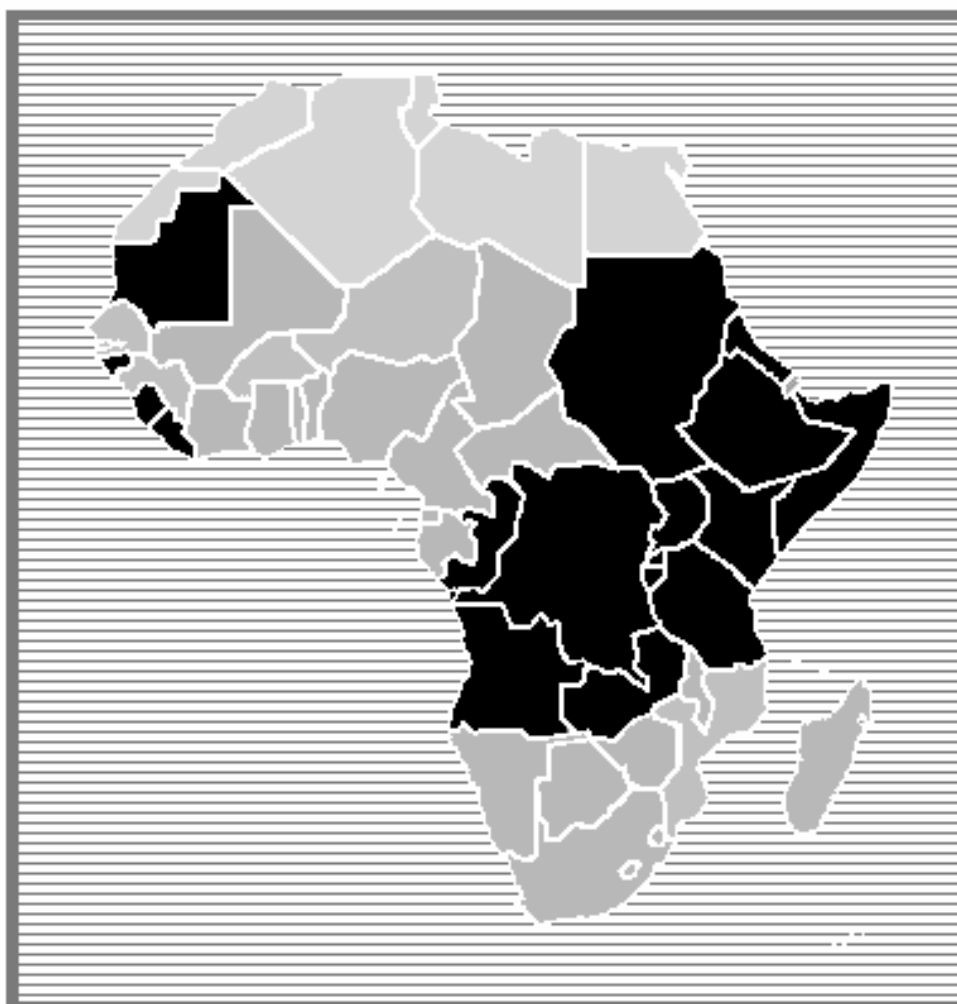


# FOOD SUPPLY SITUATION AND CROP PROSPECTS IN SUB-SAHARAN AFRICA

No.1

April 1999



*Countries facing exceptional food emergencies:*

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



FOOD AND AGRICULTURE ORGANIZATION OF THE UNITED NATIONS

## INTRODUCTION

This is the first issue in 1999 of this quarterly report prepared by the FAO Global Information and Early Warning System (GIEWS) on the food supply situation, cereal import and food aid requirements for all countries in sub-Saharan Africa. The report is designed to provide the latest analysis and information on the food situation in these countries to governments, international organizations and other institutions engaged in relief operations.

Part I focuses on the food supply difficulties in several countries of the sub-region, particularly in Angola, Somalia, Sierra Leone and Democratic Republic of Congo, where civil strife and unfavourable weather have perpetuated food emergencies for the affected populations. It also highlights successes in the Sahelian countries where above-average to record crops have been gathered.

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-March 1999 by the following donors: Australia, Belgium, Canada, China, Denmark, EC, Germany, France, Italy, Japan, Netherlands, Sweden, Switzerland, United Kingdom, United States as well as the World Food Programme. For other donors, data are based on field reports from various sources (see Tables 6 and 7).

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

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### COUNTRIES FACING EXCEPTIONAL FOOD EMERGENCIES

<u>Country</u>	<u>Reasons for emergency</u>
<b>Angola</b>	Population displacement
<b>Burundi</b>	Civil strife and insecurity
<b>Congo, Dem.Rep. of</b>	Civil strife and refugees
<b>Congo, Rep. Of</b>	Civil strife
<b>Eritrea</b>	IDPs and returnees
<b>Ethiopia</b>	Large number of vulnerable people, IDPs, localized weather adversities
<b>Guinea-Bissau</b>	Civil strife, population displacements
<b>Kenya</b>	Food shortages in central and eastern parts
<b>Liberia</b>	Impact of past civil strife, shortage of farm inputs
<b>Mauritania</b>	Localized deficits
<b>Rwanda</b>	Insecurity in parts
<b>Sierra Leone</b>	Civil strife, population displacement
<b>Somalia</b>	Poor harvest, civil strife
<b>Sudan</b>	Civil strife
<b>Tanzania</b>	Localized food deficits
<b>Uganda</b>	Civil strife in parts
<b>Zambia</b>	Unfavourable weather in 1998

## HIGHLIGHTS

**In Angola, the food outlook for 1999 is extremely bleak**, following the resumption of fighting between government forces and UNITA rebels last December, just after the beginning of the current cropping season. Large-scale population displacement in rural areas is reported, with farm families abandoning their farms and homes to take refuge in government-held towns and cities or in neighbouring countries. Some reports say that the Angolan country-side is being systematically depopulated. Food production in 1999 is expected to be sharply reduced and the country will need massive food assistance. Distribution of relief assistance will, however, be problematic due to insecurity and land mines and will have to be mainly by costly air transport. Elsewhere in southern Africa, harvest prospects for the current crops are favourable, following adequate rainfall to-date, even though it has been too much in some countries such as Mozambique where localized floods adversely affected crops. The sub-region's cereal output in 1999 is expected to exceed the 1998 production, which was some 15 percent below the long-term average.

**The food crisis in Somalia has deepened**, with reports of starvation-related deaths and widespread severe malnutrition. This is the result of six consecutive poor harvests caused by adverse weather and the long-running civil strife. Economic and commercial activities have been severely curtailed, particularly in the south, and traditional coping mechanisms have been virtually exhausted, forcing large numbers of people to move in search of food and to escape from factional fighting. Saudi Arabia's ban on livestock imports from the country on account of livestock disease outbreaks has aggravated the food crisis. It is currently estimated that over one million people are desperately short of food, with more than 400 000 threatened by starvation. Even though distribution of relief food continues to be seriously hampered by insecurity, the international community should devise ways to reach the increasingly desperate population. There is also an urgent need for seeds for planting in the "Gu" season which is just beginning.

**The ongoing war between Eritrea and Ethiopia has displaced a large number of people** on both sides who are in need of food assistance. In Tanzania, a combination of rain failure, abnormally high storage losses and significant informal maize outflows to neighbouring countries have led to a large drop in domestic maize supplies and a substantial import requirement not initially foreseen.

**In the Great Lakes region, the food supply situation remains precarious**, with efforts to increase food production hamstrung by persistent insecurity and sporadic violence, as well as weather adversities. Prolonged dry spells in Burundi and Rwanda during the just-ended growing season reduced crop yields, while insecurity in parts continues to disrupt food production activities. In the Democratic Republic of Congo, the ongoing civil strife continues to displace large sections of the rural population, thus hampering food production and leading to high levels of malnutrition. In the Republic of Congo, renewed violence in the capital city of Brazzaville and in the Pool region has displaced large numbers of people who have lost their livelihoods. As of late March some improvement in the security situation has been reported.

**In western Africa, the food outlook for 1999 is generally favourable**, particularly in the Sahelian countries, following above-average to record harvests. Several countries have cereal surpluses available for donor purchases for transfer to deficit areas within the countries themselves, or for triangular transactions. However, in rural Sierra Leone violence is causing extreme fear among the population, with large numbers of farm families fleeing their homes to seek safety elsewhere. This would adversely affect plantings in the coming season, which starts in April/May, and will probably cause a considerable reduction in yields. This means that the country will continue to rely heavily on international food assistance. In Guinea Bissau, a resurgence of fighting in the capital city at the end of January has led to new population displacements, also at the beginning of the growing season.

**Cereal import requirements of sub-Saharan Africa in 1998/99 are forecast to be lower than in 1997/98**, reflecting the good harvests in western Africa and in parts of eastern Africa. Food aid requirements are similarly forecast to be lower.

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## **PART I: OVERVIEW**

While the overall food outlook for sub-Saharan Africa in 1999 is favourable, serious food supply difficulties persist in many parts. In eastern Africa, Somalia faces a severe food crisis as a result of successive poor harvests and the continuing civil strife. In southern Africa, Angola is heading for a similar food crisis following the resumption of open warfare and renewed large-scale population displacements. In central Africa, the two Congos are gripped by civil wars which are displacing large numbers of people who need external humanitarian assistance. In western Africa, an end to the long-running food emergency in Sierra Leone is not in sight as extreme violence and insecurity continue to destabilise the rural population.

### **BLEAK FOOD OUTLOOK FOR ANGOLA BUT HARVEST PROSPECTS GENERALLY FAVOURABLE ELSEWHERE IN SOUTHERN AFRICA**

In Angola, despite adequate rainfall over most regions since October, the area planted to crops is expected to be considerably reduced this year due to renewed civil strife since December. Many farmers have abandoned their land to join the rapidly increasing number of displaced people or as refugees in neighbouring countries. Consequently, the 1999 crop is expected to be sharply below the output in recent years, which will aggravate the already precarious food supply situation. The country will, therefore, rely heavily on food assistance to meet its food needs in the 1999/2000 marketing year. Food prices have risen sharply in many regions and this has reduced access to food for the majority of the population. Difficulties in distributing relief assistance have exacerbated the situation, leading to increasing malnutrition, particularly among the internally displaced people. The immediate need is to assist the rapidly increasing number of internally displaced people, currently thought to exceed 500 000, largely concentrated in the provinces of Huambo, Bie, Malanje, Huila and Uige. The necessity to deliver relief assistance by air owing to heightened insecurity means that transport costs are bound to rise.

Elsewhere in southern Africa, rainfall has been generally favourable for the 1998/99 crops in most countries. Heavy rains through January caused localized flooding in some areas, raising concerns that yields might be reduced by water-logging in parts of Malawi, Mozambique, South Africa, Zambia and Zimbabwe. In central Mozambique, floods caused by torrential rains in late February particularly affected several districts of Inhambane Province, with some loss of life, crops and property. In these otherwise drought prone areas, an estimated 40 000 hectares of arable land were flooded and over 70 000 people affected, while some major roads were under water for days or badly damaged. The Government has appealed for international assistance amounting to US\$ 12.4 million, for food, seeds and tools, as well as for the repair of damaged infrastructure. Overall for southern Africa, however, indications are that the area sown to maize and other crops has increased compared to last year. The sub-region's cereal output in 1999 is expected to exceed the 1998 level of 14.7 million tonnes, which was, however, about 15 percent below average.

### **GRAVE FOOD SUPPLY DIFFICULTIES IN PARTS OF EASTERN AFRICA**

In **Somalia**, the food supply situation is critical following six successive poor harvests and depletion of food stocks. In addition, the ban since February 1998 by Saudi Arabia on livestock imports from Somalia due to outbreaks of animal disease and the persistent civil strife which has disrupted all economic activities have virtually exhausted coping mechanisms of the population. Insecurity also hampers distribution of relief assistance. The deteriorating nutritional situation gives cause for concern; recent surveys around Qansaxdheere town in the southern Bay region indicate alarming levels of acute malnutrition. Deaths by starvation have been reported in several parts, particularly in the Galgudud and Bakool regions and among the displaced people in search of food. Overall, it is estimated that about 1 million people face food shortages, with some 400 000 at risk of starvation.

The food situation will deteriorate further following the reduced harvest of the secondary 1998/99 Deyr crop and rising food prices. Latest estimates indicate a combined Deyr maize and sorghum production of 80 000 tonnes which, though substantially higher than the poor level of 1998, is 25 percent below the pre-civil strife average (1982-88). Even though there was an increase in the area planted in response to high cereal prices, late and erratic rains resulted in sharply reduced yields. The poor rains have also caused water shortages for humans and livestock, particularly in the northwestern areas.

Emergency food aid for the affected population will be needed until at least the next main harvest in August to avoid further hardship and loss of life. There is also an urgent need for seeds for planting in the main "Gu" season which starts in April.

In **Eritrea**, the conflict with neighbouring Ethiopia has disrupted agricultural and trade activities in border areas, where the food situation has become difficult. It is particularly serious for some 100 000 internally displaced people who have fled from the conflict area and 60 000 returnees from Ethiopia who have abandoned their farms and possessions. Overall, the Government estimates that some 450 000 people have been affected by the conflict and are in need of food aid, for which it has appealed for international assistance.

In **Ethiopia**, despite a bumper grain harvest in 1998 with exportable surpluses, the food situation is serious for large number of vulnerable population, including pastoralists in areas affected by dry weather and those displaced by the on-going conflict in areas bordering Eritrea. An FAO/WFP Mission last December estimated that 1.9 million most vulnerable rural people, affected by localized poor harvests, were in need of food assistance for a period of six months. The food supply situation is also tight for the pastoral population in southern and eastern areas, following the failure of the rainy season. This has led to a deterioration of pastures and shortages of water for both humans and animals. The number of the most affected people is estimated at 145 000 in the Borena Zone of Oromiya region. The Government has started food relief distribution to the affected areas. Severe food difficulties are also being experienced by the population affected by the war with Eritrea, mainly subsistence farmers in poor agricultural areas who have been unable to harvest their main (meher) crop. International food assistance is being provided to 272 000 internally displaced people.

In **Sudan**, a record cereal harvest was gathered in 1998 and the country has a large exportable surplus of sorghum. Prices of sorghum have declined sharply, making it unprofitable to harvest this crop in some areas, and jeopardizing planting prospects for the next season. On the other hand, access to food for the majority of the population has improved with the decrease in prices. In the southern parts, however, the food situation continues to be difficult due to persistent civil strife, although a satisfactory harvest in 1998 and increased food aid distribution in the second half of the year have resulted in a marked improvement in the nutritional status of the local population. The severe disruption of economic activities and persistent insecurity in southern Sudan necessitate continued food assistance. An FAO/WFP Mission in December 1998 estimated that 2.36 million people, mostly war-affected, were in need of emergency food assistance estimated at 173 000 tonnes in 1999.

In **Tanzania**, the recently harvested secondary "Vuli" crop in northern and coastal areas was sharply reduced by late and below-normal precipitation during the rainy season. The 1998/99 "Vuli" maize output was estimated by a recent FAO/WFP Crop and Food and Supply Assessment Mission at 228 000 tonnes, 60 percent below last year's already reduced level and 40 percent below average. Even though Vuli production only accounts for about 17 percent of the national cereal production, its contribution to the annual food supplies of the households in the Vuli growing regions is very important. Worst affected regions are the Coast, Morogoro and the lowlands of Kilimanjaro and Arusha.

The shortfall in the 1998/99 Vuli production has significantly increased the number of people that are vulnerable to food shortages. At the time of the last main harvest in June/July 1998, it was estimated that 300 000 people were in need of some form of emergency assistance because of localized crop failures in the central regions of Dodoma and Singida, where food security remains precarious following a succession of bad harvests. With the reduced output of the Vuli season, the number of people requiring food assistance has risen to an estimated 1.1 million. The Government has released 10 000 tonnes of maize from its Strategic Grain Reserve for relief assistance and has appealed for additional 20 000 tonnes of food aid to be distributed in 12 affected provinces.

At the national level, the poor Vuli crop has further tightened the maize supply situation. Despite a good 1998 main harvest, domestic supplies of maize have been reduced by higher than anticipated storage losses and increased unofficial cross-border trade, causing sharp rises in maize prices since December. However, the country has ample supplies of other foodcrops, mostly tubers and plantains, even though they tend to be available mostly where they are produced, due to their bulkiness. In addition, commercial imports in the coming months are anticipated to substantially reduce the deficit in response to the lifting of the import duty on maize.

In **Kenya**, the recently harvested 1998/99 "short rains" maize crop is provisionally estimated at only one-quarter of the normal level. The short rains crop accounts for only 15 percent of annual maize production, but it provides most of the supplies in the producing provinces of Eastern, North-eastern, Nyanza and Coast. Late and insufficient rains during the season caused reductions in plantings and yields. The dry

weather also reduced the production of beans and Irish potatoes and negatively affected pastures and water supplies.

While the overall food supply situation is satisfactory and prices of maize, the main staple, have declined sharply following the good 1998 main "long rains" harvest, the food situation is difficult in short rains growing areas. Severe food shortages are being experienced in parts of Kiambu, Kirinyaga, Maragua, Thika and Nyeri districts of Central Province, as well as in several locations in Eastern Province. The situation is anticipated to deteriorate in the coming months with the depletion of food stocks. Emergency food aid is urgently needed in these areas.

In **Uganda**, despite a reduced 1998 second season cereal and bean harvest, the overall food supply situation is adequate, reflecting ample availability of other food staples, such as bananas/plantains, and roots and tubers. However, food difficulties are being experienced in pockets of the eastern and central regions, and in the Lake Victoria Basin affected by rain failure. The situation is particularly difficult in Kifamba sub-county of Rakai District, which has experienced a succession of poor harvests. Food assistance is being distributed in this area, as well as for 400 000 displaced persons in the northern districts of Gulu and Kitgum, where persistent civil conflict has seriously hampered agricultural production.

### **FOOD SITUATION REMAINS PRECARIOUS IN THE GREAT LAKES REGION**

In the **Democratic Republic of Congo (DRC)**, the food supply situation remains tight, especially in the east. Increased population displacement by the ongoing armed conflict is reported. A UN mission recently visited areas under rebel control to explore the possibility of resuming humanitarian assistance to the displaced populations, including provision of agricultural inputs and food. As a result of discussions with the different parties, it has been agreed to re-establish a UN presence in Goma. In Kinshasa, the nutritional situation of its population is deteriorating as prices of basic food commodities continuously increase. A recent survey of families on the outskirts of Kinshasa indicated that 90 percent of daily household expenditures go on food. Many of the agricultural areas that supply Kinshasa remain cut off. In addition, the outflow of food commodities from Kinshasa to Brazzaville has reduced food availability. Food supply is also tight in Lubumbashi, where flooding in the surrounding areas last year destroyed up to 70 percent of crops, and where a large number of displaced people from Kalemie, Nyunzu and Nyemba have taken refuge. In the provinces bordering Congo Brazzaville and Angola, tens of thousands of refugees are reported coming in, fleeing from renewed fighting in the two countries.

In the **Republic of Congo (Congo Brazzaville)**, the food supply situation in Brazzaville has deteriorated significantly following an upsurge of fighting which has caused renewed population displacement in the capital. Fighting also erupted in the Pool region in the south of the country. Food prices have increased sharply. An estimated 31 000 displaced people living in several camps in the eastern part of the city are totally dependent on humanitarian assistance. However, an improvement in the security situation has been reported in recent weeks.

In **Burundi**, dry spells during the 1999A season resulted in reduced production of cereals and pulses. While the supply of these staples is tight, it is satisfactory for other foodcrops such as roots and tubers and bananas. The suspension of the international trade embargo, imposed in 1996, has stimulated economic and commercial activities. However, the security situation remains very unstable and continues to threaten food security in many areas. Food difficulties are particularly serious for some 550 000 people still living in regroupment camps because of persisting insecurity and sporadic violence. Food aid, estimated at 50 000 tonnes, will be needed in 1999 for some 300 000 vulnerable people.

In **Rwanda**, latest production estimates indicate a substantial increase in total food production of the recently harvested 1999 A season crop. This mainly reflects a good root and tuber harvest. Production of bananas and plantains was also adequate. By contrast, erratic rains during the growing season negatively affected yields of cereals and beans, resulting in an output decline of 15 percent over the same season last year. Food supply, except for grains, is satisfactory. Prices of basic staples (roots, tubers, bananas and plantains) have decreased to one-third of their level a year ago. This has improved access to food by the poor. However, the food situation continues to be unsatisfactory in the northern and northwestern prefectures affected by persistent insecurity, particularly in the prefectures of Gisenyi and Ruhengeri. Of the estimated 600 000 internally displaced people living in camps, approximately half have been resettled in new sites. International food assistance continues to be needed for these IDPs.

## **RECORD HARVESTS IN SEVERAL SAHELIAN COUNTRIES BUT FOOD SUPPLY DIFFICULTIES PERSIST ELSEWHERE IN WESTERN AFRICA**

In the **Sahelian countries**, the 1998 aggregate cereal production in the nine CILSS countries is estimated at a record 10.4 million tonnes (including rice milled), which is some 35 percent higher than in 1997 and 20 percent above the average of the last five years. Record crops were gathered in Chad, Mali and Niger. Output was above average in The Gambia and Mauritania, close to average in Burkina Faso and Senegal, but below average in Cape Verde. Cereal production in Guinea-Bissau is anticipated to be well below average due to civil strife which hampered agricultural activities.

Following good harvests, the food supply situation will improve in 1999 compared to 1998 when localized poor harvests in several Sahelian countries reduced aggregate production. Farmers are expected to replenish their stocks, which had been depleted following average to below-average harvests in recent years. Low prices of cereals may also facilitate the replenishment of national food security reserves, which were almost exhausted in Burkina Faso, Chad and Niger. However, localised food supply difficulties are anticipated during the lean season, particularly in southern Chad, parts of Mauritania and in several traditionally food-deficit areas elsewhere. Donors are urged to undertake local purchases in the surplus areas of Chad, Niger and Senegal for transfer to deficit areas, replenishment of national reserves and/or triangular transactions.

