avg (%)
Cereals - Exports	43 735	46 629	42 422	-9.0	-3.0
Cereals - Imports	100 461	122 808	117 133	-4.6	16.6
Cereals - Production	981 492	1 018 749	1 027 430	0.9	4.7
Rice-milled - Exports	33 275	36 094	37 179	3.0	11.7
Rice-milled - Imports	12 847	14 739	14 782	0.3	15.1
Rice-milled - Production	436 560	443 798	442 637	-0.3	1.4
Wheat - Exports	5 422	5 195	3 030	-41.7	-44.1
Wheat - Imports	36 511	39 048	39 332	0.7	7.7
Wheat - Production	239 577	252 939	250 452	-1.0	4.5

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

Figure 6. Rice retail prices in selected Far East countries



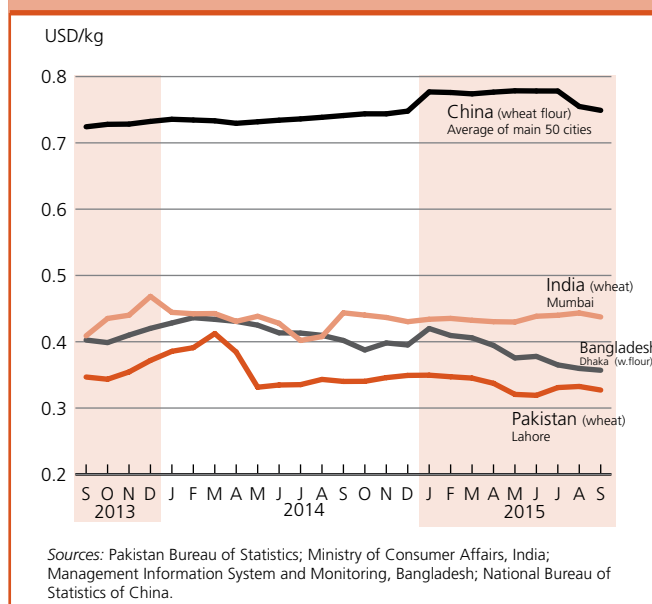
Lower anticipated shipments from India are expected to be more than compensated by an increase in exports from **Thailand** and **Viet Nam**, where they are forecast up 7 percent to 10.5 million tonnes and up 6 percent to 8.3 million tonnes, respectively, relative to their 2015 levels. Higher rice exports in 2016 are also expected from **Cambodia**, **Myanmar** and **Pakistan**.

Rice and wheat prices generally stable and below their levels a year earlier

Retail rice prices, in local currencies, followed mixed trends in the past few months but remained generally well below year-earlier levels in most countries of the subregion (with exception of Indonesia and Myanmar, where prices were at record or near-record levels). In **India**, following signs of softening in several markets in July-August, retail prices of rice remained overall stable in September, sustained by concerns over a fall in the main 2015 season paddy harvest, which has already started in some areas. Similarly, quotations remained unchanged in September in **Viet Nam** following a recent pick-up in import demand, particularly from China and the Philippines, which offset the downward pressure from the 2015 summer/autumn secondary harvest and otherwise slow trading activity. By contrast, in **Thailand**, slow export demand, combined with Government sales of old crop stocks continued to exert downward pressure on local prices, although a decline in the 2015 main season crop, to be harvested from October, is expected. In **Myanmar**, prices rose for the third consecutive month reaching record highs in September, due to losses of the 2015 main season crop, about

to be harvested, following severe flooding across the country in July and early August. Gradual resumption of rice exports in mid-September, following a suspension at the start of August to stabilize prices, provided further support. Rice exports were permitted through ports, while reports indicate that cross-border trade with China remained restricted from mid-September. Rice quotations also increased in most markets in the past several months in **Cambodia**, as a result of sustained export demand and concerns about continued dry weather affecting planting activities of the 2015 main season crop and yield potential of early-planted crops. In **China**, rice prices showed little change, as a result of overall adequate availabilities from the 2015 harvests, supplemented by relatively large imports. In importing countries, rice prices remained unchanged in **Bangladesh** and in **the Philippines**. In **Indonesia**, rice prices increased further in September and reached near-record levels. The high prices are a result of lower-than-earlier expected 2015 off-season outputs. The depreciation of the local currency, particularly in August and September, and high transport costs provided further support. Rice quotations were stable in July-August but decreased in September in **Sri Lanka**, pressured by the near-record 2015 secondary season "yala" harvest. Retail prices of wheat and wheat flour stayed generally stable and lower than a year earlier in most countries of the subregion, including in **India** and **Pakistan**, reflecting good availabilities in the markets. Moderate wheat price declines were registered in **Bangladesh** as a result of a record crop this year coupled with high import volumes since the beginning of the year.

Figure 7. Wheat and wheat flour retail prices in selected Far East countries



NEAR EAST

Above-average winter crop production forecast; ongoing conflict in parts continue to negatively impact agriculture

Harvesting of the 2015 winter wheat and barley crops is complete. Timely and abundant rains across most of the subregion contributed to production recovery compared to 2014 when drought conditions affected cereal production. The aggregate subregional cereal output (including paddy rice) is put at 75.9 million tonnes, an increase of about 8 percent and 4 percent on last year and on the five-year average, respectively.

In **Turkey**, the region's biggest producer, preliminary official forecasts indicate a 17 percent increase in cereal production in 2015 compared to last year, to about 38.4 million tonnes. The forecast includes 22.5 million tonnes of wheat (18 percent increase on last year) and 15 million tonnes of coarse grains (16 percent improvement). In the **Islamic Republic of Iran**, the second largest cereal producer in the subregion, a preliminary forecast puts the 2015 wheat production at 14 million tonnes, about the same as last year. In **Afghanistan**, reports indicate a bumper wheat harvest of 5.4 million tonnes, slightly above last year's already above-average harvest of almost 5.37 million tonnes.

By contrast, in **the Syrian Arab Republic, Iraq and Yemen**, conflict has negatively impacted crop production. Favourable weather conditions prevailed in **the Syrian Arab Republic** with abundant moisture during sowing assisting seed establishment albeit some delays in land preparation and planting were reported in parts. The continued conflict, however, resulted in great damage to agricultural machinery, irrigation systems and storage facilities together with disruptions in electricity supplies and lack of inputs (such as improved seeds, fertilizer and fuel) which, in turn, seriously hampered agricultural production. An FAO/WFP Crop and Food

Security Assessment Mission (CFSAM) report released in July 2015 indicated that area planted to cereals was very low, due mainly to insecurity. Total wheat and barley production was estimated at 3.4 million tonnes, 5 percent lower than average but 38 percent higher than the drought-stricken 2014 harvest. Similarly, security concerns and difficulties in accessing inputs affected crop production in **Iraq** where a slightly below-average cereal harvest of 4.3 million tonnes, down from 5.1 million in 2014, was gathered. In **Yemen**, insecurity, poor rains and high cost of inputs continue to negatively affect agricultural production. More than a 30 percent decline in crop production is projected in the key-cropping regions of central highlands, southern uplands and western coastal plains.

Accordingly, total subregional cereal import requirements are forecast at 62.3 million tonnes, about 8 percent less than last year but still 10 percent above the five-year average. Wheat constitutes about half of the import projections and, at almost 26 million tonnes, are expected to be about 17 percent less than last year and about the same as the five-year average. Coarse grains, mostly barley and maize, are imported mainly for animal feed.

Civil unrest affects food security of large numbers of people

In **the Syrian Arab Republic**, approximately 10.8 million people continue to be in need of urgent humanitarian assistance within the country, including more than 6.4 million people who are internally displaced. Around 4.7 million people reside in areas categorized as hard-to-reach, including at least 241 000 people whose movements are severely restricted by the conflict. As of early September 2015, over 4 million refugees are registered in the region covering Egypt, Iraq, Jordan, Lebanon and Turkey. In addition, a large share of the population lives abroad without seeking refugee registration. Although WFP continues to provide food assistance to vulnerable Syrian populations in the region, resources in host communities remain under strain.

