

FOOD SUPPLY SITUATION AND CROP PROSPECTS IN SUB-SAHARAN AFRICA

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*Countries facing exceptional food emergencies:
Angola, Burkina Faso, Burundi, Chad, Dem.Rep. of Congo, Eritrea, Ethiopia, Guinea, Kenya, Liberia, Niger, Rwanda,
Sierra Leone, Somalia, Sudan, Tanzania, Uganda*



FOOD AND AGRICULTURE ORGANIZATION OF THE UNITED NATIONS

INTRODUCTION

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

Part I focuses on the serious food supply difficulties that have emerged in parts of Sudan, the bleak food outlook for Zimbabwe and unfavourable prospects for the current "gu" season crops in Somalia. It also highlights the continuing food supply difficulties in Eritrea and parts of Kenya and Ethiopia. In addition, it highlights food supply problems in the Great Lakes region, despite favourable weather, as well as in Angola, Sierra Leone, Liberia and Guinea where international food assistance continues to be needed.

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

Part III presents the latest analysis and information on crop prospects and the food supply situation and outlook in each country. The information on food aid pledges, including triangular transactions and local purchases, and on expected arrivals, is based on data transmitted to GIEWS as of mid-July 2001 by the following donors: Australia, Belgium, Canada, China, Denmark, EC, Germany, France, Italy, Japan, Netherlands, Sweden, Switzerland, United Kingdom, United States as well as the World Food Programme. For other donors, data are based on field reports from various sources (see Tables 7 and 8).

COUNTRIES FACING EXCEPTIONAL FOOD EMERGENCIES (Total: 17 countries)

<u>Country</u>	<u>Reasons for emergency</u>
Angola	Civil strife, population displacement
Burkina Faso	Drought
Burundi	Civil strife and insecurity
Chad	Drought
Congo, Democratic Republic of	Civil strife, IDPs and refugees
Eritrea	IDPs, returnees and drought
Ethiopia	Drought, IDPs
Guinea	Civil strife, population displacement
Kenya	Drought
Liberia	Past civil strife, shortage of inputs
Niger	Drought
Rwanda	Drought in parts
Sierra Leone	Civil strife, population displacement
Somalia	Drought, civil strife
Sudan	Civil strife in the south, drought
Tanzania	Food deficits in several regions due to drought
Uganda	Civil strife in parts, drought

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

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HIGHLIGHTS

Food situation deteriorating in Sudan while continued assistance required by several countries in eastern Africa. Recent escalation of the conflict in southern Sudan, particularly in Bahr El Ghazal, has displaced a large number of people and aggravated the already precarious food situation. Two consecutive years of reduced cereal harvests and depletion of stocks have led to sharp increases in cereal prices. Consequently, the number of people in need of assistance, currently estimated at some 2.97 million people, is expected to increase. In Somalia, despite the good harvests in the last two cropping seasons, severe food difficulties are expected in parts due to poor prospects for the current main season crops. Slow recovery from a succession of droughts in recent years and long-term effects of years of insecurity have undermined households' ability to withstand shocks. In Eritrea, the food outlook remains bleak with large numbers of the displaced farmers unable to return to their farms and large tracts of land still inaccessible due to landmines. The slow response to humanitarian appeals is also a major concern with only a small fraction of the Government's appeal met so far. In Kenya, despite an overall improvement in food supply, inadequate rains in May and June, particularly in pastoral districts, have dimmed hopes of recovery from the effects of the recent devastating drought. In Ethiopia, favourable prospects for the current short rains "belg" crop, preceded by a bumper "meher" season harvest late last year, have significantly improved the food supply situation in the country. However, some 6.5 million people affected by successive droughts and the war with neighbouring Eritrea depend on food assistance. A sharp decline in grain prices in main producing areas has adversely affected household incomes and may negatively impact on farmers' production decisions in the "meher" season, which has just started. In Uganda and Tanzania, the overall food supply situation is adequate following favourable rainfall.

In southern Africa, food production has significantly declined in several countries, due to lower plantings and adverse weather. Maize output, which accounts for over 90 percent of the sub-region's total cereal production, is estimated at 13.7 million tonnes, 26 percent lower than in the previous year and well below average. In Zimbabwe, maize output is estimated at over one-quarter below the level of 2000, reflecting lower plantings and reduced yields. As a result, the overall food supply situation is expected to be very tight as the country faces severe shortages of foreign exchange, which constrain commercial imports. In Swaziland and Lesotho, import requirements have increased sharply compared to last year due to large falls in 2001 cereal production. Also Zambia, Namibia and Botswana have suffered significant falls in coarse grain production. By contrast, this year's cereal production in Angola is estimated to be significantly above last year due to improved IDPs' access to land, increased agricultural inputs distribution and generally favourable weather. However, over 1.3 million internally displaced people need emergency food assistance.

Several countries in western Africa face food supply difficulties resulting from civil strife or localised weather adversities in 2000. The food situation is particularly tight in parts of Burkina Faso, Chad and Niger following reduced harvests. In Guinea and Sierra Leone, fighting in border areas affected agricultural and marketing activities and caused new waves of population displacement. Food difficulties persist in Liberia, as agricultural production has not yet fully recovered from the long years of civil strife.

Despite favourable weather conditions, food emergencies persist in the Great Lakes region due to conflicts. In the Democratic Republic of Congo, the food and nutrition situation of an estimated 2 million internally displaced people is very serious but insecurity continues to hinder provision of humanitarian assistance. However, some improvement in security conditions has allowed the resumption of commercial traffic between Kinshasa and Kisangani on the River Congo after three years of closure. Elsewhere in the Great Lakes Region, increased insecurity in Burundi has displaced large numbers of rural people, disrupting food production and marketing activities, while in Rwanda the security situation remains precarious in parts.

Sub-Saharan Africa's cereal import requirements are set to remain high in 2001/02, reflecting large shortfalls in production in southern Africa.

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PART I: OVERVIEW

Adverse weather, persistent civil strife and insecurity have undermined food production in several parts of sub-Saharan Africa. In the Horn of Africa, the spectre of another drought is haunting several countries. In Sudan, severe food shortages due to drought have been aggravated by the recent flare-up in the long-running civil conflict that has displaced a large number of people. In Somalia, serious food shortages are anticipated due to poor rains in the current "gu" season, particularly in rainfed areas of Gedo, Hiran, Bay and Bakool. In southern Africa, several countries have experienced sharp falls in cereal production as a result of floods and prolonged dry conditions during the growing season. Elsewhere, despite favourable weather conditions for food production, civil conflicts continue to disrupt agricultural production in Angola, Burundi, DR Congo, Guinea, Liberia and Sierra Leone.

EMERGENCY FOOD ASSISTANCE CONTINUES TO BE NEEDED IN PARTS OF EASTERN AFRICA

Poor rains and escalation of long-running conflicts in parts of eastern Africa have dimmed earlier optimism of a strong recovery from the impact of the recent severe drought in the sub-region.

In **Sudan**, food supply prospects are unfavourable due to inadequate rains and population displacements following a recent upsurge in the long-running civil conflict. The food situation is particularly grave in Bahr-El-Ghazal where escalation of the civil conflict was most pronounced. Elsewhere, poor harvests for two consecutive years and consequent depletion of stocks have led to a sharp increase in cereal prices, reducing access to food for large segments of the population. Purchasing power, particularly for pastoralists, has been seriously eroded. With coping mechanisms stretched to the limit, many farmers and other vulnerable groups have migrated in search of work and food. The situation is likely to worsen in the coming months with the lean season just starting and only a fraction of the appeal for international food assistance pledged so far. The population most affected by last year's drought is mainly located in Darfur and Kordofan, Bahr el Ghazal, Bahr el Jebel, East Equatoria, Jonglei, Red Sea and Butana province in Gezira State. Latest estimates put the number of people in urgent need of food assistance in Sudan at some 2.97 million affected by drought and/or civil war. There is an urgent need for more food aid pledges and support for logistics if starvation is to be avoided.

In **Somalia**, prospects for the 2001 main "gu" cereal crops are poor due to insufficient rains. Most affected regions include rainfed areas of Gedo, Hiran, Bay and Bakool. Despite the good harvests in the last two cropping seasons, severe food difficulties may emerge reflecting slow recovery from a succession of droughts in recent years and long-term effects of years of insecurity. Moreover, further injections of new currency into the market with the attendant depreciation of the Somali Shilling have caused sharp increases in prices of food items, eroding the purchasing power of large sections of the population. The ban of livestock imports from eastern Africa by countries along the Arabian Peninsula due to a Rift Valley fever has also caused substantial losses of income and affected the livelihoods of a large number of pastoral households. In response to anticipated poor harvests, dwindling stocks and inadequate relief food in the pipeline, WFP and other humanitarian agencies have appealed to the international community for additional food assistance. Earlier in the year a UN inter-agency appeal was launched for US \$130 million, to support livelihoods and assist the country's recovery.

In **Eritrea**, the food outlook remains bleak with a large number of the displaced farmers unable to return to their farms and large tracts of land still inaccessible due to landmines. The spring (short) rains from March to May, which are beneficial for early land preparation and regeneration of pastures, have also failed in many areas. Prices of cereals have increased significantly in recent months, reflecting short supplies. The slow response to humanitarian appeals is a major concern with only a small fraction of the Government's appeal met so far. Overall, more than one million people are estimated to have been displaced by the war with Ethiopia. By early June only 35 000 internally displaced persons (IDPs) had been resettled.

In **Kenya**, the overall food supply situation has improved considerably following favourable short rains harvests and improved pasture in several central and western pastoral districts. However, most pastoral districts in the east and north have yet to recover with only scanty rainfall received so far. The severe drought in 1999/2000 seriously undermined the food security of 4.4 million people, particularly in pastoral areas, and resulted in a massive relief operation.

In **Ethiopia**, favourable current "belg" rains and last year's bumper "meher" cereal and pulse crop, have improved the overall food supply situation in the country. However, the sharp decline in grain prices in main

producing areas has reduced household incomes and may negatively impact on farmers' production decisions in the main season, which has just started. The Government and donors have made some efforts to support local markets through purchases of grain, but with limited funding available the efforts have not been successful in raising cereal prices.

In the pastoral areas, the current main season rainfall was late by about a month and ended early. Poor rains in parts of Gode, Liban, Werder and Afder Zones, the worst affected areas by last year's severe drought, are particularly worrying. Recent nutritional surveys have shown high levels of global acute malnutrition, indicating continuing food shortages. In the country as a whole, some 6.5 million people, affected by drought and the war with neighbouring Eritrea, depend on food assistance.

In **Tanzania** and **Uganda**, the overall food supply situation has improved following recent good harvests and improved pastures. However, food difficulties remain in parts of Uganda, mainly due to insecurity.

CEREAL PRODUCTION SHARPLY DOWN IN SOUTHERN AFRICA FOLLOWING SEVERE FLOODS AND DRY SPELLS.

A combination of prolonged dry spells, severe floods and disruption of farming activities in parts has resulted in significant production shortfalls in southern Africa.

In **Zimbabwe**, the food supply situation in marketing year 2001/02 (April/March) gives serious cause for concern due to sharply reduced cereal harvest and the country's current economic difficulties. A recent FAO/WFP Crop and Food Supply Assessment Mission estimated this year's main maize crop at some 1.5 million tonnes, 28 percent lower than last year and one-quarter below the average of the past five years. The recently sown 2001 wheat crop is also forecast at the same reduced level of 2000. Cereal production has been affected by a sharp decline in the area planted on the large scale commercial farms due to disruption by land acquisition activities, and in the communal farm sector by payment delays by the Grain Marketing Board. A severe mid-season dry spell and heavy rains that resulted in localized floods also reduced yields in several areas, particularly in the south.

The food supply situation is tight for large sections of the population. In rural areas, the most affected are farmers who harvested a poor crop due to the dry spell in January and excessive rain in February-March, as well as those who have not yet recovered from the impact of cyclone Eline last year, mainly in the southern parts. Farm workers who lost their jobs as a result of farm invasions or land acquisitions, and vulnerable populations in the chronically food insecure areas of the east and the south of the country also face a difficult food situation. In urban areas, declining real incomes due to high inflation, rising cost of food and non-food items and acute shortages of fuel due to scarcity of foreign exchange, are seriously affecting low-income households. Business closures are swelling unemployment, further eroding the purchasing power and access to food for large sections of the population.

In **South Africa**, latest estimates put the 2001 maize harvest at 7.2 million tonnes, which is one-third below the bumper level of last year and well below the average of the last five years. Production was adversely affected by a reduction in the planted area in response to low domestic prices, coupled with a prolonged dry spell in January and first half of February in the main growing areas that sharply reduced yields. At this forecast production level and taking into account carryover stocks, maize supplies in marketing year 2001/02 are sufficient to cover domestic requirements, leaving an exportable surplus of around 500 000 tonnes. This is substantially lower than in 2000/01 and is insufficient to cover the sub-region's increased maize import needs. Part of the sub-region's import requirement will, therefore, have to come from overseas.

In **Lesotho**, the 2001 cereal production was sharply reduced by adverse weather. An FAO/WFP Crop and Food Supply Assessment Mission in May estimated this year's cereal harvest at 80 000 tonnes, some 55 percent lower than in 2000 and 60 percent below the average of the last five years. Crops were severely damaged by frost in early January, which was followed by erratic rains, a heat wave and a hailstorm in parts. As a result of the reduced harvest, cereal imports in marketing year 2001/02 (May/April) are estimated to increase significantly to 332 000 tonnes. While most of this requirement is forecast to be covered by commercial imports, food difficulties are anticipated at household level. In particular, the food situation is expected to be tight in the mountain districts where frost damage was most severe and many households suffered crop failure. While a large proportion of the rural families have adequate coping means to get them through to the next harvest, about 10 to 15 percent of poor households in the most affected districts of Mokhotlong, Thaba-Tsek, Mophale's Hoek and Quthing were estimated as extremely vulnerable and in need

of food and seed assistance in 2001/02. The Mission recommended that a rapid survey be undertaken in these areas to identify, quantify and precisely target the at-risk households for assistance.

In **Swaziland**, a sharply reduced cereal harvest for the second consecutive year has resulted in further deterioration of the food supply situation in the country. An FAO/WFP Crop and Food Supply Assessment Mission in May estimated the 2001 maize output at 73 000 tonnes, close to the poor level of 2000 and one-third below the average of the last five years. Minor foodcrops like sorghum, sweet potato, beans and cowpeas were also lower than average. The decline in this year's food production mainly reflects a mid-season dry spell and a heat wave that severely affected crop yields.

Cereal import requirement in marketing year 2001/02 is estimated at 123 000 tonnes, well above the previous year's level. While most of these requirements are likely to be covered on commercial basis, food difficulties are anticipated at household level, particularly in the Middle and Lowerveld provinces, the most affected by the adverse weather. A food needs assessment is being conducted by the Government and NGOs in drought affected areas. Government and external assistance targeted to the most vulnerable population groups should prevent acute food shortages over the coming months.

In **Malawi**, widespread excessive rains during the season, which resulted in severe floods in parts, significantly reduced yields of the main food crop, maize. In southern and central parts, the crop was also affected by dry weather in January. Latest official estimates indicate a maize output close to 1.9 million tonnes, one-quarter lower than the bumper harvest of last year and below average. At the estimated level, production is still sufficient to meet domestic requirements in 2001/02 (May/April) but an exportable surplus will not be available this year. By contrast, production of non-cereal crops, mainly roots and tubers, is estimated to be satisfactory. The overall food supply situation is anticipated to remain satisfactory.

At the household level, however, severe flooding during the cropping season affected 561 205 persons and resulted in serious damage to crops. As a result, emergency food assistance is being provided by WFP to 208 500 most affected people. Seeds and other farm inputs for planting next season are also being distributed by the Government with the assistance of FAO and humanitarian agencies, particularly in the worst affected districts of Chikwawa and Nsanje. FAO is also providing vaccination/treatment to animals to combat diseases.

In **Angola**, an improved 2001 cereal crop has been harvested, mainly due to an increase in the area planted. This reflects somewhat better security situation at planting time and progress in allocating land to IDPs for cultivation within secure areas. Increased seed and tools distributions and generally favourable weather conditions also benefited crop production. An FAO/WFP Crop and Food Supply Assessment Mission in May 2001 estimated the cereal harvest at 577 000 tonnes, an increase of 15 percent over last year.

Although the increased foodcrop production will lead to a better overall food supply, the situation will remain difficult for increasing numbers of internally displaced people (IDPs), currently estimated at 2.7 million. Despite the increased crop cultivation by IDPs, very few have been able to return to their homes and movement of people within the country continues to be seriously restricted. Insecurity and poor road conditions continue to hamper humanitarian assistance.

Elsewhere in southern Africa, the prolonged mid-season dry spell followed by excessive rains also adversely affected crops in Botswana, Namibia and Zambia, where cereal outputs are estimated to have been significantly reduced. In Zambia, maize output is estimated to have declined by 30 percent from last year. The Government has launched an appeal for food assistance for 2 million people facing serious food shortages. Cereal import requirements are forecast to rise sharply from the 2000 levels. By contrast, in Mozambique despite localized flooding and dry weather in southern parts, good rains in the main growing areas resulted in an increase in this year's food production.

CIVIL STRIFE AND INSECURITY CONTINUE TO UNDERMINE FOOD SECURITY IN THE GREAT LAKES REGION

In **Burundi**, a UN mission to the country last June estimated that over half a million people have been forced from their homes by the fighting in the country and are in urgent need of increased humanitarian assistance. Thus, despite an improved second season crop due to generally favourable weather, as well as a satisfactory first season harvest early in the year with cereal and pulse production up by 15 and 10 percent respectively on last year, food security remains precarious for large sections of the population, particularly the internally displaced. The nutritional and health situation of this group gives cause for major concern. Despite the seriousness of the situation, pledges for humanitarian emergency assistance stood, by June 2001, at only 15 percent of the estimated requirements for the year. Additional contributions from the international community are urgently needed to alleviate human suffering.

In **Rwanda**, the food security situation is expected to improved further, reflecting a satisfactory harvest of the 2001 B season crops. The first season was also favourable. As a result of increased food supplies, prices of basic staples have declined markedly in the past month in most of the areas affected by dry weather last year. However, plantings were reduced due to shortages of seeds following a succession of poor harvests.

In the **Democratic Republic of Congo**, despite generally favourable rains during the 2001 B season, food production is anticipated to fall in several areas, reflecting insecurity, seed shortages and the extensive damage to cassava, a major staple, by the mosaic virus.

Overall, the food supply situation remains extremely precarious for large sections of the population affected by the persistent civil war. It is estimated that at least 2 million people are internally displaced by the conflict, particularly in eastern areas where violence has escalated in Butembo, Beni, Bunia and Kasindi in recent weeks. While the nutritional and health conditions of the IDPs are extremely dire, distributions of emergency humanitarian assistance remains constrained by insecurity.

However, a degree of improvement in the security situation has allowed the resumption of commercial traffic between Kinshasa and Kisangani via River Congo. After three years of closure, the first boat arrived in Kinshasa in June escorted by UN peace-keeping troops. The United Nations Mission in the Democratic Republic of Congo (MONUC) has also launched a US\$1 million initiative to implement small projects in the area of basic needs, including agricultural rehabilitation, as part of the peace process.

TIGHT FOOD SUPPLY SITUATION IN PARTS OF WESTERN AFRICA

In the **Sahelian countries**, the food supply situation is tight in several locations in Burkina Faso, Chad and Niger following poor harvests. In Burkina Faso and Niger, substantial government and donor interventions (sales at subsidised prices or limited free distributions) have improved food supplies. Cereal prices, which had increased significantly in early 2001, stabilized (or even decreased slightly in northern Burkina Faso) in May/June, at a time when they usually increase. In Chad, by contrast, food assistance remains well below requirements and the food supply situation is deteriorating. Food needs assessment missions in the affected areas organised by CILSS with the participation of FEWS-NET, USAID-OFDA, WFP and FAO, are planned for late July in Chad and Mauritania and in August for Burkina Faso and Niger. In the other countries of the Sahel, markets are generally well supplied.

The 2001 rainy season is now well established, except in Chad. Rains started on time, with the onset even somewhat earlier than usual Niger. Plantings are in progress and in some areas of Burkina Faso, Mali, Niger and Senegal crops are generally emerging satisfactorily. Erratic rains in Chad are likely to cause moisture stress for recently planted coarse grains or necessitate re-plantings. Pastures are starting to regenerate and the pest situation is mostly calm.

In **Liberia**, food supply difficulties persist as domestic production has not fully recovered from several years of civil war. Transport infrastructure is very poor and this hampers marketing of food and other local products. Post-harvest losses are reported to be high. Rebel activity resumed recently in Lofa county, one of Liberia's main rice producing areas. Farming activities were disrupted during the planting period and thousands of people have been displaced. An official ban on travel which had for more than a month prevented relief agencies from helping IDPs in Bellefanai and Gbalatuah, areas close to the border with Lofa county, has been lifted, enabling WFP to distribute food to some 6 000 IDPs in the two locations in late June. Bi-monthly

food assistance is also provided to all registered IDPs in Bong and Grand Cape Mount Counties, in collaboration with the National Red Cross Society and ACF.