In **Sierra Leone**, the food outlook for 1999 remains unfavourable due to the continuing violence and widespread insecurity. Severe food and fuel shortages are still reported in Freetown but economic activities are picking up with the return of traders and the reopening of banks. However, as staff of most international humanitarian agencies have not yet returned to the country, a number of scheduled agricultural rehabilitation activities, particularly distribution of seeds and tools and technical assistance, will be delayed or remain very limited. Food production during the coming growing season which starts in April is expected to be seriously reduced in line with recent trends. In 1998, despite favourable agro-meteorological conditions, the area planted was estimated to have been substantially lower than in 1997 due to insecurity and cereal output was estimated at 400 000 tonnes, which was 20 percent lower than in the previous year. FAO estimates Sierra Leone's cereal import requirement for 1999 at about 290 000 tonnes, including 140 000 tonnes of food aid.

Resurgence of fighting in Bissau, the capital of Guinea-Bissau, on 31 January 1999 led to new population displacements. The conflict started in the capital in June 1998 at the beginning of the growing season, and spread to other towns. It seriously disrupted land preparation and planting and the distribution of inputs to farmers. About 400 000 people, almost 80 percent of the capital's population, fled their homes to the rural regions of Cacheu, Biombo and Quinara, and to the coastal islands or neighbouring Senegal and Guinea Conakry. A cease-fire agreement signed in Praia on 26 July allowed partial resumption of field activities but the fighting resumed in October, disrupting the harvesting of crops.

Field assessments are difficult due to insecurity. Satellite imagery indicates that rainfall was generally above average in August and September. FAO estimates the 1998 cereal production at 120 000 tonnes compared to 174 000 tonnes in 1997, a decrease of some 30 percent, and about one-third less than the average of the last five years.

In **Liberia**, a recovery in agricultural production and food supply is expected to continue in 1999 as a result of improved security conditions. Foodcrop production in 1998 has been estimated at 210 100 tonnes of paddy and 313 300 tonnes of cassava, which is a significant improvement over the previous years. An expansion in planted area as a result of the return of large numbers of farm families, increased yields due to greater access to both inputs (especially seeds and tools) and extension services are the main factors behind the increasing production.



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

A recent FAO/WFP Crop and Food Supply Assessment Mission to Tanzania found that, with the exception of Kigoma and Kagera, rainfall in all other Vuli areas was significantly delayed and well below normal, which seriously affected land preparation and planting. The worst affected regions were the Coast and the lowlands of Arusha, Morogoro and Kilimanjaro where rainfall was less than 25 percent of normal. As a result of reduced rainfall, planted area and yields fell sharply and overall Vuli maize production will be significantly below normal. Rainfall over the next two months will also be critical for crop production and food supply prospects, as it will heavily influence the outcome of the main Musumi and Masika crops to be harvested from May. In the event that these crops fail, the food situation is likely to deteriorate significantly.

In addition, domestic maize supplies for the current marketing year were also reduced by higher than anticipated storage losses. These losses were due to a combination of ineffective pesticide use, generally poor storage facilities and high levels of grain borer infestation. On the basis of post harvest inspections of storage facilities, the level of loss is estimated to be much higher than was anticipated by the last FAO/WFP mission in August, which did not have the benefit of such inspections. Supplies may also have been reduced by increased unofficial cross border trade in maize to Zambia, in response to higher prices as a result of significantly reduced production last year. In addition to supply constraints, there was increased demand for maize this year in regions like Dodoma and Singida, where the principal sorghum and millet crops failed almost totally last year. In these regions the food situation is more precarious than in other parts of the country as the harvest has failed for three successive years and the population has less access to alternative foods, such as bananas and tubers.

The sudden rise in maize prices in late October/early November over a relatively short period, suggests that in addition to developing shortages, which would have had a more gradual impact on price, there was a considerable degree of hoarding. The hoarding was principally due to (i) the failure of the rains during these months, which are essential for both short and long season preparations and (ii) considerable coverage in the national press warning of impending food problems. This view is supported by discussions the mission had with small and medium traders in surplus areas in the south.

Although the availability and price of maize and, to a lesser extent, sorghum and millet, give cause for concern, the supply of other foods, such as cassava, sweet potatoes and bananas, is satisfactory in the main producing areas. Rice, however, though also in satisfactory supply, still remains beyond the reach of poorer sectors of the population who have limited purchasing power.

Based on area and yield estimates and the pattern of rainfall this year, 1999 Vuli maize production is estimated at 228 000 tonnes, some 60 percent lower than last year and 40 percent below the long term average. Taking into account estimated stocks of 120 000 tonnes, available at the beginning of February, the domestic availability of maize for the remaining four months of the current marketing year is projected at 348 000 tonnes. Most of the stock is held by large traders and the Strategic Grain Reserve (SGR). Against this, utilisation needs, including allowances for food, seed, feed, waste and closing strategic stocks, are estimated at 909 000 tonnes. To meet these needs, therefore, the country has an estimated import requirement of approximately 561 000 tonnes, of which contracted commercial imports are estimated at 75 000 tonnes and food aid in the pipeline a further 3 000 tonnes. This leaves the country with an uncovered import requirement of 483 000 tonnes, of which 20 000 will be requested as further food assistance through WFP. In the meantime the Government has released 10 000 tonnes through the SGR in relief assistance.

The shortfall in current Vuli production and successive poor harvests in parts of the country has significantly increased the numbers of people that are vulnerable to food shortages. At the time of the last FAO/WFP assessment, it was estimated that 300 000 people were in need of some form of emergency assistance. However, as this assumed a normal Vuli harvest, the fact that crop production has fallen sharply this season means that a larger number of people will need additional food assistance. The estimate of people needing food assistance, therefore, has been revised to approximately one million, for whom an additional 20 000 tonnes will be requested.

International assistance is still being provided in most parts of the country and some improvement in the nutritional status of the population is reported. For 1999, Liberia will need to import an estimated 155 000 tonnes of cereals to meet its consumption requirements. Commercial imports are estimated at 100 000 tonnes of rice and 5 000 tonnes of wheat. The remaining 50 000 tonnes will need to be covered by food aid, estimated at 30 000 tonnes of wheat and 20 000 tonnes of maize products such as maize flour for distribution to the displaced people.

## **UPDATE ON FOOD AID PLEDGES AND DELIVERIES**

The level of cereal import requirements in sub-Saharan Africa in 1998/99 is expected to decline compared to 1997/98, reflecting good harvests in the Sahelian countries of western Africa and several countries of eastern Africa. GIEWS preliminary estimates of 1998 production and 1998/99 import and food aid requirements are summarized in Table 1. The total food aid requirements in 1998/99 are estimated at some 1.6 million tonnes compared to 2.6 million tonnes in 1997/98, a decline of 38 percent. Cereal food aid pledges for 1998/99, including those carried over from 1997/98, amount to 1.46 million tonnes, of which 0.95 million tonnes have already been delivered.

## **AREAS OF PRIORITY ACTION**

The food situation in Somalia gives cause for serious concern. Following six successive poor harvests and persistent civil strife, large sections of the country's population are in desperate need of food and other humanitarian assistance. Angola is heading towards a serious food crisis with the resumption of open warfare, leading to large-scale population displacements. In the Democratic Republic of Congo, particularly in the east, food production continues to be hampered by incessant fighting, population displacement and widespread insecurity. In Sierra Leone, insecurity and violence keep farm families away from their farms, disrupting food production activities.

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

First, the desperate food situation in Somalia calls for urgent food assistance, as well as seeds for planting in the upcoming cropping season to prevent a possible human catastrophe.

Second, an impending humanitarian crisis of a large scale is unfolding in Angola and everything possible should be done to forestall it.

Third, a concerted effort should be made to reach and assist the displaced and vulnerable populations in the Democratic Republic of Congo.

Fourth, sustained donor assistance is needed for the rehabilitation of the agricultural sector in Liberia, Rwanda, and other countries where prospects for lasting peace are a reality, following devastation by prolonged civil strife.

**PART II : POSITION BY SUB-REGION**

In southern Africa and some countries of eastern Africa, the 1999 cereal crops will be harvested from April, while in other countries of eastern Africa cereal crops are being planted. In central and coastal countries of western Africa, planting has started, but in the Sahelian countries of western Africa it will not begin until June.

**Cereal Crop Calendar**

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

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

In **eastern Africa**, harvesting of the 1998/99 secondary season crops is complete, except in Ethiopia where planting is underway. Erratic rainfall during the growing season reduced crop production in several countries, particularly cereals and pulses. However, the 1998 main season food production was very good in most of the sub-region. Aggregate 1998/99 cereal production is estimated to have increased by about 25 percent over 1997/98 and is above average. In Somalia, however, food production in the main ("Gu") and the secondary ("Deyr") crop seasons was extremely poor due to drought conditions. The country has had six successive poor harvests. In Kenya, insufficient precipitation during the "short rains" season has resulted in substantially below average cereal and bean output in the central and eastern areas. By contrast, production during the main (long rains) season was above average. In Tanzania, cereal production during the just-ended "Vuli" season in northern areas has been estimated at 60 percent below last year, but production of other foodcrops has been satisfactory. In Uganda, Rwanda and Burundi the recently harvested cereal and bean crops were also reduced by insufficient precipitation, but production of other crops was satisfactory. In Ethiopia, Eritrea and Sudan, bumper cereal crops were harvested in late 1998.

However, despite the satisfactory food supply situation overall, serious food difficulties are being experienced in Somalia and in pockets elsewhere in the sub-region. The sub-region's aggregate cereal import requirement for 1999 is estimated at 3.2 million tonnes. Commercial imports are expected to reach 2.5 million tonnes, while aggregate food aid requirement is estimated at 0.7 million tonnes, of which 0.6 million tonnes have been pledged.

In **southern Africa**, harvest prospects are generally favourable following abundant and widespread rains in recent months. If the favourable conditions continue, a recovery in production is anticipated in South Africa, Zimbabwe and Zambia, while good harvests are in prospect in Madagascar, Malawi, Mozambique, and Swaziland. Overall, indications are that the sub-region's 1999 cereal crop may exceed the 1998 production, which was estimated at 18.3 million tonnes, about 15 percent below average.

However, reduced production and tight food supplies are expected in Angola due to renewed fighting since late 1998. Emergency assistance is also required in parts of central Mozambique where torrential rains in late February and early March resulted in flooding with loss of human lives, property and crops.

In **western Africa**, seasonably dry conditions prevail in the Sahel while the growing season is starting in the countries along the Gulf of Guinea. Reflecting generally favourable growing conditions, particularly during August and September 1998, above average to record crops have been gathered in the main producing countries of the Sahel. Rains started generally on time and were adequate, except in Senegal where they

were late in the centre and north. No prolonged dry spells were experienced, except in Cape Verde in October.

Final official estimates released on 22 March 1999 indicate that aggregate cereal production for the nine CILSS countries in 1998 as a record 10.4 million tonnes, which is 35.4 percent higher than in 1997 and 20.5 percent above the average of the last five years. However, cereal production in Guinea-Bissau is anticipated to be well below average due to civil strife which hampered agricultural activities.

In the coastal countries along the Gulf of Guinea, the rainy season has just started and planting of the first maize crop is in progress. Cereal harvests in 1998 were generally good in Benin, Nigeria and Togo but less favourable in Côte d'Ivoire and Ghana. Liberia and Sierra Leone remain heavily dependent on international food assistance.

The aggregate 1998 cereal output for the eight countries along the Gulf of Guinea (Benin, Côte d'Ivoire, Ghana, Guinea, Liberia, Nigeria, Sierra Leone and Togo) is estimated at around 26.9 million tonnes compared to 26.2 million tonnes in 1997.

Cereal import requirements of the sub-region in 1999 is estimated at 5.36 million tonnes. Anticipated commercial imports are estimated at 4.92 million tonnes and the food aid requirement at 0.44 million tonnes mainly in wheat and rice. Food aid pledges reported to GIEWS as of late March 1999 amount to around 249 000 tonnes, of which 106 000 tonnes have been delivered so far. No imported food aid in coarse grains is necessary for Chad, Guinea, Mali and Niger. Local purchases are strongly recommended to cover ongoing or foreseen food aid programmes or for the replenishment of the national security stocks.

#### LOCUST AND GRASSHOPPER SITUATION

The Desert Locust situation has been calm since the beginning of 1999, except for a small outbreak of hoppers in northern Sudan where control operations have been carried out. Any adults that escape from this area are expected to move east to the Red Sea coastal plains where only insignificant populations have been reported so far. Good rains fell in some places along the coastal plains, breaking a two month dry spell, and this may lead to increased breeding. Elsewhere, small groups of adults were detected and controlled in south-eastern Libya near the Sudanese/Egyptian border.

In the Sahel, isolated adults were reported in south-western Mauritania and similar populations could be present between Akjoujt and Zouerate, and near Bir Moghreïn. A few isolated adults were reported in four places in Tamesna in February. No significant developments are expected.

In Madagascar, substantial treatments in late 1998 (about 600 000 hectares) and early 1999 (more than 450 000 hectares up to 20 February), reduced populations of Malagasy Migratory Locust (*Locusta migratoria capito*) in the first 1998/99 rainy season in the traditional breeding areas. Thus, provided adequate treatments continue, second generation populations should remain under control; otherwise locusts could pose a serious threat to the 1999 crops.

In **central Africa**, average to above-average harvests were gathered in most countries in 1998. Aggregate cereal output is anticipated to be average or above average in Cameroon and Central African Republic. In the Democratic Republic of Congo, civil strife continues to disrupt agricultural activities, especially in the east. Prospects for the second season starting in April are poor due to insecurity and shortage of seeds. In Kinshasa, the deterioration of the economic and financial situation in the city has severely reduced access to food by the poor and vulnerable groups. In the Republic of Congo, the food supply situation has deteriorated significantly in Brazzaville and the Pool region following a resurgence of civil disturbances and consequent population displacements. Large sections of the population face food access difficulties due to loss of jobs, high food prices and a seriously disrupted food marketing system. However, some improvement in the security situation has been reported.

For the 1998/99 or 1999 marketing year, the cereal import requirement for the seven countries of the sub-region is estimated at 796 000 tonnes. Food aid pledges reported to GIEWS as of late March amount to 10 000 tonnes, of which 5 000 tonnes have been delivered.

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

Sub-Region	1998/99 or 1999				
	1998 Production	Cereal import requirements	Anticipated commercial imports	Food aid	
				Requirements	of which: not yet received
<b>Eastern Africa</b>	<b>27 043</b>	<b>3 151</b>	<b>2 494</b>	<b>657</b>	<b>436</b>
<b>Southern Africa</b>	<b>18 259</b>	<b>5 554</b>	<b>5 107</b>	<b>447</b>	<b>275</b>
<b>Western Africa</b>	<b>37 234</b>	<b>5 355</b>	<b>4 920</b>	<b>435</b>	<b>245</b>
- Coastal countries	26 881	3 395	3 175	220	157
- Sahelian countries	10 353	1 960	1 745	215	88
<b>Central Africa</b>	<b>3 127</b>	<b>796</b>	<b>765</b>	<b>31</b>	<b>22</b>
<b>TOTAL</b>	<b>85 663</b>	<b>14 856</b>	<b>13 286</b>	<b>1 570</b>	<b>977</b>

Note: Totals computed from unrounded data.

Table 1: Cereal Imports and Food Aid Requirements in Sub-Saharan Africa, 1998/99 or 1999 (in thousand tonnes)

Sub-Region/ Country	Marketing year	1998 Cereal production 1/		1997/98 or 1998 imports			Position for 1998/99 or 1999							
		Total	As % of average of previous 5 years	Total imports	As % of average of previous 5 years	Food aid	Cereal import require- ment 2/	Antici- pated commer- cial imports	Food aid requirements		Commer- cial imports already made or contracted	Food aid		
									Total	of which: except- ional		Pledges 3/	of which received so far	Uncov. food aid require- ments
<b>Eastern Africa</b>		<b>27 043</b>	<b>122</b>	<b>4 835</b>	<b>153</b>	<b>1 077</b>	<b>3 151</b>	<b>2 494</b>	<b>657</b>	-	<b>250</b>	<b>648</b>	<b>393</b>	<b>436</b>
Burundi	Jan./Dec.	283	107	42	70	1	65	15	50	-	-	-	-	50
Comoros	Jan./Dec.	6	100	46	108	4	46	36	10	-	-	1	-	9
Djibouti	Jan./Dec.	-	-	73	76	11	66	56	10	-	-	-	-	10
Eritrea	Jan./Dec.	459	306	327	161	103	109	65	44	-	-	16	-	28
Ethiopia 4/	Jan./Dec.	11 247	132	593	104	546	20	20	-	-	-	331	232	-
Kenya	Oct./Sept.	3 052	100	1 875	185	76	790	721	69	-	7	60	32	9
Rwanda	Jan./Dec.	179	102	180	71	142	235	-	235	-	-	62	13	173
Seychelles	Jan./Dec.	-	-	33	252	-	13	13	-	-	-	-	-	-
Somalia	Aug./July	177	62	280	140	15	385	250	135	-	86	18	13	117
Sudan	Nov./Oct.	5 824	138	577	107	68	700	675	25	-	32	91	74	-
Tanzania	June/May	4 126	111	662	562	37	596	569	27	-	126	56	30	-
Uganda	Jan./Dec.	1 690	90	149	293	75	126	74	52	-	-	13	-	39
<b>Southern Africa</b>		<b>18 259</b>	<b>85</b>	<b>4 478</b>	<b>1 302</b>	<b>379</b>	<b>5 554</b>	<b>5 107</b>	<b>447</b>	-	<b>1 957</b>	<b>548</b>	<b>449</b>	<b>275</b>
Angola	April/March	633	177	508	351	157	471	350	121	-	81	126	117	-
Botswana	April/March	9	21	233	114	-	256	256	-	-	22	-	-	-
Lesotho	April/March	152	82	135	63	8	188	188	-	-	12	6	6	-
Madagascar	April/March	1 669	90	213	167	38	205	175	30	-	31	26	19	4
Malawi	April/March	1 861	109	117	35	4	102	102	-	-	30	25	22	-
Mauritius	Jan./Dec.	2	100	265	125	-	248	248	-	-	-	-	-	-
Mozambique	April/March	1 622	150	317	61	165	212	212	-	-	88	252	178	-
Namibia	May/April	59	58	93	80	-	155	155	-	-	-	-	-	-
South Africa	May/April	9 595	78	1 882	81	-	2 169	2 169	-	-	1 038	-	-	-
Swaziland	May/April	111	116	62	75	6	63	63	-	-	60	-	-	-
Zambia	May/April	707	55	371	111	2	660	364	296	-	102	26	26	270
Zimbabwe	April/March	1 839	73	283	40	-	825	825	-	-	493	88	81	-
<b>Western Africa</b>		<b>37 234</b>	<b>112</b>	<b>6 495</b>	<b>131</b>	<b>431</b>	<b>5 355</b>	<b>4 920</b>	<b>435</b>	-	<b>274</b>	<b>249</b>	<b>106</b>	<b>245</b>
<b>Coastal countries</b>		<b>26 881</b>	<b>109</b>	<b>4 095</b>	<b>128</b>	<b>285</b>	<b>3 395</b>	<b>3 175</b>	<b>220</b>	-	<b>253</b>	<b>108</b>	<b>37</b>	<b>157</b>
Benin	Jan./Dec.	790	113	122	106	12	125	120	5	-	-	2	2	3
Côte d'Ivoire	Jan./Dec.	1 249	114	623	128	23	640	640	-	-	-	1	-	-
Ghana	Jan./Dec.	1 722	105	469	134	52	475	450	25	-	17	64	12	-
Guinea	Jan./Dec.	687	110	410	124	4	385	385	-	-	-	5	2	-
Liberia	Jan./Dec.	141	271	190	88	105	155	105	50	-	-	7	7	43
Nigeria	Jan./Dec.	21 458	109	1 780	128	-	1 250	1 250	-	-	236	-	-	-
Sierra Leone	Jan./Dec.	263	87	294	145	88	290	150	140	-	-	28	13	112
Togo	Jan./Dec.	571	101	206	167	3	75	75	-	-	-	-	-	-
<b>Sahelian countries</b>		<b>10 353</b>	<b>119</b>	<b>2 400</b>	<b>138</b>	<b>146</b>	<b>1 960</b>	<b>1 745</b>	<b>215</b>	-	<b>21</b>	<b>141</b>	<b>69</b>	<b>88</b>
Burkina Faso	Nov./Oct.	2 626	113	216	153	20	160	130	30	-	-	29	15	1
Cape Verde	Nov./Oct.	3	50	81	97	46	95	40	55	-	-	48	18	7
Chad	Nov./Oct.	1 269	144	86	128	22	72	60	12	-	-	3	3	9
Gambia	Nov./Oct.	105	109	122	136	6	131	120	11	-	-	1	1	10
Guinea-Bissau	Nov./Oct.	93	63	104	172	1	92	55	37	-	-	3	3	34
Mali	Nov./Oct.	2 304	111	94	93	10	80	70	10	-	-	5	5	5
Mauritania	Nov./Oct.	153	103	318	118	15	305	270	35	-	-	23	4	12
Niger	Nov./Oct.	2 847	135	505	230	26	220	210	10	-	-	24	16	-
Senegal	Nov./Oct.	953	103	875	124	2	805	790	15	-	21	7	7	8
<b>Central Africa</b>		<b>3 127</b>	<b>116</b>	<b>772</b>	<b>106</b>	<b>12</b>	<b>796</b>	<b>765</b>	<b>31</b>	-	<b>23</b>	<b>10</b>	<b>5</b>	<b>22</b>
Cameroon	Jan./Dec.	1 232	113	260	93	3	280	278	2	-	10	3	-	-
Cent.Afr.Rep.	Jan./Dec.	140	127	39	105	2	34	33	1	-	-	-	-	1
Congo, Dem. Rep of	Jan./Dec.	1 726	117	250	111	2	250	240	10	-	-	5	5	5
Congo, Rep.of	Jan./Dec.	4	80	121	117	2	130	115	15	-	12	2	-	13
Equat.Guinea	Jan./Dec.	-	-	9	78	1	9	8	1	-	-	-	-	1
Gabon	Jan./Dec.	25	100	82	129	-	82	82	-	-	-	-	-	-
Sao Tome	Jan./Dec.	-	-	11	103	3	11	9	2	-	2	-	-	2
<b>TOTAL</b>		<b>85 663</b>	<b>107</b>	<b>16 579</b>	<b>115</b>	<b>1 900</b>	<b>14 856</b>	<b>13 286</b>	<b>1 570</b>	-	<b>2 504</b>	<b>1 456</b>	<b>954</b>	<b>977</b>

Note : Totals computed from unrounded data.