Table 14. Near East cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	Change: 2015/2014 (%)
Near East	48.0	44.7	47.6	24.4	21.0	23.4	4.6	4.7	4.8	77.0	70.4	75.9	7.8
Afghanistan	5.2	5.4	5.4	0.7	0.7	0.7	0.8	0.8	0.8	6.7	6.9	6.9	0.5
Iran (Islamic Rep. of)	14.0	14.0	14.0	5.8	4.5	4.6	2.5	2.6	2.7	22.2	21.1	21.2	0.7
Iraq	3.3	3.5	2.8	1.2	1.2	1.1	0.5	0.5	0.5	5.0	5.1	4.3	-15.7
Syrian Arab Republic	2.4	1.9	2.4	1.1	0.8	1.1	0.0	0.0	0.0	3.5	2.6	3.6	35.5
Turkey	22.1	19.0	22.5	14.5	12.9	15.0	0.9	0.8	0.9	37.5	32.8	38.4	17.2

Note: Totals and percentage change computed from unrounded data.

In **Yemen**, the IPC indicative analysis released in June 2015 by FAO, WFP, Government and other partners, classified ten (out of 22) governorates (Saa'da, Aden, Abyan, Shabwa, Hajjah, Hodeidah, Taiz, Lahj, Al Dhale'e and Al Baida) as facing a food insecurity Phase 4: "Emergency", all affected by the ongoing armed conflict. Nine governorates were classified as facing a food security Phase 3: "Crisis", Amran, Dhamar, Sana'a, Sana'a City, Ibb, Mareb, Rayma, Al Mahweet and Al Jawf. Of the 12.9 million food insecure people across the country, about 6.1 million were in Phase 4: "Emergency", while 6.8 million were in Phase 3: "Crisis". The level of food insecurity increased by 21 percent compared to the previous year. With the rapid escalation of the conflict and insecurity, the disruption of markets, employment opportunities and rural livelihoods, the food security situation is expected to deteriorate significantly. Humanitarian assistance has been seriously constrained by lack of access and shortages of fuel and challenging security situation. Out of the total of 6.1 million people in need of emergency food assistance, only 140 000 were assisted in June and a little over 1 million were reached in July 2015.

In **Iraq**, as of June 2015, there were at least 4 million people internally displaced, of whom nearly 2 million have been displaced since January 2014. Negligible numbers of IDPs (less than 200 000 according to the International Organization for Migration, IOM) returned to their homes in Diyala, Ninewa, Salah Al-Din and Anbar. Conflict is negatively affecting food security of the Iraqi population. One out of four IDP households is using negative coping strategies. Food security conditions are likely to deteriorate with a large number of IDPs putting strain on hosting communities, in particular as a large share of IDPs have fled towards cities in the Kurdish Region of Iraq.

In **Afghanistan**, the overall food security situation has generally been stable owing to the above-average harvest. However, food security concerns remain in some areas, particularly for households displaced by conflict or natural disasters.

CIS IN ASIA⁵

Aggregate 2015 cereal output forecast to increase slightly

The 2015 cereal harvest is close to completion and the aggregate output is provisionally estimated at around 33.5 million tonnes, about 5 percent above last year's level and the average of the past five years.

Wheat production, which accounts for almost 80 percent of the aggregated cereal output, is estimated at 26.5 million tonnes, marginally up from last year's about-average level. Production of coarse grains is estimated at about 6 million tonnes, close to last year's level. The area dedicated to coarse grains has increased in the subregion over the past few years reflecting diversification of agricultural crops, but still remains small relative to wheat.

In **Kazakhstan**, the largest producer and exporter of the subregion, the aggregate cereal harvest is put at almost 17.6 million tonnes, 6 percent up from the previous year's level, reflecting a slight improvement in yields following overall favourable weather conditions. Out of the total cereal output, wheat production is estimated at 14 million tonnes, about

8 percent up from last year and the largest crop since the bumper harvest of 2011. Increased yields more than offset a contraction of over 4 percent in the area planted following a shift to alternative crops, including oilseeds and fodder crops. However, there are concerns over the quality of this year's spring crops, which account for the bulk of the cereal output, after above-average rainfall in the northern producing areas of the country delayed harvesting.

Table 15. CIS in Asia cereal production

(million tonnes)

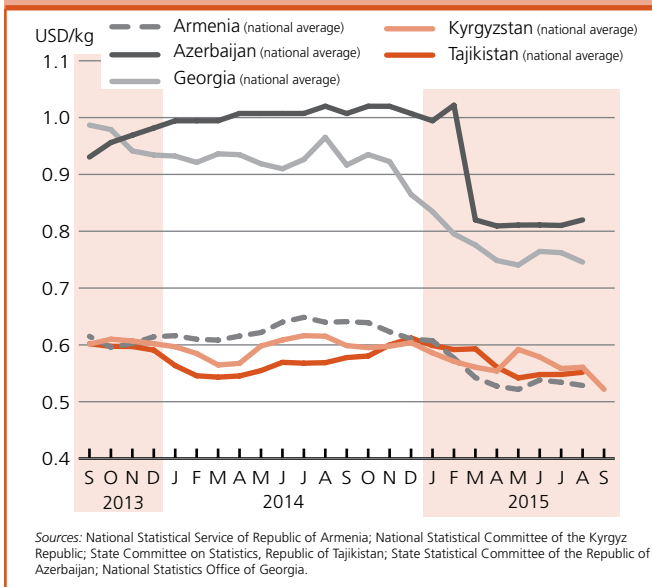
	Wheat			Coarse grains			Total cereals ¹			
	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	Change: 2015/2014 (%)
CIS in Asia	26.4	24.9	26.5	6.4	6.0	6.1	33.6	31.7	33.5	5.4
Armenia	0.3	0.3	0.4	0.2	0.2	0.2	0.5	0.5	0.6	3.2
Azerbaijan	1.9	1.7	2.0	0.9	0.8	0.9	2.8	2.5	2.9	16.1
Georgia	0.1	0.1	0.1	0.4	0.3	0.3	0.5	0.4	0.4	1.2
Kazakhstan	14.0	13.0	14.0	3.3	3.2	3.2	17.6	16.6	17.6	6.1
Kyrgyzstan	0.8	0.7	0.7	0.8	0.7	0.7	1.6	1.4	1.4	2.3
Tajikistan	0.9	0.8	0.8	0.3	0.3	0.3	1.2	1.1	1.1	1.3
Turkmenistan	1.6	1.2	1.4	0.1	0.1	0.1	1.8	1.4	1.6	14.4
Uzbekistan	6.9	7.2	7.3	0.4	0.4	0.4	7.5	7.8	7.9	0.7

Note: Totals and percentage change computed from unrounded data.

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

⁵ Georgia is no longer a member of CIS but its inclusion in this group is maintained for the time being.

Figure 8. Retail wheat flour prices in selected CIS in Asia countries



In **Azerbaijan** and **Turkmenistan**, cereal production is reported to have recovered significantly, mainly driven by higher yields compared to last year's low levels, as a result of favourable weather conditions during the cropping season.

In **Armenia**, **Georgia**, **Tajikistan** and **Uzbekistan**, normal weather conditions for rainfed crops and adequate availability of water irrigation have contributed to a slight increase of the 2015 aggregate cereal production. In **Kyrgyzstan**, despite some weather-related concerns, the 2015 cereal output is estimated at around 1.4 million tonnes.

Planting preparation for the winter crops, to be harvested in 2016, is ongoing under overall favourable weather conditions.

However, in **Kazakhstan**, the main producer of the subregion, the bulk of the crop is planted in the spring.

Cereal exports projected to increase in 2015/16 from last year's reduced level

Aggregate cereal exports for the 2015/16 marketing year (July/June), mostly wheat, are forecast at 7.3 million, some 12 percent below the five-year average, but 6 percent above the reduced level of 2014/15. The year-on-year increase is attributed to an anticipated 9 percent increase of **Kazakhstan's** wheat export availabilities, estimated at 6 million tonnes, which are traditionally exported to neighbouring CIS countries (namely Azerbaijan, Kyrgyzstan, Tajikistan and Uzbekistan) but also outside the subregion to Afghanistan.

The aggregate cereal import requirement in 2015/16 is forecast to decrease by 2 percent to 7.2 million tonnes, including about 6.5 million tonnes of wheat.