Precipitation has generally been widespread and abundant since mid-April and the rice crop is developing satisfactorily. Input distribution was undertaken by several NGOs in various areas. With the exception of Lofa County, relative peace in most areas has exerted a positive influence on farming activities. Cultivated area and rice production should increase if weather conditions remain favourable.

In **Sierra Leone**, as a result of low food production in 2000 and transport problems, the food supply situation remains tight in 2001. WFP plans to distribute more than 50 000 tonnes of food to an estimated 544 000 people during 2001, including IDPs, recent returnees and 200 000 beneficiaries of special programmes for vulnerable groups such as schooling and malnourished children. NGOs also plan to distribute around 37 000 tonnes during 2001. The Government has launched a resettlement programme in Freetown, Port Loko, Kenema and Pejehun districts. A Disarmament, Demobilisation and Reintegration Programme also started in May for ex-combatants who surrender their arms. About 60 000 Sierra Leonean refugees have recently returned from Guinea, forced by an outbreak of fighting in that country.

Planting of the rice crop started in mid-April with the onset of rains, and growing conditions are favourable so far. Rice production should increase this year, reflecting increased planted area by returning farmers and improved conditions for distribution of inputs. However, the country remains heavily dependent on food aid.

In **Guinea**, the overall food supply situation is satisfactory and markets are generally well supplied following a good harvest in 1999 and a record crop in 2000, except in the south-east where rebel incursions from Sierra Leone have severely affected agriculture and marketing activities. There are more than 400 000 refugees from Liberia and Sierra Leone and about 150 000 IDPs in the country. Voluntary repatriation of those who wish to return to Sierra Leone is facilitated and a transit camp has been established in Conakry to handle repatriation. Since September 2000, more than 55 000 Sierra Leoneans have returned from Guinea.

SUB-SAHARAN AFRICA'S IMPORT REQUIREMENTS AND FOOD AID NEEDS EXPECTED TO REMAIN HIGH

Cereal import requirements in sub-Saharan Africa in 2001 are set to remain high, reflecting mainly continued drought conditions in parts of eastern Africa, displacement due to escalation of conflicts and effects of adverse weather in southern Africa. GIEWS latest estimates of 2000 production and 2000/01 import and food aid requirements are summarized in Table 2. The total food aid requirement is estimated at 2.7 million tonnes, almost the same as actual imports in 1999/2000. Total food aid pledges for 2000/01, including those carried over from 1999/2000, amount to 1.5 million tonnes of which 0.95 million tonnes have been delivered so far.

AREAS OF PRIORITY ACTION

There are clear indications of a deterioration in the food supply situation in Sudan and Somalia, while food supply difficulties persist in several countries of sub-Saharan Africa. In southern Africa, the food outlook is unfavourable, particularly in Zimbabwe. Recent escalations of conflicts in Angola, Burundi, Liberia and Sudan have displaced large numbers of rural people, while insecurity continues to hamper food production in DRC, Sierra Leone and Guinea. The attention of the international community is drawn to the following priority areas requiring action:

First, all possible efforts should be made to arrest the deteriorating food situation in Sudan and Somalia.

Second, Zimbabwe's food outlook to the next harvest is bleak and calls for contingency plans for food assistance in the coming months.

Third, food assistance is still needed in several countries of sub-Saharan Africa affected by civil strife or adverse weather, including Angola, Burundi, DR Congo, Eritrea, Kenya, Liberia and Sierra Leone.

Fourth, increased and sustained assistance is needed for countries where security conditions have improved following devastating conflicts, including Liberia, Rwanda, Republic of Congo and Sierra Leone.

PART II : POSITION BY SUB-REGION

The harvesting of the 2000/01 coarse grain crops is virtually complete in southern Africa. In several countries of eastern Africa, the main season crops are either being harvested or are in the ground, however, the planting season of the main cereal crops has started in Ethiopia, Eritrea and Sudan. Coarse grain crops are maturing in parts of the coastal countries of western Africa and are at flowering or grain formation stages in parts of central Africa. In the Sahelian countries of western Africa main season cereal crops have just been planted.

Cereal Crop Calendar

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

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

In **eastern Africa**, the outlook for the 2001 foodcrops is mixed. In Somalia, prospects for the main Gu cereal crops are poor reflecting erratic rains; production of sorghum is forecast to be less than half of the post-war average and just one-third of last year's good crop. In Sudan, early prospects for the 2001 main season cereal crops now being planted are unfavourable due to delayed rains. In southern parts, where crops are nearing maturity, the outlook is not promising due to an escalation of the civil conflict which has displaced large numbers of farmers, coupled with insufficient rains. In Eritrea, the outlook for the 2001 main season cereal and pulse crops is also unfavourable, reflecting failure of the spring (short) rains from March to May that are necessary for early land preparation and regeneration of pastures. Furthermore, in the main producing regions of Gash Barka and Debub, only a fraction of the war displaced farming population have returned to their villages so far and large tracts of land are still inaccessible due to landmines. In Kenya, prospects for the 2001 main season cereal crops are uncertain. Abundant precipitation in April was followed by drier than normal May and June, affecting growing crops. However, crop conditions remain favourable in the key producing areas of the Rift Valley, Western and parts of Nyanza and Central Provinces. But parts of Eastern, most of Coast and lowland areas of Central Provinces have seen deteriorating crop conditions, particularly for the maize crop that has exhibited severe moisture stress. Initial forecasts for the maize crop of about 2.34 million tonnes may now be difficult to achieve. In Ethiopia, the secondary Belg crop, being harvested, is favourable reflecting generally adequate rains. Early prospects for the 2001 main season "meher" crops are generally favourable but largely depend on favourable weather conditions until harvest in November/December. Elsewhere, the outlook is generally encouraging in Uganda and Tanzania with adequate rainfall received so far.

In Rwanda and Burundi, the overall food availabilities have improved with increased foodcrop production in 2001. However, severe food difficulties remain for large sections of the population.

The aggregate cereal import requirement of the sub-region in marketing year 2000/01 is estimated at 5.7 million tonnes. Commercial imports are estimated at 3.9 million tonnes and the food aid requirements at some 1.8 million tonnes. Food aid pledges reported to GIEWS as of mid-July amount to 0.9 million tonnes, however, only 500 000 tonnes have been delivered so far.

In **southern Africa**, harvesting of the coarse grains and planting of the wheat crop are almost complete. The aggregate 2001 coarse grain production of the sub-region is estimated to be sharply reduced reflecting a decline in the area planted, coupled with reduced yields due to a mid-season dry spell and excessive rains.

Including a forecast for the wheat crop, which has just been planted, latest forecasts indicate aggregate 2001 cereal production of 18.7 million tonnes, against 24.3 million tonnes last year. Maize, the main staple, is estimated over one-quarter down on last year. In South Africa, maize production is forecast at 7.2 million tonnes, one-third lower than in 2000. Despite large carryover stocks, the country's exportable surplus for marketing year 2001/02 is not expected to cover import requirements in the sub-region. FAO/WFP Crop and Food Supply Assessment Missions to Zimbabwe, Swaziland and Lesotho in May have confirmed earlier unfavourable production forecasts. In Zimbabwe, maize output is estimated over one-quarter below the level of last year as a result of both lower plantings and yields. The overall food supply situation is expected to be very tight as the country faces severe shortages of foreign exchange, which constrain commercial imports. At household level, food difficulties are anticipated in southern and eastern parts, where the cereal harvest was sharply reduced. In Lesotho, cereal production is forecast at 80 000 tonnes, about 55 percent below last year and 60 percent below the last five years average. As a result, cereal import requirement for 2001/02 (April/March) is estimated substantially higher than average. In Swaziland, cereal production is forecast at 74 000 tonnes, around last year's level but 66 percent of the last five years average. Import requirements have doubled from last year and the food supply position is anticipated to be tight. Sharply reduced coarse grain crops were also gathered in Zambia, Namibia and Botswana where production was affected by adverse weather. In Malawi, maize output is estimated close to 1.9 million tonnes, 24 percent below the bumper level of the previous year. However, the country will remain self-sufficient in maize. By contrast, in Angola a recent FAO/WFP Crop and Food Supply Assessment Mission estimated the 2001 cereal production significantly above last year due to improved IDPs' access to land, increased agricultural input distribution and generally favourable weather. However, over 1.3 million internally displaced people are in need of emergency food aid. In Mozambique, the maize crop is officially estimated 12 percent higher than last year, at 1.14 million tonnes, due to larger plantings and overall favourable weather, despite excessive rains in northern and central parts and drought in southern provinces.

The cereal import requirement of the sub-region in marketing year 2001/02 is estimated at 4.07 million tonnes, a substantial increase from the previous year. Commercial imports are forecast at 3.68 million tonnes and the food aid requirement at 389 000 tonnes. Food aid pledges reported to GIEWS as of mid-July amount to some 163 000 tonnes, leaving an uncovered requirement of 216 000 tonnes.

In **western Africa**, rains started in March or April in the south of the countries along the Gulf of Guinea, allowing planting of the first maize crop. Precipitation was generally adequate in May but decreased in early June and was well below average during the second dekad of June, picking up again in the third dekad. Agricultural activities have been disrupted by civil conflicts in border areas of Guinea and Sierra Leone, as well as in Lofa county in Liberia. The 2000 aggregate cereal output for the eight coastal countries along the Gulf of Guinea (Benin, Côte d'Ivoire, Ghana, Guinea, Liberia, Nigeria, Sierra Leone and Togo) is estimated at around 27.1 million tonnes compared to 26.2 million tonnes in 1999. Liberia and Sierra Leone remain heavily dependent on international food assistance despite some improvement in food production.

In the Sahel, the growing season is now well established, except in Chad. Plantings have been undertaken satisfactorily as seed availability was generally adequate, except in some areas of Burkina Faso, Chad and Niger affected by poor crops in 2000. Growing conditions are generally favourable so far. Rains started in early April in the extreme south of Chad, in mid-April in southern Burkina Faso and Mali, in May in Niger, in early June in Guinea Bissau, the south-east of Senegal and the east of The Gambia and in late June in southern Mauritania. In late June, rains covered the whole of Senegal and The Gambia. Rains are expected shortly in Cape Verde. This corresponds to the normal pattern in the Sahel, except for Niger where the onset was somewhat earlier than usual. In early July, above-normal rains were received in Guinea Bissau, The Gambia, southern Mauritania, western Mali and most parts of Burkina Faso, Niger and Senegal. Precipitation was less abundant in central and southern Mali and below normal in central Chad.

Crops are generally performing satisfactorily in Burkina Faso, Mali, Niger and Senegal. Erratic rains in Chad are likely to cause water stress to recently planted coarse grains or necessitate replantings. Pastures are starting to regenerate and the pest situation is mostly calm.

In the countries along the Gulf of Guinea, the food supply situation is expected to remain satisfactory through the 2001 marketing year, except in Guinea, Liberia and Sierra Leone where production and marketing activities have been affected by current or past civil strife. In the Sahel, the food supply situation is expected to be stable until the next harvest from October, except in several areas of Burkina Faso, Chad and Niger which gathered poor crops. As a result, cereal prices increased significantly in those areas, but due to substantial cereal distributions or sales at subsidised prices by the governments or donors, cereal prices have stabilized or even slightly decreased in May/June in Burkina Faso and Niger. In Chad, food assistance

remains well below requirements and the food supply situation is deteriorating. Food needs assessment missions to the affected areas organized by CILSS, with participation of FEWS-NET, USAID-OFDA, WFP and FAO, are planned for late July in Chad and Mauritania and in August in Burkina Faso and Niger.

The aggregate cereal import requirement of the western Africa sub-region in the 2000/01 or 2001 marketing year is estimated at 7.1 million tonnes. Commercial imports are estimated at 6.7 million tonnes and food aid requirement at 400 000 tonnes, mainly wheat and rice.

LOCUST SITUATION

The Desert Locust situation remains calm. Ecological conditions have become favourable in parts of the Sahel in West Africa from south-eastern Mauritania to Tamesna, Niger. The rains that fell during June are thought to be sufficient for conditions to be favourable for breeding in most of these areas. As locust numbers are extremely low, it will take several generations before they build up to significant levels. This will depend on the continuation of rains during the summer in the breeding areas.

Good rains also fell in the summer breeding areas of Sudan where conditions are becoming favourable and small scale breeding is expected. In northern Somalia, breeding conditions remained favourable.

In **central Africa**, crops are generally developing satisfactorily in Central African Republic and Cameroon. In the Republic of Congo, food production is recovering following the peace agreement, but food assistance is necessary for refugees and internally displaced persons. For the 2001 marketing year, the cereal import requirement for the seven countries of the sub-region is estimated at 826 000 tonnes, with commercial imports anticipated at 809 000 tonnes and food aid requirement at 17 000 tonnes. Food aid pledges and deliveries reported to GIEWS as of mid-July amounted to 17 000 tonnes.

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

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

Sub-Region	2000 Production	2000/01 or 2001		
		Cereal import requirements	Anticipated commercial imports	Food aid Requirements
Eastern Africa	20 083	5 738	3 926	1 812
Southern Africa	24 305	4 419	3 950	469
Western Africa	36 048	7 113	6 709	404
Central Africa	2 858	826	809	17
TOTAL	83 294	18 096	15 394	2 702

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

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

Sub-Region/ Country	Marketing year	2001 Cereal production 1/		Position for 2001/02						
		Total	As %of average of previous 5 years	Cereal import require- ments 2/	Antici- pated com- mer- cial imports	Food aid require- ments	Cereal import position			
							Commer- cial imports already made or contracted	Pledges	of which received so far	Uncov. food aid require- ments
Eastern Africa		3 767	93	750	615	135	-	-	-	135
Somalia	Aug./July	191	71	310	225	85	-	-	-	85
Tanzania	June/May	3 576	94	440	390	50	-	-	-	50
Southern Africa		18 748	85	4 071	3 682	389	10	163	8	216
Angola	April/March	533	104	581	405	176	-	26	5	150
Botswana	April/March	10	31	263	263	-	-	-	-	-
Lesotho	April/March	80	42	332	327	5	-	-	-	5
Madagascar	April/March	1 869	101	403	378	25	-	5	3	20
Malawi	April/March	2 016	95	45	35	10	-	-	-	-
Mozambique	April/March	1 516	100	472	300	172	10	133	-	40
Namibia	May/April	90	86	99	99	-	-	-	-	-
South Africa	May/April	9 378	78	946	946	-	-	-	-	-
Swaziland	May/April	74	66	123	123	-	-	-	-	-
Zambia	May/April	1 348	111	214	213	1	-	-	-	1
Zimbabwe	April/March	1 834	76	593	593	-	-	-	-	-
TOTAL		22 515	86	4 821	4 297	524	10	163	8	351

1/ Including rice in milled equivalent.

2/ Excluding re-exports.

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

Sub-Region/ Country	Marketing year	2000 Cereal production 1/		1999/00 or 2000 imports			Position for 2000/01 or 2001						
		Total	As % of average of previous 5 years	Total imports	As % of average of previous 5 years	Food aid	Cereal import require- ment 2/	Antici- pated commer- cial imports	Food aid require- ment	Commer- cial imports already made or contracted	Food aid		
											Pledges 3/	of which received so far	Uncov. food aid require- ments
<i>Countries still in 2000/01 or 2001 marketing year</i>													
Eastern Africa		16 501	92	5 207	181	1 825	4 845	3 210	1 635	856	874	465	927
Burundi	Jan./Dec.	270	103	70	149	9	106	50	56	-	4	2	52
Comoros	Jan./Dec.	6	100	46	104	-	46	46	-	-	-	-	-
Djibouti	Jan./Dec.	-	-	68	75	10	68	55	13	-	-	-	13
Eritrea	Jan./Dec.	71	34	297	149	212	240	160	80	19	78	23	2
Ethiopia 4/	Jan./Dec.	8 938	108	1 215	236	1 108	520	130	390	22	556	259	-
Kenya	Oct./Sept.	2 079	72	1 888	176	117	2 164	1 401	763	401	162	127	601
Rwanda	Jan./Dec.	232	120	224	83	169	175	115	60	-	19	16	41
Seychelles	Jan./Dec.	-	-	13	102	-	13	13	-	-	-	-	-
Sudan	Nov./Oct.	3 326	78	1 310	249	144	1 437	1 225	212	405	26	24	186
Uganda	Jan./Dec.	1 579	87	77	82	57	76	15	61	9	29	15	32
Southern Africa		2	100	314	128	-	248	248	-	203	-	-	-
Mauritius	Jan./Dec.	2	100	314	128	-	248	248	-	203	-	-	-
Western Africa		36 048	103	6 730	114	428	7 113	6 709	404	1 359	203	94	238
Coastal countries		27 184	105	4 748	122	245	5 019	4 814	205	1 264	111	29	125
Benin	Jan./Dec.	985	126	109	86	6	111	102	9	4	5	4	4
Côte d'Ivoire	Jan./Dec.	1 408	117	1 196	194	17	778	766	12	433	4	4	8
Ghana	Jan./Dec.	1 679	100	541	129	95	490	460	30	127	57	4	-
Guinea	Jan./Dec.	810	118	265	72	1	330	330	-	-	4	4	-
Liberia	Jan./Dec.	94	90	201	93	102	200	160	40	13	8	5	32
Nigeria	Jan./Dec.	21 381	104	2 217	126	-	2 670	2 670	-	676	-	-	-
Sierra Leone	Jan./Dec.	142	57	151	58	21	360	250	110	4	34	8	76
Togo	Jan./Dec.	685	111	70	51	4	80	76	4	8	-	-	4
Sahelian countries		8 864	96	1 982	99	182	2 094	1 895	199	95	93	65	113
Burkina Faso	Nov./Oct.	2 251	94	157	94	35	210	165	45	6	11	10	34
Cape Verde	Nov./Oct.	19	173	80	90	50	88	35	53	-	57	40	-
Chad	Nov./Oct.	869	94	55	71	15	85	70	15	2	1	1	14
Gambia	Nov./Oct.	164	152	120	110	5	120	118	2	7	2	2	-
Guinea-Bissau	Nov./Oct.	133	102	64	83	10	72	60	12	-	1	1	11
Mali	Nov./Oct.	2 148	98	107	99	3	90	80	10	4	2	2	8
Mauritania	Nov./Oct.	154	103	289	101	17	285	260	25	35	1	1	24
Niger	Nov./Oct.	2 122	90	352	113	11	377	352	25	2	3	3	22
Senegal	Nov./Oct.	1 004	116	758	98	37	767	755	12	39	15	6	-
Central Africa		2 858	99	934	39	60	826	809	17	55	17	16	7
Cameroon	Jan./Dec.	1 237	101	292	111	3	300	298	2	30	-	-	2
Cent. Afr. Rep.	Jan./Dec.	132	100	39	115	3	33	31	2	-	-	-	-
Congo, Dem. Rep. of	Jan./Dec.	1 452	97	258	105	38	250	244	6	7	3	2	3
Congo, Rep. of	Jan./Dec.	4	100	225	195	11	135	130	5	10	14	14	-
Equat. Guinea	Jan./Dec.	-	-	15	122	1	10	10	-	6	-	-	-
Gabon	Jan./Dec.	33	132	94	125	1	87	87	-	2	-	-	-
Sao Tome	Jan./Dec.	-	-	11	98	4	11	9	2	-	-	-	2
Sub-total		55 409	99	13 186	462	2 313	13 032	10 976	2 056	2 472	1 094	576	1 173
<i>Countries which have entered their 2001/02 marketing year</i>													
Eastern Africa		3 582	84	724	405	105	893	716	177	429	42	36	148
Somalia	Aug./July	320	123	310	138	35	203	176	27	32	40	34	-
Tanzania	June/May	3 262	81	724	267	70	690	540	150	397	2	2	148
Southern Africa		24 303	120	4 538	1 289	349	4 171	3 702	469	3 972	341	341	230
Angola	April/March	505	108	559	118	141	753	420	333	473	181	181	152
Botswana	April/March	21	66	250	126	-	250	250	-	250	-	-	-
Lesotho	April/March	148	83	262	140	3	248	248	-	225	3	3	-
Madagascar	April/March	1 715	91	230	148	16	518	426	92	504	14	14	79
Malawi	April/March	2 612	133	130	55	68	60	60	-	11	30	30	-
Mozambique	April/March	1 414	97	302	92	94	413	370	43	326	103	103	-
Namibia	May/April	139	156	126	133	1	100	100	-	79	1	1	-
South Africa	May/April	13 730	127	1 843	107	-	1 571	1 571	-	1 812	-	-	-
Swaziland	May/April	75	67	73	100	-	88	88	-	87	-	-	-
Zambia	May/April	1 500	138	434	157	23	64	63	1	64	4	4	-
Zimbabwe	April/March	2 444	115	330	112	5	106	106	-	140	4	4	-
Sub-total		27 885	114	5 263	116	454	5 064	4 418	646	4 401	382	377	378
TOTAL		83 294	104	18 448	129	2 767	18 096	15 394	2 702	6 872	1 476	952	1 551

Note : Totals computed from unrounded data.