1/ Including rice in milled equivalent.

2/ Excludes re-exports.

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

4/ Includes refugee needs.

**Table 2: Utilization of 1998/99 or 1999 Cereal Surpluses in Sub-Saharan Africa (in thousand tonnes)**

Sub-Region/ Country	Cereal import requirement		Total availabilities for export and/or local purchases	of which local purchase requirement	Surpluses utilized or committed so far			Remaining surpluses
	Wheat and rice	Coarse grains			Donor financed local purchases	Exports		
						Commercial	Triangular transactions 1/	
<b>Eastern Africa</b>	<b>1 782</b>	<b>1 369</b>	<b>1 556</b>	<b>207</b>	<b>47</b>	-	-	<b>1 509</b>
Burundi	30	35	-	-	-	-	-	-
Comoros	46	-	-	-	-	-	-	-
Djibouti	63	3	-	-	-	-	-	-
Eritrea	105	4	-	-	-	-	-	-
Ethiopia 2/	20	-	200	50	35	-	-	165
Kenya	420	370	5	5	5	-	-	-
Rwanda	30	205	-	-	-	-	-	-
Seychelles	7	6	-	-	-	-	-	-
Somalia	275	110	-	-	-	-	-	-
Sudan	675	25	869	150	5	-	-	864
Tanzania	35	561	352	2	2	-	-	350
Uganda	76	50	130	-	-	-	-	130
<b>Southern Africa</b>	<b>2 841</b>	<b>2 713</b>	<b>835</b>	<b>16</b>	<b>16</b>	<b>199</b>	<b>21</b>	<b>599</b>
Angola	271	200	-	-	-	-	-	-
Botswana	66	190	-	-	-	-	-	-
Lesotho	43	145	-	-	-	-	-	-
Madagascar	200	5	4	4	4	-	-	-
Malawi	52	50	10	10	10	-	-	-
Mauritius	228	20	-	-	-	-	-	-
Mozambique	212	-	60	1	1	-	-	59
Namibia	35	120	-	-	-	-	-	-
South Africa	1 447	722	710	-	-	150	20	540
Swaziland	48	15	-	-	-	-	-	-
Zambia	64	596	1	1	1	-	-	-
Zimbabwe	175	650	50	-	-	49	1	-
<b>Western Africa</b>	<b>4 869</b>	<b>486</b>	<b>771</b>	<b>100</b>	<b>33</b>	-	-	<b>738</b>
<b>Coastal countries</b>	<b>3 210</b>	<b>185</b>	<b>515</b>	-	-	-	-	<b>515</b>
Benin	125	-	25	-	-	-	-	25
Côte d'Ivoire	620	20	10	-	-	-	-	10
Ghana	440	35	20	-	-	-	-	20
Guinea	375	10	-	-	-	-	-	-
Liberia	135	20	-	-	-	-	-	-
Nigeria	1 200	50	450	-	-	-	-	450
Sierra Leone	240	50	-	-	-	-	-	-
Togo	75	-	10	-	-	-	-	10
<b>Sahelian countries</b>	<b>1 659</b>	<b>301</b>	<b>256</b>	<b>100</b>	<b>33</b>	-	-	<b>223</b>
Burkina Faso	145	15	35	20	9	-	-	26
Cape Verde	45	50	-	-	-	-	-	-
Chad	72	-	40	20	4	-	-	36
Gambia	125	6	5	5	-	-	-	5
Guinea-Bissau	77	15	-	-	-	-	-	-
Mali	80	-	80	20	4	-	-	76
Mauritania	275	30	6	5	-	-	-	6
Niger	100	120	80	20	17	-	-	63
Senegal	740	65	10	10	1	-	-	10
<b>Central Africa</b>	<b>711</b>	<b>85</b>	<b>15</b>	<b>5</b>	-	-	-	<b>15</b>
Cameroon	270	10	10	-	-	-	-	10
Cent.Afr.Rep.	33	1	-	-	-	-	-	-
Congo, Dem.Rep.of	190	60	5	5	-	-	-	5
Congo, Rep. of	120	10	-	-	-	-	-	-
Equat.Guinea	9	-	-	-	-	-	-	-
Gabon	80	2	-	-	-	-	-	-
Sao Tome	9	2	-	-	-	-	-	-
<b>TOTAL</b>	<b>10 203</b>	<b>4 653</b>	<b>3 177</b>	<b>328</b>	<b>96</b>	<b>199</b>	<b>21</b>	<b>2 861</b>

Note: Totals computed from unrounded data.

1/ Referring to supplying countries

2/ Includes refugee needs.

**Table 3 - Triangular Transactions within Sub-Saharan Africa in 1998/99 or 1999 ( tonnes ) 1/**

Donor	Source of supply	Recipient Country	Total by donor
EC	South Africa	Madagascar (288), Malawi (3 000)	3 288
WFP	Kenya	Somalia (4 585), Sudan (434)	23 743
	South Africa	Lesotho (4 300), Madagascar (124), Malawi (672), Somalia (750), Tanzania (8 683), Zambia (2 315)	
	Zambia	Malawi (1 155)	
	Zimbabwe	Mozambique (725)	
<b>TOTAL</b>			<b>27 031</b>

1/ Based on information reported by donors to GIEWS as of late March 1999.

**Table 4 - Local Purchases within Sub-Saharan Africa in 1998/99 or 1999 ( tonnes ) 1/**

Donor	Recipient Country	Total by donor
Belgium	Niger (500), Senegal (750)	1 250
Canada	Niger (3 094)	3 094
EC	Ethiopia (9 950), Madagascar (2 000), Mali (596), Niger (3 100), Sudan (4 200), Tanzania (400)	20 246
France	Burkina Faso (9 000), Chad (3 700), Niger (5 000),	17 700
Germany	Ethiopia (11 200), Kenya (4 600), Malawi (5 500), Mali (3 000), Niger (5 000), Congo, Dem. Rep. (150),	29 450
Netherlands	Ethiopia (7 000)	7 000
NGO	Ethiopia (750),	750
Sweden	Ethiopia (6 000),	6 000
WFP	Cent. Afr. Rep. (200), Chad (200), Madagascar (1 800), Malawi (4 000), Mozambique (1 300), Senegal (100), Sudan (1 000), Tanzania (1 900), Zambia (500),	11 000
<b>TOTAL</b>		<b>96 490</b>

1/ Based on information reported by donors to GIEWS as of late March 1999.



**Table 5: Availabilities for Export and Local Purchase Requirements in Cereals in Sub-Saharan Africa  
in 1998/99 or 1999 (thousand tonnes)**

Sub-Region / Country	Availabilities for export		Local Purchase Requirements	
	Total	Contracted so far	Total	Utilized so far
<b>Eastern Africa</b>	<b>1 349</b>	-	<b>207</b>	<b>47</b>
Ethiopia	150	-	50	35
Kenya	-	-	5	5
Sudan	719	-	150	5
Tanzania	350	-	2	2
Uganda	130	-	-	-
<b>Southern Africa</b>	<b>819</b>	<b>220</b>	<b>16</b>	<b>16</b>
Madagascar	-	-	4	4
Malawi	-	-	10	10
Mozambique	59	-	1	1
South Africa	710	170	-	-
Zambia	-	-	1	1
Zimbabwe	50	50	-	-
<b>Western Africa</b>	<b>681</b>	-	<b>100</b>	<b>33</b>
<b>Coastal countries</b>	<b>515</b>	-	-	-
Benin	25	-	-	-
Côte d'Ivoire	10	-	-	-
Ghana	20	-	-	-
Nigeria	450	-	-	-
Togo	10	-	-	-
<b>Sahelian countries</b>	<b>166</b>	-	<b>100</b>	<b>33</b>
Burkina Faso	15	-	20	9
Chad	30	-	20	4
Gambia	-	-	5	-
Mali	60	-	20	4
Mauritania	1	-	5	-
Niger	60	-	20	17
Senegal	-	-	10	1
<b>Central Africa</b>	<b>10</b>	-	<b>5</b>	-
Cameroon	10	-	-	-
Congo, Dem.Rep.of	-	-	5	-
<b>TOTAL</b>	<b>2 859</b>	<b>220 1/</b>	<b>328</b>	<b>96</b>

Note: Totals computed from unrounded data.

1/ Includes 150 000 tonnes of commercial imports and 70 000 tonnes of triangular transactions.

**Table 6: Cereal Food Aid Pledges to Sub-Saharan Africa for 1998/99 or 1999 and Triangular Transactions/Local Purchases known to FAO as of late March 1999 (in thousand tonnes).**

Donor	Wheat	Rice	Coarse grains	Total cereals	Of which: triangular	Local purchases
Canada	38.9	-	-	38.9	-	3.1
EC	207.0	40.6	70.9	318.5	3.3	75.7
of which:						
Community action	148.3	11.3	30.8	190.4	3.3	20.3
National action	58.7	29.3	40.1	128.1	-	55.4
Austria	3.0	-	-	3.0	-	-
Belgium	4.5	2.7	7.4	14.6	-	1.3
France	24.0	1.0	9.0	34.0	-	17.7
Germany	13.5	-	23.7	37.2	-	29.4
Italy	5.7	25.6	-	31.3	-	-
Netherlands	-	-	-	0.0	-	7.0
Spain	8.0	-	-	8.0	-	-
Japan	1.8	40.5	-	42.3	-	-
NGOs	5.6	-	0.7	6.3	-	0.8
Sweden	-	-	-	0.0	-	6.0
Switzerland	-	3.1	-	3.1	-	-
United States	576.3	32.9	108.1	717.3	-	-
World Food Programme	127.0	24.9	177.2	329.1	23.7	11.0
<b>TOTAL</b>	<b>956.6</b>	<b>142.0</b>	<b>356.9</b>	<b>1 455.5</b>	<b>27.0</b>	<b>96.5</b>

Note: Totals computed from unrounded data

Table 7: Food Aid Pledges in Cereals for 1998/99 or 1999 by Donor and by Recipient (in thousand tonnes)

Donor/Recipient	Total	delivered	Canada	EC	Japan	Switzerland	U.S.A.	WFP	NGOs
<b>Eastern Africa</b>	<b>648.4</b>	<b>393.2</b>	-	<b>188.0</b>	-	-	<b>212.8</b>	<b>242.0</b>	<b>5.6</b>
Burundi	-	-	-	-	-	-	-	-	-
Comoros	1.0	-	-	1.0	-	-	-	-	-
Djibouti	-	-	-	-	-	-	-	-	-
Eritrea	15.9	-	-	5.6	-	-	10.3	-	-
Ethiopia 1/	331.4	231.6	-	158.3	-	-	78.2	89.3	5.6
Kenya	60.4	32.4	-	1.0	-	-	28.0	31.4	-
Rwanda	61.8	12.9	-	10.8	-	-	6.0	45.0	-
Seychelles	-	-	-	-	-	-	-	-	-
Somalia	17.8	12.6	-	2.2	-	-	10.0	5.6	-
Sudan	91.4	73.6	-	3.2	-	-	43.2	45.0	-
Tanzania	56.2	30.1	-	5.9	-	-	24.6	25.7	-
Uganda	12.5	-	-	-	-	-	12.5	-	-
<b>Southern Africa</b>	<b>548.3</b>	<b>448.9</b>	<b>34.8</b>	<b>63.9</b>	<b>15.0</b>	-	<b>382.5</b>	<b>51.4</b>	<b>0.7</b>
Angola	125.6	116.8	-	21.6	-	-	75.8	28.0	0.2
Botswana	-	-	-	-	-	-	-	-	-
Lesotho	5.8	5.8	-	-	-	-	-	5.8	-
Madagascar	25.8	19.2	-	7.4	5.0	-	11.4	2.0	-
Malawi	25.1	22.1	3.5	19.8	-	-	-	1.8	-
Mauritius	-	-	-	-	-	-	-	-	-
Mozambique	252.4	178.4	16.7	2.0	10.0	-	223.0	0.7	-
Namibia	-	-	-	-	-	-	-	-	-
South Africa	-	-	-	-	-	-	-	-	-
Swaziland	-	-	-	-	-	-	-	-	-
Zambia	25.5	25.5	5.8	6.1	-	-	-	13.1	0.5
Zimbabwe	88.1	81.1	8.8	7.0	-	-	72.3	-	-
<b>Western Africa</b>	<b>249.2</b>	<b>106.4</b>	<b>4.1</b>	<b>57.4</b>	<b>27.3</b>	<b>3.1</b>	<b>122.0</b>	<b>35.3</b>	<b>0.0</b>
<b>Coastal countries</b>	<b>108.2</b>	<b>37.2</b>	<b>0.0</b>	<b>16.5</b>	<b>2.9</b>	-	<b>80.8</b>	<b>8.0</b>	<b>0.0</b>
Benin	2.4	2.4	-	-	-	-	2.4	-	-
Côte d'Ivoire	1.4	-	-	1.4	-	-	-	-	-
Ghana	63.6	12.0	-	-	-	-	63.6	-	-
Guinea	5.1	2.2	-	-	2.9	-	-	2.2	-
Liberia	7.2	7.2	-	-	-	-	4.4	2.8	-
Nigeria	0.3	-	-	0.3	-	-	-	-	-
Sierra Leone	28.2	13.4	-	14.8	-	-	10.4	3.0	-
Togo	-	-	-	-	-	-	-	-	-
<b>Sahelian countries</b>	<b>141.0</b>	<b>69.2</b>	<b>4.1</b>	<b>40.9</b>	<b>24.4</b>	<b>3.1</b>	<b>41.2</b>	<b>27.3</b>	-
Burkina Faso	28.8	14.6	-	5.0	4.0	-	10.2	9.6	-
Cape Verde	47.9	17.8	-	15.2	6.6	3.1	21.1	1.9	-
Chad	2.6	2.6	-	-	-	-	2.1	0.5	-
Gambia	1.0	1.0	-	1.0	-	-	-	-	-
Guinea-Bissau	2.6	2.6	-	-	-	-	-	2.6	-
Mali	4.7	4.7	-	-	-	-	2.1	2.6	-
Mauritania	22.7	3.7	-	15.0	4.5	-	1.7	1.5	-
Niger	24.1	15.6	4.1	4.2	3.8	-	4.0	8.0	-
Senegal	6.6	6.6	-	0.5	5.5	-	-	0.6	-
<b>Central Africa</b>	<b>9.6</b>	<b>5.1</b>	-	<b>9.2</b>	-	-	-	<b>0.4</b>	-
Cameroon	2.5	-	-	2.5	-	-	-	-	-
Cent.Afr.Rep.	-	-	-	-	-	-	-	-	-
Congo, Dem.Rep.of	4.7	4.7	-	4.7	-	-	-	-	-
Congo, Rep.of	2.0	-	-	2.0	-	-	-	-	-
Equat. Guinea	-	-	-	-	-	-	-	-	-
Gabon	-	-	-	-	-	-	-	-	-
Sao Tome	0.4	0.4	-	-	-	-	-	0.4	-
<b>TOTAL</b>	<b>1 455.5</b>	<b>953.6</b>	<b>38.9</b>	<b>318.5</b>	<b>42.3</b>	<b>3.1</b>	<b>717.3</b>	<b>329.1</b>	<b>6.3</b>

1/ Includes refugee needs.

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

**(situation as of late March 1999)**

ANGOLA

<b>Area:</b>	1 247 000 sq.km
<b>Climate:</b>	Coastal desert, south-west semi-arid, rest tropical wet-dry, with rains in Sept.-April
<b>Population:</b>	13.2 million (1998 estimate), G.N.P. per caput US\$ 340 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; infrastructure devastated by prolonged civil strife
<b>Logistics:</b>	Inadequate port, rail and road facilities
<b>Major foodcrops:</b>	Roots, tubers, maize, plantains
<b>Marketing year:</b>	April/March; Lean season: January-April
<b>Share of cereals in total calorie intake:</b>	35 percent

**CURRENT SITUATION**

The 1998/99 rainy season has been favourable for crops so far, with widespread rain over most regions since October. However, planted area is expected to be considerably reduced this year as a result of insecurity in many areas following renewed civil strife since December. Intense fighting is reported in major cereal growing areas of the centre (Bie and Huambo) extending to the north and east. As a consequence, many farmers have abandoned land to join the rapidly increasing number of displaced people or refugees to neighbouring countries.

The food supply outlook in the country has become increasingly bleak. The number of internally displaced in need of urgent assistance is now estimated at over 600 000 people, largely concentrated in the provinces of Huambo, Bie, Malanje, Huila and Uige. Given the serious deterioration in security conditions necessitating delivery of food and other supplies by air, the cost of transport, logistic and insurance are expected to be drastically higher. There is therefore, an urgent need to ensure that adequate humanitarian assistance is provided to the affected population, including the strengthening of the resource capacity of humanitarian institutions. Food aid pledges at the end of January amounted to about 126 000 tonnes, of which 117 000 tonnes have been delivered so far.

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

	Wheat	Rice	Coarse grains	Total
Normal Production	3	3	330	336
Normal Imports	110	100	90	300
of which: Structural food aid	20	15	60	95
<b><u>1998/99 Domestic Availability</u></b>	<b><u>7</u></b>	<b><u>4</u></b>	<b><u>630</u></b>	<b><u>641</u></b>
1998 Production (rice in paddy terms)	-	5	630	635
1998 Production (rice in milled terms)	-	3	630	633
Possible stock drawdown	7	1	-	8
<b><u>1998/99 Utilization</u></b>	<b><u>207</u></b>	<b><u>75</u></b>	<b><u>830</u></b>	<b><u>1 112</u></b>
Food Use	207	75	668	950
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	158	158
Exports or Re-exports	-	-	-	-
Possible stock build up	-	-	4	4
<b><u>1998/99 Import Requirement</u></b>	<b><u>200</u></b>	<b><u>71</u></b>	<b><u>200</u></b>	<b><u>471</u></b>
Anticipated commercial imports	185	55	110	350
Food aid needs	15	16	90	121
<b><u>Current Aid Position</u></b>				
Food aid pledges	53	17	56	126
of which: Delivered	47	16	54	117
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>16</u></b>	<b><u>6</u></b>	<b><u>51</u></b>	<b><u>72</u></b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				189
1998/99 import requirement as % of normal:				157
1998/99 food aid requirement as % of normal:				127

<b>Area:</b>	111 000 sq.km
<b>Climate:</b>	Tropical wet-dry; two rainy seasons in south (Mar.-Jul. and Oct.) and one in north
<b>Population:</b>	5.63 million (1998 estimate); G.N.P. per caput US\$ 380 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; coastal country
<b>Logistics:</b>	Ports, roads, rail adequate; gateway to Niger
<b>Major foodcrops:</b>	Roots and tubers, maize
<b>Marketing year:</b>	January/December; Lean season: April-June
<b>Share of cereals in total calorie intake:</b>	37 percent

**CURRENT SITUATION**

Planted areas in 1998 were above normal, except for groundnuts. 1998 aggregate cereal output should be close to average but below 1997's level, and current estimates point to a production of about 800 000 tonnes.

**The overall food supply situation is satisfactory following the harvest of the main crops. Reduced demand from the sahelian countries that also had good harvests, is causing prices to remain low. The cereal import requirement for 1999 (January/December) is estimated at 200 000 tonnes (including re-exports) of wheat and rice.**

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

	Wheat	Rice	Coarse grains	Total
Normal Production	-	12	605	617
Normal Imports	50	150	8	208
of which: Structural food aid	4	4	8	16
<b>1999 Domestic Availability</b>	<b>50</b>	<b>164</b>	<b>613</b>	<b>827</b>
1998 Production (rice in paddy terms)	-	25	775	800
1998 Production (rice in milled terms)	-	15	775	790
Possible stock drawdown	-	-	-	-
<b>1999 Utilization</b>	<b>60</b>	<b>155</b>	<b>775</b>	<b>990</b>
Food Use	50	74	525	649
of which: local purchase requirement	-	-	-	-
Non-food use	-	4	215	219
Exports or Re-exports	10	75	25	110
Possible stock build up	-	2	10	12
<b>1999 Import Requirement</b>	<b>60</b>	<b>140<sup>1/</sup></b>	<b>160</b>	<b>360</b>
Anticipated commercial imports	55	140	-	195
Food aid needs	5	-	-	5
<b>Current Aid Position</b>				
Food aid pledges	2	-	-	2
of which: Delivered	2	-	-	2
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b>Estimated Per Caput Consumption (kg/Year)</b>	<b>9</b>	<b>13</b>	<b>92</b>	<b>114</b>
<b>Indexes</b>				
1998 production as % of normal:				130
1999 import requirement as % of normal:				96
1999 food aid requirement as % of normal:				31

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

**BOTSWANA**

<b>Area:</b>	567 000 sq.km
<b>Climate:</b>	South-western part arid (Kalahari desert); rest semi-arid with some rains in Dec.-Feb.
<b>Population:</b>	1.55 million (1998 estimate); G.N.P. per caput: US\$ 3 020 (1995)
<b>Specific characteristics of the country:</b>	east; swamps in the northern parts; desert in the west
<b>Logistics:</b>	Imports through South Africa
<b>Major foodcrops:</b>	Sorghum, pulses, vegetables
<b>Marketing year:</b>	April/March; Lean season: January/March
<b>Share of cereals in total calorie intake:</b>	55 percent

**CURRENT SITUATION**

The rainy season has so far been favourable to crops. However, more rains are needed. Pastures have recovered substantially, which should improve the quality of livestock.

