

FOOD SUPPLY SITUATION AND CROP PROSPECTS IN SUB-SAHARAN AFRICA

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Countries facing food emergencies:

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



FOOD AND AGRICULTURE ORGANIZATION OF THE UNITED NATIONS

INTRODUCTION

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

Part I focuses on the food crisis in southern Africa, particularly in Malawi, Zambia and Zimbabwe, as well as in Lesotho, Namibia, Swaziland and southern provinces of Mozambique, due to two consecutive years of poor cereal harvests. It highlights the bleak crop prospects in several countries of eastern Africa and western parts of the Sahel due to extended periods of dry weather that have affected crops and livestock and raised serious concerns over the food outlook in 2002/03. The report also draws attention to the precarious food situation in parts of the Great Lakes region, particularly in the Democratic Republic of Congo, due to civil strife, and the continuing need for food assistance in Angola, Guinea, Liberia and Sierra Leone due to population displacements, refugees and insecurity.

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

Part III presents the latest analysis and information on crop prospects and the food supply situation and outlook in each country. The information on food aid pledges, triangular transactions and local purchases, and on expected arrivals, is based on data transmitted to GIEWS as of late July 2002 by the following donors: Australia, Belgium, Canada, China, Denmark, EC, Germany, France, Italy, Japan, Netherlands, Sweden, Switzerland, United Kingdom, United States as well as the World Food Programme.

COUNTRIES FACING FOOD EMERGENCIES (Total: 21 countries)

<u>Country</u>	<u>Reasons for emergency</u>
Angola	Civil strife, internally displaced people (IDPs)
Burundi	Civil strife and insecurity
Congo, Dem. Rep. of	Civil strife, IDPs and refugees
Congo, Rep. of	Civil Strife
Eritrea	IDPs, returnees and drought
Ethiopia	Drought, IDPs
Guinea	IDPs and refugees
Kenya	Drought in parts
Lesotho	Drought in parts
Liberia	Civil strife, IDPs
Malawi	Drought in parts
Mauritania	Irrigation water shortages
Mozambique	Drought in parts
Sierra Leone	Civil strife, IDPs
Somalia	Drought, civil strife
Sudan	Civil strife in the south, drought
Swaziland	Drought in parts
Tanzania	Poor rains in parts, refugees
Uganda	Civil strife in parts, IDPs
Zambia	Drought and floods in parts
Zimbabwe	Drought, farming disruptions

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

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HIGHLIGHTS

In Southern Africa, nearly 13 million people are in need of emergency food aid in marketing year 2002/03 (April/March) in Zimbabwe, Zambia, Malawi, Mozambique, Lesotho and Swaziland, following two consecutive poor cereal harvests. A prolonged dry spell during the 2001/02 growing season, and excessive precipitation in parts, devastated crops in large growing areas. In Zimbabwe, reduced plantings in the large-scale commercial sector due to land reform activities compounded the problem. Maize production in the sub-region fell sharply, reaching less than one-quarter of last year's level in Zimbabwe, one-third in Lesotho and just over a half in Malawi, Zambia and Swaziland. Maize supplies were further reduced by the depletion of Government and farmers' stocks following the 2001 reduced cereal crops. Late and insufficient imports in the last marketing season resulted in severe food shortages and unprecedented increases in prices. Coping mechanisms of the vulnerable populations in the sub-region have virtually been exhausted. A regional emergency operation valued at US\$507.3 million was jointly approved by FAO and WFP in late June to provide food assistance to about 10.3 million people or 80 percent of the affected population until the next main harvest from April 2003. However, by early August, only 24 percent of this amount had been pledged. Donors are urged to commit critically needed food aid and financial support to Southern Africa to avert a large scale humanitarian crisis. Assistance is also urgently required with agricultural inputs. Against FAO's estimated requirements of US\$25 million for Malawi, Lesotho, Swaziland, Zambia and Zimbabwe, pledges by mid-August covered only 26 percent. More contributions are, therefore, needed before the next main planting season starting in October.