1/ Including rice in milled equivalent.

2/ Excludes re-exports.

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

4/ Includes refugee needs.

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

Sub-Region/ Country	Cereal import requirement		Total availabilities for export and/or local purchases	of which local purchase requirement	Surpluses utilized or committed so far			Remain- ing surpluses
	Wheat and rice	Coarse grains			Donor financed local purchases	Exports		
						Commer- cial	Trian- gular trans- actions 1/	
Eastern Africa	3 249	2 489	665	335	36	-	17	612
Burundi	25	81	-	-	-	-	-	-
Comoros	46	-	-	-	-	-	-	-
Djibouti	65	3	-	-	-	-	-	-
Eritrea	150	90	-	-	-	-	-	-
Ethiopia 2/	450	70	500	300	17	-	-	483
Kenya	800	1 364	7	7	7	-	-	-
Rwanda	25	150	1	1	1	-	-	-
Seychelles	7	6	-	-	-	-	-	-
Somalia	132	71	-	-	-	-	-	-
Sudan	1 283	154	20	20	4	-	-	16
Tanzania	240	450	57	7	7	-	17	33
Uganda	26	50	80	-	-	-	-	80
Southern Africa	3 126	1 293	2 253	42	41	1 075	146	991
Angola	359	394	1	1	1	-	-	-
Botswana	65	185	-	-	-	-	-	-
Lesotho	58	190	1	1	1	-	-	-
Madagascar	488	30	3	3	3	-	-	-
Malawi	60	-	358	7	7	-	1	350
Mauritius	228	20	-	-	-	-	-	-
Mozambique	310	103	75	15	15	-	-	60
Namibia	40	80	-	-	-	-	-	-
South Africa	1 300	271	1 750	-	-	1 075	145	530
Swaziland	48	40	-	-	-	-	-	-
Zambia	64	-	65	15	15	-	-	50
Zimbabwe	106	-	-	-	-	-	-	-
Western Africa	6 557	556	333	15	2	-	1	330
Coastal countries	4 850	169	285	-	-	-	1	284
Benin	110	1	70	-	-	-	-	70
Côte d'Ivoire	770	8	10	-	-	-	1	9
Ghana	440	50	5	-	-	-	-	5
Guinea	330	-	-	-	-	-	-	-
Liberia	190	10	-	-	-	-	-	-
Nigeria	2 600	70	200	-	-	-	-	200
Sierra Leone	330	30	-	-	-	-	-	-
Togo	80	-	-	-	-	-	-	-
Sahelian countries	1 707	387	48	15	2	-	-	46
Burkina Faso	160	50	25	5	-	-	-	25
Cape Verde	53	35	-	-	-	-	-	-
Chad	70	15	-	-	-	-	-	-
Gambia	120	-	-	-	-	-	-	-
Guinea-Bissau	67	5	-	-	-	-	-	-
Mali	90	-	17	5	2	-	-	15
Mauritania	270	15	1	-	-	-	-	1
Niger	147	230	-	-	-	-	-	-
Senegal	730	37	5	5	-	-	-	5
Central Africa	744	82	6	1	1	-	-	5
Cameroon	290	10	5	-	-	-	-	5
Cent.Afr.Rep.	30	3	-	-	-	-	-	-
Congo, Dem.Rep.of	190	60	1	1	1	-	-	-
Congo, Rep. of	130	5	-	-	-	-	-	-
Equat.Guinea	10	-	-	-	-	-	-	-
Gabon	85	2	-	-	-	-	-	-
Sao Tome	9	2	-	-	-	-	-	-
TOTAL	13 676	4 420	3 257	393	80	1 075	164	1 938

Note: Totals computed from unrounded data.

1/ Referring to supplying countries

2/ Includes refugee needs.

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

Donor	Source of supply	Recipient Country	Total by donor
EC	Côte d'Ivoire South Africa	Burkina Faso (0.5) Angola (0.3)	0.8
NGOs	Kenya South Africa	Somalia (0.1) Angola (0.4)	0.5
WFP	Côte d'Ivoire Malawi South Africa	Liberia (0.7) Mozambique (0.7), Zambia (0.5) Angola (6.8), Burundi (2.2), Chad (0.9), Kenya (33.5), Lesotho (0.9), Madagascar (3.6), Mali (0.6), Mozambique (25.5), Namibia (0.6), Rwanda (9.8), Somalia (6.4), Sudan (2.7), Zambia (0.9)	96.3
TOTAL			97.6

1/ Based on information reported by donors to GIEWS as of mid-July 2001.

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

Donor	Recipient Country	Total by donor
EC	Ethiopia (16.0), Kenya (2.0), Madagascar (1.1), Mali (0.8), Zambia (4.1), Zimbabwe (0.3)	24.3
Germany	Congo Dem. Rep. (0.6), Ethiopia (0.5), Kenya (4.0), Malawi (2.0), Rwanda (0.7), Sudan (0.1)	7.9
NGOs	Kenya (0.1), Somalia (4.4)	4.5
Switzerland	Madagascar (0.6)	0.6
WFP	Angola (0.9), Kenya (0.5), Lesotho (0.8), Madagascar (1.7), Malawi (4.7), Mali (1.6), Mozambique (15.4), Namibia (0.2), Senegal (0.2), Tanzania (6.7), Zambia (10.4)	43.1
TOTAL		80.4

1/ Based on information reported by donors to GIEWS as of mid-July 2001.

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

Current position (in thousand tonnes)

Sub-Region / Country	Availabilities for export		Local Purchase Requirements	
	Total	Contracted so far	Total	Utilized so far
<i>Countries still in 2000/01 or 2001 marketing year</i>				
Eastern Africa	280	-	328	29
Ethiopia	200	-	300	17
Kenya	-	-	7	7
Rwanda	-	-	1	1
Sudan	-	-	20	4
Uganda	80	-	-	-
Western Africa	318	1	15	2
Coastal countries	285	1	-	-
Benin	70	-	-	-
Côte d'Ivoire	10	1	-	-
Ghana	5	-	-	-
Nigeria	200	-	-	-
Sahelian countries	33	-	15	2
Burkina Faso	20	-	5	-
Chad	-	-	-	-
Mali	12	-	5	2
Mauritania	1	-	-	-
Niger	-	-	-	-
Senegal	-	-	5	-
Central Africa	5	-	1	1
Cameroon	5	-	-	-
Congo, Dem. Rep. of	-	-	1	1
Sub-total	603	1	344	32
<i>Countries which have entered their 2001/02 marketing year</i>				
Eastern Africa	50	-	-	-
Tanzania	50	-	-	-
Southern Africa	700	-	2	2
Malawi	-	-	2	2
Mozambique	100	-	-	-
South Africa	550	-	-	-
Zambia	50	-	-	-
Sub-total	750	-	2	2
TOTAL	1 303	1 1/	346	34

Note: Totals computed from unrounded data.

1/ Triangular transaction.

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

Transactions/Local Purchases known to FAO as of mid-July 2001 (in thousand tonnes).

Donor	Wheat	Rice	Coarse grains	Total cereals	Of which: triangular	Local purchases
Canada	16.8	-	-	16.8	-	-
EC	214.1	12.6	34.7	261.4	0.8	32.2
of which:						
Community action	166.5	3.2	10.5	180.2	0.8	24.3
National action	47.6	9.4	24.2	81.2	-	7.9
Austria	3.3	-	-	3.3	-	-
Belgium	5.5	-	-	5.5	-	-
France	35.0	-	1.0	36.0	-	-
Germany	-	0.6	15.3	15.9	-	7.9
Italy	-	3.8	7.9	11.5	-	-
Luxembourg	2.0	1.4	-	3.4	-	-
Netherlands	-	-	-	0.0	-	-
Spain	1.8	3.8	-	5.6	-	-
Japan	-	16.8	-	16.8	-	-
NGOs	5.1	0.5	0.2	5.8	0.5	4.5
Switzerland	-	-	-	-	-	0.6
United States	587.6	36.5	198.0	822.1	-	-
World Food Programme	34.2	12.2	306.5	352.9	96.3	43.1
TOTAL	857.8	78.6	539.4	1 475.8	97.6	80.4

Note: Totals computed from unrounded data

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

Donor/Recipient	Total	delivered	Canada	EC	Japan	NGOs	U.S.A.	WFP
Eastern Africa	915.2	501.4	2.5	206.1	-	5.2	499.9	201.5
Burundi	3.6	2.2	-	1.4	-	-	-	2.2
Comoros	-	-	-	-	-	-	-	-
Djibouti	-	-	-	-	-	-	-	-
Eritrea	78.4	23.0	-	23.9	-	-	54.5	-
Ethiopia 1/	555.8	258.6	2.5	178.5	-	5.1	345.1	24.6
Kenya	161.6	126.5	-	-	-	-	35.1	126.5
Rwanda	19.2	16.0	-	-	-	-	7.6	11.6
Seychelles	-	-	-	-	-	-	-	-
Somalia	39.5	34.0	-	2.3	-	0.1	17.5	19.6
Sudan	25.7	23.6	-	-	-	-	11.4	14.3
Tanzania	2.1	2.1	-	-	-	-	-	2.1
Uganda	29.3	15.4	-	-	-	-	28.7	0.6
Southern Africa	340.6	340.6	14.3	31.8	-	0.6	154.0	139.9
Angola	181.4	181.4	-	22.1	-	0.6	75.6	83.1
Botswana	-	-	-	-	-	-	-	-
Lesotho	3.1	3.1	-	2.2	-	-	-	0.9
Madagascar	13.5	13.5	-	0.2	-	-	5.7	7.6
Malawi	29.9	29.9	14.3	-	-	-	12.9	2.7
Mauritius	-	-	-	-	-	-	-	-
Mozambique	103.1	103.1	-	1.1	-	-	59.8	42.2
Namibia	1.3	1.3	-	-	-	-	-	1.3
South Africa	-	-	-	-	-	-	-	-
Swaziland	-	-	-	-	-	-	-	-
Zambia	3.9	3.9	-	1.8	-	-	-	2.1
Zimbabwe	4.4	4.4	-	4.4	-	-	-	-
Western Africa	203.4	93.8	-	23.1	16.8	-	157.4	6.1
Coastal countries	110.7	29.0	-	-	-	-	108.1	2.6
Benin	4.7	3.6	-	-	-	-	4.7	-
Côte d'Ivoire	3.8	3.8	-	-	-	-	3.8	-
Ghana	56.7	4.3	-	-	-	-	56.7	-
Guinea	4.0	4.0	-	-	-	-	4.0	-
Liberia	7.9	4.9	-	-	-	-	5.3	2.6
Nigeria	-	-	-	-	-	-	-	-
Sierra Leone	33.6	8.4	-	-	-	-	33.6	-
Togo	-	-	-	-	-	-	-	-
Sahelian countries	92.7	64.8	-	23.1	16.8	-	49.3	3.5
Burkina Faso	10.9	9.6	-	1.3	7.6	-	2.0	-
Cape Verde	57.3	40.0	-	20.5	3.6	-	33.2	-
Chad	1.2	1.2	-	-	-	-	-	1.2
Gambia	1.9	1.9	-	-	-	-	1.9	-
Guinea-Bissau	1.1	1.1	-	-	-	-	-	1.1
Mali	2.3	2.0	-	1.3	-	-	-	1.0
Mauritania	0.7	0.7	-	-	-	-	0.7	-
Niger	2.7	2.7	-	-	-	-	2.5	0.2
Senegal	14.6	5.6	-	-	5.6	-	9.0	-
Central Africa	357.2	16.2	-	0.4	-	-	10.8	5.4
Cameroon	-	-	-	-	-	-	-	-
Cent.Afr.Rep.	-	-	-	-	-	-	-	-
Congo, Dem.Rep.of	2.6	2.2	-	0.4	-	-	0.4	1.8
Congo, Rep.of	14.0	14.0	-	-	-	-	10.4	3.6
Equat. Guinea	-	-	-	-	-	-	-	-
Gabon	-	-	-	-	-	-	-	-
Sao Tome	-	-	-	-	-	-	-	-
TOTAL	1 475.8	952.0	16.8	261.4	16.8	5.8	822.1	352.9

1/ Includes refugee needs.

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

(situation as of mid-July 2001)

ANGOLA

Area:	1 247 000 sq.km
Climate:	Coastal desert, south-west semi-arid, rest tropical wet-dry. Rainy season: Sept.-May
Population:	13.68 million (2000 estimate), G.N.P. per caput US\$220 (1999)
Specific characteristics of the country:	Low-income food-deficit country; infrastructure devastated by prolonged civil strife
Logistics:	Inadequate port, rail and road facilities
Major foodcrops:	Roots, tubers, maize, plantains
Marketing year:	April/March; Lean season: January-April
Share of cereals in total calorie intake:	35 percent

CURRENT SITUATION

An FAO/WFP Crop and Food Supply Assessment Mission visited Angola from 5-27 May 2001 to estimate crop production from the 2000/01 season, as well as the cereal import requirements and food aid in the 2001/02 marketing year (April/March). The Mission made field visits to eight out of the 18 provinces. Plans had been made to visit ten provinces, but the security situation was very fluid and the plans had to be changed at the last minute.

The Mission found that the security situation has improved, as the Government has military control over all provincial and most municipal centres, with an expansion of the secure areas around these centres. However, UNITA is still mounting guerrilla attacks in many areas, thereby restricting operations by the Government, aid agencies and NGOs to the areas immediately surrounding the administrative centres. Most food aid and essential commodities have still to be transported by air from Luanda. Insecurity and poor road conditions continue to disrupt marketing activities. Although very few IDPs have been able to return to their original homes, there has been good progress in allocating land to IDPs within the secure areas. Some 218 000 IDPs and returnees have been recorded as being active in farming during the 2000/01 season. New IDPs are still arriving and the current estimate of the total number (old and new) is reported to be 2.7 million compared to 2.6 million last year. About 1.34 million are still in need of food aid.

The area planted to coarse grains in the 2000/01 season is estimated at 995 000 hectares, an increase of 13 percent from 1999/00. Output in 2001 is estimated at 528 000 tonnes, against 500 000 tonnes last year. The increase in production is largely attributed to higher sowings, as a result of improved security conditions at planting time; allocation of land to IDPs; improved agricultural input distribution and natural increase of population. In spite of a severe mid-season dry spell in northern areas, weather conditions were generally favourable in the main cereal growing areas of the centre and south. Maize harvest is estimated at 429 000 tonnes, 9 percent above last year's level, with larger plantings partially offset by crop losses in the northern provinces. Millet and sorghum production is estimated, at 148 000 tonnes, up by nearly 30 percent on last year. This reflects a sharp increase in the area planted and the effect of good rains in the south. The bean crop is estimated at 71 000 tonnes, down 10 percent from last year, also as a result of dry spells in the north. Cassava estimate for 2000/01 is 5.3 million tonnes compared to 4.4 million tonnes in the previous year.

Reflecting the improved production, the food deficit in marketing year 2001/02 (April/March) has decreased to 581 000 tonnes of cereals. This includes 48 000 tonnes of maize, 107 000 tonnes of rice and 250 000 tonnes of wheat. Commercial imports are forecast at 405 000 tonnes of cereals, leaving 176 000 tonnes to be covered by food aid. By mid-July food aid pledges amounted to 26 000 tonnes.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	6	525	531
Previous five years average imports	254	95	167	516
<u>2001/02 Domestic Availability</u>	<u>25</u>	<u>7</u>	<u>528</u>	<u>560</u>
2001 Production (rice in paddy terms)	-	7	528	535
2001 Production (rice in milled terms)	-	5	528	533
Possible stock drawdown	25	2	-	27
<u>2001/02 Utilization</u>	<u>275</u>	<u>114</u>	<u>752</u>	<u>1 141</u>
Food use	271	111	662	1 044
of which: local purchase requirement	-	-	-	-
Non-food use	4	3	79	86
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	11	11
<u>2001/02 Import Requirement</u>	<u>250</u>	<u>107</u>	<u>224</u>	<u>581</u>
Anticipated commercial imports	250	107	48	405
Food aid needs	-	-	176	176
<u>Current Aid Position</u>				
Food aid pledges	15	-	11	26
of which: delivered	-	-	5	5
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>20</u>	<u>8</u>	<u>48</u>	<u>76</u>
<u>Indexes</u>				
2001 Production as % of average:				101
2001/02 Import requirement as % of average:				113

Area:	111 000 sq.km
Climate:	Tropical wet-dry; two rainy seasons in south (Mar.-Jul. and Oct.) and one in north (May-Oct.)
Population:	6.26 million (2001 estimate); G.N.P. per caput US\$380 (1999)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports, roads, rail adequate; gateway to Niger
Major foodcrops:	Roots and tubers, maize
Marketing year:	January/December; Lean season: April-June
Share of cereals in total calorie intake:	37 percent

CURRENT SITUATION

The first rains started in mid-March in the south, allowing planting of the first maize crop. Rains covered the entire country from mid-April and remained widespread and above average during May, benefiting planting and emergence of millet and sorghum crops in the north. They decreased somewhat in early June, became well below average in mid-June, but resumed in late June. They remained abundant in early July in the north but decreased significantly in the south.

Following a well above-average cereal harvest in 2000, the overall food supply situation is satisfactory. Markets are well supplied and prices of cereals remain generally stable. Cereal imports for domestic use and re-exports during the 2001 marketing year are estimated at 136 000 tonnes and food aid requirements at 9 000 tonnes.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	27	798	825
Previous five years average imports	48	121	5	174
<u>2001 Domestic Availability</u>	<u>0</u>	<u>31</u>	<u>953</u>	<u>985</u>
2000 Production (rice in paddy terms)	-	52	953	1 006
2000 Production (rice in milled terms)	-	31	953	985
Possible stock drawdown	-	-	-	-
<u>2001 Utilization</u>	<u>55</u>	<u>111</u>	<u>954</u>	<u>1 121</u>
Food use	49	84	625	758
of which: local purchase requirement	-	-	-	-
Non-food use	1	8	234	243
Exports or re-exports	5	20	70	95
Possible stock build up	-	-	25	25
<u>2001 Import Requirement</u>	<u>55</u>	<u>80</u>	<u>1</u>	<u>136</u> ^{1/}
Anticipated commercial imports	52	75	-	127
Food aid needs	3	5	1	9
<u>Current Aid Position</u>				
Food aid pledges	1	3	1	5
of which: delivered	-	3	1	4
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>8</u>	<u>13</u>	<u>100</u>	<u>121</u>
<u>Indexes</u>				
2000 Production as % of average:				122
2001 Import requirement as % of average:				78

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

BOTSWANA

Area:	567 000 sq.km
Climate:	South-western part arid (Kalahari desert); rest semi-arid with some rains in Dec.-Feb.
Population:	1.60 million (2000 estimate); G.N.P. per caput: US\$3 240 (1999)
Specific characteristics of the country:	East; swamps in the northern parts; desert in the west
Logistics:	Imports through South Africa
Major foodcrops:	Sorghum, pulses, vegetables
Marketing year:	April/March; Lean season: January-March
Share of cereals in total calorie intake:	55 percent

CURRENT SITUATION

Preliminary estimates of the recently harvested 2001 coarse grains indicate an output of 10 000 tonnes, 52 percent down on last year. Maize production, estimated at only 2 000 tonnes, is 78 percent lower than in 2000. Sorghum and millet are forecast to decline by 42 percent to 7 000 tonnes. The sharp decline in production reflects a prolonged dry spell from late December to early February, coupled with high temperatures. Total crop failure has been reported in some areas.

As a result of the poor harvest and low carry-over stocks, the cereal import requirement for the 2001/02 marketing year (April/March) has increased to 263 000 tonnes, including 66 000 tonnes of wheat. While these requirements are expected to be covered on commercial basis, the food situation is anticipated to be very tight for poor households that gathered a reduced harvest.

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

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

BURKINA FASO

Area:	274 000 sq.km
Climate:	Tropical wet-dry in south, semi-arid in north; rainy season: May-October
Population:	11.55 million (2001 estimate); G.N.P. per caput: US\$240 (1999)
Specific characteristics of the country:	Low-income food-deficit country; Sahelian land-locked country
Logistics:	Roads inadequate during rainy season; adequate rail link to Abidjan (Côte d'Ivoire)
Major foodcrops:	Millet, sorghum, pulses, maize
Marketing year:	November/October; Lean season: July-September
Share of cereals in total calorie intake:	73 percent

CURRENT SITUATION

Rains progressed northwards in May and reached the extreme north in June. Satellite imagery indicates that precipitation remained well below normal or even ceased during the second dekad of June in the south and the centre. However, rains improved significantly during the third dekad and became abundant countrywide in early July. Rice and millet crops are tillering and weeding is underway in the south and west. Plantings are continuing in the north. Pastures are regenerating in the west and the centre-east. No pest activity is reported.

Final 2000 production figures and the 2000/01 cereal balance sheet were revised in late April by the government, and the aggregate output of cereals is now estimated at 2 286 300 tonnes, which is 15 percent below the 1999 level and 6 percent below the last five years average.