The national food supply situation is generally satisfactory as domestic cereal availability and planned imports should adequately cover current needs.

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

	Wheat	Rice	Coarse grains	Total
Normal Production	1	-	59	60
Normal Imports	60	8	116	184
of which: Structural food aid	-	-	20	20
<b><u>1998/99 Domestic Availability</u></b>	<b>=</b>	<b>=</b>	<b>9</b>	<b>9</b>
1998 Production (rice in paddy terms)	-	-	9	9
1998 Production (rice in milled terms)	-	-	9	9
Possible stock drawdown	-	-	-	-
<b><u>1998/99 Utilization</u></b>	<b>66</b>	<b>=</b>	<b>199</b>	<b>265</b>
Food Use	66	-	195	261
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	4	4
Exports or Re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<b><u>1998/99 Import Requirement</u></b>	<b>66</b>	<b>=</b>	<b>190</b>	<b>256</b>
Anticipated commercial imports	66	-	190	256
Food aid needs	-	-	-	-
<b><u>Current Aid Position</u></b>				
Food aid pledges	-	-	-	-
of which: Delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b>43</b>	<b>=</b>	<b>126</b>	<b>168</b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				15
1998/99 import requirement as % of normal:				139
1998/99 food aid requirement as % of normal:				-

**BURKINA FASO**

<b>Area:</b>	274 000 sq.km
<b>Climate:</b>	Tropical wet-dry in south, semi-arid in north; one rainy season: May-October
<b>Population:</b>	11.13 million (1998 estimate); G.N.P. per caput: US\$ 240 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; sahelian land-locked country
<b>Logistics:</b>	Roads inadequate during rainy season; adequate rail link to Abidjan (Côte d'Ivoire)
<b>Major foodcrops:</b>	Millet, sorghum, pulses, maize
<b>Marketing year:</b>	November/October; Lean season: July-September
<b>Share of cereals in total calorie intake:</b>	73 percent

**CURRENT SITUATION**

Seasonably dry conditions prevail. Off-season crops are developing satisfactorily as water reserves have been well replenished. The final official estimate of aggregate 1998 cereal production is 2 626 000 tonnes which is well above the previous year's output but remains about average.

<p>

The overall food supply situation has improved following this better harvest. Prices of cereals have decreased significantly following the harvest but increased slightly in late January/early February. In January, the Government launched bids to buy about 15 000 tonnes of local cereals in order to replenish the national security stock to its recommended level of 35 000 tonnes. Some deficit areas remain vulnerable and may need some assistance during the lean season, notably in Kouritenga, Oubritenga, Passoré, Sanguié and in the provinces of the centre-north and north.

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

	Wheat	Rice	Coarse grains	Total
Normal Production	-	83	2 290	2 373
Normal Imports	50	80	25	155
of which: Structural food aid	7	6	15	28
<b><u>1998/99 Domestic Availability</u></b>	<b>-</b>	<b>79</b>	<b>2 567</b>	<b>2 646</b>
1998 Production (rice in paddy terms)	-	90	2 567	2 657
1998 Production (rice in milled terms)	-	59	2 567	2 626
Possible stock drawdown	-	20	-	20
<b><u>1998/99 Utilization</u></b>	<b>55</b>	<b>169</b>	<b>2 582</b>	<b>2 806</b>
Food Use	52	159	2 042	2 253
of which: local purchase requirement	-	-	20	20
Non-food use	1	11	395	407
Exports or Re-exports	-	-	15	15
Possible stock build up	2	-	130	132
<b><u>1998/99 Import Requirement</u></b>	<b>55</b>	<b>90</b>	<b>15</b>	<b>160</b>
Anticipated commercial imports	45	80	5	130
Food aid needs	10	10	10	30
<b><u>Current Aid Position</u></b>				
Food aid pledges	10	10	9	29
of which: Delivered	5	1	9	15
Donor-financed purchases	-	-	9	9
of which: for local use	-	-	9	9
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b>5</b>	<b>16</b>	<b>187</b>	<b>206</b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				112
1998/99 import requirement as % of normal:				103
1998/99 food aid requirement as % of normal:				107



**BURUNDI**

<b>Area:</b>	26 000 sq.km
<b>Climate:</b>	Highland rainy climate with moderate temperature (200C); two rainy seasons (Feb.- May and Sept.-Nov.)
<b>Population:</b>	6.29 million (1998 estimate); G.N.P. per caput: US\$ 180 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; land-locked country
<b>Logistics:</b>	Ports: Mombasa (Kenya) and Dar es Salaam (Tanzania); rail and road connections inadequate
<b>Major foodcrops:</b>	Pulses, plantains, roots, tubers, maize and sorghum
<b>Marketing year:</b>	January/December; Lean season: November-December
<b>Share of cereals in total calorie intake:</b>	34 percent

**CURRENT SITUATION**

Harvesting of the 1999 A season crops has been completed and a reduced output is estimated, reflecting late and insufficient rains during the growing season. An FAO/WFP/Government of Burundi crop assessment in the second half of December estimated food production from the season at 1.1 million tonnes, 3 percent below the 1998 A season output and 23 percent below the pre-crisis average. Output of beans, estimated at 75 000 tonnes, is 14 percent below last year, while cereals declined 5 percent to 85 000 tonnes. Production of roots and tubers and bananas and plantains decreased by 2 percent and 3 percent respectively.

Violent incidents and insecurity persist in several regions of the country. Approximately 550 000 people are still living in displacement camps. Food assistance for some 300 000 most vulnerable people for 1999 is estimated at 50 000 tonnes of food.

The suspension of the 1996 trade embargo in December 1998 is expected to increase economic and trade activities in the country.

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

	Wheat	Rice	Coarse grains	Total
Normal Production	7	41	253	301
Normal Imports	20	2	7	29
of which: Structural food aid	-	-	-	-
<b><u>1999 Domestic Availability</u></b>	<b><u>10</u></b>	<b><u>30</u></b>	<b><u>248</u></b>	<b><u>288</u></b>
1998 Production (rice in paddy terms)	10	38	248	296
1998 Production (rice in milled terms)	10	25	248	283
Possible stock drawdown	-	5	-	5
<b><u>1999 Utilization</u></b>	<b><u>35</u></b>	<b><u>35</u></b>	<b><u>283</u></b>	<b><u>353</u></b>
Food Use	35	33	254	322
of which: local purchase requirement	-	-	-	-
Non-food use	-	2	24	26
Exports or Re-exports	-	-	-	-
Possible stock build up	-	-	5	5
<b><u>1999 Import Requirement</u></b>	<b><u>25</u></b>	<b><u>5</u></b>	<b><u>35</u></b>	<b><u>65</u></b>
Anticipated commercial imports	10	5	-	15
Food aid needs	15	-	35	50
<b><u>Current Aid Position</u></b>				
Food aid pledges	-	-	-	-
Of which: Delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
Of which: for local use	-	-	-	-
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>5</u></b>	<b><u>5</u></b>	<b><u>39</u></b>	<b><u>50</u></b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				98
1999 import requirement as % of normal:				224
1999 food aid requirement as % of normal:				-

<b>Area:</b>	465 000 sq.km
<b>Climate:</b>	months in south to 4 months in extreme north
<b>Population:</b>	14.32 million (1998 estimate); G.N.P. per caput: US\$ 650 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; coastal country
<b>Logistics:</b>	Ports and roads adequate; gateway to Chad
<b>Major foodcrops:</b>	Roots and tubers, coarse grains, fruit
<b>Marketing year:</b>	Jan./Dec.; Lean season: June-August
<b>Share of cereals in total calorie intake:</b>	39 percent

### CURRENT SITUATION

The 1998 cereal output is estimated to be about average. Food prices decreased following the harvest and the food supply situation is satisfactory. Food supply difficulties are likely in northern areas. A WFP Emergency Operation provided 6 000 tonnes of relief food for 210 000 people in the extreme north in 1998. A new WFP operation is under preparation for the distribution of 9 500 tonnes of food to 660 000 persons for six months.

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

	Wheat	Rice	Coarse grains	Total
Normal Production	-	80	1 106	1 186
Normal Imports	200	50	10	260
of which: Structural food aid	-	2	2	4
<b><u>1999 Domestic Availability</u></b>	<b><u>200</u></b>	<b><u>132</u></b>	<b><u>1 116</u></b>	<b><u>1 332</u></b>
1998 Production (rice in paddy terms)	-	90	1 170	1 260
1998 Production (rice in milled terms)	-	61	1 170	1 232
Possible stock drawdown	-	-	-	-
<b><u>1999 Utilization</u></b>	<b><u>220</u></b>	<b><u>111</u></b>	<b><u>1 180</u></b>	<b><u>1 512</u></b>
Food Use	206	100	933	1 239
of which: local purchase requirement	-	-	-	-
Non-food use	4	11	238	252
Exports or Re-exports	10	-	10	20
Possible stock build up	-	-	-	-
<b><u>1999 Import Requirement</u></b>	<b><u>220</u></b>	<b><u>50</u></b>	<b><u>10</u></b>	<b><u>280</u></b>
Anticipated commercial imports	220	48	10	278
Food aid needs	-	2	-	2
<b><u>Current Aid Position</u></b>				
Food aid pledges	-	-	3	3
of which: Delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>15</u></b>	<b><u>7</u></b>	<b><u>67</u></b>	<b><u>89</u></b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				106
1999 import requirement as % of normal:				108
1999 food aid requirement as % of normal:				50

CAPE VERDE

<b>Area:</b>	4 000 sq.km
<b>Climate:</b>	Semi-arid; rainfall increases with altitude; rainy season: July-December
<b>Population:</b>	417 000 (1998 estimate); G.N.P. per caput: US\$ 960 (1995)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; archipelago
<b>Logistics:</b>	Port capacity and roads adequate
<b>Major foodcrops:</b>	Maize, rice, pulses
<b>Marketing year:</b>	November/October; Lean season: n.a. since 90 percent of requirements covered by imports
<b>Share of cereals in total calorie intake:</b>	57 percent

**CURRENT SITUATION**

The 1998 maize production has been estimated at 3 400 tonnes, which is below the previous year's reduced harvest and well below average. Following successive poor harvests, some sections of the rural population may need assistance in food and/or seeds for the next season. However, the overall food supply situation remains satisfactory as the country imports the bulk of its consumption requirement. Substantial quantities have recently been imported or will arrive soon, providing stocks for several months of consumption. The cereal food aid requirements for 1998/99 amount to 95 000 tonnes. Pledges amount to 48 400 tonnes, of which 18 000 tonnes have been delivered so far

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

	Wheat	Rice	Coarse grains	Total
Normal Production	-	-	6	6
Normal Imports	20	20	45	85
of which: Structural food aid	15	15	25	55
<b>1998/99 Domestic Availability</b>	<b>2</b>	<b>-</b>	<b>7</b>	<b>9</b>
1998 Production (rice in paddy terms)	-	-	3	3
1998 Production (rice in milled terms)	-	-	3	3
Possible stock drawdown	2	-	4	6
<b>1998/99 Utilization</b>	<b>22</b>	<b>25</b>	<b>57</b>	<b>104</b>
Food Use	21	24	57	102
of which: local purchase requirement	-	-	-	-
Non-food use	1	1	-	2
Exports or Re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<b>1998/99 Import Requirement</b>	<b>20</b>	<b>25</b>	<b>50</b>	<b>95</b>
Anticipated commercial imports	5	10	25	40
Food aid needs	15	15	25	55
<b>Current Aid Position</b>				
Food aid pledges	23	12	13	48
of which: Delivered	5	12	1	18
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b>Estimated Per Caput Consumption (kg/Year)</b>	<b>49</b>	<b>56</b>	<b>134</b>	<b>239</b>
<b>Indexes</b>				
1998 production as % of normal:				53
1998/99 import requirement as % of normal:				112
1998/99 food aid requirement as % of normal:				100

CENTRAL AFRICAN REPUBLIC

<b>Area:</b>	623 000 sq.km
<b>Climate:</b>	North: tropical wet-dry, south: tropical wet; one rainy season: March-November
<b>Population:</b>	3.49 million (1998 estimate); G.N.P. per caput: US\$ 320 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; land-locked country
<b>Logistics:</b>	Roads inadequate during rainy season; river transport important
<b>Major foodcrops:</b>	Roots and tubers, tree nuts, coarse grain, fruits
<b>Marketing year:</b>	January/December; Lean season: May-July
<b>Share of cereals in total calorie intake:</b>	21 percent

**CURRENT SITUATION**

Reflecting generally abundant and widespread rains, a good cereal crop has been gathered in late 1998. The food supply situation is satisfactory. For the 1999 marketing year (January/December), the cereal import requirement will remain close to 1998 level, consisting mainly of wheat. About 4 400 Congolese refugees are relocated to a new camp in Boubou area.

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

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

<b>Area:</b>	1 259 000 sq.km
<b>Climate:</b>	From north to south: arid, semi-arid and tropical wet-dry; one rainy season: May-Oct.
<b>Population:</b>	7.23 million (1998 estimate); G.N.P. per caput: US\$ 240 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; land-locked sahelian country.
<b>Logistics:</b>	Roads inadequate during rainy season
<b>Major foodcrops:</b>	Millet and sorghum, roots and tubers, tree nuts
<b>Marketing year:</b>	November/October; Lean season: August-September
<b>Share of cereals in total calorie intake:</b>	52 percent

### CURRENT SITUATION

Seasonably dry conditions prevail. Recession crops are developing satisfactorily. The final official estimate of aggregate 1998 cereal production is a record 1 269 000 tonnes, which is 29 percent above the previous year's output.

The overall food supply situation is satisfactory in the Sahelian zone which gathered well above average harvests. Prices of cereals declined following the harvest. This should facilitate local purchases for the reconstitution of the national security stock (which was almost exhausted) for which external assistance is required. Some food supply difficulties are likely in areas of the Sudanian zone affected by successive poor harvests and/or flooding in 1998, notably in the Logone, Tandjilé and parts of Mayo-Kebbi. Prices of cereals decreased but remained above normal levels. Cash crop production was also reduced, limiting income for farmers.

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

	Wheat	Rice	Coarse grains	Total
Normal Production	3	83	828	914
Normal Imports	50	10	10	70
of which: Structural food aid	4	1	10	15
<b><u>1998/99 Domestic Availability</u></b>	<b><u>5</u></b>	<b><u>74</u></b>	<b><u>1 195</u></b>	<b><u>1 274</u></b>
1998 Production (rice in paddy terms)	5	100	1 195	1 300
1998 Production (rice in milled terms)	5	69	1 195	1 269
Possible stock drawdown	-	5	-	5
<b><u>1998/99 Utilization</u></b>	<b><u>65</u></b>	<b><u>86</u></b>	<b><u>1 195</u></b>	<b><u>1 346</u></b>
Food Use	64	74	806	944
of which: local purchase requirement	-	-	20	20
Non-food use	1	12	189	202
Exports or Re-exports	-	-	20	20
Possible stock build up	-	-	180	180
<b><u>1998/99 Import Requirement</u></b>	<b><u>60</u></b>	<b><u>12</u></b>	<b><u>-</u></b>	<b><u>72</u></b>
Anticipated commercial imports	50	10	-	60
Food aid needs	10	2	-	12
<b><u>Current Aid Position</u></b>				
Food aid pledges	2	-	1	3
of which: Delivered	2	-	1	3
Donor-financed purchases	-	-	4	4
of which: for local use	-	-	4	4
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>8</u></b>	<b><u>10</u></b>	<b><u>116</u></b>	<b><u>135</u></b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				142
1998/99 import requirement as % of normal:				102
1998/99 food aid requirement as % of normal:				80

COMOROS

<b>Area:</b>	2 000 sq.km
<b>Climate:</b>	Tropical wet-dry; one hot rainy season with cyclone probability; June-October dry and cool
<b>Population:</b>	0.729 million (1998 estimate); G.N.P. per caput: US\$ 470 (1995)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; archipelago of four small islands
<b>Logistics:</b>	-
<b>Major foodcrops:</b>	Rice, roots, tubers, bananas and coconuts
<b>Marketing year:</b>	January/December
<b>Share of cereals in total calorie intake:</b>	44 percent

**CURRENT SITUATION**

Most of the country's agricultural land is planted to cash crops, bananas and root crops. Only one-quarter of the cereal requirement is produced locally and, consequently, there is a structural deficit of some 46 000 tonnes of cereals, largely covered by commercial imports. Food aid needs are estimated at 10 000 tonnes.

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

	Wheat	Rice	Coarse grains	Total
Normal Production	-	17	4	21
Normal Imports	5	35	-	40
of which: Structural food aid	1	5	-	6
<b>1999 Domestic Availability</b>	<b>5</b>	<b>42</b>	<b>4</b>	<b>51</b>
1999 Production (rice in paddy terms)	-	3	4	7
1999 Production (rice in milled terms)	-	2	4	6
Possible stock drawdown	-	2	-	2
<b>1999 Utilization</b>	<b>6</b>	<b>44</b>	<b>4</b>	<b>54</b>
Food Use	6	42	2	50
of which: local purchase requirement	-	-	-	-
Non-food use	-	2	2	4
Exports or Re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<b>1999 Import Requirement</b>	<b>6</b>	<b>40</b>	<b>-</b>	<b>46</b>
Anticipated commercial imports	5	31	-	36
Food aid needs	1	9	-	10
<b>Current Aid Position</b>				
Food aid pledges	-	1	-	1
of which: Delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b>Estimated Per Caput Consumption (kg/Year)</b>	<b>8</b>	<b>58</b>	<b>3</b>	<b>69</b>
<b>Indexes</b>				
1999 production as % of normal:				33
1999 import requirement as % of normal:				115
1999 food aid requirement as % of normal:				167

CONGO, DEMOCRATIC REPUBLIC OF

<b>Area:</b>	2 345 000 sq.km
<b>Climate:</b>	Tropical wet climate in the central basin, tropical wet-dry in the extreme north and south
<b>Population:</b>	45.734 million (1998 estimate); G.N.P. per caput: US \$ 110 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; tropical country with access to sea
<b>Logistics:</b>	Roads inadequate
<b>Major foodcrops:</b>	Roots and tubers, coarse grains, fruit
<b>Marketing year:</b>	January/December; Lean season: October (north), November-December (south)
<b>Share of cereals in total calorie intake:</b>	15 percent

**CURRENT SITUATION**

Increased population displacement by armed conflict is reported in Goma region in eastern DRC. A UN mission visited areas under RCD control to explore possibilities of emergency assistance to the displaced populations in the rebel-held areas. The assistance will consist of the distribution of seeds, agricultural implements and foodstuffs. In Kinshasa, the nutritional situation continues to deteriorate. Prices of basic food commodities increased sharply. Many of the agriculture areas that supply Kinshasa remain cut off, restricting many households' access to food. In addition, the transport of some food supplies from Kinshasa to Brazzaville reduced food availability. A recent survey of families on the outskirts of Kinshasa indicated that 90 percent of daily household expenditure goes on food.

The food supply situation remains tight in Lubumbashi, where flooding last year destroyed up to 70 percent of crops and where a large number of displaced people from the Kalemie, Nyunzu and Nyemba areas are reported. In the provinces of Bas Congo, Bandundu and Katanga, tens of thousands of refugees are reported coming from the Pool region in the Republic of Congo or from northern Angola, which has been affected by renewed fighting.

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

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

CONGO, REPUBLIC OF

<b>Area:</b>	342 000 sq.km
<b>Climate:</b>	Tropical wet climate in north, tropical wet-dry in south with main rainy season in October-April
<b>Population:</b>	3.075 million (1998 estimate); G.N.P. per caput: US\$ 660 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; tropical coastal country
<b>Logistics:</b>	Ports adequate; roads inadequate during rainy season
<b>Major foodcrops:</b>	Roots and tubers, fruit
<b>Marketing year:</b>	Jan./Dec.; Lean season: September-November
<b>Share of cereals in total calorie intake:</b>	19 percent

**CURRENT SITUATION**

The food supply situation in Brazzaville has deteriorated significantly following an upsurge of fighting which caused new population displacement in the capital, notably from the two southern districts of Bacongo and Makelekele. In 1997, civil strife had already severely disrupted food marketing and caused large-scale displacement of the urban population. Food prices have increased sharply. Some 31 000 displaced people are totally dependent on humanitarian aid, living in several camps in the northern part of the city. Food and medical supplies are scarce. Fighting also erupted in the Pool region in the south of the country, where there is a serious need for humanitarian assistance for displaced people. About 21 000 people fled the region to seek refuge in the province of Bas-Congo in DRC, while about 20 000 refugees are also reported in Pointe Noire.

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

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



COTE D'IVOIRE

<b>Area:</b>	318 000 sq.km
<b>Climate:</b>	Tropical wet-dry; two rainy seasons (March-July and September-December) in south and one in north
<b>Population:</b>	14.90 million (1998 estimate); G.N.P. per caput: US\$ 690 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; coastal country
<b>Logistics:</b>	Ports and roads adequate; gateway to Burkina Faso and Mali
<b>Major foodcrops:</b>	Roots and tubers, fruit, rice, maize
<b>Marketing year:</b>	January/December; Lean season: April to July
<b>Share of cereals in total calorie intake:</b>	40 percent

**CURRENT SITUATION**

Below-normal and erratic rainfall was recorded over Côte d'Ivoire, notably in the south. However, in the north, the rainfall situation has been satisfactory and could partly compensate for the reduced output in the south. Estimates for the 1998/99 cereal production point to about 1.6 million tonnes, compared with 1.55 million tonnes in 1997/98.

The overall food supply situation is satisfactory with the arrival of the new crop on the market. Repatriation of about 140 000 Liberian refugees who remain in the country is underway. The cereal import requirement for 1999 (January/December), is estimated at 640 000 tonnes, mostly wheat and rice.