In eastern Africa, the food outlook is bleak in several countries due to poor seasonal rains. In Eritrea, crop prospects are grim with the short (azmera) rains from March to May having failed totally. The drought has also continued into the important planting months of June and July, raising serious concerns over the country's prospective food security. Over one million people are currently estimated to be in need of assistance. Similarly in Ethiopia, severe drought conditions have caused the death of large numbers of livestock, mainly in the eastern and north-eastern pastoral areas. The number of people in need of assistance is now estimated at more than 8 million. In Kenya, poor rains in parts and an early end to the main season rains elsewhere have reversed earlier optimistic crop prospects and raised serious concerns over the food supply outlook. Despite improved pastures in some pastoral areas, food insecurity persists in several districts. Nearly 1.3 million people are estimated to be dependent on food assistance. In Somalia, despite a favourable forecast for the main (gu) season crops, serious malnutrition rates are reported in several parts, reflecting diminished livelihoods due to successive droughts and long-term effects of years of insecurity. The recent escalation of conflict, particularly around Baidoa, north-eastern Somalia (Puntland) and in Mogadishu, has displaced a large number of people and disrupted delivery of food assistance to vulnerable groups. In Tanzania and Uganda, the overall food supply situation is satisfactory. However, the escalation of conflict in northern Uganda has displaced large numbers of people, adding to the more than 1.5 million IDPs, refugees and other vulnerable people that already depend on food assistance.

In the Great Lakes region, the food supply situation has improved in Rwanda and Burundi following good harvests of the 2002 second season crops. By contrast, the food and nutritional situation in the Democratic Republic of Congo gives cause for serious concern. Persistent civil strife continues to cause massive population displacements, with the number of internally displaced persons (IDPs) currently estimated at 2 million. Their food situation is extremely serious, as distribution of relief assistance is hampered by insecurity. The food supply situation in Kinshasa is also serious, as food availability falls far short of needs.

In western Africa, dry weather conditions have seriously affected crops in parts, particularly in The Gambia, Guinea-Bissau, Mauritania and Senegal. In Cape Verde, prospects for the maize crop, normally planted from July, are unfavourable due to delayed onset of rains. By contrast, crop growing conditions have improved in central and eastern parts of the Sahel with increased and better distributed rainfall in most agricultural regions of Burkina Faso, Chad, Mali and Niger. Agricultural activities in Liberia have been disrupted by renewed civil strife, pointing to reduced rice production this year. Sierra Leone and Guinea remain heavily dependent on international food assistance due to large numbers of IDPs and refugees.

Sub-Saharan Africa's cereal import requirements are expected to increase in 2002/03, reflecting large production shortfalls in southern Africa and anticipated reduced harvests in eastern Africa.

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PART I: OVERVIEW

The food outlook for sub-Saharan Africa in 2002/03 gives cause for serious concern. In southern Africa, sharp declines in maize harvests for two consecutive years have put a large number of people at the brink of starvation, while in eastern and western Africa the food outlook is unfavourable due to poor and erratic rainfall. Consequently, sub-Saharan Africa's cereal import requirements in 2002/03 are expected to be above average. However, given the reduced import capacity of these countries due to falling international prices for their exports, increased international food assistance will be necessary to avert extreme hardship.

THE FOOD SITUATION IN SOUTHERN AFRICA IS OF GRAVE CONCERN

Following two consecutive years of poor cereal harvests, nearly 13 million people in southern Africa are in need of emergency food assistance until the next harvest in April 2003.

In **Zimbabwe**, the food and nutritional situation gives cause for serious concern following two consecutive sharply reduced cereal harvests and the country's prevailing economic crisis. Shortages of the main staple, maize, are reported, particularly in rural areas. A recent assessment by the Government and UNICEF indicated an overall deterioration of the nutritional status of children, mostly in rural areas. The study showed that in 19 out of 24 districts surveyed, the prevalence of severe malnutrition was over 10 percent. In urban areas, recent shortages of bread, which had been used as an alternative to scarce maize-meal, has aggravated the food situation and accelerated price increases in the parallel market. Overall, high levels of inflation continue to erode access of poor households to food and non-food items. Further, the outlook for the crop and livestock production in 2002/03 is bleak due to disruption of farming activities in the large-scale commercial sector.

An FAO/WFP Mission in May estimated the maize deficit at 1.7 million tonnes, including 705 000 tonnes of emergency food aid for some 6 million most vulnerable people, or almost half of the country's population. The Government, which has a monopoly for grain trade, has started arrangements to import maize commercially but so far arrivals have been slow, totalling less than 200 000 tonnes since the beginning of the marketing year in May. Pledges of food aid also remain well below requirements. Additional donor contributions are urgently needed to stem the deterioration of the food situation. Assistance with agricultural inputs is also urgently required to enable drought-affected farming families to restart agricultural production during the next main planting season starting in October 2002.