Following this reduced crop, the overall food supply situation is tight in several deficit areas, notably in the north, the centre and the east. The return of Burkinabé from Côte d'Ivoire to their villages has also put additional pressure on food supply. Prices of cereals increased sharply in the north, east and centre in February and March. However, in April and May, prices eased and even decreased slightly in the north but remained much higher than at this time last year. The Government plans to distribute 34 000 tonnes of food aid to 527 000 vulnerable people in 25 affected provinces, of which 18 000 tonnes will be taken from the National Security Stock.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2000/01 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	94	2 338	2 432
Previous five years average imports	58	99	18	175
<u>2000/01 Domestic Availability</u>	<u>1</u>	<u>108</u>	<u>2 383</u>	<u>2 492</u>
2000 Production (rice in paddy terms)	-	103	2 183	2 286
2000 Production (rice in milled terms)	-	68	2 183	2 251
Possible stock drawdown	1	40	200	241
<u>2000/01 Utilization</u>	<u>61</u>	<u>208</u>	<u>2 433</u>	<u>2 702</u>
Food use	60	196	2 074	2 329
of which: local purchase requirement	-	-	5	5
Non-food use	1	12	340	353
Exports or re-exports	-	-	20	20
Possible stock build up	-	-	-	-
<u>2000/01 Import Requirement</u>	<u>60</u>	<u>100</u>	<u>50</u>	<u>210</u>
Anticipated commercial imports	50	90	25	165
Food aid needs	10	10	25	45
<u>Current Aid Position</u>				
Food aid pledges	2	8	1	11
of which: delivered	2	8	-	10
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>5</u>	<u>17</u>	<u>180</u>	<u>202</u>
<u>Indexes</u>				
2000 Production as % of average:				94
2000/01 Import requirement as % of average:				120

BURUNDI

Area:	25 700 sq.km
Climate:	Highland rainy climate with moderate temperature (20°C); two rainy seasons: Feb.-May and Sept.-Nov.
Population:	6.66 million (2001 estimate); G.N.P. per caput: US\$120 (1999)
Specific characteristics of the country:	Low-income food-deficit country; land-locked country
Logistics:	Ports: Mombasa (Kenya) and Dar es Salaam (Tanzania); rail and road connections inadequate
Major foodcrops:	Pulses, plantains, roots, tubers, maize and sorghum
Marketing year:	January/December; Lean season: November-December
Share of cereals in total calorie intake:	34 percent

CURRENT SITUATION

The output of the 2001 A season crops is estimated to be satisfactory. A locally organized FAO/WFP/UNICEF assessment estimated food production at 85 000 tonnes of cereals, 68 000 tonnes of pulses, 483 000 tonnes of roots and tubers and 465 000 tonnes of bananas and plantains, which is 15 percent, 10 percent, 4 percent and 1 percent respectively higher than in the 2000 A season. However, outputs remain below the pre-crisis (1988-1993) average levels, due to insecurity and disruption of agricultural production since 1994. The area planted increased significantly this season reflecting a relatively better security situation in western parts, particularly in the provinces of Bubanza and Cibitoke, and the closure of regroupment camps in Bujumbura Rural Province, which allowed farmers to return to their fields. Another factor which contributed to higher plantings this season was the timely seed distributions by the Government and international agencies, mainly in the Kirundo and Muyinga provinces, the worst affected by drought during the 2000 A season.

Despite a late start of the rainy season, precipitation was abundant and well distributed from October to November, benefiting crop development. However, excessive rains in parts resulted in floods and crop losses and, in general, reduced yields, particularly for beans. Yields of bananas and plantains are expected to increase only from March/April as trees were seriously affected by previous prolonged dry weather. The small 2000 C season in the marshlands, from mid-June to September, was poor due to dry weather in previous months. The food output was estimated 4 percent below the level of the 1999 C season.

The tight food situation has eased with the arrival of the new harvest. Nevertheless, following several consecutive below average harvests, persistent insecurity and population displacements, as well as a recent malaria epidemic, the food and nutrition situation of vulnerable groups remains precarious. In particular, the situation is difficult for 324 000 internally displaced people and for drought affected persons in the provinces of Karuzi, Gitega, Kayanza and Muyinga. A recent nutrition survey in seven provinces of the country indicated a 10 percent rate of acute global malnutrition. Similarly, a recent report by MSF indicated that the number of malnourished children admitted to its therapeutic feeding centres in Karuzi province had doubled in January 2001. Emergency food aid continues to be necessary for the vulnerable sections of the population.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	10	45	237	292
Previous five years average imports	21	4	28	53
<u>2001 Domestic Availability</u>	<u>13</u>	<u>63</u>	<u>180</u>	<u>256</u>
2001 Production (rice in paddy terms)	10	95	178	283
2001 Production (rice in milled terms)	10	63	178	251
Possible stock drawdown	3	-	2	5
<u>2001 Utilization</u>	<u>38</u>	<u>63</u>	<u>261</u>	<u>362</u>
Food use	38	48	227	313
of which: local purchase requirement	-	-	-	-
Non-food use	-	10	34	44
Exports or re-exports	-	0	-	0
Possible stock build up	-	5	-	5
<u>2001 Import Requirement</u>	<u>25</u>	<u>-</u>	<u>81</u>	<u>106</u>
Anticipated commercial imports	20	-	30	50
Food aid needs	5	-	51	56
<u>Current Aid Position</u>				
Food aid pledges	-	-	4	4
of which: delivered	-	-	2	2
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>6</u>	<u>7</u>	<u>34</u>	<u>47</u>
<u>Indexes</u>				
2001 Production as % of average:				97
2001 Import requirement as % of average:				200

CAMEROON

Area:	465 000 sq.km
Climate:	North: tropical wet-dry, south: tropical wet; length of rainy season declines from 11 months in south to 4 months in extreme north
Population:	15.49 million (2001 estimate); G.N.P. per caput: US\$580 (1999)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports and roads adequate; gateway to Chad
Major foodcrops:	Roots and tubers, coarse grains, fruit
Marketing year:	January/December; Lean season: June-August
Share of cereals in total calorie intake:	39 percent

CURRENT SITUATION

Rains started in the south in March. They became particularly abundant in the south and the centre in mid-April and reached the extreme north in May, permitting land preparation and first plantings. Precipitation decreased in the south in June. Rains were abundant in the north in late June and early July.

The overall food supply situation is satisfactory except in the extreme north. A joint FAO/WFP assessment mission in late May estimated food aid needs at 19 000 tonnes for 80 000 families affected by poor crops due to drought, flooding or pest attacks in the north and extreme north provinces. Cereal imports for domestic use and re-export during the 2001 marketing year are estimated at 310 000 tonnes, mostly wheat and rice.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	81	1 181	1 262
Previous five years average imports	182	94	13	289
<u>2001 Domestic Availability</u>	<u>0</u>	<u>55</u>	<u>1 211</u>	<u>1 267</u>
2000 Production (rice in paddy terms)	0	81	1 181	1 263
2000 Production (rice in milled terms)	0	55	1 181	1 237
Possible stock drawdown	-	-	30	30
<u>2001 Utilization</u>	<u>200</u>	<u>155</u>	<u>1 221</u>	<u>1 577</u>
Food use	186	145	966	1 298
of which: local purchase requirement	-	-	-	-
Non-food use	4	10	250	264
Exports or re-exports	10	-	5	15
Possible stock build up	-	-	-	-
<u>2001 Import Requirement</u>	<u>200</u>	<u>100</u>	<u>10</u>	<u>310^{1/}</u>
Anticipated commercial imports	200	98	10	308
Food aid needs	-	2	-	2
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>12</u>	<u>9</u>	<u>62</u>	<u>84</u>
<u>Indexes</u>				
2000 Production as % of average:				100
2001 Import requirement as % of average:				107

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

CAPE VERDE

Area:	4 000 sq.km
Climate:	Semi-arid; rainfall increases with altitude; rainy season: July-December
Population:	451 500 (2001 estimate); G.N.P. per caput: US\$1 330 (1999)
Specific characteristics of the country:	Low-income food-deficit country; archipelago
Logistics:	Port capacity and roads adequate
Major foodcrops:	Maize, rice, pulses
Marketing year:	November/October; Lean season: n.a. since 90 percent of requirements covered by imports
Share of cereals in total calorie intake:	57 percent

CURRENT SITUATION

Seasonably dry conditions prevail. Planting of maize normally starts in July with the onset of the rains on the main islands. Following two successive good harvests in 1999 and 2000, the availability of seeds is adequate.

The overall food supply situation is satisfactory. However, domestic production covers only about a quarter of consumption requirement and the country relies on imports and food aid to cover its needs. With available stocks and planned commercial imports and food aid for the coming months, markets should remain well supplied with stable prices. The cereal import requirement for the 2000/01 marketing year (November/October) is estimated at 88 000 tonnes and the food aid requirement at 53 000 tonnes.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2000/01 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	-	11	11
Previous five years average imports	21	26	39	86
<u>2000/01 Domestic Availability</u>	21	26	19	19
2000 Production (rice in paddy terms)	-	-	19	19
2000 Production (rice in milled terms)	-	-	19	19
Possible stock drawdown	-	-	-	-
<u>2000/01 Utilization</u>	23	30	54	107
Food use	23	30	51	104
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	3	3
Exports or Re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2000/01 Import Requirement</u>	23	30	35	88
Anticipated commercial imports	5	15	15	35
Food aid needs	18	15	20	53
<u>Current Aid Position</u>				
Food aid pledges	16	7	34	57
of which: delivered	14	7	19	40
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	51	67	113	230
<u>Indexes</u>				
2000 Production as % of average:				168
2000/01 Import requirement as % of average:				102

CENTRAL AFRICAN REPUBLIC

Area:	623 000 sq.km
Climate:	North: tropical wet-dry, south: tropical wet; rainy season: March-November
Population:	3.68 million (2001 estimate); G.N.P. per caput: US\$290 (1999)
Specific characteristics of the country:	Low-income food-deficit country; land-locked country
Logistics:	Roads inadequate during rainy season; river transport important
Major foodcrops:	Roots and tubers, tree nuts, coarse grain, fruit
Marketing year:	January/December; Lean season: May-July
Share of cereals in total calorie intake:	21 percent

CURRENT SITUATION

Precipitation was abundant in April, notably during the first dekad. Rains were well below average in early May but improved from mid-May, notably in the eastern half of the country. They remained widespread and abundant in early June, decreased in mid-June but improved in late June/early July.

Following successive good harvests, the food supply situation remains satisfactory. However, population movements from the capital have been reported following a coup attempt in late May. The cereal import requirement for the 2001 marketing year is estimated at 33 000 tonnes, mainly wheat.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	16	121	137
Previous five years average imports	26	4	3	33
<u>2001 Domestic Availability</u>	<u>5</u>	<u>10</u>	<u>123</u>	<u>139</u>
2000 Production (rice in paddy terms)	-	16	121	137
2000 Production (rice in milled terms)	-	10	121	132
Possible stock drawdown	5	-	2	7
<u>2001 Utilization</u>	<u>30</u>	<u>15</u>	<u>126</u>	<u>172</u>
Food use	29	13	108	151
of which: local purchase requirement	-	-	-	-
Non-food use	1	2	18	21
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2001 Import Requirement</u>	<u>25</u>	<u>5</u>	<u>3</u>	<u>33</u>
Anticipated commercial imports	25	5	1	31
Food aid needs	-	-	2	2
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>8</u>	<u>4</u>	<u>29</u>	<u>41</u>
<u>Indexes</u>				
2000 Production as % of average:				100
2001 Import requirement as % of average:				100

Area:	1 259 000 sq.km
Climate:	From north to south: arid, semi-arid and tropical wet-dry; rainy season: May-Oct.
Population:	7.56 million (2001 estimate); G.N.P. per caput: US\$200 (1999)
Specific characteristics of the country:	Low-income food-deficit country; land-locked Sahelian country.
Logistics:	Roads inadequate during rainy season
Major foodcrops:	Millet and sorghum, roots and tubers, tree nuts
Marketing year:	November/October; Lean season: August-September
Share of cereals in total calorie intake:	52 percent

CURRENT SITUATION

The start of the rainy season was somewhat erratic in the south. Following above normal first rains in early April in the extreme south, rainfall progressed in the south-west in late April/early May while no rains were registered in the south-east. During the second dekad of May, precipitation improved in the south, in the Sudanian zone, but decreased significantly during the third dekad. Precipitation remained limited but widespread during the first two dekads of June. By contrast, rains were above normal during the last dekad but they decreased in the Sahelian zone in early July. Plantings of coarse grains may have suffered water stress or been delayed in the south. Plantings are underway in the Sahelian zone. Pastures are starting to regenerate. The pest situation remains mostly calm.

Following a below average harvest in 2000, the food supply situation is tight in the chronically deficit areas of the Sahelian zone. Unusual population movements were reported from several cantons of Lac Department to major urban centres, southern Chad or the Lake Chad area. In the Sudanian Zone, the food situation is also tight in the rice producing areas in Tandjilé and parts of Kabia, notably in Mayo Beneye area. Prices of millet have increased sharply. A locally-organized joint CILSS/FAO/WFP/FEWS-NET assessment of the food supply situation in the at-risk zones in January estimated the at-risk population at 800 000 persons for whom about 40 000 tonnes of cereals are needed. An additional 700 000 people are considered moderately vulnerable. The sale of 20 000 tonnes of cereals at subsidised prices has been recommended. A WFP Emergency Operation is underway to provide 27 000 tonnes of food aid to 375 000 beneficiaries in eight departments of the Sahelian zone.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2000/01 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	3	111	957	1 071
Previous five years average imports	56	9	9	74
<u>2000/01 Domestic Availability</u>	<u>10</u>	<u>67</u>	<u>979</u>	<u>1 056</u>
2000 Production (rice in paddy terms)	3	69	819	890
2000 Production (rice in milled terms)	3	47	819	869
Possible stock drawdown	7	20	160	187
<u>2000/01 Utilization</u>	<u>70</u>	<u>77</u>	<u>994</u>	<u>1 141</u>
Food use	69	69	840	977
of which: local purchase requirement	-	-	-	-
Non-food use	1	8	154	163
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2000/01 Import Requirement</u>	<u>60</u>	<u>10</u>	<u>15</u>	<u>85</u>
Anticipated commercial imports	52	8	10	70
Food aid needs	8	2	5	15
<u>Current Aid Position</u>				
Food aid pledges	-	-	1	1
of which: delivered	-	-	1	1
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>9</u>	<u>9</u>	<u>111</u>	<u>129</u>
<u>Indexes</u>				
2000 Production as % of average:				83
2000/01 Import requirement as % of average:				115

Area:	2 200 sq.km
Climate:	Tropical wet-dry; one hot rainy season with cyclone probability; June-October dry and cool
Population:	0.785 million (2001 estimate); G.N.P. per caput: US\$350 (1999)
Specific characteristics of the country:	Low-income food-deficit country; archipelago of four small islands
Logistics:	-
Major foodcrops:	Rice, roots, tubers, bananas and coconuts
Marketing year:	January/December
Share of cereals in total calorie intake:	44 percent

CURRENT SITUATION

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

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	3	4	7
Previous five years average imports	6	39	-	45
<u>2001 Domestic Availability</u>	<u>6</u>	<u>42</u>	<u>4</u>	<u>52</u>
2001 Production (rice in paddy terms)	-	3	4	7
2001 Production (rice in milled terms)	-	2	4	6
Possible stock drawdown	-	-	-	-
<u>2001 Utilization</u>	<u>6</u>	<u>42</u>	<u>4</u>	<u>52</u>
Food use	6	40	2	48
of which: local purchase requirement	-	-	-	-
Non-food use	-	2	2	4
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2001 Import Requirement</u>	<u>6</u>	<u>40</u>	<u>-</u>	<u>46</u>
Anticipated commercial imports	6	40	-	46
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>8</u>	<u>51</u>	<u>3</u>	<u>61</u>
<u>Indexes</u>				
2001 Production as % of average:				100
2001 Import requirement as % of average:				102

CONGO, DEMOCRATIC REPUBLIC OF

Area:	2 268 000 sq.km
Climate:	Tropical wet climate in the central basin, tropical wet-dry in the extreme north and south
Population:	47.12 million (2001 estimate); G.N.P. per caput: US \$ 110 (1998)
Specific characteristics of the country:	Low-income food-deficit country; tropical country with access to sea
Logistics:	Roads inadequate
Major foodcrops:	Roots and tubers, coarse grains, fruit
Marketing year:	January/December; Lean season: October (north), November-December (south)
Share of cereals in total calorie intake:	15 percent

CURRENT SITUATION

The food supply situation continues to deteriorate due to persistent insecurity. Intensified fighting, particularly in eastern parts, has further disrupted all economic and agricultural activities and resulted in fresh waves of population displacements. The number of IDPs whose food and nutritional situation is critical is currently estimated at 2 million. Recent surveys conducted by non-governmental organisations indicated that up to 21 percent of the population is suffering from severe malnutrition in the eastern province of North-Kivu. The situation could deteriorate with an expected cassava crop failure in eastern parts due to pests and diseases. The food situation is also difficult in the main cities of the country, mainly Kinshasa with a population of 6-7 million. An FAO Mission last October estimated Kinshasa's food deficit in 2000 at 1 million tonnes. In general, factors constraining food supply to Kinshasa and other cities include the extreme state of disrepair of the road infrastructure; police/military harassment of shippers, traders and farmers; the cut-off of food supply from Equateur and Eastern Provinces; and the scarcity of fuel due to a shortage of foreign exchange.

Humanitarian assistance remains constrained by persistent insecurity and very poor road conditions. WFP plans to increase its distributions of food aid to cover 1.2 million people, including some 70 000 Angolan refugees, and has recently appealed for US\$112 million for the relief operations.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	18	375	1 259	1 652
Previous five years average imports	133	46	45	224
<u>2001 Domestic Availability</u>	<u>18</u>	<u>240</u>	<u>1 194</u>	<u>1 452</u>
2000 Production (rice in paddy terms)	18	360	1 194	1 572
2000 Production (rice in milled terms)	18	240	1 194	1 452
Possible stock drawdown	-	-	-	-
<u>2001 Utilization</u>	<u>158</u>	<u>290</u>	<u>1 254</u>	<u>1 702</u>
Food use	150	247	980	1 377
of which: local purchase requirement	-	-	1	1
Non-food use	8	43	264	315
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	10	10
<u>2001 Import Requirement</u>	<u>140</u>	<u>50</u>	<u>60</u>	<u>250</u>
Anticipated commercial imports	140	50	54	244
Food aid needs	-	-	6	6
<u>Current Aid Position</u>				
Food aid pledges	-	-	2	3
of which: delivered	-	-	2	2
Donor-financed purchases	-	-	1	1
of which: for local use	-	-	1	1
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>3</u>	<u>5</u>	<u>21</u>	<u>29</u>
<u>Indexes</u>				
2000 Production as % of average:				95
2001 Import requirement as % of average:				112

CONGO, REPUBLIC OF

Area:	342 000 sq.km
Climate:	Tropical wet climate in north, tropical wet-dry in south with main rainy season in October-April
Population:	3.02 million (2001 estimate); G.N.P. per caput: US\$670 (1999)
Specific characteristics of the country:	Low-income food-deficit country; tropical coastal country
Logistics:	Ports adequate; roads inadequate during rainy season
Major foodcrops:	Roots and tubers, fruit
Marketing year:	January/December; Lean season: September-November
Share of cereals in total calorie intake:	19 percent

CURRENT SITUATION

After below-average rains in January and February, precipitation increased in early March and became particularly abundant from mid-March to mid-April. However, it decreased in May but remained generally widespread, except in the south.

The overall food supply situation has improved. All areas are now accessible to humanitarian agencies. The bulk of the estimated 810 000 people displaced by the civil war have returned to their homes. There are about 100 000 refugees from the Equateur province of DRC in northern areas, notably in Betou, near the border with the Central African Republic. There are also 7 000 Rwandan/Burundian refugees and 18 000 Angolan refugees. WFP launched a new Emergency Operation to assist 50 000 refugees from the DRC over a period of 6 months. It is also providing food to some 120 000 persons in Brazzaville, Pointe Noire and other main towns.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	1	3	4
Previous five years average imports	99	33	5	137
<u>2001 Domestic Availability</u>	<u>10</u>	<u>2</u>	<u>4</u>	<u>16</u>
2000 Production (rice in paddy terms)	-	1	4	5
2000 Production (rice in milled terms)	-	-	4	4
Possible stock drawdown	10	2	-	12
<u>2001 Utilization</u>	<u>110</u>	<u>32</u>	<u>9</u>	<u>151</u>
Food use	107	30	7	144
of which: local purchase requirement	-	-	-	-
Non-food use	3	2	2	7
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2001 Import Requirement</u>	<u>100</u>	<u>30</u>	<u>5</u>	<u>135</u>
Anticipated commercial imports	100	25	5	130
Food aid needs	-	5	-	5
<u>Current Aid Position</u>				
Food aid pledges	10	3	1	14
of which: delivered	10	3	1	14
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>35</u>	<u>10</u>	<u>2</u>	<u>48</u>
<u>Indexes</u>				
2000 Production as % of average:				125
2001 Import requirement as % of average:				99

COTE D'IVOIRE

Area:	318 000 sq.km
Climate:	Tropical wet-dry; two rainy seasons (March-July and September-December) in south and one in north (May-Oct.)
Population:	15.1 million (2001 estimate); G.N.P. per caput: US\$710 (1999)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports and roads adequate; gateway to Burkina Faso and Mali
Major foodcrops:	Roots and tubers, fruit, rice, maize
Marketing year:	January/December; Lean season: April-July
Share of cereals in total calorie intake:	40 percent

CURRENT SITUATION

Following the start of rains in late February, planting of the first maize crop is underway. Abundant precipitation covered the entire country during April and May, benefiting planting and emergence of millet and sorghum crops in the north. Precipitation decreased in June, notably during the second dekad, but remained widespread.