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

	Wheat	Rice	Coarse grains	Total
Normal Production	-	950	700	1650
Normal Imports	220	280	20	520
of which: Structural food aid	-	-	-	-
<b>1999 Domestic Availability</b>	<b>220</b>	<b>525</b>	<b>724</b>	<b>1 249</b>
1998 Production (rice in paddy terms)	-	875	724	1 599
1998 Production (rice in milled terms)	-	525	724	1 249
Possible stock drawdown	-	-	-	-
<b>1999 Utilization</b>	<b>255</b>	<b>890</b>	<b>744</b>	<b>1 889</b>
Food Use	250	759	568	1 577
of which: local purchase requirement	-	-	-	-
Non-food use	5	131	166	302
Exports or Re-exports	-	-	10	10
Possible stock build up	-	-	-	-
<b>1999 Import Requirement</b>	<b>255</b>	<b>365</b>	<b>20</b>	<b>640</b>
Anticipated commercial imports	255	365	20	640
Food aid needs	-	-	-	-
<b>Current Aid Position</b>				
Food aid pledges	-	-	1	1
of which: Delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b>Estimated Per Caput Consumption (kg/Year)</b>	<b>17</b>	<b>50</b>	<b>38</b>	<b>105</b>
<b>Indexes</b>				
1998 production as % of normal:				97
1999 import requirement as % of normal:				123
1999 food aid requirement as % of normal:				-

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

### CURRENT SITUATION

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

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

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

EQUATORIAL GUINEA

<b>Area:</b>	28 000 sq.km
<b>Climate:</b>	Tropical wet climate
<b>Population:</b>	422 000 (1998 estimate); G.N.P. per caput: US\$ 380 (1995)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; coastal country
<b>Logistics:</b>	Ports and roads inadequate
<b>Major foodcrops:</b>	Cassava, sweet potatoes, bananas
<b>Marketing year:</b>	January/December; Lean season: September-November
<b>Share of cereals in total calorie intake:</b>	12 percent

**CURRENT SITUATION**

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

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

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

<b>Area:</b>	124 320 sq.km
<b>Climate:</b>	Highland areas: tropical wet/dry with unreliable rains. Lowlands: semi-arid to arid
<b>Population:</b>	2.899 million (1998 estimate); G.N.P. per caput: n.a.
<b>Specific characteristics of the country:</b>	Low-income food-deficit country
<b>Logistics:</b>	Roads inadequate, gateway to northern Ethiopia
<b>Major foodcrops:</b>	Sorghum, teff, millet, maize, pulses
<b>Marketing year:</b>	January/December; Lean season: August-November
<b>Share of cereals in total calorie intake:</b>	73 percent

### CURRENT SITUATION

The 1998 main season cereal crop is estimated to be well above average, as a result of abundant and well distributed rains during the season in the main growing areas.

While the overall food supply situation has improved with the arrival of the new harvest on the market, the situation continues to be difficult for the families displaced by the conflict with neighbouring Ethiopia. A recent Government assessment indicates that during 1999, some 450 000 people will need food assistance, including 100 000 internally displaced persons and 60 000 expelled from Ethiopia, hosting families of returnees/displaced as well as those affected by the economic disruption caused by the war. The Government has appealed for international food aid to assist this population.

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

	Wheat	Rice	Coarse grains	Total
Normal Production	-	-	-	-
Normal Imports	-	-	-	-
of which: Structural food aid	-	-	-	-
<b>1999 Domestic Availability</b>	<b>23</b>	<b>-</b>	<b>436</b>	<b>459</b>
1998 Production (rice in paddy terms)	23	-	436	459
1998 Production (rice in milled terms)	23	-	436	459
Possible stock drawdown	-	-	-	-
<b>1999 Utilization</b>	<b>128</b>	<b>-</b>	<b>440</b>	<b>568</b>
Food Use	121	-	315	436
of which: local purchase requirement	-	-	-	-
Non-food use	2	-	70	72
Exports or Re-exports	-	-	-	-
Possible stock build up	5	-	55	60
<b>1999 Import Requirement</b>	<b>105</b>	<b>-</b>	<b>4</b>	<b>109</b>
Anticipated commercial imports	65	-	-	65
Food aid needs	40	-	4	44
<b>Current Aid Position</b>				
Food aid pledges	12	-	4	16
of which: Delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b>Estimated Per Caput Consumption (kg/Year)</b>	<b>40</b>	<b>-</b>	<b>105</b>	<b>145</b>
<b>Indexes</b>				
1998 production as % of normal:				-
1999 import requirement as % of normal:				-
1999 food aid requirement as % of normal:				-

**ETHIOPIA**

<b>Area:</b>	976 680 sq.km
<b>Climate:</b>	Northern coastal area and lowlands in the south and the east are semi-arid to arid; the rest of the country has a highland rainy climate with mild winter.
<b>Population:</b>	58.652 million (1998 estimate); G.N.P. per caput: US\$ 110 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country
<b>Logistics:</b>	Land-locked country, roads inadequate
<b>Major foodcrops:</b>	Maize, teff, barley, sorghum, wheat, pulses, enset (false banana)
<b>Marketing year:</b>	January/December; Lean season: August-November
<b>Share of cereals in total calorie intake:</b>	69 percent

**CURRENT SITUATION**

An FAO/WFP Crop and Food Supply Assessment Mission which visited the country in late 1998 estimated cereal and pulse production from the 1998 Meher season at 11.69 million tonnes, 36 percent up on last year but slightly less than the record crop of 1996. The increase is due to favourable rains, increased use of fertilizer and improved seeds, and a low incidence of pests and diseases.

The improved availability of cereals has resulted in falling grain prices in most markets. Only minimal imports, mainly rice, will be necessary in 1999. Given this favourable outturn, there should be scope for a significant build-up of stocks at all levels. Export possibilities to neighbouring countries will be restricted because of weak import demand and the closed border with Eritrea.

Despite the excellent harvest, some 2 million vulnerable people will require an estimated 180 000 tonnes of food aid, excluding those from pastoral areas. In addition, some 272 000 internally displaced persons affected by the on-going conflict with neighbouring Eritrea will require 45 000 tonnes of food aid. Due to ample domestic supplies, imported food aid is not needed this year. However, donors are strongly urged to support local purchases to provide some strength to the market.

In pastoral southern and eastern parts, dry weather has resulted in a deterioration of pastures and the condition of animals. Distribution of emergency water is underway in some areas. A recent Government/donor/international agency assessment of the situation indicates that most affected areas are Somali region and lowland Bale and Borena zones of Oromiya regions. Prices of grains are increasing in these areas, while those of livestock have declined. It is estimated that about 1.1 million people will require 85 000 tonnes of food aid for a period of six months.

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

	Wheat	Rice	Coarse grains	Total
Normal Production	950	-	5 600	6 550
Normal Imports	700	5	75	780
of which: Structural food aid	380	5	65	450
<b><u>1999 Domestic Availability</u></b>	<b><u>2 264</u></b>	<b><u>-</u></b>	<b><u>8 983</u></b>	<b><u>11 247</u></b>
1998 Production (rice in paddy terms)	2 264	7	8 983	11 254
1998 Production (rice in milled terms)	2 264	-	8 983	11 247
Possible stock drawdown	-	-	-	-
<b><u>1999 Utilization</u></b>	<b><u>2 264</u></b>	<b><u>20</u></b>	<b><u>8 983</u></b>	<b><u>11 267</u></b>
Food Use	1 978	20	6 411	8 409
of which: local purchase requirement	-	-	50	50
Non-food use	286	-	1 969	2 255
Exports or Re-exports	-	-	150	150
Possible stock build up	-	-	453	453
<b><u>1999 Import Requirement</u></b>	<b><u>-</u></b>	<b><u>20</u></b>	<b><u>-</u></b>	<b><u>20</u></b>
Anticipated commercial imports	-	20	-	20
Food aid needs	-	-	-	-
<b><u>Current Aid Position</u></b>				
Food aid pledges	307	14	10	331
of which: Delivered	215	14	3	232
Donor-financed purchases	-	-	35	35
of which: for local use	-	-	35	35
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>32</u></b>	<b><u>0</u></b>	<b><u>104</u></b>	<b><u>136</u></b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				172
1999 import requirement as % of normal:				3
1999 food aid requirement as % of normal:				-

<b>Area:</b>	258 000 sq.km
<b>Climate:</b>	Tropical wet climate; most rainfall: October-May
<b>Population:</b>	1.397 million (1998 estimate); G.N.P. per caput: US\$ 4 230 (1997)
<b>Specific characteristics of the country:</b>	Coastal country
<b>Logistics:</b>	Ports and roads adequate
<b>Major foodcrops:</b>	Roots and tubers
<b>Marketing year:</b>	January/December; Lean season: September-November
<b>Share of cereals in total calorie intake:</b>	19 percent

### CURRENT SITUATION

The main staple foodcrops are cassava and plantains, the production of which is estimated at about 330 000 tonnes. The country imports the bulk of its cereal consumption requirement, estimated at around 82 000 tonnes in 1999, all of which is brought in commercially.

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

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

THE GAMBIA

<b>Area:</b>	10 000 sq.km
<b>Climate:</b>	Tropical wet-dry climate; one rainy season: May-October
<b>Population:</b>	1.312 million (1998 estimate); G.N.P. per caput: US\$ 320 (1995)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; coastal sahelian country
<b>Logistics:</b>	Port capacity and roads adequate
<b>Major foodcrops:</b>	Rice, millet and sorghum
<b>Marketing year:</b>	November/October; Lean season: July-September
<b>Share of cereals in total calorie intake:</b>	63 percent

**CURRENT SITUATION**

Seasonably dry conditions prevail. The final official estimate of aggregate 1998 cereal production is about 105 000 tonnes, which is the same as in 1997 and 9 percent above the average of the previous five years.

The overall food supply situation is anticipated to be satisfactory in light of the relatively good harvest. Cereal prices declined following the harvest. However, the food supply situation may become tight during the lean season in the Lower River Division, particularly in the Nuimis districts, due to a reduced millet output.

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

	Wheat	Rice	Coarse grains	Total
Normal Production	-	21	82	103
Normal Imports	20	90	4	114
of which: Structural food aid	1	2	4	7
<b>1998/99 Domestic Availability</b>	<b>20</b>	<b>112</b>	<b>86</b>	<b>118</b>
1998 Production (rice in paddy terms)	-	27	88	114
1998 Production (rice in milled terms)	-	17	88	105
Possible stock drawdown	-	-	-	-
<b>1998/99 Utilization</b>	<b>30</b>	<b>112</b>	<b>94</b>	<b>236</b>
Food Use	24	93	78	196
of which: local purchase requirement	-	-	5	5
Non-food use	1	3	15	19
Exports or Re-exports	5	16	-	21
Possible stock build up	-	-	-	-
<b>1998/99 Import Requirement</b>	<b>30</b>	<b>95</b>	<b>6</b>	<b>131</b>
Anticipated commercial imports	30	90	-	120
Food aid needs	-	5	6	11
<b>Current Aid Position</b>				
Food aid pledges	-	1	-	1
of which: Delivered	-	1	-	1
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b>Estimated Per Caput Consumption (kg/Year)</b>	<b>18</b>	<b>70</b>	<b>59</b>	<b>146</b>
<b>Indexes</b>				
1998 production as % of normal:				111
1998/99 import requirement as % of normal:				115
1998/99 food aid requirement as % of normal:				157

<b>Area:</b>	230 000 sq.km
<b>Climate:</b>	Tropical wet-dry; two rainy seasons in south and one in north
<b>Population:</b>	18.166 million (1998 estimate); G.N.P. per caput: US\$ 370 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; coastal country
<b>Logistics:</b>	Ports and roads inadequate
<b>Major foodcrops:</b>	Roots and tubers, coarse grain, rice
<b>Marketing year:</b>	January/December; Lean season: April-June
<b>Share of cereals in total calorie intake:</b>	27 percent

### CURRENT SITUATION

Seasonably dry conditions prevail. Aggregate 1998 cereal production is estimated at 1.78 million tonnes, which is slightly above 1997. Production has recovered in the extreme north, where crop output had been reduced in 1997. Roots and tubers production is estimated at about 13.44 million tonnes, which is well above average.

The overall food supply situation is satisfactory following the harvest of the main crops. About 30 000 Liberian refugees who remain in the country are receiving food assistance. The 1999 cereal import requirement is estimated at 475 000 tonnes, mostly wheat and rice.

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

	Wheat	Rice	Coarse grains	Total
Normal Production	-	165	1 410	1 575
Normal Imports	175	200	15	390
of which: Structural food aid	60	40	12	112
<b><u>1999 Domestic Availability</u></b>	<b>-</b>	<b><u>129</u></b>	<b><u>1 593</u></b>	<b><u>1 722</u></b>
1998 Production (rice in paddy terms)	-	193	1 593	1 786
1998 Production (rice in milled terms)	-	129	1 593	1 722
Possible stock drawdown	-	-	-	-
<b><u>1999 Utilization</u></b>	<b><u>210</u></b>	<b><u>359</u></b>	<b><u>1 628</u></b>	<b><u>2 197</u></b>
Food Use	207	321	1 279	1 807
of which: local purchase requirement	-	-	-	-
Non-food use	3	23	329	355
Exports or Re-exports	-	-	20	20
Possible stock build up	-	15	-	15
<b><u>1999 Import Requirement</u></b>	<b><u>210</u></b>	<b><u>230</u></b>	<b><u>35</u></b>	<b><u>475</u></b>
Anticipated commercial imports	210	210	30	450
Food aid needs	-	20	5	25
<b><u>Current Aid Position</u></b>				
Food aid pledges	57	1	6	64
of which: Delivered	12	-	-	12
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>11</u></b>	<b><u>17</u></b>	<b><u>69</u></b>	<b><u>98</u></b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				113
1999 import requirement as % of normal:				122
1999 food aid requirement as % of normal:				22



<b>Area:</b>	246 000 sq.km
<b>Climate:</b>	Tropical wet-dry; one rainy season: March/June to October/November
<b>Population:</b>	7.0 million (1998 estimate); G.N.P. per caput: US\$ 570 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; mountainous coastal country
<b>Logistics:</b>	Ports and roads inadequate
<b>Major foodcrops:</b>	Rice, roots and tubers, coarse grains
<b>Marketing year:</b>	January/December; Lean season: July-September
<b>Share of cereals in total calorie intake:</b>	52 percent

### **CURRENT SITUATION**

Following widespread and abundant rainfall during the whole growing season, production estimates for 1999 point to about 925 000 tonnes, which is about average. The overall food supply situation is satisfactory.

The total number of refugees in Guinea is estimated at 614 000, made up of about 414 000 Sierra Leoneans and 200 000 Liberians. They are mainly in the south of the country, putting high pressure on natural and food resources in these areas. The 1999 cereal import requirement is estimated at 385 000 tonnes, mostly wheat and rice.

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

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

GUINEA-BISSAU

<b>Area:</b>	28 000 sq.km
<b>Climate:</b>	Tropical wet-dry; one rainy season: May-October
<b>Population:</b>	1.13 million (1998 estimate); G.N.P. per caput: US\$ 240 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; coastal country
<b>Logistics:</b>	Port capacity being improved; roads inadequate, particularly during the rainy season; river transport important
<b>Major foodcrops:</b>	Rice, coarse grains, oils and fats, roots and tubers
<b>Marketing year:</b>	November/October; Lean season: May-August
<b>Share of cereals in total calorie intake:</b>	64 percent

**CURRENT SITUATION**

Resurgence of fighting in Bissau, the capital, on 31 January, caused damage to infrastructure and renewed population displacements. The conflict started in the capital in June 1998, at the beginning of the growing season, and spread to others towns. It seriously disrupted the land preparation and planting activities and the distribution of inputs to farmers. About 400 000 people, almost 80 percent of the capital's population, fled their homes to the rural regions of Cacheu, Biombo and Quinara, and to the coastal islands or neighbouring Senegal and Guinea Conakry. A cease-fire agreement signed in Praia on 26 July allowed partial resumption of field activities but the fighting resumed in October, disrupting the harvesting of some crops and normal field activities on others. An agreement to end hostilities was signed in Abuja, Nigeria, on 1 November but fighting erupted again in late January.

No crop assessment mission could be undertaken due to insecurity. Satellite imagery indicated that rainfall was generally above average in August and September allowing a satisfactory desalination of swamp rice fields. FAO estimates the 1998 cereal production at 120 000 tonnes compared to 174 000 tonnes in 1997, a decrease of 31 percent, and about one third less than the average of the last five years. The food supply situation improved with the harvesting of rice in late 1998, but recent fighting caused new population displacements.

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

	Wheat	Rice	Coarse grains	Total
Normal Production	-	117	62	179
Normal Imports	7	60	-	67
of which: Structural food aid	1	3	-	4
<b>1998/99 Domestic Availability</b>	<b>7</b>	<b>58</b>	<b>49</b>	<b>107</b>
1998 Production (rice in paddy terms)	-	80	40	120
1998 Production (rice in milled terms)	-	53	40	93
Possible stock drawdown	-	5	9	14
<b>1998/99 Utilization</b>	<b>7</b>	<b>128</b>	<b>75</b>	<b>210</b>
Food Use	7	114	58	180
of which: local purchase requirement	-	-	-	-
Non-food use	-	9	16	25
Exports or Re-exports	-	5	-	5
Possible stock build up	-	-	-	-
<b>1998/99 Import Requirement</b>	<b>7</b>	<b>70</b>	<b>15</b>	<b>92</b>
Anticipated commercial imports	5	50	-	55
Food aid needs	2	20	15	37
<b>Current Aid Position</b>				
Food aid pledges	-	3	-	3
of which: Delivered	-	3	-	3
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b>Estimated Per Caput Consumption (kg/Year)</b>	<b>6</b>	<b>101</b>	<b>51</b>	<b>158</b>
<b>Indexes</b>				
1998 production as % of normal:				67
1998/99 import requirement as % of normal:				137
1998/99 food aid requirement as % of normal:				925

**KENYA**

<b>Area:</b>	569 000 sq.km
<b>Climate:</b>	North-east is semi-arid to arid; mountainous central and south-western areas have two rainy seasons (March-May and November-December).
<b>Population:</b>	31.10 million (1998 estimate), GNP per caput US\$ 330 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; regular importer and occasional exporter of grain.
<b>Logistics:</b>	Good port (Mombasa) and extensive rail and road network. Gateway to Burundi, Rwanda and Uganda
<b>Major foodcrops:</b>	Maize, wheat, pulses, roots and tubers
<b>Marketing year:</b>	October/September
<b>Lean season:</b>	June-July
<b>Share of cereals in total calorie intake:</b>	56 percent

**CURRENT SITUATION**

The recently harvested "short rains" maize and beans crops have been poor. Late and insufficient rains resulted in reductions in plantings and negatively affected yields. Preliminary production estimates indicate an output of 100 000 tonnes, only one-quarter of the normal levels. Although the short rains maize accounts for only 15 percent of the national production, it is the main crop in Eastern and parts of Central Province. Despite an overall satisfactory food supply, severe food shortages are already being reported, particularly from the marginal lower parts of Kiambu, Kirinyaga, Maragua Thika, and Nyeri districts. The dry weather has also resulted in the deterioration of pastures and shortage of water supplies for livestock. Food aid is needed for the affected population.

The output of the 1998 main "long rains" cereal crop was significantly higher than in 1997, mainly reflecting abundant and well distributed rains in the main producing area of the Rift Valley. Maize, the main staple, has been estimated at an above average level of 2.34 million tonnes. With a reduced "short rains" crop of 100 000 tonnes, the aggregate 1998/99 maize production is projected at 2.44 million tonnes.

Reflecting the good "long rains" maize crop and large carryover stocks from last year, prices have declined sharply in recent months. In order to support prices the Government has announced the buying of 270 000 tonnes of maize for food aid distribution to the population affected by a poor "short rains" harvest and building up its Strategic Reserves.

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

	Wheat	Rice	Coarse grains	Total
Normal Production	241	49	2 587	2 877
Normal Imports	311	57	312	680
of which: Structural food aid	74	-	-	74
<b><u>1998/99 Domestic Availability</u></b>	<b><u>465</u></b>	<b><u>152</u></b>	<b><u>3 159</u></b>	<b><u>3 776</u></b>
1998 Production (rice in paddy terms)	315	65	2 695	3 075
1998 Production (rice in milled terms)	315	42	2 695	3 052
Possible stock drawdown	150	110	464	724
<b><u>1998/99 Utilization</u></b>	<b><u>765</u></b>	<b><u>272</u></b>	<b><u>3 529</u></b>	<b><u>4 566</u></b>
Food Use	725	222	3 118	4 065
of which: local purchase requirement	-	-	5	5
Non-food use	40	50	411	501
Exports or Re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<b><u>1998/99 Import Requirement</u></b>	<b><u>300</u></b>	<b><u>120</u></b>	<b><u>370</u></b>	<b><u>790</u></b>
Anticipated commercial imports	251	120	350	721
Food aid needs	49	-	20	69
<b><u>Current Aid Position</u></b>				
Food aid pledges	49	-	12	60
of which: Delivered	22	-	10	32
Donor-financed purchases	-	-	5	5
of which: for local use	-	-	5	5
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>23</u></b>	<b><u>7</u></b>	<b><u>100</u></b>	<b><u>131</u></b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				107
1998/99 import requirement as % of normal:				116
1998/99 food aid requirement as % of normal:				93

LESOTHO

<b>Area:</b>	30 000 sq.km
<b>Climate:</b>	Highland rainy climate with mild winter. One rainy season Oct.-April. Cool temperatures in May-September with frost hazard
<b>Population:</b>	2.18 million (1998 estimate); G.N.P. per caput: US\$ 670 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; land-locked
<b>Logistics:</b>	All imports through South Africa
<b>Major foodcrops:</b>	Maize, sorghum, vegetables
<b>Marketing year:</b>	April/March; Lean season: February-April
<b>Share of cereals in total calorie intake:</b>	75 percent

**CURRENT SITUATION**

Rainfall has been abundant and widespread since October and cumulative levels at the end of January range from normal to above normal. Crops are reported in good condition. Maize in the mountains and foothills is at flowering stage while it is at vegetative stages in the lowlands.