Wheat flour prices stable but higher than a year ago, except in the main exporter Kazakhstan

In most importing countries of the subregion, prices of the main staple, wheat flour, remained overall unchanged in September but above their year-earlier levels, especially in **Tajikistan** and **Kyrgyzstan**, where prices were at record or near-record highs due to the depreciation of the national currencies coupled with increased fuel prices since July.

In **Kazakhstan**, wheat export quotations reduced significantly over the past two months under downward pressure from new crop supplies entering the market, a decline in trade activity due to reduced import demand from neighbouring countries following the 2015 wheat harvests and the sharp devaluation of the Tenge against the US dollar initiated in mid-August.

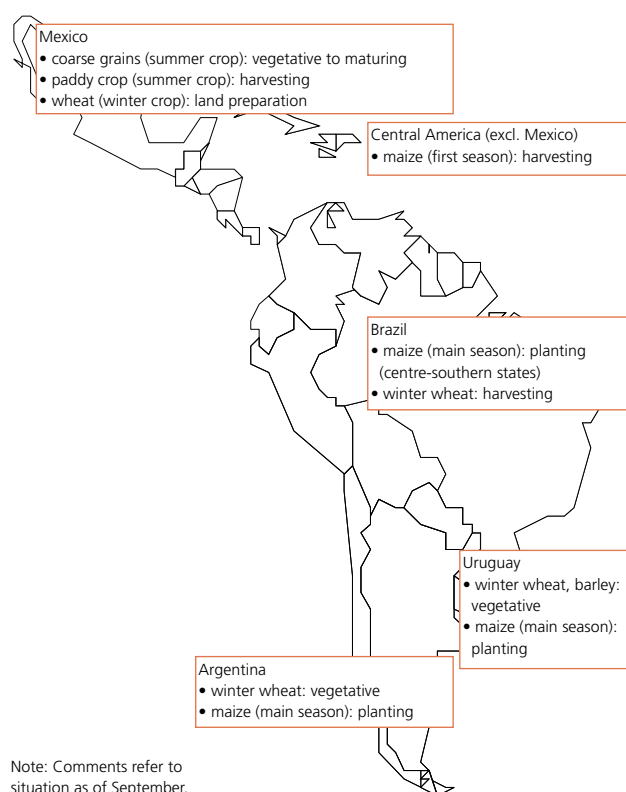
CENTRAL AMERICA AND THE CARIBBEAN

Wheat production in 2015 estimated at a near-record level

In **Mexico**, virtually the only wheat producer in the subregion, the 2015 wheat harvest is concluded. Preliminary estimates put this year's production at 3.8 million tonnes (including the autumn-winter and minor spring-summer seasons), slightly lower than previously estimated but still a near-record level. The increase reflects an expansion in the area planted, driven by high local demand.

Record 2015 maize production forecast in Mexico, but prolonged dry weather associated with El Niño to reduce outputs in most other parts of the subregion

FAO's estimate of the subregion's aggregate 2015 maize production stands at 29.7 million tonnes, almost 6 percent up from last year's output. This reflects a larger maize production in Mexico, which accounts for about 86 percent of the subregion's total maize output. Official forecasts point to a record output of close to 25.5 million tonnes, mainly due to an increase in the planted area. However, excluding Mexico, prospects for the 2015 maize crop (first and second season) are uncertain. Prolonged and severe dry weather associated with El Niño reduced maize outputs during the main first season which concluded in September, particularly in the "Dry Corridor" of **El Salvador, Guatemala, Honduras** and **Nicaragua**. Planting of the second season, which concluded in mid-September, was also affected by severe dry weather which might have reduced sowings. The El Niño phenomenon is expected to continue until early spring and, thus, could influence precipitation levels during the second



season, which might reduce yields and output. However, should conditions improve, normal second season crops may still be achieved. Thus, incorporating only the reduced outputs of the first season, FAO forecasts the aggregate 2015 maize output at 4.1 million tonnes, virtually unchanged from last year's already drought-reduced level.

Cereal imports forecast at high levels in 2015/16

Cereal imports in the 2015/16 marketing year (September/August) are forecast at 27.8 million tonnes, slightly below last year's near-record level but well above the subregion's five-year

Table 16. Latin America and Caribbean cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	Change: 2015/2014 (%)
Central America & Caribbean	3.4	3.7	3.8	35.9	36.4	38.0	3.2	3.0	2.9	42.4	43.1	44.7	3.7
El Salvador	0.0	0.0	0.0	1.0	1.0	0.8	0.0	0.0	0.0	1.1	1.0	0.8	-14.4
Guatemala	0.0	0.0	0.0	1.8	1.8	1.7	0.0	0.0	0.0	1.8	1.9	1.8	-4.6
Honduras	0.0	0.0	0.0	0.6	0.4	0.6	0.1	0.1	0.1	0.7	0.5	0.6	25.2
Mexico	3.4	3.7	3.8	30.7	31.8	33.4	0.2	0.3	0.2	34.3	35.8	37.4	4.5
Nicaragua	0.0	0.0	0.0	0.6	0.4	0.5	0.5	0.5	0.5	1.2	0.9	0.9	2.7
South America	19.2	24.7	22.6	141.2	136.8	143.9	24.3	24.8	25.6	184.7	186.2	192.1	3.2
Argentina	9.2	13.9	11.0	40.9	39.9	41.5	1.6	1.6	1.6	51.7	55.4	54.0	-2.4
Brazil	5.7	6.2	7.2	83.5	82.1	87.3	11.8	12.1	12.4	101.1	100.4	107.0	6.5

Note: Totals and percentage change computed from unrounded data.

average. The small year-on-year decrease reflects lower maize imports by Mexico. However, excluding Mexico, cereal imports for the rest of the subregion are forecast to reach a record 11.3 million tonnes, mostly maize and rice, as a result of the expected drought-reduced outputs.

Maize prices at high levels in several countries

In countries affected by unfavourable production prospects, new crop supplies from recently-gathered main season maize harvests brought little relief from upward price pressure, and white maize prices in September remained above their year-earlier levels. In **El Salvador** and **Honduras**, prices in August and September weakened somewhat with the arrival of the new crop and recent imports but the seasonal declines were limited by this year's reduced production prospects. In **Nicaragua**, by contrast, prices have continuously increased since July and in September were well above their levels at the same time last year. In response to the high price levels, various government initiatives have been implemented in these countries to prevent adverse impacts on the affected populations, including direct food assistance and provision of agricultural inputs for the ongoing second season. Moreover, in an effort to boost market supplies, governments are importing maize and/or issuing import permits. The FAO and WFP are complementing government actions with additional assistance in coordination with local authorities.

In **Guatemala**, maize prices declined in August and September and were lower than their year-earlier levels, mainly as a result of good carryover stocks from last year's good production. In **Mexico**, the subregion's main producer, maize prices increased

seasonally in the past few months also supported by a strong depreciation of the local currency.

Given the current state of local cereal supplies and prices, the situation needs to be closely monitored in the coming months. However, governments, and in particular **El Salvador**, **Nicaragua**, **Honduras** and **Guatemala**, are already providing food assistance to the most affected populations as well as agricultural inputs for the ongoing second season. Moreover, governments are importing and/or issuing import permits to mitigate the sharp increases in prices. The FAO and WFP are complementing government actions with additional assistance or in coordination with local authorities in El Salvador, Honduras and Guatemala.