Following an above-average cereal harvest in 2000, the overall food supply situation is satisfactory. Some 110 000 Liberian refugees and 2 000 Sierra Leoneans remain in the west.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	1 000	748	1 748
Previous five years average imports	272	474	13	759
<u>2001 Domestic Availability</u>	<u>5</u>	<u>710</u>	<u>748</u>	<u>1 463</u>
2000 Production (rice in paddy terms)	-	1 100	748	1 848
2000 Production (rice in milled terms)	-	660	748	1 408
Possible stock drawdown	5	50	-	55
<u>2001 Utilization</u>	<u>275</u>	<u>1 210</u>	<u>756</u>	<u>2 241</u>
Food use	265	1 045	582	1 892
of which: local purchase requirement	-	-	-	-
Non-food use	5	165	164	334
Exports or re-exports	5	-	10	15
Possible stock build up	-	-	-	-
<u>2001 Import Requirement</u>	<u>270</u>	<u>500</u>	<u>8</u>	<u>778</u>
Anticipated commercial imports	270	490	6	766
Food aid needs	-	10	2	12
<u>Current Aid Position</u>				
Food aid pledges	-	4	-	4
of which: delivered	-	4	-	4
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>18</u>	<u>69</u>	<u>39</u>	<u>126</u>
<u>Indexes</u>				
2000 Production as % of average:				106
2001 Import requirement as % of average:				103

Area:	23 000 sq.km
Climate:	Arid climate
Population:	0.635 million (2000 estimate); G.N.P. per caput: US\$790 (1999)
Specific characteristics of the country:	Low-income food-deficit country
Logistics:	Djibouti is one of the three gateways of Ethiopia
Major foodcrops:	Vegetables
Marketing year:	January/December
Share of cereals in total calorie intake:	52 percent

CURRENT SITUATION

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

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

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

EQUATORIAL GUINEA

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

CURRENT SITUATION

Abundant rains were registered during the second dekad of April. Precipitation remained widespread in May and decreased in June. The staple crops are sweet potatoes, cassava and plantains. The cereal import requirement for the 2001 marketing year is estimated at 10 000 tonnes of rice and wheat.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	-	-	-
Previous five years average imports	5	6	-	11
<u>2001 Domestic Availability</u>	=	=	=	=
2000 Production (rice in paddy terms)	-	-	-	-
2000 Production (rice in milled terms)	-	-	-	-
Possible stock drawdown	-	-	-	-
<u>2001 Utilization</u>	5	5	=	10
Food use	5	5	-	10
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	-	-
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2001 Import Requirement</u>	5	5	=	10
Anticipated commercial imports	5	5	-	10
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	11	11	=	22
<u>Indexes</u>				
2000 Production as % of average:				-
2001 Import requirement as % of average:				91

Area:	124 320 sq.km
Climate:	Highland areas: tropical wet/dry with unreliable rains. Lowlands: semi-arid to arid
Population:	3.2 million (2001 estimate); G.N.P. per caput: US\$200 (1999)
Specific characteristics of the country:	Low-income food-deficit country
Logistics:	Roads inadequate, gateway to northern Ethiopia
Major foodcrops:	Sorghum, teff, millet, maize, pulses
Marketing year:	January/December; Lean season: August-November
Share of cereals in total calorie intake:	73 percent

CURRENT SITUATION

Planting of the 2001 cereal and pulse crops is underway. Spring (short) rains from March to May have failed in many areas. These short rains are beneficial for early preparation of land and replenishment of pasture. The overall outlook for the current agricultural season is not promising with only part of the war displaced farming population being able to return so far and large tracts of land still inaccessible due to landmines. Overall, over one million people are estimated to have been displaced. By early-June only 35 000 internally displaced persons (IDPs) had been resettled.

The food situation remains tight as a result of the war with Ethiopia and last year's drought. The 2000 cereal crop was sharply reduced due to the displacement of hundreds of thousands of farmers from the agriculturally rich regions of Gash Barka and Debub, which account for more than 70 percent of cereal production.

Two Emergency Operations were jointly approved in April and May 2001 by FAO and WFP for emergency food assistance to about 1.8 million people affected by war and drought, worth a total sum of US\$77 million for a period of 10 months (May 2001 to February 2002). The slow response to the Government's appeal in February 2001 is a major concern with only a small fraction of the appeal of about US\$224 million to assist nearly 2 million people for a period of twelve months received so far.

Food aid pledges for 2001 amount to 78 000 tonnes of which 23 000 tonnes have already been delivered.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	12	-	196	208
Previous five years average imports	160	1	87	248
<u>2001 Domestic Availability</u>	<u>43</u>	<u>-</u>	<u>124</u>	<u>167</u>
2000 Production (rice in paddy terms)	8	-	63	71
2000 Production (rice in milled terms)	8	-	63	71
Possible stock drawdown	35	-	61	96
<u>2001 Utilization</u>	<u>193</u>	<u>-</u>	<u>214</u>	<u>407</u>
Food use	178	-	211	389
of which: local purchase requirement	-	-	-	-
Non-food use	15	-	3	18
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2001 Import Requirement</u>	<u>150</u>	<u>-</u>	<u>90</u>	<u>240</u>
Anticipated commercial imports	70	-	90	160
Food aid needs	80	-	-	80
<u>Current Aid Position</u>				
Food aid pledges	77	-	1	78
of which: delivered	23	-	-	23
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>55</u>	<u>-</u>	<u>66</u>	<u>121</u>
<u>Indexes</u>				
2000 Production as % of average:				34
2001 Import requirement as % of average:				97

ETHIOPIA

Area:	976 680 sq.km
Climate:	Northern coastal area and lowlands in south and east are semi-arid to arid; rest of country has a highland rainy climate with mild winter.
Population:	65.0 million (2001 estimate); G.N.P. per caput: US\$100 (1999)
Specific characteristics of the country:	Low-income food-deficit country
Logistics:	Land-locked country, roads inadequate
Major foodcrops:	Maize, teff, barley, sorghum, wheat, pulses, enset (false banana)
Marketing year:	January/December; Lean season: August-November
Share of cereals in total calorie intake:	69 percent

CURRENT SITUATION

Despite a late start, performance of the "belg" season rainfall is near normal. The "belg" crop accounts for some 7 to 10 percent of the aggregate cereal production of the country, but it is important in several areas, where it provides the bulk of the annual food supplies. Overall prospects for the harvest are favourable and output is anticipated to recover substantially from last year's poor "belg" crop. However, an army-worm outbreak recently reported in eastern parts of the country and bird infestations in the south may impact negatively on the outcome of the season.

In the pastoral areas, the current main season rainfall was late by about a month and ended early. Poor rainfall in parts of Gode, Liban, Werder and Afder Zones, sites of last year's severe food shortages, are particularly worrying. Recent nutritional surveys have shown high levels of global acute malnutrition, indicating continuing food shortages.

As a result of last year's bumper "meher" cereal and pulse crop, the overall food supply situation in the country is stable. However, the sharp decline in grain prices in main producing areas has severely affected household income in rural areas and may negatively impact on farmers' production decisions in the main "meher" season, which has just started. The Government and donors have made some attempts to support local markets through purchases of grain, but with limited funding available the efforts have not been successful so far. Some 6.5 million people, affected by a severe drought in the last two years and the war with neighbouring Eritrea, depend on food assistance.

An Emergency Operations (EMOP) worth about US\$90 million was jointly approved in March 2001 by FAO and WFP for relief food assistance to 2.5 million small-scale farmers and drought-affected pastoralists, for a period of 10 months (April 2001 to January 2002). A revised EMOP was also approved jointly in April 2001 for 323 000 internally displaced people due to the war, worth a total of about US\$55 million until end of July 2001. Food aid pledges by mid-July amounted to 556 000 tonnes, of which 259 000 tonnes have been delivered.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	1 145	-	7 103	8 248
Previous five years average imports	556	17	45	618
<u>2001 Domestic Availability</u>	<u>1 369</u>	<u>-</u>	<u>7 569</u>	<u>8 938</u>
2000 Production (rice in paddy terms)	1 369	-	7 569	8 938
2000 Production (rice in milled terms)	1 369	-	7 569	8 938
Possible stock drawdown	-	-	-	-
<u>2001 Utilization</u>	<u>1 769</u>	<u>50</u>	<u>7 639</u>	<u>9 458</u>
Food use	1 582	50	6 232	7 864
<i>of which: local purchase requirement</i>	-	-	300	300
Non-food use	137	-	1 017	1 154
Exports or re-exports	-	-	200	200
Possible stock build up	50	-	190	240
<u>2001 Import Requirement</u>	<u>400</u>	<u>50</u>	<u>70</u>	<u>520</u>
Anticipated commercial imports	70	50	10	130
Food aid needs	330	-	60	390
<u>Current Aid Position</u>				
Food aid pledges	458	1	97	556
<i>of which: delivered</i>	230	1	28	259
Donor-financed purchases	-	-	17	17
<i>of which: for local use</i>	-	-	17	17
<i>for export</i>	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>24</u>	<u>1</u>	<u>96</u>	<u>121</u>
<u>Indexes</u>				
2000 Production as % of average:				108
2001 Import requirement as % of average:				84

Area:	258 000 sq.km
Climate:	Tropical wet climate; most rainfall: October-May
Population:	1.26 million (2001 estimate); G.N.P. per caput: US\$3 350 (1999)
Specific characteristics of the country:	Coastal country
Logistics:	Ports and roads adequate
Major foodcrops:	Roots and tubers
Marketing year:	January/December; Lean season: September-November
Share of cereals in total calorie intake:	19 percent

CURRENT SITUATION

Precipitation was very abundant from mid-March to mid-April. Though it decreased in late April, it remained regular in May. Precipitation seasonably decreased in June. The main foodcrops are cassava and plantains but some maize is also produced (around 25 000 tonnes). The country imports commercially the bulk of its cereal requirement, estimated at around 87 000 tonnes in 2001.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	1	30	31
Previous five years average imports	44	34	2	80
<u>2001 Domestic Availability</u>	<u>44</u>	<u>35</u>	<u>32</u>	<u>111</u>
2000 Production (rice in paddy terms)	-	1	32	33
2000 Production (rice in milled terms)	-	1	32	33
Possible stock drawdown	-	-	-	-
<u>2001 Utilization</u>	<u>50</u>	<u>36</u>	<u>34</u>	<u>120</u>
Food use	49	36	26	110
of which: local purchase requirement	-	-	-	-
Non-food use	1	-	8	9
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2001 Import Requirement</u>	<u>50</u>	<u>35</u>	<u>2</u>	<u>87</u>
Anticipated commercial imports	50	35	2	87
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>39</u>	<u>28</u>	<u>20</u>	<u>88</u>
<u>Indexes</u>				
2000 Production as % of average:				106
2001 Import requirement as % of average:				109

Area:	10 000 sq.km
Climate:	Tropical wet-dry climate; rainy season: May-October
Population:	1.44 million (2001 estimate); G.N.P. per caput: US\$340 (1999)
Specific characteristics of the country:	Low-income food-deficit country; coastal Sahelian country
Logistics:	Port capacity and roads adequate
Major foodcrops:	Rice, millet and sorghum
Marketing year:	November/October; Lean season: July-September
Share of cereals in total calorie intake:	63 percent

CURRENT SITUATION

The rainy season is now well established. The first rains were registered during the first dekad of June and permitted land preparation and first early plantings. The weather remained mostly dry during the second dekad but rains covered the entire country during the third dekad and became abundant in early July. Plantings are well underway. Following a record harvest in 2000, cereals seed availability is adequate.

With two successive bumper crops in 1999 and 2000, the overall food supply situation is satisfactory. Markets are well supplied. Prices of cereals remained low and stable. However, the Central River Division (CRD) North gathered poor crops due to blister beetles and striga infestations in early millet fields. About 250 tonnes of cereals are needed for about 9 300 affected persons. More than 2 000 people fled to The Gambia from Casamance in southern Senegal, following heavy fighting between the Senegalese army and rebel fighters. WFP will provide food in the border villages or in the Kanilai transit camp.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2000/01 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	27	92	119
Previous five years average imports	31	81	3	115
<u>2000/01 Domestic Availability</u>	<u>31</u>	<u>108</u>	<u>95</u>	<u>234</u>
2000 Production (rice in paddy terms)	-	34	142	176
2000 Production (rice in milled terms)	-	22	142	164
Possible stock drawdown	-	-	-	-
<u>2000/01 Utilization</u>	<u>40</u>	<u>102</u>	<u>142</u>	<u>284</u>
Food use	24	88	102	214
of which: local purchase requirement	-	-	-	-
Non-food use	1	4	24	30
Exports or re-exports	15	10	-	25
Possible stock build up	-	-	15	15
<u>2000/01 Import Requirement</u>	<u>40</u>	<u>80</u>	<u>-</u>	<u>120</u>
Anticipated commercial imports	40	78	-	118
Food aid needs	-	2	-	2
<u>Current Aid Position</u>				
Food aid pledges	-	-	2	2
of which: delivered	-	-	2	2
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>17</u>	<u>61</u>	<u>71</u>	<u>148</u>
<u>Indexes</u>				
2000 Production as % of average:				148
2000/01 Import requirement as % of average:				104

Area:	230 000 sq.km
Climate:	Tropical wet-dry; two rainy seasons in south and one in north
Population:	20.75 million (2001 estimate); G.N.P. per caput: US\$390 (1999)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports and roads inadequate
Major foodcrops:	Roots and tubers, coarse grain, rice
Marketing year:	January/December; Lean season: April-June
Share of cereals in total calorie intake:	27 percent

CURRENT SITUATION

First rains in the south in late February/early March permitted planting of the first maize crop. Precipitation was well above average from mid-March to mid-April. Rains decreased in late April and early May but improved in mid and late May. They remained below average in early June, except in the north. Well below-average rainfall was recorded in the second dekad of June, but precipitation became well above average during the third dekad and remained widespread in early July.

Reflecting poor harvests in several regions in 2000, the food supply situation is tight in some areas. The government announced its plans to halve its rice imports in 2001 by developing more than one million hectares of inland valleys for rice production. About 10 000 Liberian and up to 2 500 Sierra Leoneans refugees remain in the country.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	213	1 536	1 749
Previous five years average imports	207	207	31	445
<u>2001 Domestic Availability</u>	<u>210</u>	<u>142</u>	<u>1 536</u>	<u>1 679</u>
2000 Production (rice in paddy terms)	-	213	1 536	1 750
2000 Production (rice in milled terms)	-	142	1 536	1 679
Possible stock drawdown	-	-	-	-
<u>2001 Utilization</u>	<u>210</u>	<u>372</u>	<u>1 586</u>	<u>2 169</u>
Food use	207	342	1 210	1 758
of which: local purchase requirement	-	-	-	-
Non-food use	3	26	342	370
Exports or re-exports	-	5	5	10
Possible stock build up	-	-	30	30
<u>2001 Import Requirement</u>	<u>210</u>	<u>230</u>	<u>50</u>	<u>490</u>
Anticipated commercial imports	200	220	40	460
Food aid needs	10	10	10	30
<u>Current Aid Position</u>				
Food aid pledges	46	-	11	57
of which: delivered	-	-	4	4
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>10</u>	<u>17</u>	<u>58</u>	<u>85</u>
<u>Indexes</u>				
2000 Production as % of average:				100
2001 Import requirement as % of average:				110

Area:	246 000 sq.km
Climate:	Tropical wet-dry; rainy season: March/June to October/November
Population:	7.18 million (2001 estimate); G.N.P. per caput: US\$510 (1999)
Specific characteristics of the country:	Low-income food-deficit country; mountainous coastal country
Logistics:	Ports and roads inadequate
Major foodcrops:	Rice, roots and tubers, coarse grains
Marketing year:	January/December; Lean season: July-September
Share of cereals in total calorie intake:	52 percent

CURRENT SITUATION

First rains were registered in the south in late March, and subsequently covered the entire country in May, allowing land preparation and first plantings. They remained widespread in June, being well above normal in the west in early and late June, and throughout the country in early July. Reflecting a good harvest in 1999 and a record crop in 2000, the overall food supply situation is satisfactory and markets are generally well supplied, except in the south-east where rebel incursions from Sierra Leone have severely affected agriculture and marketing activities.

There are more than 400 000 refugees from Liberia and Sierra Leone and about 150 000 IDPs in the country. About 57 000 Sierra Leonean and Liberian refugees have been relocated from the Parrot's Beak, a stretch of Guinean territory which has been and is likely to remain the scene of military operations by various armed groups. New refugee camps have been established in the Dabola and Albadaria prefectures to relocate refugees.

At the same time, the voluntary repatriation of those who wish to return to Sierra Leone is facilitated. A transit camp has been established in Conakry to organise repatriation of refugees by boat to Freetown where reception facilities are available. Since September 2000, more than 55 000 Sierra Leoneans have returned from Guinea.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	721	207	928
Previous five years average imports	112	235	1	348
<u>2001 Domestic Availability</u>	112	956	208	1376
2000 Production (rice in paddy terms)	-	871	230	1 100
2000 Production (rice in milled terms)	-	581	230	810
Possible stock drawdown	-	-	-	-
<u>2001 Utilization</u>	110	801	230	1 140
Food use	107	650	184	941
of which: local purchase requirement	-	-	-	-
Non-food use	3	131	44	178
Exports or re-exports	-	10	-	10
Possible stock build up	-	10	2	12
<u>2001 Import Requirement</u>	110	220	-	330
Anticipated commercial imports	110	220	-	330
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	4	-	-	4
of which: delivered	4	-	-	4
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	14	87	25	126
<u>Indexes</u>				
2000 Production as % of average:				119
2001 Import requirement as % of average:				95

Area:	28 000 sq.km
Climate:	Tropical wet-dry; rainy season: May-October
Population:	1.18 million (2001 estimate); G.N.P. per caput: US\$160 (1999)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Roads inadequate, particularly during the rainy season; river transport important
Major foodcrops:	Rice, coarse grains, oils and fats, roots and tubers
Marketing year:	November/October; Lean season: May-August
Share of cereals in total calorie intake:	64 percent

CURRENT SITUATION

First rains were recorded in mid-May in the east but precipitation became abundant countrywide only in early June. Rains decreased during the second dekad but resumed and were well above average over the entire country during the third dekad and in early July. Coarse grains are emerging/tillering in the east and the north. Land preparation and plantings of rainfed rice are underway. Transplanting of swamp rice from seedbeds will take place in July/August after desalination of swamp rice fields. The pest situation is calm but localised insect attacks have been reported in the south.

The overall food supply situation is satisfactory. Markets remain generally well supplied countrywide. However, some population groups with low purchase power are facing food difficulties, notably in urban areas and in Pirada, Fulacunda, Tite, S. Domingos and Ingoré areas, due to insecurity in border areas with Senegal.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2000/01 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	97	61	158
Previous five years average imports	8	65	2	75
<u>2000/01 Domestic Availability</u>	8	69	64	133
2000 Production (rice in paddy terms)	-	104	64	168
2000 Production (rice in milled terms)	-	69	64	133
Possible stock drawdown	-	-	-	-
<u>2000/01 Utilization</u>	7	129	69	205
Food use	7	111	53	170
<i>of which: local purchase requirement</i>	-	-	-	-
Non-food use	-	12	10	22
Exports or re-exports	-	2	-	2
Possible stock build up	-	5	6	11
<u>2000/01 Import Requirement</u>	7	60	5	72
Anticipated commercial imports	5	55	-	60
Food aid needs	2	5	5	12
<u>Current Aid Position</u>				
Food aid pledges	-	1	-	1
<i>of which: delivered</i>	-	1	-	1
Donor-financed purchases	-	-	-	-
<i>of which: for local use</i>	-	-	-	-
<i>for export</i>	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	6	94	45	144
<u>Indexes</u>				
2000 Production as % of average:				106
2000/01 Import requirement as % of average:				96

KENYA

Area:	570 000 sq.km
Climate:	North-east is semi-arid to arid; mountainous central and south-western areas have two rainy seasons: March-May and November-December.
Population:	30.75 million (2001 estimate), GNP per caput US\$360 (1999)
Specific characteristics of the country:	Low-income food-deficit country; regular importer and occasional exporter of grain.
Logistics:	Good port (Mombasa) and extensive rail and road network. Gateway to Burundi, Rwanda and Uganda
Major foodcrops:	Maize, wheat, pulses, roots and tubers
Marketing year:	October/September; Lean season: June-July
Share of cereals in total calorie intake:	56 percent

CURRENT SITUATION

Prospects for the 2001 main season cereal crops are uncertain. Abundant precipitation in April has given way to drier than normal May affecting early planted crops. Government reports indicate that planting of major crops was completed in all agro-ecological zones during May. An estimated 1 million hectares of maize were planted. Crop conditions remain favourable in the key producing areas of the Rift Valley, Western and parts of Nyanza and Central Provinces. However, parts of Eastern, most of Coast and lowland areas of Central Provinces have seen deteriorating crop conditions, particularly the maize crop that exhibited severe moisture stress. Initial forecasts for the maize crop of about 2.34 million tonnes may now be difficult to achieve.