The national food supply situation is generally stable. Cereal import requirements of some 188 000 tonnes are expected to be met largely through commercial channels. The Government, through its Drought Relief Programme of the Disaster Management Authority, plans to provide assistance to 400 000 beneficiaries, with donor assistance.

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

	Wheat	Rice	Coarse grains	Total
Normal Production	23	-	155	178
Normal Imports	55	10	150	215
of which: Structural food aid	15	2	20	37
<b>1998/99 Domestic Availability</b>	<b>13</b>	<b>-</b>	<b>172</b>	<b>185</b>
1998 Production (rice in paddy terms)	11	-	141	152
1998 Production (rice in milled terms)	11	-	141	152
Possible stock drawdown	2	-	31	33
<b>1998/99 Utilization</b>	<b>53</b>	<b>3</b>	<b>317</b>	<b>373</b>
Food Use	52	3	301	356
of which: local purchase requirement	-	-	-	-
Non-food use	1	-	16	17
Exports or Re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<b>1998/99 Import Requirement</b>	<b>40</b>	<b>3</b>	<b>145</b>	<b>188</b>
Anticipated commercial imports	40	3	145	188
Food aid needs	-	-	-	-
<b>Current Aid Position</b>				
Food aid pledges	-	-	6	6
of which: Delivered	-	-	6	6
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b>Estimated Per Caput Consumption (kg/Year)</b>	<b>24</b>	<b>1</b>	<b>138</b>	<b>163</b>
<b>Indexes</b>				
1998 production as % of normal:				85
1998/99 import requirement as % of normal:				87
1998/99 food aid requirement as % of normal:				-

**LIBERIA**

<b>Area:</b>	96 000 sq.km
<b>Climate:</b>	Southern half tropical wet, northern half tropical wet-dry; one rainy season: March-November
<b>Population:</b>	2.85 million (1998 estimate); G.N.P. per caput: n.a.
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; coastal country
<b>Logistics:</b>	Ports and roads adequate
<b>Major foodcrops:</b>	Rice, roots and tubers, oils
<b>Marketing year:</b>	January/December; Lean season: July-August
<b>Share of cereals in total calorie intake:</b>	48 percent

**CURRENT SITUATION**

An FAO Crop and Food Supply Assessment Mission visited Liberia late last year and found a significantly improved overall food situation. The Mission estimated paddy production in 1998 at 210 100 tonnes, up 25 percent on the estimate for 1997 and about 70 percent of the pre-civil strife 1986/90 average. Cassava production is estimated at 313 300 tonnes (fresh weight), which is 96 percent of the pre-crisis average. The main factors which contributed to the increase in production include an expansion in planted area as a result of the return of large numbers of farm families to their homes, increased yields due to greater access to NGO-supplied inputs (especially seeds and tools) and improved crop husbandry practices as more extension services become available. In addition, improved varieties of cassava have become more readily available from a number of NGO-supported projects. However, bad road conditions, eating habit as well as the lack of processing and preservation facilities, often lead to food insecurity during the "hungry" season that runs from late June to late October. Many of the food crops, including cassava, are highly perishable, due to the lack of storage and poor marketing capacity of the farmers.

Food assistance is delivered throughout almost the entire country and an improvement in the nutritional status of the population is reported but the country relies almost entirely on humanitarian assistance. Food assistance is provided to about 1 717 000 to IDPs and refugees from Sierra Leone. Organised repatriation is underway for about 480 000 Liberian refugees in neighbouring countries, and 80 000 have been repatriated. Resettlement of IDPs and returnee refugees is taking place in many villages and towns in the counties of Bomi, Grand Cape Mount, Grand Gedeh, Upper Lofa, Maryland and Sinoe. These are experiencing food deficit. On the basis of an estimated population of about 2.8 million in 1999, the Mission estimated that Liberia will need to import 155 000 tonnes of cereals to meet its consumption requirements. Commercial imports are anticipated at 100 000 tonnes of rice and 5 000 tonnes of wheat. The remaining 50 000 tonnes will need to be covered by food aid, estimated at 30 000 tonnes of wheat and 20 000 tonnes of maize products such as maize meal and CSB for distribution to vulnerable displaced people. Food aid in the form of rice is not foreseen.

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

	Wheat	Rice	Coarse grains	Total
Normal Production	-	78	1	79
Normal Imports	35	70	40	145
of which: Structural food aid	25	5	40	70
<b><u>1999 Domestic Availability</u></b>	<b><u>11</u></b>	<b><u>148</u></b>	<b><u>1</u></b>	<b><u>160</u></b>
1998 Production (rice in paddy terms)	-	210	1	211
1998 Production (rice in milled terms)	-	140	1	141
Possible stock drawdown	11	8	-	19
<b><u>1999 Utilization</u></b>	<b><u>46</u></b>	<b><u>248</u></b>	<b><u>21</u></b>	<b><u>315</u></b>
Food Use	44	223	20	287
of which: local purchase requirement	-	-	-	-
Non-food use	2	25	-	27
Exports or Re-exports	-	-	-	-
Possible stock build up	-	-	1	1
<b><u>1999 Import Requirement</u></b>	<b><u>35</u></b>	<b><u>100</u></b>	<b><u>20</u></b>	<b><u>155</u></b>
Anticipated commercial imports	5	100	-	105
Food aid needs	30	-	20	50
<b><u>Current Aid Position</u></b>				
Food aid pledges	3	-	4	7
of which: Delivered	3	-	4	7
Donor-financed purchases	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>15</u></b>	<b><u>79</u></b>	<b><u>7</u></b>	<b><u>101</u></b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				267
1999 import requirement as % of normal:				107
1999 food aid requirement as % of normal:				71

**MADAGASCAR**

<b>Area:</b>	582 000 sq.km
<b>Climate:</b>	Eastern coast is tropical wet, the rest tropical wet-dry. Rains in October-March; tropical cyclones
<b>Population:</b>	14.38 million (1998 estimate); G.N.P. per caput: US\$ 250 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country
<b>Logistics:</b>	Dilapidated roads and lack of spare parts and tyres
<b>Major foodcrops:</b>	Rice, roots, tubers, maize, fruit
<b>Marketing year:</b>	April/March; Lean season: February/March
<b>Share of cereals in total calorie intake:</b>	60 percent

**CURRENT SITUATION**

Rainfall has been favourable so far for the 1998/99 crops. Abundant rains have been received since October, starting along the eastern coast and expanding north-eastward in November, gradually covering most crop growing areas. Thunderstorms in the Mozambique Channel, which developed into Tropical Storm Alda in mid-January, missed southern Madagascar but brought abundant rains to many areas, particularly the Southwest. This also provided welcome relief to many southern areas where planting had been delayed for lack of rains. Overall, crops are reported in good vegetative condition in most growing areas.

The overall food supply situation in the country in the 1998/99 marketing year remains relatively stable. In the drought-prone south, markets are supplied with rice from other parts of the country. Relief assistance continues to be provided to vulnerable population groups.

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

	Wheat	Rice	Coarse grains	Total
Normal Production	7	2 476	152	2 635
Normal Imports	48	53	10	111
of which: Structural food aid	13	11	10	34
<b><u>1998/99 Domestic Availability</u></b>	<b><u>11</u></b>	<b><u>1 553</u></b>	<b><u>162</u></b>	<b><u>1 726</u></b>
1998 Production (rice in paddy terms)	11	2 200	162	2 373
1998 Production (rice in milled terms)	11	1 496	162	1 669
Possible stock drawdown	-	57	-	57
<b><u>1998/99 Utilization</u></b>	<b><u>81</u></b>	<b><u>1 683</u></b>	<b><u>167</u></b>	<b><u>1 931</u></b>
Food Use	80	1 679	131	1 890
of which: local purchase requirement	-	-	4	4
Non-food use	1	4	32	37
Exports or Re-exports	-	-	-	-
Possible stock build up	-	-	4	4
<b><u>1998/99 Import Requirement</u></b>	<b><u>70</u></b>	<b><u>130</u></b>	<b><u>5</u></b>	<b><u>205</u></b>
Anticipated commercial imports	60	110	5	175
Food aid needs	10	20	-	30
<b><u>Current Aid Position</u></b>				
Food aid pledges	8	10	8	26
of which: Delivered	5	9	5	19
Donor-financed purchases	-	-	4	4
of which: for local use	-	-	4	4
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>6</u></b>	<b><u>117</u></b>	<b><u>9</u></b>	<b><u>132</u></b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				90
1998/99 import requirement as % of normal:				185
1998/99 food aid requirement as % of normal:				88

**MALAWI**

<b>Area:</b>	94 000 sq.km
<b>Climate:</b>	Tropical wet-dry climate with one rainy season (November-May)
<b>Population</b>	12.21 million (1998 estimate); G.N.P. per caput: US\$ 220 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; land-locked country; importer and exporter of grain
<b>Logistics:</b>	Imports/exports through Beira (Mozambique) or Dar es Salaam (Tanzania)
<b>Major foodcrops:</b>	Maize, pulses, roots, tubers, rice
<b>Marketing year:</b>	April/March; Lean season: February-March
<b>Share of cereals in total calorie intake:</b>	70 percent

**CURRENT SITUATION**

Widespread rainfall has continued over the southern and central parts of the country since November, providing favourable conditions for crop development. In the north, planting rains were received only in January in some areas. As a result, the outcome of harvest will depend largely on the continuation of good rains during the next two months.

Following a good harvest in 1998/99, the food supply situation has improved significantly. Markets are supplied by local maize but also by imports primarily from Zimbabwe and South Africa. Government assistance continues to be provided to vulnerable populations groups, victims of drought or floods.

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

	Wheat	Rice	Coarse grains	Total
Normal Production	2	35	1 330	1 367
Normal Imports	40	3	40	83
of which: Structural food aid	-	-	40	40
<b><u>1998/99 Domestic Availability</u></b>	<b><u>2</u></b>	<b><u>32</u></b>	<b><u>1 832</u></b>	<b><u>1 866</u></b>
<i>1998 Production (rice in paddy terms)</i>	<i>2</i>	<i>50</i>	<i>1 827</i>	<i>1 879</i>
1998 Production (rice in milled terms)	2	32	1 827	1 861
Possible stock drawdown	-	-	5	5
<b><u>1998/99 Utilization</u></b>	<b><u>52</u></b>	<b><u>34</u></b>	<b><u>1 882</u></b>	<b><u>1 968</u></b>
Food Use	52	28	1 712	1 792
of which: local purchase requirement	-	-	10	10
Non-food use	-	5	170	175
Exports or Re-exports	-	1	-	1
Possible stock build up	-	-	-	-
<b><u>1998/99 Import Requirement</u></b>	<b><u>50</u></b>	<b><u>2</u></b>	<b><u>50</u></b>	<b><u>102</u></b>
Anticipated commercial imports	50	2	50	102
Food aid needs	-	-	-	-
<b><u>Current Aid Position</u></b>				
Food aid pledges	5	-	20	25
of which: Delivered	5	-	17	22
Donor-financed purchases	-	-	10	10
of which: for local use	-	-	10	10
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>4</u></b>	<b><u>2</u></b>	<b><u>140</u></b>	<b><u>147</u></b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				137
1998/99 import requirement as % of normal:				123
1998/99 food aid requirement as % of normal:				-

MALI

<b>Area:</b>	1 220 000 sq.km
<b>Climate:</b>	From north to south: arid, semi-arid and tropical wet-dry; one rainy season: May-October
<b>Population:</b>	9.63 million (1998 estimate); G.N.P. per caput: US\$ 260 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; land-locked sahelian country
<b>Logistics:</b>	Roads inadequate during rainy season; river transport important; rail link to Dakar (Senegal)
<b>Major foodcrops:</b>	Millet, sorghum, rice, maize
<b>Marketing year:</b>	November/October; Lean season: July-September
<b>Share of cereals in total calorie intake:</b>	75 percent

### CURRENT SITUATION

Seasonably dry conditions prevail. Off-season crops are developing satisfactorily. The final official aggregate 1998 cereal production is estimated at a record 2.5 million tonnes, 18 percent above the 1997 level, 11 percent above average and 3 percent over the previous 1994 record. Rice production reached a record for the fourth consecutive year. Low numbers of Desert Locusts may be present in a few areas of the Adrar des Iforas.

Following this record crop, the food supply situation is satisfactory. Prices of cereals have declined strongly on rural markets. There is a substantial surplus for local purchase, export or triangular transaction. The national early warning system (SAP) reports that localized economic difficulties are possible in some traditionally deficit areas of Gao (arrondissements of Gao-central, Bourem-central and Bamba) and around the Lac Faguibine. About 18 000 tonnes of cereals have been purchased for the reconstitution of the national security stock, against 8 000 tonnes during the same period in 1998.

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

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



**MAURITANIA**

<b>Area:</b>	1 030 000 sq.km
<b>Climate:</b>	Mostly a Saharian country; semi-arid fringe in extreme south with rains in June-September
<b>Population:</b>	2.57 million (1998 estimate); G.N.P. per caput: US\$ 450 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; coastal country
<b>Logistics:</b>	Port capacity adequate, though storms during January-March sometimes cause difficulties
<b>Major foodcrops:</b>	Wheat, rice, millet and sorghum
<b>Marketing year:</b>	November/October; Lean season: July-September
<b>Share of cereals in total calorie intake:</b>	54 percent

**CURRENT SITUATION**

Seasonably dry conditions prevail. Off-season and recession crops are developing satisfactorily and harvest prospects are generally favourable. The final cereal production estimates have been released. The aggregate 1998/99 cereal production is estimated at 1 89 700 tonnes, including 111 000 tonnes of rice and 66 900 tonnes of sorghum. This represents a 25 percent increase on the previous year and is 11 percent above average. In February, scattered Desert Locust adults were observed in the south-west. Similarly, adults are expected to be present and persist in a few areas of the north.

The overall food supply situation is satisfactory but localised shortages are likely following reduced crops in some areas. The cereal import requirement (excluding re-exports) for 1998/99 (November/October) is estimated at 305 000 tonnes and the food aid requirement at 35 000 tonnes.

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

	Wheat	Rice	Coarse grains	Total
Normal Production	-	64	107	171
Normal Imports	180	80	15	275
of which: Structural food aid	18	7	5	30
<b><u>1998/99 Domestic Availability</u></b>	<b><u>20</u></b>	<b><u>74</u></b>	<b><u>79</u></b>	<b><u>173</u></b>
1998 Production (rice in paddy terms)	-	111	79	190
1998 Production (rice in milled terms)	-	74	79	153
Possible stock drawdown	20	-	-	20
<b><u>1998/99 Utilization</u></b>	<b><u>220</u></b>	<b><u>164</u></b>	<b><u>109</u></b>	<b><u>493</u></b>
Food Use	180	141	95	416
of which: local purchase requirement	-	-	5	5
Non-food use	25	13	13	51
Exports or Re-exports	15	5	1	21
Possible stock build up	-	5	-	5
<b><u>1998/99 Import Requirement</u></b>	<b><u>200<sup>1/</sup></u></b>	<b><u>90</u></b>	<b><u>30</u></b>	<b><u>320</u></b>
Anticipated commercial imports	185	80	20	285
Food aid needs	15	10	10	35
<b><u>Current Aid Position</u></b>				
Food aid pledges	15	6	2	23
of which: Delivered	2	-	2	4
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>70</u></b>	<b><u>55</u></b>	<b><u>37</u></b>	<b><u>162</u></b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				111
1998/99 import requirement as % of normal:				116
1998/99 food aid requirement as % of normal:				117

<sup>1/</sup> Including 15 000 tonnes for re-export.

<b>Area:</b>	2 000 sq.km
<b>Climate:</b>	No dry months, most rainfall in November-July; tropical cyclones
<b>Population:</b>	1.14 million (1998 estimate); G.N.P. per caput: US\$ 3 800 (1997)
<b>Specific characteristics of the country:</b>	Cereal consumption covered almost entirely by imports
<b>Logistics:</b>	Inadequate port handling capacity; road system good
<b>Major foodcrops:</b>	Vegetables
<b>Marketing year:</b>	January/December
<b>Share of cereals in total calorie intake:</b>	48 percent

**CURRENT SITUATION**

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

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

	Wheat	Rice	Coarse grains	Total
Normal Production	-	-	2	2
Normal Imports	72	75	25	172
of which: Structural food aid	5	1	-	6
<b><u>1999 Domestic Availability</u></b>	<b>77</b>	<b>76</b>	<b>2</b>	<b>155</b>
1998 Production (rice in paddy terms)	-	-	2	2
1998 Production (rice in milled terms)	-	-	2	2
Possible stock drawdown	-	10	-	10
<b><u>1999 Utilization</u></b>	<b>150</b>	<b>88</b>	<b>22</b>	<b>260</b>
Food Use	104	88	2	194
of which: local purchase requirement	-	-	-	-
Non-food use	6	-	20	26
Exports or Re-exports	40	-	-	40
Possible stock build up	-	-	-	-
<b><u>1999 Import Requirement</u></b>	<b>150</b>	<b>78</b>	<b>20</b>	<b>248</b>
Anticipated commercial imports	150	78	20	248
Food aid needs	-	-	-	-
<b><u>Current Aid Position</u></b>				
Food aid pledges	-	-	-	-
of which: Delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b>90</b>	<b>76</b>	<b>2</b>	<b>168</b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				100
1999 import requirement as % of normal:				144
1999 food aid requirement as % of normal:				-

MOZAMBIQUE

<b>Area:</b>	784 000 sq.km
<b>Climate:</b>	Tropical wet-dry; coast is semi-arid
<b>Population:</b>	19.09 million (1998 estimate); G.N.P. per caput: US\$ 90 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; exposed to tropical storms and cyclones
<b>Logistics:</b>	Dilapidated rail and road transport fleet; lack of fuel and spares; poor roads; substantial deliveries by coastal vessels; disruption by guerrillas
<b>Major foodcrops:</b>	Roots, tubers, maize
<b>Marketing year:</b>	March/April; Lean season: February-April
<b>Share of cereals in total calorie intake:</b>	53 percent

**CURRENT SITUATION**

Conditions have so far been generally favourable for crop development in the south and the centre where rainfall has been abundant since October. The wet conditions resulted in flooding in several areas, including Gaza and Sofala provinces, causing localized damage to crops in low lying areas. Floods caused by torrential rains in late February particularly hit several districts of Inhambane Province, leaving some 23 people dead and over 70 000 affected. In these normally drought prone areas, an estimated 40 000 hectares of arable land were flooded while sections of the main north-south highway linking the country's two main cities of Maputo and Beira were under water for days or badly damaged. On 3 March, the Government launched an international appeal for assistance for a total of US\$12.4 million, including food, seeds and agricultural tools as well as repair damages to the infrastructure. However, dry conditions prevailed until December in northern and north-eastern provinces (Cabo Delgado, Nampula and Niassa Provinces), where the season normally starts later than the rest of the country. In late February, several areas in the north were still recording below-normal rainfall. In these cereal surplus producing areas, prospects for a good 1999 harvest are still favourable, provided sustained and widespread rains are received in the next few weeks.

The national food security situation for the 1998/99 marketing year is generally satisfactory. As a result of a steady increase in food production during the past several years, the country is now self-sufficient in maize, with exportable surpluses available for deficit countries in the sub-region. The import requirement in rice and wheat, estimated at 67 000 tonnes and 145 000 tonnes, respectively, will be met through private channels.

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

	Wheat	Rice	Coarse grains	Total
Normal Production	-	50	458	508
Normal Imports	102	60	244	406
of which: Structural food aid	102	52	140	294
<b>1998/99 Domestic Availability</b>	<b>13</b>	<b>128</b>	<b>1 494</b>	<b>1 635</b>
1998 Production (rice in paddy terms)	-	192	1 494	1 686
1998 Production (rice in milled terms)	-	128	1 494	1 622
Possible stock drawdown	13	-	-	13
<b>1998/99 Utilization</b>	<b>158</b>	<b>195</b>	<b>1 494</b>	<b>1 847</b>
Food Use	151	170	1 225	1 546
of which: local purchase requirement	-	-	1	1
Non-food use	7	15	172	194
Exports or Re-exports	-	-	59	59
Possible stock build up	-	10	38	48
<b>1998/99 Import Requirement</b>	<b>145</b>	<b>67</b>	<b>-</b>	<b>212</b>
Anticipated commercial imports	145	67	-	212
Food aid needs	-	-	-	-
<b>Current Aid Position</b>				
Food aid pledges	229	23	1	252
of which: Delivered	168	10	1	178
Donor-financed purchases	-	-	1	1
of which: for local use	-	-	1	1
for export	-	-	-	-
<b>Estimated Per Caput Consumption (kg/Year)</b>	<b>8</b>	<b>9</b>	<b>64</b>	<b>81</b>
<b>Indexes</b>				
1998 production as % of normal:				332
1998/99 import requirement as % of normal:				52
1998/99 food aid requirement as % of normal:				-

**NAMIBIA**

<b>Area:</b>	824 000 sq.km
<b>Climate:</b>	Mostly arid (south-west and coast) or semi-arid. Only north and north-east gets regular rainfall in November-April
<b>Population:</b>	1.75 million (1998 estimate); G.N.P. per caput: US\$ 2 220 (1997)
<b>Specific characteristics of the country:</b>	Arid to semi-arid country; cereal production mainly in the north
<b>Logistics:</b>	Good road and railway network
<b>Major foodcrops:</b>	Millet, maize, sorghum, wheat
<b>Marketing year:</b>	May/April;
<b>Share of cereals in total calorie intake:</b>	48 percent

**CURRENT SITUATION**

The 1998/99 growing season started in late November and early December with widespread rains over the north-eastern part of the country, gradually moving south and other parts of the country. Planting continues in some areas. Additional rainfall is needed for the remainder of the season for crops to achieve normal development.

The national food supply situation in the current marketing year continues to be tight as a result of the drought-reduced 1998 cereal harvest of 59 000 tonnes. As this was only one-third of the previous year's output, the cereal import requirement was estimated at 155 000 tonnes for 1998/99 (May/April), through commercial channels.