SOUTH AMERICA

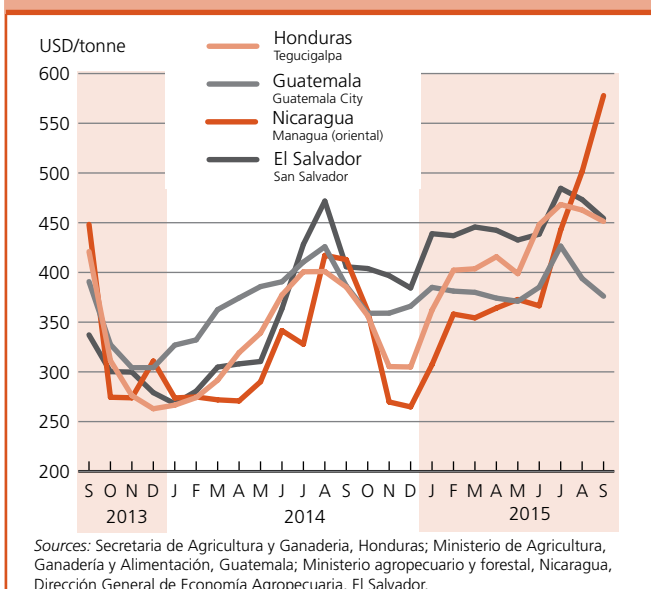
Maize production in 2015 estimated at a record level

Maize production in *South America* is estimated to have reached a record high in 2015 of almost 130 million tonnes. In **Argentina** and **Brazil**, which together account for 91 percent of the subregional cereal output, increased plantings and high yields reflecting particularly favourable weather mid-season conditions, led to record productions in both countries. Elsewhere in the subregion, production remained at high levels particularly in **Bolivia** and **Colombia**. Sowing of the 2016 crop begins in mid-October and early indications point to a reduction in plantings in response to the high levels of maize stocks and depressed prices.

Wheat crop forecast at high level in 2015 despite significant reductions in plantings in main producer Argentina

The 2015 wheat output in the subregion is forecast at 22.6 million tonnes, below last year's high level but still well above the average. In **Argentina**, which accounts for half of the subregional output, low precipitation during the planting period, which ended in August, sharply reduced sowings. Furthermore, prevailing dry weather during the season up to September is likely to have negatively impacted yields. Preliminary forecasts point to an output of 11 million tonnes, well below last year's high level and the five-year average, but still enough to meet domestic and subregional demand. In **Brazil**, which accounts for more than one-third of the subregional output, the latest official forecast points to a bumper crop of just over 7 million tonnes, mainly reflecting increased sowings due to high prices at the beginning of the season. Elsewhere in the subregion, outputs are expected to remain high, particularly in main importers, **Bolivia** and **Chile**.

Figure 9. Wholesale white maize prices in selected countries in Central America



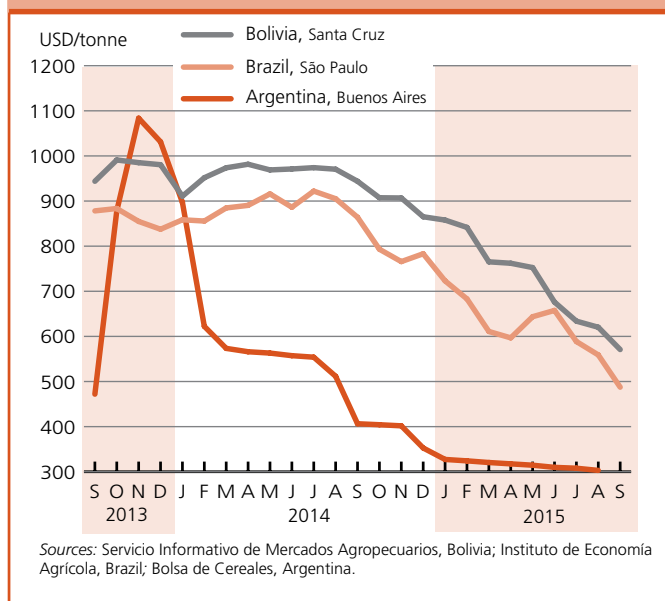
Wheat flour and maize prices generally below last year's levels

Prices of wheat flour and yellow maize followed mixed trends during July-September but were generally well below their year-earlier levels.

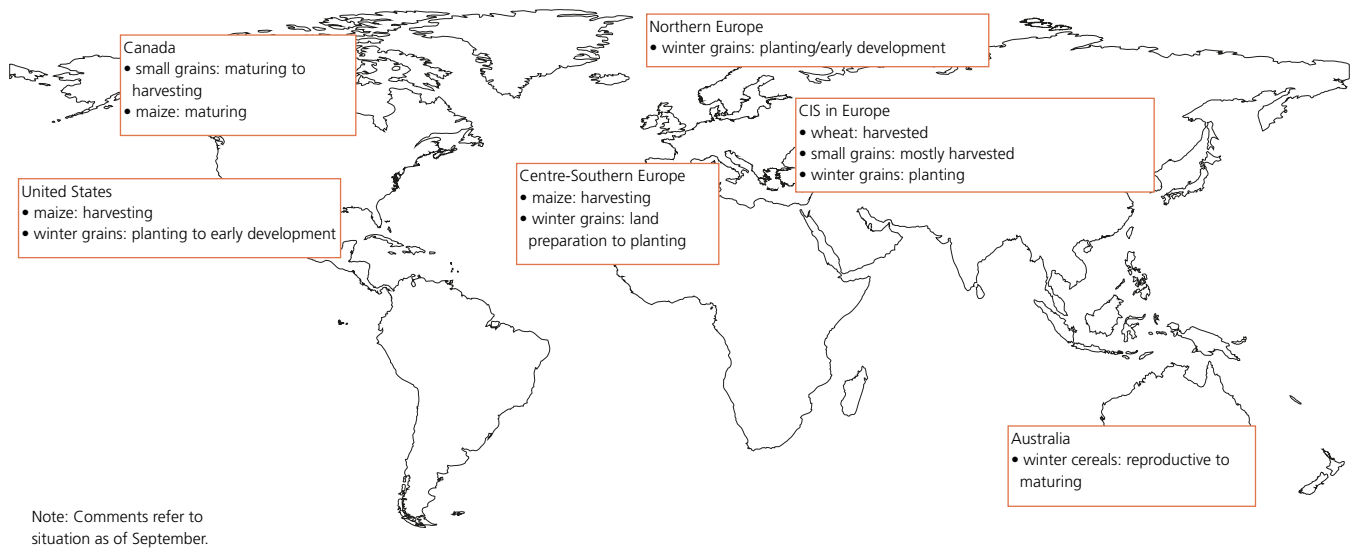
In **Argentina** and **Chile**, wheat prices increased seasonally in the past three months, however, ample carryover stocks from the 2014 bumper outputs kept prices below their year-earlier levels. In **Brazil** and **Bolivia**, prices of wheat flour declined during July-September and were lower than at the same time last year, as a result of adequate flows of imports and good prospects for the 2015 harvests to begin in the last quarter of the year. In **Colombia**, prices remained relatively stable in July-September but were higher than a year earlier mainly due to the weakness of the currency.

In **Argentina, Chile, Ecuador** and **Peru**, yellow maize prices remained generally stable in the past three months and in September were below their year-earlier levels, as a result of good 2015 outputs and ample carryover stocks. In **Brazil**, the main producer and exporter of the subregion, despite the ongoing 2015 bumper second season "*safrinha*" crop, strong export demand and a weak currency provided support in July-September and pushed prices above their year-earlier levels. Similarly, in **Colombia**, the

Figure 10. Wholesale wheat flour prices in selected countries in South America



weakening of the local currency is keeping prices above those of September last year despite ample supplies and the flow of imports.



NORTH AMERICA

United States 2015 cereal production down from last year's record but still at a good level

The United States of America's 2015 wheat output is officially estimated up by some 5 percent from last year to 58.1 million tonnes, largely reflecting an increase in the area harvested. Although, total wheat plantings were virtually unchanged from the previous year and the winter wheat planted area actually declined, better growing conditions meant abandonment was significantly reduced and, overall, an estimated 4 percent more wheat was harvested in 2015. Winter wheat planting for the 2016 crop got underway in September. Dry weather is reported in parts of the Great Plains, where rainfall has been sparse and temperatures hot, especially in the "High Plains", eastern Colorado, western Nebraska, west Kansas and the Texas panhandle. More rains are needed in these areas but there is still plenty of time for sowing as the planting window extends until late October in these areas. As of 28 September, the USDA reported that plantings were completed over 31 percent of the expected national area, just slightly below the average for this time of the year. Regarding coarse grains, the latest official estimate puts the 2015 maize output at 345.1 million tonnes, 4.4 percent below last year's record high but still a bumper level. In **Canada**, wheat production in 2015 is estimated sharply down by about 16 percent at 24.6 million tonnes: a slight increase in harvested area was more than offset by lower yields due to unfavourably dry weather early in the growing season. The maize crop, still to be harvested in Eastern Canada, is forecast to increase by about 7 percent, rising to 12.3 million tonnes.