The overall food supply situation has improved considerably following favourable short-rains harvests and improved pasture in several central and western pastoral districts following abundant rains. However, eastern pastoral districts have yet to recover with only scanty rainfall received so far.

The severe drought in 1999/2000 seriously undermined the food security of 4.4 million people, particularly in pastoral areas, and resulted in a massive relief operation. Notable improvement in rates of child malnutrition were reported illustrating the impact of emergency interventions. However, emergency food assistance will still be required, at least until the main season harvest towards the end of the year.

A revised Emergency Operation (EMOP) was jointly approved in January 2001 by FAO and WFP for food assistance to the 4.4 million drought affected people. Delays in shipments were reported to have caused problems since January 2001.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2000/01 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	267	50	2 588	2 905
Previous five years average imports	456	222	745	1 423
<u>2000/01 Domestic Availability</u>	<u>180</u>	<u>33</u>	<u>2 016</u>	<u>2 229</u>
2000 Production (rice in paddy terms)	130	50	1 916	2 096
2000 Production (rice in milled terms)	130	33	1 916	2 079
Possible stock drawdown	50	-	100	150
<u>2000/01 Utilization</u>	<u>780</u>	<u>233</u>	<u>3 380</u>	<u>4 393</u>
Food use	760	213	3 104	4 077
<i>of which: local purchase requirement</i>	-	-	7	7
Non-food use	20	20	276	316
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2000/01 Import Requirement</u>	<u>600</u>	<u>200</u>	<u>1 364</u>	<u>2 164</u>
Anticipated commercial imports	451	200	750	1 401
Food aid needs	149	-	614	763
<u>Current Aid Position</u>				
Food aid pledges	51	-	111	162
<i>of which: delivered</i>	16	-	111	127
Donor-financed purchases	-	-	7	7
<i>of which: for local use</i>	-	-	7	7
<i>for export</i>	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>25</u>	<u>7</u>	<u>101</u>	<u>133</u>
<u>Indexes</u>				
2000 Production as % of average:				72
2000/01 Import requirement as % of average:				152

LESOTHO

Area:	30 000 sq.km
Climate:	Highland rainy climate with mild winter. Rainy season: Oct.-April. Cool temperatures in May-September with frost hazard
Population:	2.15 million (2001 estimate); G.N.P. per caput: US\$550 (1999)
Specific characteristics of the country:	Low-income food-deficit country; land-locked
Logistics:	All imports through South Africa
Major foodcrops:	Maize, sorghum, vegetables
Marketing year:	April/March; Lean season: February-April
Share of cereals in total calorie intake:	75 percent

CURRENT SITUATION

An FAO/ WFP Crop and Supply Assessment Mission visited the country from 5 to 16 May 2001, to review prospects for the 2000/01 crops and the overall food supply situation, and to estimate the cereal import requirements, including food aid, for the 2001/02 marketing year.

The Mission estimated that the total cropped area had not changed from normal years. However at the beginning of January 2001 a cold front passed over Lesotho causing frost that severely affected crops at their critical development stages. It was immediately followed by a prolonged dry spell, a heat wave and a hailstorm in parts, all of which further damaged crops and resulted in poor crop yields. Frost damage was particularly severe in the mountain districts where many households suffered total crop loss. As a result of these adverse effects, the Mission forecast the 2001 cereal production at 80 000 tonnes, which is about 55 percent below last year and 60 percent below the average of the last five years. Maize production is estimated at 58 000 tonnes, wheat and sorghum each at 11 000 tonnes. Other crops such as beans and peas were also observed on most farmers' fields, and contribute to the diet of families and cash incomes when grown in larger quantities.

For the 2001/02 marketing year (April/March), domestic cereal supply, estimated at 112 000 tonnes, falls far short of national consumption requirements. The cereal import requirement was estimated at 332 000 tonnes, which is expected to be covered mostly by commercial imports. Even in normal years, Lesotho's cereal production covers about 50 percent of its domestic consumption requirements. The one-to-one convertibility of the local currency with the South African Rand means that availability of foreign exchange is not a major constraint to commercial imports from South Africa.

The Mission estimated that there was no need for large-scale food assistance. At the household level, while most families will face larger than usual food deficits in marketing year 2001/02 (nearly all rural households in Lesotho buy food between harvests), they have adequate coping means to get them through to the next harvest, provided food prices remain stable. The means include sale of livestock (over 80 percent of rural households own cattle, goats and sheep) remittances from family members working in South Africa and towns in Lesotho, as well as local wage labour and informal sector income earning activities. However, there is a relatively small proportion of rural households (probably 10-15 percent) in the most affected districts (Mokhotlong, Thaba-Tseka, Mhale's Hoek and Quthing) who have lost their crops but have neither livestock nor off-farm income with which to access food on the market. This is the group most at risk. The group will also not have seed for planting in the next cropping season starting in September 2001.

The Mission recommended that a rapid survey be undertaken in the four worst affected districts to identify, quantify and precisely target these households for food and seed assistance. It recommended that the survey be jointly undertaken by Government of Lesotho/WFP/FAO's Special Relief Operation Service (TCOR).

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

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

LIBERIA

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

CURRENT SITUATION

Planting of rice, the staple crop, is underway. Precipitation has been generally widespread and abundant from mid-April to mid-May. Precipitation decreased in late May but improved in early June. Rains remained widespread in June and early July. With the exception of Lofa County, relative peace in most areas has exerted a positive influence on farming activities. The cultivated area and rice production should increase if climatic conditions are favourable. Input distribution has been undertaken by several NGOs in various areas. However, transport infrastructure is very poor, and hampers distributions as well as the marketing of local produce. Post-harvest losses are also reported to be high.

It is estimated that there are a total of about 80 000 Sierra Leonean refugees and 360 000 Liberian returnees, mainly in Lofa county, one of Liberia's main rice producing areas, where rebel incursions have disrupted farming and displaced thousands of people.

The cereal import requirement in 2001 is estimated at 200 000 tonnes, with commercial imports at 160 000 tonnes and 40 000 tonnes needed as food aid. WFP is seeking a total of 21 000 tonnes of cereals and pulses and 3 800 tonnes of other commodities to meet the food needs of about 145 000 refugees and other war affected people, as well as 140 000 children attending primary schools during the year 2001. The Government has lifted the travel restriction imposed on 30 April on UN staff which seriously affected WFP's operations. Bi-monthly food distribution are undertaken to all registered IDPs in Bong and Grand Cape Mount Counties, in collaboration with the National Red Cross Society and ACF. More IDPs are arriving in these counties from Lofa County with the relaxation of restrictions on crossing the Lofa Bridge.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	98	-	98
Previous five years average imports	62	80	31	173
<u>2001 Domestic Availability</u>	<u>62</u>	<u>94</u>	<u>31</u>	<u>187</u>
2000 Production (rice in paddy terms)	-	144	-	144
2000 Production (rice in milled terms)	-	94	-	94
Possible stock drawdown	-	-	-	-
<u>2001 Utilization</u>	<u>50</u>	<u>234</u>	<u>10</u>	<u>294</u>
Food use	50	212	10	272
of which: local purchase requirement	-	-	-	-
Non-food use	-	22	-	22
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2001 Import Requirement</u>	<u>50</u>	<u>140</u>	<u>10</u>	<u>200</u>
Anticipated commercial imports	40	120	-	160
Food aid needs	10	20	10	40
<u>Current Aid Position</u>				
Food aid pledges	5	0	3	8
of which: delivered	2	0	3	5
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>17</u>	<u>72</u>	<u>3</u>	<u>92</u>
<u>Indexes</u>				
2000 Production as % of average:				147
2001 Import requirement as % of average:				116

MADAGASCAR

Area:	582 000 sq.km
Climate:	Eastern coast is tropical wet, the rest tropical wet-dry. Rainy season: October-March; tropical cyclones
Population:	15.2 million (2001 estimate); G.N.P. per caput: US\$250 (1999)
Specific characteristics of the country:	Low-income food-deficit country
Logistics:	Dilapidated roads and lack of spare parts and tyres
Major foodcrops:	Rice, roots, tubers, maize, fruit
Marketing year:	April/March; Lean season: February/March
Share of cereals in total calorie intake:	60 percent

CURRENT SITUATION

Below-average rains in northern and central parts during February and first dekad of March, which followed abundant rains in previous months, affected growing conditions for the 2001 paddy crop. The overall prospects for the paddy harvest, starting from April, are uncertain; yield reductions are anticipated in parts. By contrast, in the southern maize growing areas abundant precipitation since the second dekad of February improved prospects for the maize crop which had been affected by dry weather. However, the rains may have arrived too late to prevent yield reductions and the harvest could be reduced for the second consecutive year. Last year, the southern areas were affected by a severe drought that caused a one-quarter decline in the maize output.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	7	2 467	166	2 640
Previous five years average imports	76	144	10	230
<u>2001/02 Domestic Availability</u>	<u>9</u>	<u>1 700</u>	<u>165</u>	<u>1 874</u>
2001 Production (rice in paddy terms)	9	2 500	160	2 669
2001 Production (rice in milled terms)	9	1 700	160	1 869
Possible stock drawdown	-	-	5	5
<u>2001/02 Utilization</u>	<u>79</u>	<u>2 020</u>	<u>178</u>	<u>2 277</u>
Food use	79	1 875	157	2 111
of which: local purchase requirement	-	-	-	-
Non-food use	-	120	21	141
Exports or re-exports	-	-	-	-
Possible stock build up	-	25	-	25
<u>2001/02 Import Requirement</u>	<u>70</u>	<u>320</u>	<u>13</u>	<u>403</u>
Anticipated commercial imports	68	300	10	378
Food aid needs	2	20	3	25
<u>Current Aid Position</u>				
Food aid pledges	2	-	3	5
of which: delivered	2	-	1	3
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>5</u>	<u>115</u>	<u>10</u>	<u>129</u>
<u>Indexes</u>				
2001 Production as % of average:				101
2001/02 Import requirement as % of average:				175

Area:	94 000 sq.km
Climate:	Tropical wet-dry climate; rainy season: November-May
Population	12.96 million (2000 estimate); G.N.P. per caput: US\$190 (1999)
Specific characteristics of the country:	Low-income food-deficit country; land-locked country; importer and exporter of grain
Logistics:	Imports/exports through Beira (Mozambique) or Dar es Salaam (Tanzania)
Major foodcrops:	Maize, pulses, roots, tubers, rice
Marketing year:	April/March; Lean season: February-March
Share of cereals in total calorie intake:	70 percent

CURRENT SITUATION

Latest preliminary estimate of the recently harvested 2001 maize crop has been revised downwards to 1.899 million tonnes, a decline of 24 percent from the bumper crop of last year but still at the average level of the past five years. A mid-season dry spell in southern and central parts and subsequent excessive rains in 13 of the country's 27 districts adversely affected cereal production. Severe floods in these districts affected 346 000 people and resulted in the loss of 50 000 hectares of foodcrops. WFP has targeted 275 000 people for emergency food assistance.

Despite the decline in production, the maize harvest is anticipated to be sufficient to satisfy domestic requirements in marketing year 2001/02 (April/March).

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	2	78	2 085	2 165
Previous five years average imports	44	1	78	123
<u>2001/02 Domestic Availability</u>	<u>2</u>	<u>58</u>	<u>2 048</u>	<u>2 108</u>
2001 Production (rice in paddy terms)	2	89	1 956	2 047
2001 Production (rice in milled terms)	2	58	1 956	2 016
Possible stock drawdown	-	-	92	92
<u>2001/02 Utilization</u>	<u>47</u>	<u>58</u>	<u>2 048</u>	<u>2 153</u>
Food use	46	45	1 793	1 884
of which: local purchase requirement	-	-	2	2
Non-food use	-	12	255	267
Exports or re-exports	-	1	-	1
Possible stock build up	1	-	-	1
<u>2001/02 Import Requirement</u>	<u>45</u>	<u>-</u>	<u>-</u>	<u>45</u>
Anticipated commercial imports	35	-	-	35
Food aid needs	10	-	-	10
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	2	2
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>3</u>	<u>3</u>	<u>134</u>	<u>141</u>
<u>Indexes</u>				
2001 Production as % of average:				95
2001/02 Import requirement as % of average:				37

Area:	1 220 000 sq.km
Climate:	From north to south: arid, semi-arid and tropical wet-dry; rainy season: May-October
Population:	10.45 million (2001 estimate); G.N.P. per caput: US\$240 (1999)
Specific characteristics of the country:	Low-income food-deficit country; land-locked Sahelian country
Logistics:	Roads inadequate during rainy season; river transport important; rail link to Dakar (Senegal)
Major foodcrops:	Millet, sorghum, rice, maize
Marketing year:	November/October; Lean season: July-September
Share of cereals in total calorie intake:	75 percent

CURRENT SITUATION

Adequate rains so far benefited plantings and crop development. Following first rains in the extreme south in mid-April, precipitation progressed northwards in May and remained generally widespread and regular in June, being more abundant during the third dekad. Precipitation became abundant in the west in early July. Plantings of millet and sorghum are well underway; crops are emerging in the south. Pastures are good in the south and regenerating further north. The pest situation is calm.

Following an average harvest and two successive bumper crops in 1998 and 1999, farmers' stocks are still available for the lean season. The national security stock is also at its recommended level of 35 000 tonnes (plus 25 000 tonnes in the form of "financial" security stock). Therefore, the overall food situation is satisfactory. However, cereal prices increased significantly in April. In Ségou region, the average price of millet in mid-April was 26 percent higher than in March, 56 percent higher than the price in April last year and 30 percent higher than the previous five-year average price. The SAP (national early warning system) classified almost 400 000 persons as at risk of "food difficulties" in the "cercles" of Douentza, Mopti, Bandiagara and Youvarou in Mopti region; Niafunké and Gourma-Rharous in Tombouctou region; Gao, Ansongo, Bourem and Ménaka in Gao region and Kidal and Abébara in Kidal region. It recommended the distribution of 10 790 tonnes of millet and sorghum to these populations for 3 months.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2000/01 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	5	625	1 767	2 397
Previous five years average imports	47	59	5	111
<u>2000/01 Domestic Availability</u>	<u>10</u>	<u>507</u>	<u>1 841</u>	<u>2 358</u>
2000 Production (rice in paddy terms)	10	745	1 631	2 386
2000 Production (rice in milled terms)	10	507	1 631	2 148
Possible stock drawdown	-	-	210	210
<u>2000/01 Utilization</u>	<u>60</u>	<u>547</u>	<u>1 841</u>	<u>2 448</u>
Food use	59	400	1 581	2 040
of which: local purchase requirement	-	-	5	5
Non-food use	1	97	248	346
Exports or re-exports	-	50	12	62
Possible stock build up	-	-	-	-
<u>2000/01 Import Requirement</u>	<u>50</u>	<u>40</u>	<u>-</u>	<u>90</u>
Anticipated commercial imports	40	40	-	80
Food aid needs	10	-	-	10
<u>Current Aid Position</u>				
Food aid pledges	-	1	1	2
of which: delivered	-	1	1	2
Donor-financed purchases	-	-	2	2
of which: for local use	-	-	2	2
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>6</u>	<u>38</u>	<u>151</u>	<u>195</u>
<u>Indexes</u>				
2000 Production as % of average:				100
2000/01 Import requirement as % of average:				81

MAURITANIA

Area:	1 025 000 sq.km
Climate:	Mostly a Saharian country; semi-arid fringe in extreme south with rains in June-September
Population:	2.72 million (2001 estimate); G.N.P. per caput: US\$380 (1999)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Port capacity adequate, though storms during January-March sometimes cause difficulties
Major foodcrops:	Wheat, rice, millet and sorghum
Marketing year:	November/October; Lean season: July-September
Share of cereals in total calorie intake:	54 percent

CURRENT SITUATION

First rains were received in late June in the extreme south on 22, 24-26 and 29 June in Gorgol, Guidimakha, Hodh El Gharbi and Trarza. They permitted land preparation and planting to start. Satellite imagery indicates that rains were abundant in early July in the south and south-east. Dry plantings may already have started in some areas in the the south-west. The pest situation is calm.

The food situation improved in rural areas following a good rainfed crops harvest in 2000. Although markets are generally well supplied, sorghum prices have increased sharply in Brakna, Gorgol and Trarza following poor recession crops. Several populations remain vulnerable, notably in various areas of Trarza, Brakna and western Gorgol, where imports of cereals from Mali decreased. The Government launched an appeal for 25 000 tonnes of emergency food aid.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2000/01 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	78	99	177
Previous five years average imports	219	63	11	293
<u>2000/01 Domestic Availability</u>	<u>219</u>	<u>141</u>	<u>110</u>	<u>470</u>
2000 Production (rice in paddy terms)	-	69	108	177
2000 Production (rice in milled terms)	-	46	108	154
Possible stock drawdown	-	-	-	-
<u>2000/01 Utilization</u>	<u>220</u>	<u>111</u>	<u>123</u>	<u>454</u>
Food use	180	100	104	384
of which: local purchase requirement	-	-	-	-
Non-food use	25	9	18	52
Exports or re-exports	15	2	1	18
Possible stock build up	-	-	-	-
<u>2000/01 Import Requirement</u>	<u>220</u>	<u>65</u>	<u>15</u>	<u>300</u> ^{1/}
Anticipated commercial imports	210	55	10	275
Food aid needs	10	10	5	25
<u>Current Aid Position</u>				
Food aid pledges	-	-	1	1
of which: delivered	-	-	1	1
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>66</u>	<u>37</u>	<u>38</u>	<u>141</u>
<u>Indexes</u>				
2000 Production as % of average:				100
2000/01 Import requirement as % of average:				102

^{1/} Including 15 000 tonnes for re-export.

Area:	1 850 sq.km
Climate:	No dry months, most rainfall in November-July; tropical cyclones
Population:	1.15 million (2001 estimate); G.N.P. per caput: US\$3 590 (1999)
Specific characteristics of the country:	Cereal consumption covered almost entirely by imports
Logistics:	Inadequate port handling capacity; road system good
Major foodcrops:	Vegetables
Marketing year:	January/December
Share of cereals in total calorie intake:	48 percent

CURRENT SITUATION

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

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

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

MOZAMBIQUE

Area:	784 000 sq.km
Climate:	Tropical wet-dry; coast is semi-arid
Population:	17.24 million (2000 estimate); G.N.P. per caput: US\$230 (1999)
Specific characteristics of the country:	Low-income food-deficit country; exposed to tropical storms and cyclones
Logistics:	Dilapidated rail and road transport fleet; lack of fuel and spares; poor roads; substantial Deliveries by coastal vessels
Major foodcrops:	Roots, tubers, maize
Marketing year:	April/March; Lean season: February-April
Share of cereals in total calorie intake:	53 percent

CURRENT SITUATION

Harvesting of the 2001 cereal crops is complete. An estimate of production is still not available. However, preliminary indications point to a maize output around or slightly above last year's good crop of 1 million tonnes. This reflects an increase of 10 percent in the area planted and generally favourable rains in the main growing areas, despite localized floods.

Torrential rains in January and February, as well as high levels of the Zambezi River, resulted in severe floods in central provinces of Zambesia, Sofala, Manica and Tete. About 77 000 hectares of foodcrops were lost to the floods. Outside the flooded areas, the excessive rains are likely to have resulted in yield reductions. In main growing northern provinces, abundant and well distributed rains favoured cereal crop development and a good output is expected. By contrast, in southern provinces of Maputo, Gaza and Inhambane, a prolonged mid-season dry spell in January severely reduced yields of maize and bean crops. In these provinces, which were the worst affected by floods last year, food production is anticipated to be poor for the second consecutive year.