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

	Wheat	Rice	Coarse grains	Total
Normal Production	4	-	88	92
Normal Imports	30	-	31	61
of which: Structural food aid	1	-	2	3
<b><u>1998/99 Domestic Availability</u></b>	<b><u>16</u></b>	<b><u>-</u></b>	<b><u>69</u></b>	<b><u>85</u></b>
1998 Production (rice in paddy terms)	6	-	53	59
1998 Production (rice in milled terms)	6	-	53	59
Possible stock drawdown	10	-	16	26
<b><u>1998/99 Utilization</u></b>	<b><u>51</u></b>	<b><u>-</u></b>	<b><u>189</u></b>	<b><u>240</u></b>
Food Use	51	-	180	231
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	9	9
Exports or Re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<b><u>1998/99 Import Requirement</u></b>	<b><u>35</u></b>	<b><u>-</u></b>	<b><u>120</u></b>	<b><u>155</u></b>
Anticipated commercial imports	35	-	120	155
Food aid needs	-	-	-	-
<b><u>Current Aid Position</u></b>				
Food aid pledges	-	-	-	-
of which: Delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>29</u></b>	<b><u>-</u></b>	<b><u>103</u></b>	<b><u>132</u></b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				64
1998/99 import requirement as % of normal:				254
1998/99 food aid requirement as % of normal:				-

<b>Area:</b>	1 267 000 sq.km
<b>Climate:</b>	Northern part arid, southern part semi-arid with rains in June-October
<b>Population:</b>	9.80 million (1998 estimate); G.N.P. per caput: US\$ 200 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; land-locked sahelian country
<b>Logistics:</b>	Roads inadequate during rainy season
<b>Major foodcrops:</b>	Millet and sorghum, pulses, roots and tubers
<b>Marketing year:</b>	November/October; Lean season: July-September
<b>Share of cereals in total calorie intake:</b>	70 percent

### CURRENT SITUATION

Seasonably dry conditions prevail. The final official aggregate 1998 cereal production is estimated at a record 2.9 million tonnes, about 71 percent higher than in 1997 and about 35 percent above the average of the last five years. Some isolated Desert Locusts have been reported in February in a few areas of Tamesna.

The overall food supply situation is satisfactory. Low cereal prices should facilitate local purchases for the reconstitution of the national security stock for which external assistance is required. However, the food supply situation is likely to be tight in some areas which are chronically food deficit, notably in Agadez, Diffa or Tillabery departments. In addition, the increase of petrol prices in Nigeria will increase transport costs and prices of imported food, notably in Maradi, Tahoua and Zinder departments.

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

	Wheat	Rice	Coarse grains	Total
Normal Production	4	66	1 991	2 061
Normal Imports	15	60	220	295
of which: Structural food aid	5	5	10	20
<b><u>1998/99 Domestic Availability</u></b>	<b><u>12</u></b>	<b><u>36</u></b>	<b><u>2 903</u></b>	<b><u>2 952</u></b>
1998 Production (rice in paddy terms)	7	56	2 903	2 966
1998 Production (rice in milled terms)	7	36	2 903	2 947
Possible stock drawdown	5	-	-	5
<b><u>1998/99 Utilization</u></b>	<b><u>27</u></b>	<b><u>121</u></b>	<b><u>3 023</u></b>	<b><u>3 172</u></b>
Food Use	26	105	2 268	2 399
of which: local purchase requirement	-	-	20	20
Non-food use	1	7	445	453
Exports or Re-exports	-	-	60	60
Possible stock build up	-	10	250	260
<b><u>1998/99 Import Requirement</u></b>	<b><u>15</u></b>	<b><u>85</u></b>	<b><u>120</u></b>	<b><u>220</u></b>
Anticipated commercial imports	10	80	120	210
Food aid needs	5	5	-	10
<b><u>Current Aid Position</u></b>				
Food aid pledges	6	6	13	24
of which: Delivered	-	4	12	16
Donor-financed purchases	-	-	17	17
of which: for local use	-	-	17	17
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>3</u></b>	<b><u>11</u></b>	<b><u>231</u></b>	<b><u>245</u></b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				144
1998/99 import requirement as % of normal:				75
1998/99 food aid requirement as % of normal:				50

<b>Area:</b>	911 000 sq.km
<b>Climate:</b>	Mostly tropical wet-dry, south-west tropical wet, extreme north semi-arid
<b>Population:</b>	116 million (1998 estimate); G.N.P. per caput: US\$ 260 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; coastal country
<b>Logistics:</b>	Ports adequate, roads inadequate during rainy season
<b>Major foodcrops:</b>	Roots and tubers, coarse grains, rice
<b>Marketing year:</b>	January/December; Lean season: April-May
<b>Share of cereals in total calorie intake:</b>	43 percent

### CURRENT SITUATION

The official estimate of cereal output in 1998 is put at 22.8 million tonnes, about 4 percent above the 1997 level, due to the favourable growing conditions. Production of roots and tubers, mainly cassava and yams, is estimated at 62 million tonnes, which is well above average.

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

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

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

RWANDA

<b>Area:</b>	25 000 sq.km
<b>Climate:</b>	Highland rainy climate with moderate temperature (20°C); two rainy seasons (February-May and September-November)
<b>Population:</b>	7.884 million (1998 estimate); G.N.P. per caput: US\$ 210 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; land-locked country
<b>Logistics:</b>	Ports: Mombasa (Kenya) and Dar es Salaam (Tanzania); roads and railway inadequate
<b>Major foodcrops:</b>	Roots, tubers, pulses, plantains, sorghum, maize
<b>Marketing year:</b>	January/December; Lean season: November-December
<b>Share of cereals in total calorie intake:</b>	25 percent

**CURRENT SITUATION**

Latest estimates of the recently harvested 1999 A season indicate a foodcrops output of 2.34 million tonnes, an increase of 14 percent from last year and slightly below the pre-war normal level. This include 64 000 tonnes of cereals, 92 000 of pulses, 1.5 million tonnes of bananas, 646 000 tonnes of root and tubers and 50 000 of fruit and vegetables. While there has been a significant increase in production of root and tubers, and the output of bananas and plantains remained around last year's level, the season was mediocre for cereals and beans crops. Insufficient rains during the growing season resulted in reduced yields and production is estimated to be some 15 percent lower than the 1998A season.

The food supply, except for grains, is satisfactory. Prices of basic staples, sweet potatoes and cassava, have declined to one-third their level of a year ago. This has improved access to food for the poorest strata of population. Indications point to a general improvement in the nutritional status of the population. However, the food situation remains tight in the northwestern prefectures of Gisenyi and Ruhengeri where persistent civil strife has disrupted agricultural activities. Some improvement in security conditions during the month of January allowed the Government to resettle part of the displaced population. From the approximately 600 000 internally displaced people, including those living and those not living in camps, half has been resettled in new sites. International food assistance continues to be provided to the most affected population.

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

	Wheat	Rice	Coarse grains	Total
Normal Production	10	9	276	295
Normal Imports	10	6	3	19
of which: Structural food aid	3	1	3	7
<b>1999 Domestic Availability</b>	<b>5</b>	<b>8</b>	<b>170</b>	<b>183</b>
1998 Production (rice in paddy terms)	4	8	170	182
1998 Production (rice in milled terms)	4	5	170	179
Possible stock drawdown	1	3	-	4
<b>1999 Utilization</b>	<b>25</b>	<b>18</b>	<b>375</b>	<b>418</b>
Food Use	25	17	354	396
of which: local purchase requirement	-	-	-	-
Non-food use	-	1	21	22
Exports or Re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<b>1999 Import Requirement</b>	<b>20</b>	<b>10</b>	<b>205</b>	<b>235</b>
Anticipated commercial imports	-	-	-	-
Food aid needs	20	10	205	235
<b>Current Aid Position</b>				
Food aid pledges	1	5	57	62
Of which: Delivered	1	-	12	13
Donor-financed purchases	-	-	-	-
Of which: for local use	-	-	-	-
for export	-	-	-	-
<b>Estimated Per Caput Consumption (kg/Year)</b>	<b>3</b>	<b>2</b>	<b>44</b>	<b>49</b>
<b>Indexes</b>				
1998 production as % of normal:				62
1999 import requirement as % of normal:				1237
1999 food aid requirement as % of normal:				3357

SAO TOME AND PRINCIPE

<b>Area:</b>	96 000 sq.km
<b>Climate:</b>	Tropical wet; rainfall increases with altitude and towards southern parts of the islands
<b>Population:</b>	138 000 (1998 estimate); G.N.P. per caput: US\$ 350 (1995)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; archipelago
<b>Logistics:</b>	Ports and roads adequate
<b>Major foodcrops:</b>	Bananas, breadfruit, cocoyam
<b>Marketing year:</b>	January/December
<b>Share of cereals in total calorie intake:</b>	36 percent

**CURRENT SITUATION**

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

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

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



<b>Area:</b>	192 000 sq.km
<b>Climate:</b>	Semi-arid in north, tropical wet-dry in south, with rains in June-October
<b>Population:</b>	9.23 million (1998 estimate); G.N.P. per caput: US\$ 550 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; coastal sahelian country
<b>Logistics:</b>	Port capacity adequate; gateway to Mali.
<b>Major foodcrops:</b>	Millet and sorghum, rice, maize, wheat
<b>Marketing year:</b>	November/October; Lean season: August-September
<b>Share of cereals in total calorie intake:</b>	61 percent

### CURRENT SITUATION

Seasonably dry conditions prevail. Recession crops are generally developing satisfactorily in the Senegal river region. The final official estimate of 1998 rainfed cereal production is 1 008 000 tonnes, about 23 percent above the 1997 reduced harvest but 3 percent above the average of the last five years. With favourable prospects for recession and off-season crops, total cereal production is forecast at slightly over 1 million tonnes.

The overall food supply situation is expected to improve. Markets are well supplied. Prices of rice are generally stable. Prices of millet and sorghum were declining in early February and are much lower than in 1998. However, some localized food supply difficulties are likely for vulnerable populations affected by successive poor harvests, notably in the centre and the north. The cereal import requirement for the 1998/99 marketing year (November/October) is estimated at about 800 000 tonnes, mainly rice and wheat.

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

	Wheat	Rice	Coarse grains	Total
Normal Production	-	180	816	996
Normal Imports	190	425	70	685
of which: Structural food aid	3	5	4	12
<b><u>1998/99 Domestic Availability</u></b>	<b>190</b>	<b>610</b>	<b>890</b>	<b>1 690</b>
1998 Production (rice in paddy terms)	-	181	827	1 008
1998 Production (rice in milled terms)	-	126	827	953
Possible stock drawdown	-	-	-	-
<b><u>1998/99 Utilization</u></b>	<b>230</b>	<b>631</b>	<b>892</b>	<b>1 753</b>
Food Use	230	610	746	1 586
of which: local purchase requirement	-	-	10	10
Non-food use	5	22	131	157
Exports or Re-exports	-	-	-	-
Possible stock build up	-	-	15	15
<b><u>1998/99 Import Requirement</u></b>	<b>235</b>	<b>505</b>	<b>65</b>	<b>805</b>
Anticipated commercial imports	230	500	60	790
Food aid needs	5	5	5	15
<b><u>Current Aid Position</u></b>				
Food aid pledges	-	7	-	7
of which: Delivered	-	7	-	7
Donor-financed purchases	-	-	1	1
of which: for local use	-	-	1	1
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b>25</b>	<b>66</b>	<b>81</b>	<b>172</b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				101
1998/99 import requirement as % of normal:				118
1998/99 food aid requirement as % of normal:				125

SEYCHELLES

<b>Area:</b>	455 sq.km
<b>Climate:</b>	Tropical wet; rains throughout the year, peaking in October-May
<b>Population:</b>	75 000 (1998 estimate); G.N.P. per caput: US\$ 6 620 (1995)
<b>Specific characteristics of the country:</b>	Consists of about 100 islands scattered over more than 1 million sq.km. Tourism provides 50 percent of G.D.P.
<b>Logistics:</b>	-
<b>Major foodcrops:</b>	Coconuts, fruit, vegetables
<b>Marketing year:</b>	January/December
<b>Share of cereals in total calorie intake:</b>	49 percent

**CURRENT SITUATION**

The cultivated area of only some 6 000 hectares is used mainly for coconuts, cinnamon and tea. Other crops, of secondary importance, include fruit and vegetables. The cereal needs for human consumption and feed are all imported commercially. For 1999, the cereal import requirement is estimated at 13 000 tonnes.

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

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

SIERRA LEONE

<b>Area:</b>	72 000 sq.km
<b>Climate:</b>	Mostly tropical wet-dry; extreme south tropical wet; one rainy season: March-October
<b>Population:</b>	4.67 million (1998 estimate); G.N.P. per caput: US\$ 200 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; coastal country
<b>Logistics:</b>	Roads inadequate
<b>Major foodcrops:</b>	Rice, roots and tubers
<b>Marketing year:</b>	January/December; Lean season: July-August
<b>Share of cereals in total calorie intake:</b>	57 percent

**CURRENT SITUATION**

The food supply situation remains critical in Freetown, following recent escalation of violence. Some 117 000 internally displaced persons (IDPs) have been registered at six locations in western Freetown and limited food distributions are underway. Severe food and fuel shortages are reported and most traders and importers have left Freetown. Aid agencies' warehouses in Freetown have been looted and humanitarian aid distributions remain very limited. If insecurity continues, most scheduled rehabilitation activities, including seed and tool distribution and technical assistance, will be delayed or remain limited. As a result, agricultural production in the coming season, starting in May, is likely to be reduced.

Fighting in the east, notably in Bo, Kenema, Koidu and Makeni in late 1998 and early 1999 has severely disrupted food distribution in these areas and caused large population displacements. UNHCR estimates that there are currently around 350 000 internally displaced people in the country, most of them in Kenema, Bo (the second city of Sierra Leone) and in the western border area of Kambia. Pockets of acute food shortage are located in these areas where insecurity prevents humanitarian activities.

Despite favourable conditions, the area planted in 1998 is estimated to have been substantially lower than in 1997 due to insecurity, and estimates point to a cereal output of about 400 000 tonnes, which is about 15 percent lower. Sierra Leone's cereal import requirement for 1999 is estimated at 290 000 tonnes, including 140 000 tonnes of food aid.

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

	Wheat	Rice	Coarse grains	Total
Normal Production	-	390	57	447
Normal Imports	60	110	15	185
of which: Structural food aid	40	10	15	65
<b><u>1999 Domestic Availability</u></b>	<b>-</b>	<b>210</b>	<b>53</b>	<b>263</b>
1998 Production (rice in paddy terms)	-	350	53	403
1998 Production (rice in milled terms)	-	210	53	263
Possible stock drawdown	-	-	-	-
<b><u>1999 Utilization</u></b>	<b>100</b>	<b>350</b>	<b>103</b>	<b>553</b>
Food Use	94	280	93	467
of which: local purchase requirement	-	-	-	-
Non-food use	-	70	10	80
Exports or Re-exports	-	-	-	-
Possible stock build up	6	-	-	6
<b><u>1999 Import Requirement</u></b>	<b>100</b>	<b>140</b>	<b>50</b>	<b>290</b>
Anticipated commercial imports	40	110	-	150
Food aid needs	60	30	50	140
<b><u>Current Aid Position</u></b>				
Food aid pledges	8	12	8	28
of which: Delivered	5	-	8	13
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b>20</b>	<b>60</b>	<b>20</b>	<b>100</b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				90
1999 import requirement as % of normal:				157
1999 food aid requirement as % of normal:				215

<b>Area:</b>	627 000 sq.km
<b>Climate:</b>	Semi-arid in the south; rest arid
<b>Population:</b>	6.15 million (1998 estimate); G.N.P. per caput; n.a.
<b>Specific characteristics of the country:</b>	Low-income food-deficit country
<b>Logistics:</b>	Inadequate port facilities; serious shortage of fuel and spare parts
<b>Major foodcrops:</b>	Maize, sorghum, sesame
<b>Marketing year:</b>	August/July; Lean season: June-August
<b>Share of cereals in total calorie intake:</b>	45 percent

**CURRENT SITUATION**

The recently-harvested 1998/99 secondary "Deyr" cereal crops was estimated at 80 000 tonnes, twice the poor level of 1997/98 affected by severe floods, but still 25 percent below pre-civil strife normal levels. Despite an increase in plantings, late and below-average rains from October to December negatively affected yields. Insufficient rainfall has also caused the deterioration of pastures and water supplies for livestock and humans. Although "Deyr" crops normally account for only 20 percent of annual cereal production, this "Deyr" crop follows on from the failure of the 1998 main "Gu" cereal crop, which was only one-quarter of the level pre-war.

The already difficult food supply situation is anticipated to deteriorate in the coming months, with an estimated 1 million people at risk of food shortages and 400 000 most at risk. Prices of cereals have increased sharply in recent months and are well beyond the reach of the majority of the population. Coping mechanisms are becoming exhausted after five consecutive reduced harvests and the ban of livestock imports from Somalia by Saudi Arabia. Population movements, particularly from the worst affected Bay and Bakol regions, in search of food and water, are on the increase. The situation has been aggravated by renewed fighting in many areas. Current estimates indicate that some 30 000 people have been displaced by hunger and insecurity.

Following the sharply reduced 1998 "Gu" crop, FAO projected the aggregate cereal deficit at 340 000 tonnes. This estimate was based on an optimistic assumption of normal rains during the "Deyr" season. However, with the final production estimates for the Northwest region and "Deyr" crop, the cereal deficit has been revised up to 385 000 tonnes. Of this, some 250 000 tonnes are projected to be met by commercial imports, leaving an overall food aid requirement of 135 000 tonnes. However, insecurity in many areas of the country prevents access to needy people. Emergency food aid requirements for the 400 000 most vulnerable people in rural areas of southern Somalia (or some 7 percent of the population) are estimated at 11 000 tonnes for the period January-March.

With six consecutive reduced harvests, there is also urgent need for seeds for planting in the next season from April. It is estimated that approximately 1 500 tonnes of sorghum seed would be required for some 75 000 most vulnerable households.

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

	Wheat	Rice	Coarse grains	Total
Normal Production	-	13	550	563
Normal Imports	70	60	10	140
of which: Structural food aid	40	20	10	70
<b><u>1998/99 Domestic Availability</u></b>	<b>70</b>	<b>13</b>	<b>560</b>	<b>643</b>
1998 Production (rice in paddy terms)	-	2	176	178
1998 Production (rice in milled terms)	-	1	176	177
Possible stock drawdown	-	-	3	3
<b><u>1998/99 Utilization</u></b>	<b>155</b>	<b>121</b>	<b>289</b>	<b>565</b>
Food Use	155	121	271	547
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	18	18
Exports or Re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<b><u>1998/99 Import Requirement</u></b>	<b>155</b>	<b>120</b>	<b>110</b>	<b>385</b>
Anticipated commercial imports	120	105	25	250
Food aid needs	35	15	85	135
<b><u>Current Aid Position</u></b>				
Food aid pledges	-	-	18	18
of which: Delivered	-	-	13	13
Donor-financed purchases	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b>25</b>	<b>20</b>	<b>44</b>	<b>89</b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				32
1998/99 import requirement as % of normal:				275
1998/99 food aid requirement as % of normal:				193

**SOUTH AFRICA**

<b>Area:</b>	1.22 million sq.km
<b>Climate:</b>	Sub-tropical with rains concentrated in the summer months (November-April); occasional snow in winter over higher parts of plateau and Cape ranges; an average of 120 days frost in the interior plateau
<b>Population:</b>	44.295 million (1998 estimate); GNP per caput US\$ 3 400 (1997)
<b>Specific characteristics of the country:</b>	Normally net food exporter, notably maize
<b>Logistics:</b>	Adequate port, rail and road facilities
<b>Major foodcrops:</b>	Maize, wheat
<b>Marketing year:</b>	May/April; Lean season: February-April
<b>Share of cereals in total calorie intake:</b>	54 percent

**CURRENT SITUATION**

Heavy rains through mid-February over crop growing areas were followed by a prolonged dry spell in late February and early March, raising concerns that yields in some areas might be reduced due to water-logging or dryness. Preliminary official estimates of plantings indicate a reduction of area sown to maize to 2.9 million hectares from 3.0 million hectares last year. Part of the explanation appears to be that farmers are switching to more lucrative crops such as sunflowers that showed a 48 percent increase in plantings to 0.8 million hectares. Some producers also shifted to planting groundnuts or left fields fallow.

Total 1999 maize output is forecast at 6.5 million tonnes, slightly below last year's production. The official estimate of the 1998/99 winter wheat crop currently stands at 1.5 million tonnes, 36 percent below the 1997/98 level and below average, a response to low international and domestic prices. Aggregate cereal output in 1998 stands at 9.6 million tonnes, some 20 percent lower than the previous year's above-average crop. Despite the decrease in production, the total cereal availability has enabled the country to have an exportable surplus due to large carryover stocks.