EUROPE

European Union

Latest information points to better than expected wheat harvest but total cereal production significantly down from last year

In the **European Union (EU)** the forecast for aggregate cereal output in 2015 has been revised downward slightly since previously reported to 306.8 million tonnes, approximately 7 percent below the 2014 record output. The latest revision largely reflects the impact of hot and dry weather in August on the maize crops in the eastern parts of the region. The aggregate 2015 output of coarse grains is now forecast at about 149.3 million tonnes, some 12 percent down from last year's level. The EU's aggregate output of wheat, mostly harvested earlier in the summer, is now estimated at 154.5 million tonnes, slightly up from previous expectations and just 1.6 percent below the 2014 record level. Planting of the winter wheat crop for harvest in 2016 is already underway in some countries or due to start in October. Following the August heatwave with reduced precipitation over large areas of central and eastern Europe, soil moisture levels may be less than ideal for sowing and emergence in these areas unless good September rains have been received.

CIS in Europe

Cereal production forecast to fall in 2015, but to remain above average

In all *European CIS* countries (**Belarus, the Republic of Moldova, the Russian Federation** and **Ukraine**), harvesting of the 2015 cereals, except maize, is virtually complete. The aggregate cereal output is forecast at almost 172 million tonnes

Table 17. North America, Europe and Oceania cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	Change: 2015/2014 (%)
North America	95.6	84.4	82.8	396.3	399.4	389.5	8.6	10.0	8.6	500.5	493.9	480.8	-2.6
Canada	37.5	29.3	24.6	28.8	22.0	23.5	0.0	0.0	0.0	66.4	51.3	48.1	-6.2
United States	58.1	55.1	58.1	367.4	377.4	366.0	8.6	10.0	8.6	434.1	442.6	432.7	-2.2
Europe	225.5	248.5	247.7	252.4	268.9	240.2	4.1	4.0	4.2	482.0	521.4	492.1	-5.6
Belarus	2.0	2.5	2.4	5.3	6.0	5.8	0.0	0.0	0.0	7.3	8.5	8.2	-3.7
EU	143.6	157.0	154.5	158.9	170.2	149.3	2.9	2.9	3.0	305.4	330.1	306.8	-7.1
Russian Federation	52.1	59.7	59.8	36.6	41.7	40.0	0.9	1.0	1.1	89.6	102.5	100.9	-1.5
Serbia	2.7	2.4	2.5	6.6	7.2	6.5	0.0	0.0	0.0	9.3	9.6	8.9	-7.1
Ukraine	22.3	24.1	25.8	40.5	39.5	34.4	0.1	0.1	0.1	62.9	63.7	60.3	-5.3
Oceania	25.6	24.0	25.6	13.9	11.6	13.3	1.2	0.8	0.7	40.7	36.4	39.7	8.9
Australia	25.3	23.7	25.3	13.4	11.1	12.8	1.2	0.8	0.7	39.8	35.5	38.8	9.1

Note: Totals and percentage change computed from unrounded data.

(including 89 million tonnes of wheat, 40 million tonnes of maize and 28 million tonnes of barley), 3 percent down from last year's record but still nearly 18 percent above the previous five-year average.

In **the Russian Federation**, the aggregate cereal production, mainly wheat, is estimated at 100.9 million tonnes, slightly below the 2014 bumper production but almost 22 percent above the five-year average. Favourable spring/summer weather conditions with ample precipitation to maintain adequate soil moisture made up for a dry start of the season in the autumn and winter, particularly in southern growing areas. The wheat output remained unchanged from the 2014 bumper level, with an increase in area harvested offsetting slightly lower yields achieved this year. For barley, however, with virtually no change in the area planted, lower yields resulted in a significant 15 percent reduction in the output. By contrast, maize production increased by 15 percent to 13 million tonnes as a result of increased plantings and better yields.

In **Ukraine**, the 2015 cereal production is put at 60.3 million tonnes, 5 percent down from the 2014 record level but well above its five-year average. The wheat output, which is anticipated at a near-record level of 25.8 million tonnes following better than expected yields, increased by 7 percent on an annual basis, although the overall quality is poorer compared to 2014: about 60 percent of the output is reportedly graded as feed due to adverse weather during the cropping season, mainly in western regions. By contrast, despite higher yields, barley production decreased by 9 percent to 8.2 million tonnes as a result of reduced plantings triggered by higher input costs. For maize, the 2015 output is put at 24.5 million tonnes, down 14 percent from 2014, reflecting reduced plantings, and a hot and dry spell, mainly in the central and southern parts of the country, which contributed to lower yields.

The 2015 cereal output in **the Republic of Moldova** is put at 2.5 million tonnes, 7 percent lower than last year's above-average level as a result of drought which affected the 2015 winter wheat crop.

In **Belarus**, despite lower plantings and unfavourable weather conditions during the grain-filling stage, the 2015 cereal harvest is estimated at 8.2 million tonnes or 7 percent above the five-year average, as a result of increased yields in about 25 percent of the planted area, following the introduction of new crop varieties and the reliance on improved agricultural technologies.

Plantings of the 2016 winter cereal crops, mainly wheat and barley, are currently underway although prolonged dry weather in some regions of **the Russian Federation** and **Ukraine** is raising concerns that the planted area may be limited and soil conditions will not favour emergence. However, as the normal sowing period continues up until the end of October, there is still time for conditions to improve should rainfall arrive. Assuming favourable conditions, early indications point to a small expansion to 17.1 million hectares of winter crops in **the Russian Federation**, while in **Ukraine**, the area planted is forecast to remain at about 7.4 million hectares, similar to last year's level.

Exports in the 2015/16 marketing year forecast to decrease slightly

Aggregate cereal exports in the 2015/16 marketing year (July/June), mainly wheat and maize, are forecast at 63.4 million tonnes, 3 percent down from last year's record level but 38 percent above the average of the previous five years. The potential export surplus from the Russian Federation and Ukraine is estimated at 30.2 and 32.4 million tonnes, respectively. The 2015/16 marketing year's performance is attributed to **Ukraine's** increased wheat export availabilities, estimated at 12 million tonnes, 7 percent up from the previous marketing year. In **the Russian Federation**, wheat

exports representing about 74 percent of total exports, are anticipated at 22.5 million tonnes, up by 3.2 percent from the 2014/15 marketing year.

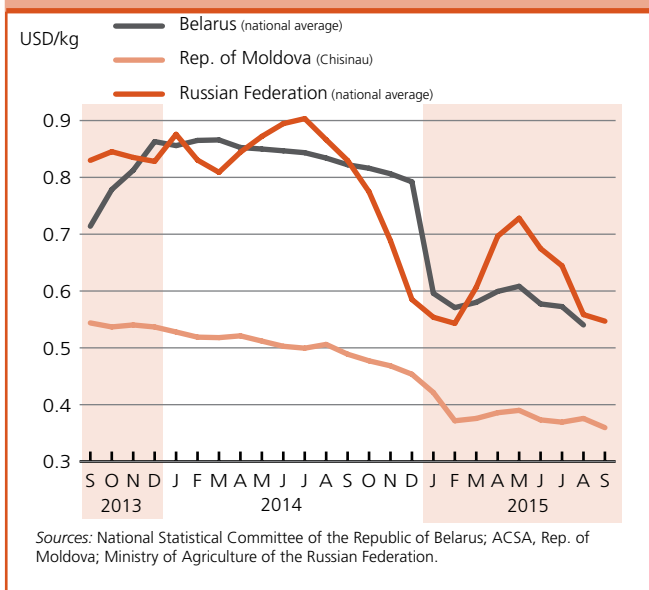
Currency fluctuations affect wheat and wheat flour prices in the domestic market

In the **Russian Federation**, export prices of milling wheat continued their decreasing trend since the beginning of the year under downward pressure from the sharp depreciation of the local currency, coupled with good supplies from the recently-concluded bumper wheat harvest. In September, export prices of milling wheat were almost one-third below their year-earlier levels. However, while the devaluation of the Rouble has been favourable for encouraging export sales, it

has put the domestic market under significant upward pressure with wheat flour quotations in September remaining well above their year-earlier values.