Overall, a satisfactory 2001 cereal production is expected. Cassava production is also anticipated to be good. Reflecting the arrival of the new harvest onto the markets, maize prices have declined in the main markets, and are below their level of a year ago.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	170	1 407	1 577
Previous five years average imports	174	72	40	286
<u>2001/02 Domestic Availability</u>	<u>-</u>	<u>118</u>	<u>1 406</u>	<u>1 524</u>
2001 Production (rice in paddy terms)	-	165	1 406	1 571
2001 Production (rice in milled terms)	-	110	1 406	1 516
Possible stock drawdown	-	8	-	8
<u>2001/02 Utilization</u>	<u>227</u>	<u>258</u>	<u>1 511</u>	<u>1 996</u>
Food use	212	242	1 142	1 596
of which: local purchase requirement	-	-	-	-
Non-food use	10	16	264	290
Exports or re-exports	-	-	100	100
Possible stock build up	5	-	5	10
<u>2001/02 Import Requirement</u>	<u>227</u>	<u>140</u>	<u>105</u>	<u>472</u>
Anticipated commercial imports	95	130	75	300
Food aid needs	132	10	30	172
<u>Current Aid Position</u>				
Food aid pledges	133	-	-	133
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>12</u>	<u>14</u>	<u>65</u>	<u>90</u>
<u>Indexes</u>				
2001 Production as % of average:				100
2001/02 Import requirement as % of average:				165

NAMIBIA

Area:	823 000 sq.km
Climate:	Mostly arid (south-west and coast) or semi-arid. Only north and north-east gets regular rainfall in November-April
Population:	1.74 million (2000 estimate); G.N.P. per caput: US\$1 890 (1999)
Specific characteristics of the country:	Arid to semi-arid country; cereal production mainly in the north
Logistics:	Good road and railway network
Major foodcrops:	Millet, maize, sorghum, wheat
Marketing year:	May/April;
Share of cereals in total calorie intake:	48 percent

CURRENT SITUATION

A delay in the start of the rainy season, coupled with severe dry weather in January and first dekad of February in the major cereal growing areas of the north, resulted in planting reductions and poor yields. Maize production in 2001 is tentatively estimated at 45 percent below the satisfactory harvest of last year at 27 000 tonnes. Production is also 10 percent lower than the average of the past five years. Estimates of the sorghum/millet harvest, accounting for two-thirds of the total cereal production, are not yet available, but the output is expected to decline from the below-normal level of last year.

As a result of the sharply reduced maize harvest, imports of coarse grains in marketing year 2001/02 (April/March) are projected at 54 000 tonnes. In addition, the country needs to import 45 000 tonnes of wheat, the crop for which it has a structural deficit. Although all import requirements are expected to be covered on commercial basis, the food supply situation is anticipated to be very tight for small farmers who experienced crop failure this season.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	5	-	101	106
Previous five years average imports	39	-	65	104
<u>2001/02 Domestic Availability</u>	<u>5</u>	<u>-</u>	<u>93</u>	<u>98</u>
2001 Production (rice in paddy terms)	5	-	85	90
2001 Production (rice in milled terms)	5	-	85	90
Possible stock drawdown	-	-	8	8
<u>2001/02 Utilization</u>	<u>50</u>	<u>-</u>	<u>147</u>	<u>197</u>
Food use	50	-	137	187
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	10	10
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2001/02 Import Requirement</u>	<u>45</u>	<u>-</u>	<u>54</u>	<u>99</u>
Anticipated commercial imports	45	-	54	99
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>26</u>	<u>-</u>	<u>71</u>	<u>97</u>
<u>Indexes</u>				
2001 Production as % of average:				85
2001/02 Import requirement as % of average:				95

Area:	1 267 000 sq.km
Climate:	Northern part arid, southern part semi-arid with rains in June-October
Population:	10.34 million (2001 estimate); G.N.P. per caput: US\$190 (1999)
Specific characteristics of the country:	Low-income food-deficit country; land-locked Sahelian country
Logistics:	Roads inadequate during rainy season
Major foodcrops:	Millet and sorghum, pulses, roots and tubers
Marketing year:	November/October; Lean season: July-September
Share of cereals in total calorie intake:	70 percent

CURRENT SITUATION

The rainy season is now well established. The first rains came earlier than usual, during the first two dekads of May, allowing land preparation and first plantings to start. Rainfall decreased in late May and early June but picked up in mid-June and covered all the producing areas by late June/early July. It is estimated that about 53 percent of the villages had finished planting by 20 June, instead of 44 percent last year. Crops are emerging and already tillering/elongating in Tahoua and Zinder departments. The pest situation is mostly calm. However, grasshoppers and caterpillar attacks have been reported and localised treatments have been undertaken.

Following a below-average crop in 2000, estimated at 2 143 000 tonnes, which was 25 percent below the 1999 level and about 10 percent below the average of the previous five years, the food supply situation is tight in the traditionally food deficit areas. Prices of cereals increased significantly in March and April, and have remained higher than average. The most at-risk zones are in Tchirozérine, Mainé-Sorea, N'Guigmi, Filingué and Ouallam arrondissements. The Government launched an appeal for international food assistance and seeds for the next growing season. The government and donors have bought cereals for sale at subsidized prices in the areas that experienced production shortfalls. The cereals, mainly millet and sorghum, are being sold at 10 000 F.CFA (about US \$14) per 100-kg bag instead of the market price of 18 000 to 20 000 F.CFA. More than 1 billion F.CFA francs has been made available from the National Food Security Fund and the Donor Common Fund to buy cereals. In addition, 2 000 tonnes of seeds have been distributed in the affected areas. Financial assistance has also been given for off-season irrigated crops.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2000/01 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	7	63	2 313	2 383
Previous five years average imports	44	100	231	375
<u>2000/01 Domestic Availability</u>	<u>21</u>	<u>59</u>	<u>2 372</u>	<u>2 452</u>
2000 Production (rice in paddy terms)	11	61	2 072	2 143
2000 Production (rice in milled terms)	11	39	2 072	2 122
Possible stock drawdown	10	20	300	330
<u>2000/01 Utilization</u>	<u>68</u>	<u>159</u>	<u>2 602</u>	<u>2 829</u>
Food use	62	152	2 287	2 500
of which: local purchase requirement	-	-	-	-
Non-food use	1	8	315	324
Exports or re-exports	5	-	-	5
Possible stock build up	-	-	-	-
<u>2000/01 Import Requirement</u>	<u>47</u>	<u>100</u>	<u>230</u>	<u>377</u>
Anticipated commercial imports	45	92	215	352
Food aid needs	2	8	15	25
<u>Current Aid Position</u>				
Food aid pledges	-	3	-	3
of which: delivered	-	3	-	3
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>6</u>	<u>15</u>	<u>221</u>	<u>242</u>
<u>Indexes</u>				
2000 Production as % of average:				90
2000/01 Import requirement as % of average:				101

Area:	911 000 sq.km
Climate:	Mostly tropical wet-dry, south-west tropical wet, extreme north semi-arid
Population:	114.2 million (2001 estimate); G.N.P. per caput: US\$310 (1999)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports adequate, roads inadequate during rainy season
Major foodcrops:	Roots and tubers, coarse grains, rice
Marketing year:	January/December; Lean season: April-May
Share of cereals in total calorie intake:	43 percent

CURRENT SITUATION

Rains started in the south-east in early March and progressed to the south-west in mid-March, allowing land preparation and plantings of the first maize crop. Precipitation was generally above average in April and May. Rains reached northern areas in late April/early May where they permitted planting of coarse grains. Precipitation was below normal in mid-June, notably in the south, but improved in late June/early July. The Government has re-introduced the 25 percent subsidy on fertilizers.

The overall food supply situation is satisfactory. Some population groups, however, remain vulnerable following flooding last year in Sokoto in the north-west.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	48	3 134	18 602	21 784
Previous five years average imports	1 392	558	85	2 035
<u>2001 Domestic Availability</u>	<u>40</u>	<u>2 000</u>	<u>19 341</u>	<u>21 381</u>
2000 Production (rice in paddy terms)	40	3 333	19 341	22 714
2000 Production (rice in milled terms)	40	2 000	19 341	21 381
Possible stock drawdown	-	-	-	-
<u>2001 Utilization</u>	<u>1 640</u>	<u>3 000</u>	<u>19 411</u>	<u>24 051</u>
Food use	1 588	2 450	15 207	19 244
of which: local purchase requirement	-	-	-	-
Non-food use	52	400	3 804	4 257
Exports or re-exports	-	50	200	250
Possible stock build up	-	100	200	300
<u>2001 Import Requirement</u>	<u>1 600</u>	<u>1 000</u>	<u>70</u>	<u>2 670</u>
Anticipated commercial imports	1 600	1 000	70	2 670
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>14</u>	<u>22</u>	<u>133</u>	<u>169</u>
<u>Indexes</u>				
2000 Production as % of average:				104
2001 Import requirement as % of average:				131

RWANDA

Area:	25 000 sq.km
Climate:	Highland rainy climate with moderate temperature (20°C); two rainy seasons: February-May and September-November
Population:	8.34 million (2001 estimate); G.N.P. per caput: US\$250 (1999)
Specific characteristics of the country:	Low-income food-deficit country; land-locked country
Logistics:	Ports: Mombasa (Kenya) and Dar es Salaam (Tanzania); roads and railway inadequate
Major foodcrops:	Roots, tubers, pulses, plantains, sorghum, maize
Marketing year:	January/December; Lean season: November-December
Share of cereals in total calorie intake:	25 percent

CURRENT SITUATION

Preliminary indications of the recently harvested 2001 A season crop point to a food output around or slightly lower than the good level of last year. Despite a delay to the start of the rainy season, precipitation was abundant and well distributed from mid-October to December. Although excessive rains in November resulted in floods and crop losses, mainly in Gisenyi and Butare Prefectures, they generally benefited plantings and yields, particularly of cereals and pulses. Production of roots and tubers and banana and plantains was less satisfactory reflecting shortages of planting material and prolonged dry weather. Also despite the overall positive picture, a poor harvest was gathered in the Bugesera region of Kigali Rural Province, due to seed shortages following successive reduced crops. A locally-organized Government/FAO/WFP/EU Mission has assessed this season's food production but its findings are not yet available.

The tight food supply situation has eased with the new harvest. Prices of maize, beans and Irish potatoes have decreased from their levels of a year ago. However, despite the overall improvement in the food situation, emergency food assistance is anticipated to be needed until the next harvest for people in the Bugesera region, particularly in Kanzenze and Gashora districts. WFP plans to distribute 13 000 tonnes of emergency food assistance for three months to 267 000 drought-affected people in southeast Rwanda. While stringent controls have contained the outbreak of food-and-mouth disease in Umutara, marketing restrictions are causing economic difficulties for pastoralist households.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	6	7	182	195
Previous five years average imports	15	13	182	210
<u>2001 Domestic Availability</u>	8	8	219	235
2001 Production (rice in paddy terms)	8	12	219	239
2001 Production (rice in milled terms)	8	8	219	235
Possible stock drawdown	-	-	-	-
<u>2001 Utilization</u>	23	18	369	410
Food use	23	17	348	388
of which: local purchase requirement	-	-	1	1
Non-food use	-	1	21	22
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2001 Import Requirement</u>	15	10	150	175
Anticipated commercial imports	15	10	90	115
Food aid needs	-	-	60	60
<u>Current Aid Position</u>				
Food aid pledges	-	-	19	19
of which: delivered	-	-	16	16
Donor-financed purchases	-	-	1	1
of which: for local use	-	-	1	1
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	3	2	42	47
<u>Indexes</u>				
2001 Production as % of average:				123
2001 Import requirement as % of average:				83

SAO TOME AND PRINCIPE

Area:	960 sq.km
Climate:	Tropical wet; rainfall increases with altitude and towards southern parts of the islands
Population:	150 000 (2001 estimate); G.N.P. per caput: US\$270 (1999)
Specific characteristics of the country:	Low-income food-deficit country; archipelago
Logistics:	Ports and roads adequate
Major foodcrops:	Bananas, breadfruit, cocoyam
Marketing year:	January/December
Share of cereals in total calorie intake:	36 percent

CURRENT SITUATION

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

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

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

SENEGAL

Area:	193 000 sq.km
Climate:	Semi-arid in north, tropical wet-dry in south, with rains in June-October
Population:	9.74 million (2001 estimate); G.N.P. per caput: US\$510 (1999)
Specific characteristics of the country:	Low-income food-deficit country; coastal Sahelian country
Logistics:	Port capacity adequate; gateway to Mali.
Major foodcrops:	Millet and sorghum, rice, maize, wheat
Marketing year:	November/October; Lean season: August-September
Share of cereals in total calorie intake:	61 percent

CURRENT SITUATION

Good rains in late June permitted widespread plantings. Following limited rains in the extreme south-east in May, precipitation improved significantly in the south in early June. Rainfall decreased during the second dekad of June but improved and progressed northwards during the third dekad. Rains were often above normal during the first dekad of July. Cumulative rainfall is generally above normal in the south and centre-south. Land preparation and plantings of coarse grains are well underway.

Seed availability is generally adequate following 2000 above average harvest. No significant pest activity has been reported.

The aggregate output of cereals in 2000 has been estimated at 1 073 000 tonnes which is about 14 percent above average. Following two successive good harvests in 1999 and 2000, the overall food supply situation is satisfactory. Markets are well supplied. The price of millet and sorghum seasonably increased, while the price of rice remained mostly stable. Renewed fighting in May in Casamance in southern Senegal may hamper agriculture activities at the critical planting period for paddy.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2000/01 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	189	753	942
Previous five years average imports	217	452	47	716
<u>2000/01 Domestic Availability</u>	<u>3</u>	<u>171</u>	<u>852</u>	<u>1 027</u>
2000 Production (rice in paddy terms)	-	231	842	1 073
2000 Production (rice in milled terms)	-	161	842	1 004
Possible stock drawdown	3	10	10	23
<u>2000/01 Utilization</u>	<u>233</u>	<u>671</u>	<u>889</u>	<u>1 794</u>
Food use	230	630	766	1 626
of which: local purchase requirement	-	-	5	5
Non-food use	3	42	123	168
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2000/01 Import Requirement</u>	<u>230</u>	<u>500</u>	<u>37</u>	<u>767</u>
Anticipated commercial imports	225	495	35	755
Food aid needs	5	5	2	12
<u>Current Aid Position</u>				
Food aid pledges	-	15	-	15
of which: delivered	-	6	-	6
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>24</u>	<u>65</u>	<u>79</u>	<u>167</u>
<u>Indexes</u>				
2000 Production as % of average:				114
2000/01 Import requirement as % of average:				107

SEYCHELLES

Area:	455 sq.km
Climate:	Tropical wet; rains throughout the year, peaking in October-May
Population:	78 000 (2001 estimate); G.N.P. per caput: US\$6 540 (1999)
Specific characteristics of the country:	Consists of about 100 islands scattered over more than 1 million sq.km. Tourism provides 50 percent of G.D.P.
Logistics:	-
Major foodcrops:	Coconuts, fruit, vegetables
Marketing year:	January/December
Share of cereals in total calorie intake:	49 percent

CURRENT SITUATION

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

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	-	-	-
Previous five years average imports	2	5	6	13
<u>2001 Domestic Availability</u>	2	5	6	13
2000 Production (rice in paddy terms)	-	-	-	-
2000 Production (rice in milled terms)	-	-	-	-
Possible stock drawdown	-	-	-	-
<u>2001 Utilization</u>	2	5	6	13
Food use	2	5	1	8
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	5	5
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2001 Import Requirement</u>	2	5	6	13
Anticipated commercial imports	2	5	6	13
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	26	65	13	103
<u>Indexes</u>				
2000 Production as % of average:				-
2001 Import requirement as % of average:				100

SIERRA LEONE

Area:	72 000 sq.km
Climate:	Mostly tropical wet-dry; extreme south tropical wet; rainy season: March-October
Population:	5.03 million (2001 estimate); G.N.P. per caput: US\$130 (1999)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Roads inadequate
Major foodcrops:	Rice, roots and tubers
Marketing year:	January/December; Lean season: July-August
Share of cereals in total calorie intake:	57 percent

CURRENT SITUATION

Planting of the rice crop is underway with the onset of rains in mid-April. Precipitation was abundant in mid-May and early June. Rains decreased in mid and late June but improved in early July. Rice production should increase this year reflecting increased planted areas by returning farmers and improved conditions for distribution of inputs.

As a result of low food production in 2000 and transport problems, the food supply situation will remain tight in 2001. WFP plans to distribute more than 50 000 tonnes of food aid to an estimated 544 000 beneficiaries during 2001, including IDPs, recent returnees from Guinea and 200 000 beneficiaries of special programmes for vulnerable groups such as schooling and malnourished children. NGOs also plan to distribute around 37 000 tonnes during 2001. The Government has launched a resettlement programme in Freetown, Port Loko, Kenema and Pejehun districts, which have been declared safe. A Disarmament, Demobilisation and Reintegration Programme also started in May for ex-combatants who return their arms. Between 58 000 and 60 000 Sierra Leonean refugees have recently returned following fighting in Guinea, 2 000 to 2 500 are returning to Sierra Leone each week.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	347	45	392
Previous five years average imports	78	109	30	217
<u>2001 Domestic Availability</u>	-	119	23	142
2000 Production (rice in paddy terms)	-	198	23	221
2000 Production (rice in milled terms)	-	119	23	142
Possible stock drawdown	-	-	-	-
<u>2001 Utilization</u>	80	369	53	502
Food use	80	339	48	467
of which: local purchase requirement	-	-	-	-
Non-food use	-	30	5	35
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2001 Import Requirement</u>	80	250	30	360
Anticipated commercial imports	50	200	-	250
Food aid needs	30	50	30	110
<u>Current Aid Position</u>				
Food aid pledges	33	-	1	34
of which: delivered	8	-	-	8
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	16	67	10	93
<u>Indexes</u>				
2000 Production as % of average:				56
2001 Import requirement as % of average:				166

Area:	627 000 sq.km
Climate:	Semi-arid in the south; rest arid
Population:	6.20 million (2001 estimate); G.N.P. per caput; n.a.
Specific characteristics of the country:	Low-income food-deficit country
Logistics:	Inadequate port facilities; serious shortage of fuel and spare parts
Major foodcrops:	Maize, sorghum, sesame
Marketing year:	August/July; Lean season: June-August
Share of cereals in total calorie intake:	45 percent

CURRENT SITUATION

Prospects for the 2001 main "Gu" cereal crops, now being harvested, are poor. Erratic and below-normal rains in the main growing areas in the south have reduced soil moisture for growing crops. Preliminary forecasts point to a sorghum output of about one-third the previous year's "Gu" production and less than half of the post-war average. Most affected regions include, rainfed areas of Gedo, Hiran, Bay and Bakool. However, good maize production is anticipated in the irrigated areas of Juba and Shabelle valleys.

Despite the good harvests in the last two cropping seasons, severe food difficulties may emerge reflecting slow household recovery from the earlier succession of droughts and long-term effects of years of insecurity. Moreover, further injections of new currency into the market with the attendant depreciation of the Somali Shilling have caused a sharp increase in prices of food items eroding the purchasing power of large sections of the population.

Elsewhere, in northern Somalia, pasture conditions have deteriorated due to poor rains. The ban of livestock imports from eastern Africa by countries along the Arabian Peninsula due to a Rift Valley fever has caused substantial loss of income and has affected the livelihoods of a large number of pastoral households. Some livestock marketing activities, chilled meat and exports to the United Arab Emirates (UAE), have created income generating opportunities and strengthened the Somali Shilling. However, the UAE accounts for only 2 percent of the total Somali livestock exports to countries along the Arabian Peninsula and the food security impact of lifting the ban is expected to be limited.

In response to anticipated poor harvests, dwindling stocks and inadequate relief food in the pipeline, WFP and other humanitarian agencies have appealed to the international community for additional food assistance. Earlier in the year a UN inter-agency appeal was launched for US \$130 million, to support livelihoods and assist the country's recovery.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	2	267	269
Previous five years average imports	113	94	56	263
<u>2001/02 Domestic Availability</u>	<u>5</u>	<u>1</u>	<u>225</u>	<u>231</u>
2001 Production (rice in paddy terms)	-	2	190	192
2001 Production (rice in milled terms)	-	1	190	191
Possible stock drawdown	5	-	35	40
<u>2001/02 Utilization</u>	<u>105</u>	<u>91</u>	<u>345</u>	<u>541</u>
Food use	105	81	310	496
of which: local purchase requirement	-	-	-	-
Non-food use	-	10	35	45
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2001/02 Import Requirement</u>	<u>100</u>	<u>90</u>	<u>120</u>	<u>310</u>
Anticipated commercial imports	100	75	50	225
Food aid needs	-	15	70	85
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>17</u>	<u>13</u>	<u>49</u>	<u>78</u>
<u>Indexes</u>				
2001 Production as % of average:				71
2001/02 Import requirement as % of average:				118

SOUTH AFRICA

Area:	1.22 million sq.km
Climate:	Sub-tropical with rains concentrated in the summer months (November-April); occasional snow in winter over higher parts of plateau and Cape ranges; an average of 120 days frost in the interior plateau
Population:	40.38 million (2000 estimate); GNP per caput US\$3 160 (1999)
Specific characteristics of the country:	Normally net food exporter, notably maize
Logistics:	Adequate port, rail and road facilities
Major foodcrops:	Maize, wheat
Marketing year:	May/April; Lean season: February-April
Share of cereals in total calorie intake:	54 percent

CURRENT SITUATION

Harvesting of the 2001 coarse grains, mainly maize, is complete. Latest production forecasts indicate a maize output of 7.2 million tonnes. At this level, production is one-third below the bumper crop of last year and well below the average of the past five years. The reduced harvest reflects a decrease of 17 percent in the area sown, due to low domestic prices at planting time, as well as unfavourable weather during the season. Poor rains and high temperatures in January and early February, particularly in the main western growing areas, stressed the developing maize crop. Subsequent abundant rains arrived too late to prevent sharp yield reductions.