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

	Wheat	Rice	Coarse grains	Total
Normal Production	1 835	3	8 830	10 668
Normal Imports	434	367	1 717	2 518
of which: Structural food aid	-	-	-	-
<b><u>1998/99 Domestic Availability</u></b>	<b><u>1 819</u></b>	<b><u>102</u></b>	<b><u>8 299</u></b>	<b><u>10 220</u></b>
1998 Production (rice in paddy terms)	1 469	3	8 124	9 596
1998 Production (rice in milled terms)	1 469	2	8 124	9 595
Possible stock drawdown	350	100	175	625
<b><u>1998/99 Utilization</u></b>	<b><u>2 819</u></b>	<b><u>549</u></b>	<b><u>9 021</u></b>	<b><u>12 389</u></b>
Food Use	2 465	499	4 605	7 569
of which: local purchase requirement	-	-	-	-
Non-food use	154	50	3 906	4 110
Exports or Re-exports	200	-	510	710
Possible stock build up	-	-	-	-
<b><u>1998/99 Import Requirement</u></b>	<b><u>1 000</u></b>	<b><u>447</u></b>	<b><u>722</u></b>	<b><u>2 169</u></b>
Anticipated commercial imports	1 000	447	722	2 169
Food aid needs	-	-	-	-
<b><u>Current Aid Position</u></b>				
Food aid pledges	-	-	-	-
of which: Delivered	-	-	-	-
Donor-financed purchases	-	-	170	170
of which: for local use	-	-	-	-
for export	-	-	170	170
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>56</u></b>	<b><u>11</u></b>	<b><u>104</u></b>	<b><u>171</u></b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				91
1998/99 import requirement as % of normal:				-
1998/99 food aid requirement as % of normal:				-

<b>Area:</b>	2.4 million sq.km
<b>Climate:</b>	From north to south, arid, semi-arid and tropical wet-dry. Rainy season May-October
<b>Population:</b>	29.53 million (1998 estimate); GNP per caput: n.a.
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; cereal production mainly in eastern and central areas.
<b>Logistics:</b>	Roads, railway and river transport inadequate
<b>Major foodcrops:</b>	Sorghum, millet, wheat, roots and tubers, oils
<b>Marketing year:</b>	November/October; Lean season: September-October
<b>Share of cereals in total calorie intake:</b>	51 percent

**CURRENT SITUATION**

An FAO/WFP Crop and Food Supply Assessment Mission which visited the country in November/December 1998, estimated record coarse grain production following adequate and well-distributed rains, timely availability of agricultural inputs and minimal damage by pests and diseases. Millet production is estimated at 1 million tonnes, almost twice the previous year's level, and sorghum at 4.5 million tonnes, 60 percent above the below-average crop of 1997. By contrast, prospects for the 1999 wheat crop, the harvesting of which has started, are unfavourable reflecting a sharp decline in the area planted, mainly reflecting high cost of production and comparatively low prices of imported wheat and wheat flour. Also, unseasonal high temperatures during December and January are likely to negatively affect yields.

Sorghum market prices have fallen below production costs in main producing areas, due to large cereal supplies. This may depress area planted next year. Sorghum exports are no longer banned and export availabilities are estimated at 640 000 tonnes.

Despite the satisfactory food supply situation in the north, some 2.36 million people in the south will need emergency food assistance due to on-going civil conflict. In the north, vulnerable groups including internally displaced people and needy communities in specific localities will need food aid especially during the lean period (April-October) in 1999. Emergency food aid needs of war-affected and food-deficit regions are in the order of 173 000 tonnes, including 130 000 tonnes of cereals. In view of the ample domestic availability, local purchases for food aid are highly recommended in order to support markets.

The serious nutritional situation in southern Sudan, particularly in Bahr El-Ghazal, where famine conditions were experienced last year, has improved in the past months with increased food aid distributions.

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

	Wheat	Rice	Coarse grains	Total
Normal Production	460	1	3 189	3 650
Normal Imports	450	10	130	590
of which: Structural food aid	250	-	-	250
<b>1998/99 Domestic Availability</b>	<b>380</b>	<b>2</b>	<b>5 542</b>	<b>5 924</b>
1998 Production (rice in paddy terms)	280	3	5 542	5 825
1998 Production (rice in milled terms)	280	2	5 542	5 824
Possible stock drawdown	100	-	-	100
<b>1998/99 Utilization</b>	<b>1 030</b>	<b>27</b>	<b>5 567</b>	<b>6 624</b>
Food Use	960	26	3 363	4 349
of which: local purchase requirement	-	-	150	150
Non-food use	70	1	1 235	1 306
Exports or Re-exports	-	-	719	719
Possible stock build up	-	-	250	250
<b>1998/99 Import Requirement</b>	<b>650</b>	<b>25</b>	<b>25</b>	<b>700</b>
Anticipated commercial imports	650	25	-	675
Food aid needs	-	-	25	25
<b>Current Aid Position</b>				
Food aid pledges	29	3	59	91
of which: Delivered	29	3	41	74
Donor-financed purchases	-	-	5	5
of which: for local use	-	-	5	5
for export	-	-	-	-
<b>Estimated Per Caput Consumption (kg/Year)</b>	<b>32</b>	<b>1</b>	<b>111</b>	<b>144</b>
<b>Indexes</b>				
1998 production as % of normal:				160
1998/99 import requirement as % of normal:				119
1998/99 food aid requirement as % of normal:				10

SWAZILAND

<b>Area:</b>	17 000 sq.km
<b>Climate:</b>	Highland rainy climate. One rainy season (October-April); cool temperatures in May-September
<b>Population:</b>	0.936 million (1998 estimate); G.N.P. per caput: US\$ 1 170 (1995)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; land-locked country
<b>Logistics:</b>	Good road network; imports through Mozambique or South Africa
<b>Major foodcrops:</b>	Maize
<b>Marketing year:</b>	May/April; Lean season: February-April
<b>Share of cereals in total calorie intake:</b>	55 percent

**CURRENT SITUATION**

Conditions for crops, now at the flowering stage, have been favourable so far. The 1998/99 growing season started early with light to moderate rains falling over most of the country in October. Rainfall in November and December was abundant and cumulative levels by January ranged from normal to above normal in most areas.

The food supply situation is expected to remain satisfactory until the end of the 1998/99 marketing year in April, due to adequate domestic availability of cereals and planned commercial imports, mainly wheat and rice.

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

	Wheat	Rice	Coarse grains	Total
Normal Production	1	3	116	120
Normal Imports	25	2	20	47
of which: Structural food aid	8	-	1	9
<b><u>1998/99 Domestic Availability</u></b>	<b><u>26</u></b>	<b><u>5</u></b>	<b><u>117</u></b>	<b><u>128</u></b>
1998 Production (rice in paddy terms)	-	3	109	112
1998 Production (rice in milled terms)	-	2	109	111
Possible stock drawdown	-	-	-	-
<b><u>1998/99 Utilization</u></b>	<b><u>40</u></b>	<b><u>10</u></b>	<b><u>124</u></b>	<b><u>174</u></b>
Food Use	38	10	102	150
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	20	20
Exports or Re-exports	-	-	-	-
Possible stock build up	2	-	2	4
<b><u>1998/99 Import Requirement</u></b>	<b><u>40</u></b>	<b><u>8</u></b>	<b><u>15</u></b>	<b><u>63</u></b>
Anticipated commercial imports	40	8	15	63
Food aid needs	-	-	-	-
<b><u>Current Aid Position</u></b>				
Food aid pledges	-	-	-	-
of which: Delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>41</u></b>	<b><u>11</u></b>	<b><u>110</u></b>	<b><u>161</u></b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				93
1998/99 import requirement as % of normal:				134
1998/99 food aid requirement as % of normal:				-

<b>Area:</b>	886 000 sq.km
<b>Climate:</b>	December) and one in south (November-April)
<b>Population:</b>	31.51 million (1998 estimate); G.N.P. per caput: US\$ 210 (1997)
<b>Specific characteristics of the country:</b>	cereal deficit in the north-west. Distribution difficulties
<b>Logistics:</b>	Serious shortage of rolling stock, fuel and spare parts
<b>Major foodcrops:</b>	Maize, roots, tubers, sorghum, pulses, plantains, rice
<b>Marketing year:</b>	June/May; Lean season: February-April
<b>Share of cereals in total calorie intake:</b>	60 percent

### CURRENT SITUATION

An FAO/WFP Crop and Food Supply Assessment Mission in early January 1999 found that as a result of reduced rainfall, planted area and yields fell sharply and overall Vuli maize production will be significantly below normal. The worst affected regions were the Coast and the lowlands of Arusha, Morogoro and Kilimanjaro where rainfall was less than 25 percent of normal.

In addition, domestic maize supplies for the 1998/99 marketing year (June/May) were reduced by higher than anticipated storage losses, due to a combination of ineffective pesticide use, generally poor storage facilities and high levels of grain borer infestation. Supplies may also have been reduced by increased unofficial cross border trade in maize to Zambia, in response to higher prices. In addition to supply constraints, there was increased demand for maize this year in regions like Dodoma and Singida, where the principal sorghum and millet crops failed almost totally last year. The sudden rise in maize prices in late October/early November over a relatively short period, suggests that in addition to developing shortages, which would have had a more gradual impact on price, there was a considerable degree of hoarding.

Although the availability and price of maize have given cause for concern, there is satisfactory supply of food, other than sorghum and millet, in the main producing areas at reasonable prices. This is due to the favourable production of rice, banana and tuber crops last main season. Rice, however, still remains beyond the reach of poorer sectors of the population who have limited purchasing power, whilst crops like cassava and banana are only available in main producing areas as they are not easily transported to food deficit areas over long distances.

The Mission estimated the 1999 Vuli maize production at 228 000 tonnes, some 60 percent lower than last year and 40 percent below the long term average. For the remaining four months of the current marketing year, the Mission estimated that the country has an import requirement of 561 000 tonnes of maize, of which already contracted commercial imports amount to 75 000 tonnes and food aid in the pipeline to 3 000 tonnes. This leaves the country with an uncovered import requirement of 483 000 tonnes, of which 20 000 will be requested as further food assistance through WFP. In the meantime the Government has released 10 000 tonnes through the SGR for relief assistance. Although the aggregate deficit in maize remains sizeable, it is recognized that considerable substitution by other food crops will reduce overall requirements for maize. The commercial sector may also increase the volume of imports, in view of the lifting of the import duty on maize and providing domestic prices in relation to international prices remain high.

The shortfall in current Vuli production and successive poor harvests in parts of the country have significantly increased the number of people that are vulnerable to food shortages, now estimated at 1 million.

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

	Wheat	Rice	Coarse grains	Total
Normal Production	85	607	3 230	3 922
Normal Imports	60	25	-	85
of which: Structural food aid	15	15	-	30
<b><u>1998/99 Domestic Availability</u></b>	<b><u>145</u></b>	<b><u>699</u></b>	<b><u>3 474</u></b>	<b><u>4 318</u></b>
<i>1998 Production (rice in paddy terms)</i>	<i>111</i>	<i>1050</i>	<i>3 332</i>	<i>4 493</i>
1998 Production (rice in milled terms)	111	683	3 332	4 126
Possible stock drawdown	34	16	142	192
<b><u>1998/99 Utilization</u></b>	<b><u>172</u></b>	<b><u>707</u></b>	<b><u>4 035</u></b>	<b><u>4 914</u></b>
Food Use	136	461	3 089	3 686
of which: local purchase requirement	-	-	2	2
Non-food use	6	46	826	878
Exports or Re-exports	30	200	120	350
Possible stock build up	-	-	-	-
<b><u>1998/99 Import Requirement</u></b>	<b><u>27</u></b>	<b><u>8</u></b>	<b><u>561</u></b>	<b><u>596</u></b>
Anticipated commercial imports	25	6	538	569
Food aid needs	2	2	23	27
<b><u>Current Aid Position</u></b>				
Food aid pledges	28	3	26	56
of which: Delivered	3	1	26	30
Donor-financed local purchases	-	-	2	2
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>4</u></b>	<b><u>15</u></b>	<b><u>98</u></b>	<b><u>117</u></b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				115
1998/99 import requirement as % of normal:				701
1998/99 food aid requirement as % of normal:				90



<b>Area:</b>	54 000 sq.km
<b>Climate:</b>	Tropical wet-dry; two rainy seasons in south (March-June and October) and one in north
<b>Population:</b>	4.31 million (1998 estimate) G.N.P. per caput: US\$ 330 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; coastal country
<b>Logistics:</b>	Ports and roads adequate; gateway to Burkina Faso and Niger
<b>Major foodcrops:</b>	Roots and tubers, coarse grains, fruit
<b>Marketing year:</b>	January/December; Lean season: April-July
<b>Share of cereals in total calorie intake:</b>	40 percent

### CURRENT SITUATION

Following late and inadequate rainfall, cereal output in 1998 point to about 590 000 tonnes, about 15 percent below last year's record. Roots and tubers production, which is less sensitive to dry periods, recorded a 5 percent increase over last year's level, reaching 1.29 million tonnes.

The food supply situation is satisfactory. Food prices are decreasing following the start of the harvesting period. The cereal import requirement (including re-exports) for 1999 (January/December) is estimated at 75 000 tonnes.

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

	Wheat	Rice	Coarse grains	Total
Normal Production	-	32	460	492
Normal Imports	50	60	10	120
of which: Structural food aid	5	-	-	5
<b><u>1999 Domestic Availability</u></b>	<b>50</b>	<b>92</b>	<b>470</b>	<b>612</b>
1998 Production (rice in paddy terms)	-	56	533	589
1998 Production (rice in milled terms)	-	38	533	571
Possible stock drawdown	-	10	25	35
<b><u>1999 Utilization</u></b>	<b>45</b>	<b>78</b>	<b>558</b>	<b>681</b>
Food Use	43	67	380	490
of which: local purchase requirement	-	-	-	-
Non-food use	2	11	168	181
Exports or Re-exports	-	-	10	10
Possible stock build up	-	-	-	-
<b><u>1999 Import Requirement</u></b>	<b>45</b>	<b>30</b>	<b>-</b>	<b>75</b>
Anticipated commercial imports	45	30	-	75
Food aid needs	-	-	-	-
<b><u>Current Aid Position</u></b>				
Food aid pledges	-	-	-	-
of which: Delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b>10</b>	<b>16</b>	<b>88</b>	<b>114</b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				120
1999 import requirement as % of normal:				63
1999 food aid requirement as % of normal:				-

UGANDA

<b>Area:</b>	200 000 sq.km
<b>Climate:</b>	North-east is semi-arid, rest of the country is tropical wet-dry; main rainy period is March-October
<b>Population:</b>	21.0 million (1998 estimate); G.N.P. per caput: US\$ 320 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country
<b>Logistics:</b>	Ports: Mombasa (Kenya) and Dar es Salaam (Tanzania); roads and railways inadequate
<b>Major foodcrops:</b>	Roots, tubers, plantains, pulses, maize, millet, sorghum
<b>Marketing year:</b>	January/December; Lean season: April-May
<b>Share of cereals in total calorie intake:</b>	35 percent

**CURRENT SITUATION**

Harvesting of the 1998 second season crop is complete. Maize production is estimated to be about 57 percent of normal levels due to insufficient rains. By contrast, production of other important foodcrops such as bananas and roots and tubers, more resistant to dry conditions, is estimated to be normal.

The areas most affected by a reduced harvest are the eastern and central regions, and the Lake Victoria Basin. Severe food shortages are reported in Kifamba sub-county of Rakai District following a succession of poor crops. In the northern districts of Gulu and Kitgum, affected by civil strife, renewed fighting has resulted in a deterioration of the security conditions. International food assistance continues to be provided to some 400 000 displaced persons in these areas.

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

	Wheat	Rice	Coarse grains	Total
Normal Production	9	78	1 810	1 897
Normal Imports	18	5	10	33
of which: Structural food aid	15	-	10	25
<b><u>1999 Domestic Availability</u></b>	<b><u>14</u></b>	<b><u>51</u></b>	<b><u>1 650</u></b>	<b><u>1 715</u></b>
1999 Production (rice in paddy terms)	9	77	1 630	1 716
1999 Production (rice in milled terms)	9	51	1 630	1 690
Possible stock drawdown	5	-	20	25
<b><u>1999 Utilization</u></b>	<b><u>84</u></b>	<b><u>57</u></b>	<b><u>1 700</u></b>	<b><u>1 841</u></b>
Food Use	83	57	1 245	1 385
of which: local purchase requirement	-	-	-	-
Non-food use	1	-	325	326
Exports or Re-exports	-	-	130	130
Possible stock build up	-	-	-	-
<b><u>1999 Import Requirement</u></b>	<b><u>70</u></b>	<b><u>6</u></b>	<b><u>50</u></b>	<b><u>126</u></b>
Anticipated commercial imports	70	4	-	74
Food aid needs	-	2	50	52
<b><u>Current Aid Position</u></b>				
Food aid pledges	13	-	-	13
Of which: Delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
Of which: for local use	-	-	-	-
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>4</u></b>	<b><u>3</u></b>	<b><u>57</u></b>	<b><u>64</u></b>
<b><u>Indexes</u></b>				
1999 production as % of normal:				90
1999 import requirement as % of normal:				382
1999 food aid requirement as % of normal:				208

<b>Area:</b>	741 000 sq.km
<b>Climate:</b>	Tropical wet-dry, one rainy season (November-April)
<b>Population:</b>	10.240 million (1997 estimate); G.N.P. per caput: US\$ 380 (1997)
<b>Specific characteristics of the country:</b>	Low-income food-deficit country; land-locked country
<b>Logistics:</b>	Imports through Dar es Salaam (Tanzania); inadequate rail and road connections
<b>Major foodcrops:</b>	Maize, roots, tubers
<b>Marketing year:</b>	May/April; Lean season: March-May
<b>Share of cereals in total calorie intake:</b>	70 percent

### CURRENT SITUATION

Abundant rains in December and January, particularly in the central part of the country, enabled farmers to put more land into cultivation. Initial indications are that the area under coarse grains will be much higher than last year's level. However, input supply is reported to be inadequate in many areas. After the drought and flood reduced harvest of 1997/98, early prospects for the 1998/99 cereal crops are favourable.

The food supply situation for the current marketing year continues to be tight. To meet its domestic food shortfall, the country has been importing maize, largely from countries in the sub-region, including Mozambique, South Africa and Zimbabwe. Relief food assistance continues to be needed for vulnerable groups and those affected by drought. Food aid pledges by donors amount to 25 500 tonnes, of which 26z 000 tonnes have been delivered.

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

	Wheat	Rice	Coarse grains	Total
Normal Production	53	14	1 348	1 415
Normal Imports	35	4	65	104
of which: Structural food aid	25	-	45	70
<b><u>1998/99 Domestic Availability</u></b>	<b><u>81</u></b>	<b><u>5</u></b>	<b><u>673</u></b>	<b><u>759</u></b>
1998 Production (rice in paddy terms)	71	6	632	709
1998 Production (rice in milled terms)	71	4	632	707
Possible stock drawdown	10	1	41	52
<b><u>1998/99 Utilization</u></b>	<b><u>122</u></b>	<b><u>28</u></b>	<b><u>1 269</u></b>	<b><u>1 419</u></b>
Food Use	118	26	1 154	1 298
of which: local purchase requirement	-	-	1	1
Non-food use	4	2	115	121
Exports or Re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<b><u>1998/99 Import Requirement</u></b>	<b><u>41</u></b>	<b><u>23</u></b>	<b><u>596</u></b>	<b><u>660</u></b>
Anticipated commercial imports	41	15	308	364
Food aid needs	-	8	288	296
<b><u>Current Aid Position</u></b>				
Food aid pledges	6	1	19	26
of which: Delivered	6	1	19	26
Donor-financed purchases	-	-	1	1
of which: for local use	-	-	1	1
for export	-	-	-	-
<b><u>Estimated Per Caput Consumption (kg/Year)</u></b>	<b><u>12</u></b>	<b><u>3</u></b>	<b><u>113</u></b>	<b><u>127</u></b>
<b><u>Indexes</u></b>				
1998 production as % of normal:				50
1998/99 import requirement as % of normal:				635
1998/99 food aid requirement as % of normal:				423

ZIMBABWE

<b>Area:</b>	387 000 sq.km
<b>Climate:</b>	Centre and north-east tropical wet-dry; south and west semi-arid. One rainy season (November-March)
<b>Population:</b>	11.97 million (1997 estimate); G.N.P. per caput: US\$ 750 (1997)
<b>Specific characteristics of the country:</b>	Land-locked country; exporter and importer of grain
<b>Logistics:</b>	Exports and imports through Mozambique or South Africa
<b>Major foodcrops:</b>	Maize, wheat, millet, sorghum
<b>Marketing year:</b>	April/March; Lean season: February-April
<b>Share of cereals in total calorie intake:</b>	66 percent

**CURRENT SITUATION**

Rainfall has been abundant and widespread since October, becoming heavy in many areas in December and part of January, raising cumulative rainfall to over 100 percent of normal levels in most areas. This has raised concerns that crops in low-lying areas could suffer yield losses from water-logging and leaching of fertilizers. Crop conditions are reported to be generally good in most areas and harvest prospects are favourable so far.

The national food supply situation is generally stable. Available supply of cereals and planned imports are expected to cover needs until the beginning of the new harvest in April. Government relief assistance continues to be provided to vulnerable groups in food deficit regions.

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

	Wheat	Rice	Coarse grains	Total
Normal Production	240	4	1 880	2 124
Normal Imports	55	20	-	75
of which: Structural food aid	5	-	-	5
<b>1998/99 Domestic Availability</b>	<b>250</b>	<b>-</b>	<b>1 616</b>	<b>1 866</b>
1998 Production (rice in paddy terms)	250	-	1 589	1 839
1998 Production (rice in milled terms)	250	-	1 589	1 839
Possible stock drawdown	-	-	27	27
<b>1998/99 Utilization</b>	<b>400</b>	<b>25</b>	<b>2 266</b>	<b>2 691</b>
Food Use	345	25	1 741	2 111
of which: local purchase requirement	-	-	-	-
Non-food use	15	-	475	490
Exports or Re-exports	-	-	50	50
Possible stock build up	40	-	-	40
<b>1998/99 Import Requirement</b>	<b>150</b>	<b>25</b>	<b>650</b>	<b>825</b>
Anticipated commercial imports	150	25	650	825
Food aid needs	-	-	-	-
<b>Current Aid Position</b>				
Food aid pledges	86	-	2	88
of which: Delivered	81	-	-	81
Donor-financed purchases	-	-	50	50
of which: for local use	-	-	-	-
for export	-	-	50	50
<b>Estimated Per Caput Consumption (kg/Year)</b>	<b>29</b>	<b>2</b>	<b>145</b>	<b>176</b>
<b>Indexes</b>				
1998 production as % of normal:				87
1998/99 import requirement as % of normal:				1100
1998/99 food aid requirement as % of normal:				-

## TERMINOLOGY

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

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

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

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

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

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

**"Low-income food deficit countries" (LIFDCs):** Includes all food deficit countries with per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. US\$1 505 in 1996), which in accordance with guidelines and criteria agreed to by the CFA should be given priority in the allocation of food aid.

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