In **Ukraine**, domestic prices of wheat and wheat flour declined in September due to abundant supplies in the market following the 2015 bumper harvest. However, after a sharp devaluation of the national currency in past months, some strengthening in September added to the downward pressure on prices. Despite recent declines, however, prices remained well-above their year-earlier levels after sustained increases since late 2014 due to the devaluation. Export prices of maize and wheat also declined in September and were almost one-third below their year-earlier levels, in line with trends in the international market.

Figure 11. Retail wheat flour prices in Belarus, Russian Federation and Republic of Moldova



OCEANIA

Favourable conditions prevail for developing winter grains in Australia

In **Australia**, conditions remain generally favourable for the developing winter grain crops. Above-average rains in past weeks improved conditions in Western and South Australia where previously dry weather in June and July had stressed crops. By contrast, conditions deteriorated in some southern growing regions, particularly in Victoria, due to limited precipitation. Based on the latest information, the 2015 wheat crop is forecast at 25.3 million tonnes, almost 7 percent up from last year, largely reflecting better yield prospects in Western Australia and New South Wales in view of good moisture availability after ample seasonal rains so far. Early information regarding the minor summer grain crop for harvest in 2016, mainly sorghum and maize, points to a largely unchanged level of plantings. Thus, assuming a return to average yields after good levels this year, production is tentatively forecast to fall.

Statistical appendix

Table A1. Global cereal supply and demand indicators	40
Table A2. World cereal stocks.....	41
Table A3. Selected international prices of wheat and coarse grains.....	42
Table A4a. Cereal import requirements of Low-Income Food-Deficit Countries, 2014/15 or 2015 estimates.....	43
Table A4b. Cereal import requirements of Low-Income Food-Deficit Countries, 2014/15 or 2015 estimates	44
Table A5. Cereal import requirements of Low-Income Food-Deficit Countries, 2015/16 estimates.....	45

Table A1. Global cereal supply and demand indicators

	Average 2008/09 - 2012/13	2011/12	2012/13	2013/14	2014/15	2015/16
1. Ratio of world stocks to utilization (%)						
Wheat	28.0	28.9	25.4	26.4	27.9	28.9
Coarse grains	18.0	17.6	15.6	18.3	20.7	20.1
Rice	30.2	30.7	33.1	34.4	34.1	32.3
Total cereals	23.4	23.6	21.9	23.8	25.4	24.8
2. Ratio of major grain exporters' supplies to normal market requirements (%)						
	119.6	118.6	108.1	121.5	122.9	120.6
3. Ratio of major exporters' stocks to their total disappearance (%)						
Wheat	18.9	18.2	13.8	13.8	15.6	16.8
Coarse grains	12.6	11.1	8.6	11.2	13.7	12.9
Rice	23.7	25.1	27.8	28.8	23.4	17.6
Total cereals	18.4	18.1	16.7	17.9	17.6	15.7
	Annual trend growth rate 2005-2014	2011	Change from previous year			2015
			2012	2013	2014	
4. Changes in world cereal production (%)						
	2.5	4.2	-2.1	9.8	1.4	-0.9
5. Changes in cereal production in the LIFDCs (%)						
	0.2	2.0	3.9	1.2	1.7	-3.3
6. Changes in cereal production in the LIFDCs less India (%)						
	-2.1	-3.6	5.7	0.9	4.5	-3.6
	Average 2008-2012	2011	Change from previous year (%)			2015*
			2012	2013	2014	
7. Selected cereal price indices:						
Wheat	191.1	31.8	-4.8	-4.9	-6.6	-19.6
Maize	220.5	57.6	2.2	-12.9	-25.8	-14.2
Rice	247.0	6.6	-4.6	0.8	0.8	-9.2

Notes:

Utilization is defined as the sum of food use, feed and other uses.

Cereals refer to wheat, coarse grains and rice; grains refer to wheat and coarse grains.

Major wheat exporters are Argentina, Australia, Canada, the EU, Kazakhstan, the Russian Federation, Ukraine and the United States of America; major coarse grain exporters are Argentina, Australia, Brazil, Canada, the EU, the Russian Federation, Ukraine and the United States of America; major rice exporters are India, Pakistan, Thailand, the United States of America and Viet Nam.

Normal market requirements for major grain exporters are defined as the average of domestic utilization plus exports in the three preceding seasons.

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

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

*January-September average.

Table A2. World cereal stocks¹
(million tonnes)

	2011	2012	2013	2014	2015 estimate	2016 forecast
TOTAL CEREALS	525.4	548.4	530.5	595.0	642.1	637.8
Wheat	196.7	197.5	176.0	188.4	202.6	205.9
held by:						
- main exporters ²	52.3	43.8	37.8	41.8	48.1	50.3
- others	144.4	153.7	138.2	146.6	154.5	155.6
Coarse grains	199.2	205.3	194.4	236.4	269.2	267.6
held by:						
- main exporters ²	62.8	59.5	47.6	69.1	86.4	79.6
- others	136.4	145.8	146.8	167.3	182.8	188.0
Rice (milled basis)	129.4	145.7	160.1	170.3	170.3	164.3
held by:						
- main exporters ²	33.8	41.3	46.6	49.4	42.1	31.5
- others	95.6	104.4	113.5	120.9	128.2	132.8
Developed countries	160.0	154.8	119.6	141.9	169.2	167.2
Australia	11.1	9.0	6.8	6.8	6.5	6.5
Canada	11.2	9.4	8.2	15.0	9.9	6.2
European Union	32.5	32.7	25.8	33.5	43.0	42.2
Japan	5.4	5.5	6.2	5.6	5.4	5.8
Russian Federation	20.2	16.4	5.8	5.3	6.7	8.1
South Africa	4.0	2.5	2.3	1.6	3.3	2.4
Ukraine	5.9	10.4	6.1	8.3	9.7	9.4
United States	57.3	49.3	44.2	51.4	69.0	69.2
Developing countries	365.3	393.7	410.9	453.1	472.9	470.6
Asia	300.7	327.0	353.0	380.8	394.1	395.2
China	182.6	194.9	212.5	234.0	244.4	258.2
India	44.8	50.3	53.3	53.9	53.6	46.4
Indonesia	10.0	10.6	11.4	11.2	11.4	12.1
Iran (Islamic Republic of)	3.9	2.4	6.6	7.6	10.5	9.4
Korea, Republic of	3.7	3.7	3.2	3.6	3.8	4.2
Pakistan	3.4	5.2	3.5	3.9	4.4	4.1
Philippines	3.3	2.7	3.0	2.7	3.8	3.9
Syrian Arab Republic	3.8	3.5	2.6	2.1	1.3	1.5
Turkey	3.6	4.2	4.3	5.5	4.9	5.2
Africa	35.9	39.1	36.8	39.5	39.7	35.1
Algeria	4.0	4.7	5.2	6.6	5.8	5.4
Egypt	5.8	8.1	6.0	6.4	6.1	5.5
Ethiopia	1.9	2.1	1.6	2.1	2.3	1.7
Morocco	4.0	4.6	3.4	6.0	5.3	6.7
Nigeria	1.4	2.1	1.4	1.4	1.9	1.4
Tunisia	0.8	0.8	1.3	1.1	1.3	1.0
Central America	6.9	5.5	5.7	6.5	6.8	7.0
Mexico	3.8	2.3	2.7	3.3	3.6	3.8
South America	21.5	21.7	15.0	25.9	31.8	33.0
Argentina	5.4	4.8	2.1	5.9	8.5	7.9
Brazil	8.4	9.1	5.7	11.5	13.8	15.5

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

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

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

Table A3. Selected international prices of wheat and coarse grains
(USD/tonne)