Despite the sharp decline in production, the country still has an exportable surplus of about 500 000 tonnes of maize, as a result of large carry-over stocks estimated at 2.6 million tonnes.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	2 178	3	9 904	12 085
Previous five years average exports	146	-	1 274	1 420
<u>2001/02 Domestic Availability</u>	<u>1 863</u>	<u>100</u>	<u>9 120</u>	<u>11 083</u>
2001 Production (rice in paddy terms)	1 713	-	7 665	9 378
2001 Production (rice in milled terms)	1 713	-	7 665	9 378
Possible stock drawdown	150	100	1 455	1 705
<u>2001/02 Utilization</u>	<u>2 663</u>	<u>100</u>	<u>9 266</u>	<u>12 029</u>
Food use	2 450	100	4 612	7 162
of which: local purchase requirement	-	-	-	-
Non-food use	163	-	4 154	4 317
Exports or re-exports	50	-	500	550
Possible stock build up	-	-	-	-
<u>2001/02 Import Requirement</u>	<u>800</u>	<u>-</u>	<u>146</u>	<u>946</u>
Anticipated commercial imports	-	-	-	-
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>60</u>	<u>2</u>	<u>113</u>	<u>175</u>
<u>Indexes</u>				
2001 Production as % of average:				78
2001/02 Import requirement as % of average:				67

Area:	2.4 million sq.km
Climate:	From north to south, arid, semi-arid and tropical wet-dry. Rainy season: May-October
Population:	31.95 million (2001 estimate); GNP per caput: US\$330 (1999)
Specific characteristics of the country:	Low-income food-deficit country; cereal production mainly in eastern and central areas.
Logistics:	Roads, railway and river transport inadequate
Major foodcrops:	Sorghum, millet, wheat, roots and tubers, oils
Marketing year:	November/October; Lean season: September-October
Share of cereals in total calorie intake:	51 percent

CURRENT SITUATION

Planting of the 2001 main season cereal crop is in progress in central and northern growing areas. Early prospects are unfavourable due to below normal rains in May and June which affected planting. More rains are needed in the coming weeks to avoid further reductions in yield potential. In southern Sudan prospects are also unfavourable. The area planted has been reduced by continuous population displacements due to recent upsurge in conflict coupled with late and insufficient rains. Erratic rains in May and June have in general negatively affected crop development. The situation gives cause for serious concern in Northern Bahr-EI-Ghazal where escalation of civil conflict was more pronounced.

The aggregate cereal production in 2000/01 is estimated at 3.33 million tonnes, representing a drop of about 21 percent compared to the average of the previous five years. The cereal import requirement in the 2000/01 marketing year (November/October) is estimated at 1.4 million tonnes. Commercial imports are estimated at about 1.2 million tonnes, about the same as last year's actual imports, with the rest being food assistance requirements.

Lower harvests for two consecutive years coupled with virtual depletion of stocks have led to a sharp rise in cereal prices. In March and April 2001 sorghum prices averaged SP45 000 compared to SP15 000 for the same period in 1999 and SP30 000 in 2000. Such an increase has reduced access to food for the poorer segments of the population. The purchasing power of large numbers of people, particularly pastoralists, has been seriously eroded. With coping mechanisms stretched to the limit, farmers and other vulnerable groups have migrated in search of work and food. The number of people joining WFP's "Food for Work" programmes has increased dramatically. Government efforts to mitigate food shortages by lifting customs duties on food imports and financing grain purchases through the recently instituted Strategic Commodity Stock Authority have, to some extent, helped stabilise cereal markets. However, acute food shortages and severe malnutrition rates are on the rise. The situation is likely to worsen in the coming months with the lean season just starting and only a fraction of the appeal for international food assistance pledged so far. The population most affected by last year's drought are mainly located in greater Darfur and Kordofan, Bahr el Ghazal, Bahr el Jebel, East Equatoria, Jonglei, Red Sea and Butana province in Gezira State. Latest estimates put the number of people in need of urgent food assistance in Sudan at some 2.97 million affected by both drought and/or civil war. There is an urgent need of more food aid pledges and support for logistics if large scale starvation is to be avoided.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2000/01 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	418	3	3 845	4 266
Previous five years average imports	795	28	64	887
<u>2000/01 Domestic Availability</u>	<u>299</u>	<u>3</u>	<u>3 086</u>	<u>3 388</u>
2000 Production (rice in paddy terms)	299	5	3 024	3 328
2000 Production (rice in milled terms)	299	3	3 024	3 326
Possible stock drawdown	-	-	62	62
<u>2000/01 Utilization</u>	<u>1 557</u>	<u>28</u>	<u>3 240</u>	<u>4 825</u>
Food use	1 525	26	2 808	4 359
of which: local purchase requirement	-	-	20	20
Non-food use	32	1	432	465
Exports or re-exports	-	-	-	-
Possible stock build up	-	1	-	1
<u>2000/01 Import Requirement</u>	<u>1 258</u>	<u>25</u>	<u>154</u>	<u>1 437</u>
Anticipated commercial imports	1 200	25	-	1 225
Food aid needs	58	-	154	212
<u>Current Aid Position</u>				
Food aid pledges	3	-	23	26
of which: delivered	3	-	21	24
Donor-financed purchases	-	-	4	4
of which: for local use	-	-	4	4
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>48</u>	<u>1</u>	<u>88</u>	<u>136</u>
<u>Indexes</u>				
2000 Production as % of average:				78
2000/01 Import requirement as % of average:				162

SWAZILAND

Area:	17 000 sq.km
Climate:	Highland rainy climate. Rainy season: October-April; cool temperatures in May- September
Population:	0.98 million (2000 estimate); G.N.P. per caput: US\$1 360 (1999)
Specific characteristics of the country:	Low-income food-deficit country; land-locked country
Logistics:	Good road network; imports through Mozambique or South Africa
Major foodcrops:	Maize
Marketing year:	May/April; Lean season: February-April
Share of cereals in total calorie intake:	55 percent

CURRENT SITUATION

An FAO/WFP Crop and Supply Assessment Mission visited Swaziland from 16 to 28 May 2001, to review harvest prospects and the overall food supply situation, and to estimate cereal import requirements for the 2001/02 marketing year.

The Mission forecast the 2001 maize production at 73 000 tonnes, which is about 66 percent of the last five years average. Swaziland does not produce other cereal crops, except for a few hundred tonnes of sorghum. Other crops like sweet potato, beans and cowpeas are produced but in small and declining quantities. Field observations by the Mission indicated that production of these crops has also been lower than average.

The reduction in maize production was particularly serious in the Middle and Lowerveld where late planted crops were affected at the critical flowering /tasseling stage. The early-planted crops escaped the drought and generally produced good yields. For the 2001/02 marketing year (April/March), domestic cereal supply, estimated at 85 000 tonnes, falls far short of national consumption requirements. With a mid-marketing year population estimate of 1 034 000, cereal import requirement was estimated at 123 000 tonnes. The Mission estimated that the requirement will be fully covered by commercial imports. Even in normal years, Swaziland's cereal production covers only 60 percent of its domestic consumption requirements. The one-to-one convertibility of the local currency with the South African Rand means that availability of foreign exchange is not a major constraint to commercial imports from South Africa.

Nonetheless, because of reduced production, food shortages may be experienced by the most affected households and other vulnerable population groups, which will need food assistance. A needs assessment is currently being conducted jointly by the Disaster Management Task Force and NGOs in drought affected areas. This exercise will be important in targeting more precisely the vulnerable groups that should be assisted.

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

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

TANZANIA

Area:	886 000 sq.km
Climate:	Tropical wet-dry climate with two rainy seasons in north (November-December and March-May) and one in south (November-April)
Population:	33.1 million (2000 estimate); G.N.P. per caput: US\$240 (1999)
Specific characteristics of the country:	Low-income food-deficit country; cereal surplus production in south and south-west; cereal deficit in central and north-west. Distribution difficulties
Logistics:	Serious shortage of rolling stock, fuel and spare parts
Major foodcrops:	Maize, roots, tubers, sorghum, pulses, plantains, rice
Marketing year:	June/May; Lean season: February-April
Share of cereals in total calorie intake:	60 percent

CURRENT SITUATION

Growing conditions have been generally favourable, with normal to above normal cumulative rainfall in most parts of the country during the season (September/April). Drier conditions in March may have caused stress to crops at the critical grain filling stages in parts of central regions but have also helped in reducing excessive moisture in flooded areas in southern and western parts of the country. A recovery in this year's output from the reduced level of 2000 is anticipated.

In bi-modal rainfall areas of the north and north-east, despite a late start, good rains since April benefited the crops of the "Masika" season. The outlook for the harvest is satisfactory. However, crops in some regions were reported to have been affected by pests, including Quelea Quelea birds and Armyworm. Pastures and livestock are reported in good condition reflecting generally abundant rains.

The overall food supply situation is satisfactory. The completed harvests in the bimodal rainfall areas and on-going harvests in unimodal rainfall regions following a generally adequate rainfall have effectively increased on-farm stocks and access due to low prices. The food situation of pastoralists has also improved due to increased water and pasture.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	98	700	3 344	4 142
Previous five years average imports	148	94	209	451
<u>2001/02 Domestic Availability</u>	<u>202</u>	<u>400</u>	<u>3 454</u>	<u>4 056</u>
2001 Production (rice in paddy terms)	82	615	3 094	3 791
2001 Production (rice in milled terms)	82	400	3 094	3 576
Possible stock drawdown	120	-	360	480
<u>2001/02 Utilization</u>	<u>322</u>	<u>520</u>	<u>3 654</u>	<u>4 496</u>
Food use	294	458	3 265	4 017
of which: local purchase requirement	-	-	-	-
Non-food use	8	62	339	409
Exports or re-exports	20	-	50	70
Possible stock build up	-	-	-	-
<u>2001/02 Import Requirement</u>	<u>120</u>	<u>120</u>	<u>200</u>	<u>440</u>
Anticipated commercial imports	120	100	170	390
Food aid needs	-	20	30	50
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>9</u>	<u>14</u>	<u>96</u>	<u>118</u>
<u>Indexes</u>				
2001 Production as % of average:				92
2001/02 Import requirement as % of average:				98

Area:	54 000 sq.km
Climate:	Tropical wet-dry; two rainy seasons in south (March-June and October) and one in North (May-October)
Population:	4.75 million (2001 estimate) G.N.P. per caput: US\$320 (1999)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports and roads adequate; gateway to Burkina Faso and Niger
Major foodcrops:	Roots and tubers, coarse grains, fruit
Marketing year:	January/December; Lean season: April-July
Share of cereals in total calorie intake:	40 percent

CURRENT SITUATION

Reflecting adequate rains from mid-March, the first maize crop is developing satisfactorily in the south and the centre. Coarse grains are emerging in the north. Precipitation decreased significantly in mid-June, but improved in late June, remaining abundant in the north in early July.

The overall food supply situation is satisfactory. However, some populations affected by floods in various areas remain vulnerable.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	62	569	631
Previous five years average imports	50	145	21	216
<u>2001 Domestic Availability</u>	50	55	630	685
2000 Production (rice in paddy terms)	-	81	630	711
2000 Production (rice in milled terms)	-	55	630	685
Possible stock drawdown	-	-	-	-
<u>2001 Utilization</u>	50	135	630	815
Food use	46	73	386	505
of which: local purchase requirement	-	-	-	-
Non-food use	2	12	209	223
Exports or re-exports	2	50	10	62
Possible stock build up	-	-	25	25
<u>2001 Import Requirement</u>	50	80	-	130^{1/}
Anticipated commercial imports	50	76	-	126
Food aid needs	-	4	-	4
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	10	15	81	106
<u>Indexes</u>				
2000 Production as % of average:				113
2001 Import requirement as % of average:				60

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

UGANDA

Area:	200 000 sq.km
Climate:	North-east is semi-arid, rest of the country is tropical wet-dry; main rainy period is March-October
Population:	23.37 million (2001 estimate); G.N.P. per caput: US\$320 (1999)
Specific characteristics of the country:	Low-income food-deficit country
Logistics:	Ports: Mombasa (Kenya) and Dar es Salaam (Tanzania); roads and railways inadequate
Major foodcrops:	Roots, tubers, plantains, pulses, maize, millet, sorghum
Marketing year:	January/December; Lean season: April-May
Share of cereals in total calorie intake:	35 percent

CURRENT SITUATION

Despite reports of army-worm invasion in some districts, prospects for the 2001 first season foodcrops, being harvested, remain favourable following normal rains. The first rainy season was fully established by mid-March in most southern parts of the country providing adequate moisture for growing crops. Crops are reported in good condition in most parts of the country. In north-eastern and eastern districts, affected by successive poor harvests and insecurity, abundant rains and improved security benefited crops and pasture.

Overall food supply conditions are satisfactory. Prices of beans and maize remain stable. However, food shortages are reported in parts of Katakwi, Kotido and Moroto Districts. The displaced population in Bundibugyo, Gulu and Kitgum Districts are reported to have adequate own production and assistance through WFP feeding programs.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	9	85	1 743	1 837
Previous five years average imports	31	6	45	82
<u>2001 Domestic Availability</u>	<u>14</u>	<u>60</u>	<u>1 620</u>	<u>1 694</u>
2000 Production (rice in paddy terms)	9	90	1 510	1 609
2000 Production (rice in milled terms)	9	60	1 510	1 579
Possible stock drawdown	5	-	110	115
<u>2001 Utilization</u>	<u>34</u>	<u>66</u>	<u>1 670</u>	<u>1 770</u>
Food use	33	66	1 407	1 506
<i>of which: local purchase requirement</i>	-	-	-	-
Non-food use	1	-	183	184
Exports or re-exports	-	-	80	80
Possible stock build up	-	-	-	-
<u>2001 Import Requirement</u>	<u>20</u>	<u>6</u>	<u>50</u>	<u>76</u>
Anticipated commercial imports	11	4	-	15
Food aid needs	9	2	50	61
<u>Current Aid Position</u>				
Food aid pledges	20	-	9	29
<i>of which: delivered</i>	15	-	1	15
Donor-financed purchases	-	-	-	-
<i>of which: for local use</i>	-	-	-	-
<i>for export</i>	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>2</u>	<u>3</u>	<u>63</u>	<u>67</u>
<u>Indexes</u>				
2000 Production as % of average:				88
2001 Import requirement as % of average:				93

Area:	741 000 sq.km
Climate:	Tropical wet-dry; rainy season: November-April
Population:	10.65 million (2000 estimate); G.N.P. per caput: US\$320 (1999)
Specific characteristics of the country:	Low-income food-deficit country; land-locked country
Logistics:	Imports through Dar es Salaam (Tanzania); inadequate rail and road connections
Major foodcrops:	Maize, roots, tubers
Marketing year:	May/April; Lean season: March-May
Share of cereals in total calorie intake:	70 percent

CURRENT SITUATION

Harvesting of the 2001 coarse grains, mainly maize, is complete. Prospects deteriorated with excessive rains in February and March over most parts of the country, which negatively affected yields and resulted in localized floods, particularly along the Zambezi and Luangwa Rivers. By contrast, in the Southern and Western Provinces, prolonged dry weather in January stressed developing maize crop and reduced yields.

After being self-sufficient in maize in 2000/01 (April/March) the country faces a substantial import requirement in marketing year 2001/02. Latest official estimates indicate that maize production declined by 30 percent from last year, and the Government has appealed to the international community for food assistance to meet the food needs of some 2 million people facing serious food shortages.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	72	16	1 130	1 218
Previous five years average imports	55	17	204	276
<u>2001/02 Domestic Availability</u>	<u>90</u>	<u>13</u>	<u>1 250</u>	<u>1 353</u>
2001 Production (rice in paddy terms)	90	19	1 245	1 354
2001 Production (rice in milled terms)	90	13	1 245	1 348
Possible stock drawdown	-	-	5	5
<u>2001/02 Utilization</u>	<u>131</u>	<u>36</u>	<u>1 400</u>	<u>1 567</u>
Food use	127	34	1 180	1 341
of which: local purchase requirement	-	-	-	-
Non-food use	4	2	170	176
Exports or re-exports	-	-	50	50
Possible stock build up	-	-	-	-
<u>2001/02 Import Requirement</u>	<u>41</u>	<u>23</u>	<u>150</u>	<u>214</u>
Anticipated commercial imports	41	22	150	213
Food aid needs	-	1	-	1
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>12</u>	<u>3</u>	<u>109</u>	<u>123</u>
<u>Indexes</u>				
2001 Production as % of average:				111
2001/02 Import requirement as % of average:				78

ZIMBABWE

Area:	387 000 sq.km
Climate:	Centre and north-east tropical wet-dry; south and west semi-arid; rainy season: November-March
Population:	12.52 million (2000 estimate); G.N.P. per caput: US\$520 (1999)
Specific characteristics of the country:	Land-locked country; exporter and importer of grain
Logistics:	Exports and imports through Mozambique or South Africa
Major foodcrops:	Maize, wheat, millet, sorghum
Marketing year:	April/March; Lean season: February-April
Share of cereals in total calorie intake:	66 percent

CURRENT SITUATION

An FAO/WFP Crop and Food Supply Assessment Mission visited Zimbabwe from 25 April to 11 May 2001 to estimate the production of the main season cereal and pulse crops, forecast the 2001/02 winter season production and assess food import requirements.

The Mission found that similar to the pattern of the previous year, the 2000/01 rainy season was generally favourable for the northern provinces of the country which normally produce nearly 70 percent of the national cereal harvest. But, rains were late and below normal in the southern and eastern areas of the country. There was a dry spell during January in most parts of the country followed by widespread incessant rains in February and March, which resulted in localised flooding.

The area under grain crops in the 2000/01 main season decreased by 15 percent compared to the previous year. The area planted to maize in the large scale commercial farming sector was reduced by more than half primarily due to land acquisition activities. The smallholder sector did not make up for this reduction in maize plantings. Some of the decrease in total maize area was compensated by an increase in the area under soybeans, groundnuts, sunflower and paprika.

The Mission estimated a national cereal harvest of 1.57 million tonnes in the 2000/01 main cropping season, compared to 2.15 million tonnes in 1999/00, a reduction of 27 percent. Maize production, which accounts for over 90 percent of the total grain production, was estimated at 1.47 million tonnes.

Livestock condition was generally good in the large-scale commercial sector while in the smallholder sector it ranged from fair to good. However, animal deaths due to tick borne diseases were reported in some communal areas. Pastures and water availability conditions were generally good in most provinces.

Based on the forecast production, the import requirement is estimated at 593 000 tonnes. Given the substantial decline in gold production and the tobacco harvest, and much of the expected foreign currency earnings being pre-committed for fuel, other energy imports and the international debt servicing, Government's ability to import maize is extremely limited. Even if the wheat and rice deficit of 146 000 tonnes were to be met by commercial imports by private traders primarily by raising foreign currency in the parallel market, there remains a net deficit of about 447 000 tonnes of maize to be covered by imports or by drawing down on stocks. Given the current economic conditions and food insecurity in several parts of the country, a major draw down of stocks may not be advisable. The country needs to hold adequate cereal stocks to maintain stable and adequate supply necessary to prevent any price escalations and to keep prices at affordable levels for both rural and urban populations. Free food aid distribution is not appropriate. Bilateral programme food aid may be considered as an option to help ensure an adequate grain supply at affordable prices in the deficit areas, both rural and urban.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	293	-	2 148	2 441
Previous five years average imports	110	25	119	254
<u>2001/02 Domestic Availability</u>	<u>250</u>	<u>-</u>	<u>1 584</u>	<u>1 834</u>
2001 Production (rice in paddy terms)	250	-	1 584	1 834
2001 Production (rice in milled terms)	250	-	1 584	1 834
Possible stock drawdown	-	-	-	-
<u>2001/02 Utilization</u>	<u>371</u>	<u>25</u>	<u>2 031</u>	<u>2 427</u>
Food use	350	25	1 669	2 044
of which: local purchase requirement	-	-	-	-
Non-food use	15	-	362	377
Exports or re-exports	-	-	-	-
Possible stock build up	6	-	-	6
<u>2001/02 Import Requirement</u>	<u>121</u>	<u>25</u>	<u>447</u>	<u>593</u>
Anticipated commercial imports	121	25	447	593
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>28</u>	<u>2</u>	<u>132</u>	<u>161</u>
<u>Indexes</u>				
2001 Production as % of average:				75
2001/02 Import requirement as % of average:				233

TERMINOLOGY

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

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

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

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

"Low-income food deficit countries" (LIFDCs): Includes all food deficit countries with per caput income below the level used by the World Bank to determine eligibility for IDA assistance (e.g. US\$1 460 in 1998), which in accordance with guidelines and criteria agreed to by the CFA should be given priority in the allocation of food aid.

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