	Wheat			Maize		Sorghum
	US No.2 Hard Red Winter Ord. Prot. ¹	US Soft Red Winter No.2 ²	Argentina Trigo Pan ³	US No.2 Yellow ²	Argentina ³	US No.2 Yellow ²
Annual (July/June)						
2003/04	161	149	154	115	109	118
2004/05	154	138	123	97	90	99
2005/06	175	138	138	104	101	108
2006/07	212	176	188	150	145	155
2007/08	361	311	318	200	192	206
2008/09	270	201	234	188	180	170
2009/10	209	185	224	160	168	165
2010/11	316	289	311	254	260	248
2011/12	300	256	264	281	269	264
2012/13	348	310	336	311	278	281
2013/14	318	265	335	217	219	218
2014/15	266	221	246	173	177	210
Monthly						
2013 - September	312	258	300	209	219	217
2013 - October	333	289	344	201	207	204
2013 - November	317	274	353	199	207	196
2013 - December	301	267	340	197	212	207
2014 - January	288	248	330	198	215	216
2014 - February	303	261	328	209	218	224
2014 - March	334	285	340	222	226	228
2014 - April	340	281	361	224	229	226
2014 - May	345	271	372	217	224	223
2014 - June	314	235	365	202	204	220
2014 - July	294	218	287	182	192	203
2014 - August	284	219	270	175	181	183
2014 - September	279	204	248	164	166	174
2014 - October	289	223	242	165	171	189
2014 - November	280	236	252	178	179	197
2014 - December	289	261	251	178	197	217
2015 - January	262	233	254	176	184	231
2015 - February	252	221	241	174	178	230
2015 - March	250	219	228	173	169	226
2015 - April	239	209	225	172	168	223
2015 - May	231	199	228	166	168	217
2015 - June	242	211	226	170	173	224
2015 - July	238	208	229	179	176	223
2015 - August	216	190	227	163	160	180
2015 - September	218	195	223	166	161	177

Sources: International Grains Council and USDA.

¹ Delivered United States f.o.b. Gulf.

² Delivered United States Gulf.

³ Up River f.o.b.

Table A4a. Cereal import requirements of Low-Income Food-Deficit Countries¹, 2014/15 or 2015 estimates
(thousand tonnes)

	2013/14 or 2014				2014/15 or 2015			
	Marketing year	Actual imports		Total commercial and aid	Total import requirements (excl. re-exports)	Import position ²		
		Commercial purchases	Food aid		Total commercial and aid	Food aid allocated, committed or shipped	Commercial purchases	
AFRICA		29 486.5	1 158.3	30 644.8	30 600.9	15 633.2	592.0	15 041.2
East Africa		9 058.0	726.2	9 784.2	9 683.6	5 386.6	427.6	4 959.0
Burundi	Jan/Dec	125.5	9.9	135.4	145.6	13.0	2.8	10.2
Comoros	Jan/Dec	57.7	0.0	57.7	71.0	24.8	0.0	24.8
Djibouti	Jan/Dec	156.8	8.7	165.5	151.0	130.9	1.6	129.3
Eritrea	Jan/Dec	416.7	0.0	416.7	427.0	184.0	0.0	184.0
Ethiopia	Jan/Dec	535.4	181.9	717.3	586.3	266.3	24.4	241.9
Kenya	Oct/Sep	2 555.3	108.6	2 663.9	2 957.2	1 333.7	74.3	1 259.4
Rwanda	Jan/Dec	141.3	3.4	144.7	118.7	26.9	0.0	26.9
Somalia	Aug/Jul	446.5	99.3	545.8	575.0	326.7	37.9	288.8
South Sudan	Nov/Oct	n.a.	n.a.	585.0	585.0	n.a.	n.a.	n.a.
Sudan	Nov/Oct	2 741.7	230.9	2 972.6	2 447.7	1 802.6	257.3	1 545.3
Tanzania U.R.	Jun/May	810.2	48.3	858.5	1 171.7	1 171.7	27.5	1 144.2
Uganda	Jan/Dec	485.9	35.2	521.1	447.4	106.0	1.8	104.2
Southern Africa		2 963.9	63.4	3 027.3	2 651.7	2 672.0	36.7	2 635.3
Lesotho	Apr/Mar	166.0	7.0	173.0	224.6	224.4	2.0	222.4
Madagascar	Apr/Mar	553.0	17.4	570.4	570.4	570.4	10.0	560.4
Malawi	Apr/Mar	210.0	4.1	214.1	114.2	134.7	12.7	122.0
Mozambique	Apr/Mar	1 251.0	25.0	1 276.0	1 241.0	1 241.0	2.2	1 238.8
Zimbabwe	Apr/Mar	783.9	9.9	793.8	501.5	501.5	9.8	491.7
West Africa		15 857.1	224.4	16 081.5	16 555.4	6 890.2	84.1	6 806.1
Coastal Countries		11 903.5	121.5	12 025.0	12 583.0	5 051.8	12.1	5 039.7
Benin	Jan/Dec	354.5	2.0	356.5	317.0	403.1	0.3	402.8
Côte d'Ivoire	Jan/Dec	1 756.1	4.4	1 760.5	1 720.5	892.4	5.1	887.3
Ghana	Jan/Dec	892.0	8.0	900.0	900.0	491.9	2.1	489.8
Guinea	Jan/Dec	619.9	7.6	627.5	512.0	288.8	4.6	284.2
Liberia	Jan/Dec	290.0	70.0	360.0	432.0	159.3	0.0	159.3
Nigeria	Jan/Dec	7 420.0	0.0	7 420.0	8 120.0	2 519.0	0.0	2 519.0
Sierra Leone	Jan/Dec	296.0	29.0	325.0	356.0	173.1	0.0	173.1
Togo	Jan/Dec	275.0	0.5	275.5	225.5	124.2	0.0	124.2
Sahelian Countries		3 953.6	102.9	4 056.5	3 972.4	1 838.4	72.0	1 766.4
Burkina Faso	Nov/Oct	493.6	11.8	505.4	485.0	83.4	2.4	81.0
Chad	Nov/Oct	100.0	42.2	142.2	144.6	67.9	30.0	37.9
Gambia	Nov/Oct	209.9	0.6	210.5	212.5	75.5	0.5	75.0
Guinea-Bissau	Nov/Oct	69.4	4.9	74.3	94.3	8.6	2.5	6.1
Mali	Nov/Oct	338.8	6.4	345.2	303.1	184.8	4.7	180.1
Mauritania	Nov/Oct	506.2	10.8	517.0	458.3	296.3	2.3	294.0
Niger	Nov/Oct	495.4	18.1	513.5	508.6	79.8	27.7	52.1
Senegal	Nov/Oct	1 740.3	8.1	1 748.4	1 766.0	1 042.1	1.9	1 040.2
Central Africa		1 607.5	144.3	1 751.8	1 710.2	684.4	43.6	640.8
Cameroon	Jan/Dec	886.2	2.6	888.8	827.0	463.0	11.2	451.8
Cent.Afr.Rep.	Jan/Dec	53.9	21.1	75.0	75.0	13.8	4.2	9.6
Dem.Rep.of the Congo	Jan/Dec	649.7	120.3	770.0	790.0	202.6	28.0	174.6
Sao Tome and Principe	Jan/Dec	17.7	0.3	18.0	18.2	5.0	0.2	4.8

Source: FAO

¹ The Low-Income Food-Deficit Countries (LIFDCs) group includes net food deficit countries with annual per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. USD 1 945 in 2011); for full details see <http://www.fao.org/countryprofiles/lifdc>

² Estimates based on information as of early September 2015.

Table A4b. Cereal import requirements of Low-Income Food-Deficit Countries¹, 2014/15 or 2015 estimates
(thousand tonnes)

	Marketing year	2013/14 or 2014 Actual imports			2014/15 or 2015 Import position ²			
		Commercial purchases	Food aid	Total commercial and aid	Total import requirements (excl. re-exports)	Total commercial and aid	Food aid allocated, committed or shipped	Commercial purchases
ASIA		17 710.9	548.7	18 259.6	20 830.7	20 357.8	404.2	19 953.6
Cis in Asia		4 001.9	0.2	4 002.1	4 108.9	3 935.8	0.3	3 935.5
Kyrgyzstan	Jul/Jun	565.9	0.2	566.1	574.9	560.5	0.3	560.2
Tajikistan	Jul/Jun	1 028.0	0.0	1 028.0	1 081.0	1 069.5	0.0	1 069.5
Uzbekistan	Jul/Jun	2 408.0	0.0	2 408.0	2 453.0	2 305.8	0.0	2 305.8
Far East		4 198.6	146.9	4 345.5	6 544.8	6 245.0	31.1	6 213.9
Bangladesh	Jul/Jun	3 173.4	75.6	3 249.0	5 286.0	5 286.0	12.1	5 273.9
Bhutan	Jul/Jun	82.9	0.0	82.9	86.0	86.0	0.0	86.0
D.P.R. of Korea	Nov/Oct	269.9	70.2	340.1	421.0	141.9	15.4	126.5
India	Apr/Mar	26.9	0.0	26.9	38.2	51.2	0.0	51.2
Mongolia	Oct/Sep	69.8	0.0	69.8	81.8	48.1	0.0	48.1
Nepal	Jul/Jun	575.7	1.1	576.8	631.8	631.8	3.6	628.2
Near East		9 510.4	401.6	9 912.0	10 177.0	10 177.0	372.8	9 804.2
Afghanistan	Jul/Jun	2 226.0	16.0	2 242.0	2 247.0	2 247.0	15.2	2 231.8
Syrian Arab Republic	Jul/Jun	3 263.5	316.5	3 580.0	3 830.0	3 830.0	284.2	3 545.8
Yemen	Jan/Dec	4 020.9	69.1	4 090.0	4 100.0	4 100.0	73.4	4 026.6
CENTRAL AMERICA		1 818.2	87.1	1 905.3	2 028.9	2 028.9	7.7	2 021.2
Haiti	Jul/Jun	588.0	80.1	668.1	710.1	710.1	2.5	707.6
Honduras	Jul/Jun	782.6	5.8	788.4	858.8	858.8	3.9	854.9
Nicaragua	Jul/Jun	447.6	1.2	448.8	460.0	460.0	1.3	458.7
OCEANIA		455.2	0.0	455.2	463.2	164.1	0.0	164.1
Papua New Guinea	Jan/Dec	420.2	0.0	420.2	420.2	154.6	0.0	154.6
Solomon Islands	Jan/Dec	35.0	0.0	35.0	43.0	9.5	0.0	9.5
TOTAL		49 470.8	1 794.1	51 264.9	53 923.7	38 184.0	1 003.9	37 180.1

Source: FAO

¹ The Low-Income Food-Deficit Countries (LIFDCs) group includes net food deficit countries with annual per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. USD 1 945 in 2011); for full details see <http://www.fao.org/countryprofiles/lifdc>² Estimates based on information as of early September 2015.

Table A5. Cereal import requirements of Low-Income Food-Deficit Countries¹, 2015/16 estimates*
(thousand tonnes)

	Marketing year	2014/15 Actual imports			2015/16 Import position ²			
		Commercial purchases	Food aid	Total commercial and aid	Total import requirements (excl. re-exports)	Total commercial and aid	Food aid allocated, committed or shipped	Commercial purchases
AFRICA		3 779.5	64.2	3 843.7	3 936.0	314.5	5.7	308.8
Eastern Africa		1 144.2	27.5	1 171.7	795.0	22.2	0.0	22.2
United Rep. of Tanzania	Jun/May	1 144.2	27.5	1 171.7	795.0	22.2	0.0	22.2
Southern Africa		2 635.3	36.7	2 672.0	3 141.0	292.3	5.7	286.6
Lesotho	Apr/Mar	222.4	2.0	224.4	233.0	26.3	0.0	26.3
Madagascar	Apr/Mar	560.4	10.0	570.4	478.0	7.8	4.1	3.7
Malawi	Apr/Mar	122.0	12.7	134.7	222.0	82.7	0.2	82.5
Mozambique	Apr/Mar	1 238.8	2.2	1 241.0	1 220.0	122.4	1.3	121.1
Zimbabwe	Apr/Mar	491.7	9.8	501.5	988.0	53.1	0.1	53.0
ASIA		15 752.4	315.4	16 067.8	16 073.0	256.0	33.3	222.7
CIS in Asia		3 935.5	0.3	3 935.8	4 096.2	0.0	0.0	0.0
Kyrgyzstan	Jul/Jun	560.2	0.3	560.5	580.2	0.0	0.0	0.0
Tajikistan	Jul/Jun	1 069.5	0.0	1 069.5	1 089.0	0.0	0.0	0.0
Uzbekistan	Jul/Jun	2 305.8	0.0	2 305.8	2 427.0	0.0	0.0	0.0
Far East		6 039.3	15.7	6 055.0	5 684.8	223.3	0.6	222.7
Bangladesh	Jul/Jun	5 273.9	12.1	5 286.0	4 300.0	0.0	0.0	0.0
Bhutan	Jul/Jun	86.0	0.0	86.0	79.0	0.0	0.0	0.0
India	Apr/Mar	51.2	0.0	51.2	510.0	222.7	0.0	222.7
Nepal	Jul/Jun	628.2	3.6	631.8	795.8	0.6	0.6	0.0
Near East		5 777.6	299.4	6 077.0	6 292.0	32.7	32.7	0.0
Afghanistan	Jul/Jun	2 231.8	15.2	2 247.0	2 102.0	0.0	0.0	0.0
Syrian Arab Republic	Jul/Jun	3 545.8	284.2	3 830.0	4 190.0	32.7	32.7	0.0
CENTRAL AMERICA		2 021.2	7.7	2 028.9	2 105.1	0.0	0.0	0.0
Haiti	Jul/Jun	707.6	2.5	710.1	730.1	0.0	0.0	0.0
Honduras	Jul/Jun	854.9	3.9	858.8	880.0	0.0	0.0	0.0
Nicaragua	Jul/Jun	458.7	1.3	460.0	495.0	0.0	0.0	0.0
TOTAL		21 553.1	387.3	21 940.4	22 114.1	570.5	39.0	531.5

Source: FAO

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

¹ The Low-Income Food-Deficit Countries (LIFDCs) group includes net food deficit countries with annual per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. USD 1 945 in 2011); for full details see <http://www.fao.org/countryprofiles/lifdc>

² Estimates based on information as of early September 2015

GIEWS continuously monitors crop prospects and food security situation at global, regional, national and sub-national levels and warns of impending food difficulties and emergencies. Established in the wake of the world food crisis of the early 1970's, GIEWS maintains a unique database on all aspects of food supply and demand for every country of the world. The System regularly provides policy makers and the international community with up-to-date information so that timely interventions can be planned and suffering avoided.

Crop Prospects and Food Situation is published by the Trade and Markets Division of FAO under the Global Information and Early Warning System (GIEWS). It is published four times a year and focuses on developments affecting the food situation of developing countries and the Low-Income Food-Deficit Countries (LIFDCs) in particular. The report provides a review of the food situation by geographic region, a section dedicated to the LIFDCs and a list of countries requiring external assistance for food. It also includes a global cereal supply and demand overview to complement the biannual analysis in the ***Food Outlook*** publication. ***Crop Prospects and Food Situation*** is available in English, French and Spanish in electronic format.

Crop Prospects and Food Situation and other GIEWS reports are available online at: <http://www.fao.org/giews/>. In addition, GIEWS ***Special Reports*** and ***Special Alerts***, when published, can be received by e-mail through automatic mailing lists. Subscription information is available at: <http://www.fao.org/giews/english/listserv.htm>.

This report is based on information available as of mid-September 2015.

Enquiries may be directed to:

Global Information and Early Warning System on Food and Agriculture (GIEWS)
Trade and Markets Division (EST)
Food and Agriculture Organization of the United Nations (FAO)
Viale delle Terme di Caracalla
00153 Rome - Italy
Direct Facsimile: 0039-06-5705-4495
E-mail: GIEWS1@fao.org

Disclaimer

The designations employed and the presentation of material in this information product do not imply the expression of any opinion whatsoever on the part of the Food and Agriculture Organization of the United Nations (FAO) concerning the legal or development status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries. The mention of specific companies or products of manufacturers, whether or not these have been patented, does not imply that these have been endorsed or recommended by FAO in preference to others of a similar nature that are not mentioned.

The views expressed in this information product are those of the author(s) and do not necessarily reflect the views or policies of FAO.