In **Malawi**, the food supply situation remains serious following two consecutive years of reduced cereal harvests. Earlier in the year, severe food shortages resulted in starvation in parts of the country. Approximately 3.2 million people are estimated to be seriously affected by the combined effects of reduced food availability and food access. Emergency food aid needs are estimated at 208 000 tonnes of cereals, mainly maize. Distribution of relief food has already started, targeting 500 000 beneficiaries with the number to be increased to 3.2 million people by December. Food aid requirements are so far well resource by donors' contributions.

Prices of maize, the staple crop, have declined from their record levels in March but are still above their levels of a year ago reflecting reduced supply. Of the estimated maize deficit of 575 000 tonnes, the Government has already approved importation of 250 000 tonnes through the National Food Reserve Agency (NFRA). These imports will augment the available supply of maize and minimize price hikes. Substantial informal cross-border maize inflows from Tanzania and Mozambique have also helped stabilize prices. The Government has announced the resumption of the "starter-pack" agricultural inputs programme for the next cropping season, targeting 3 million farmers at a cost of US\$14.9 million, of which the Government will provide US\$1.5 million and the balance is expected from donors.

In **Zambia**, severe crop losses during the last cropping season due to drought have left some 2.3 million people, or about one-quarter of the population, in need of food assistance. In the worst affected Southern Province 60 percent of the population require relief food assistance. This is the second consecutive year of reduced cereal harvests and coping mechanisms of the population are stretched to the limit. Aggregate, output of the main staple maize has been estimated at 25 percent below last year's reduced crop.

The maize deficit in marketing year 2002/03 (May/April) is estimated at 575 000 tonnes. The Government and private millers signed an agreement in July to import 350 000 tonnes of maize duty-free. This is expected to prevent a repeat of last year's delays in imports that resulted in serious maize shortages. Food

aid requirements for the most affected population are estimated at 174 000 tonnes. Food distributions are underway in 39 of the country's 72 districts. Current pledges of cereal food aid are adequate for the current operations but additional pledges of pulses and vegetable oil are still needed, as well as financial contributions for agricultural inputs for the next planting from October.

In **Angola**, the cease-fire agreement signed in April 2002 between UNITA and the Angolan Government revealed the extent of suffering by people trapped in rural areas. Large numbers of severely malnourished people have since made their way to reception and transit centres and up to 500 000 are reported to be in a critical nutritional condition. Severe malnutrition rates have been found particularly in Bié, Uíge, Huambo and Huíla provinces, but as the security situation improves and more areas become accessible, similarly affected people are expected to be reached by the humanitarian community.

The total number of people in urgent need of food assistance in marketing year 2002/03 (April/March) is estimated at 1.4 million. This includes households in areas worst affected by the military conflict, the families of demobilised UNITA soldiers living in camps in several areas, IDPs with limited or no access to land to produce food, large numbers of vulnerable people and refugees returning from neighbouring countries. An FAO/WFP Mission in June 2002 estimated food aid needs at 221 000 tonnes of cereals, but by the end of July pledges fell far short of requirements. More contributions from donors are, therefore, urgently needed to avoid an interruption in the delivery of the assistance. International assistance is also required for repair of key roads and bridges before the rainy season starts in mid-September. The country will also need substantial assistance for an extensive de-mining programme.

In **Mozambique**, despite the good cereal harvest at the national level, the food situation is extremely tight in the southern and parts of the central regions, where crops were devastated by drought. On average, cereal output in the affected provinces declined by one-third from the reduced level of the previous year. The populations in these areas have exhausted their coping mechanisms due to the cumulative effects of several recent natural disasters - especially floods/excessive rains and cyclones - that hit the same areas during the last three years. For most households, alternative sources of income such as employment in South Africa and selling of charcoal are limited and dwindling.

It is estimated that 515 000 people in 43 districts of the Southern and Central regions are facing severe food shortages and need emergency food aid. This represents less than 3 percent of the country's total population but about 15 percent of the population of the two regions. Most of the food aid requirement, estimated at about 70 000 tonnes of cereals, is to be covered mainly by imports as high transport costs within the country make the movement of maize from the surplus north to the deficit south prohibitively expensive. WFP is distributing food through food-for-work programmes in 36 districts and through general distributions in two worst affected districts. Additional donor pledges are urgently required to avoid a break in the cereal pipeline in the next few months.

In **Namibia**, the food supply situation is tight following a sharp decline in this year's cereal production. The country faces a cereal deficit of about 156 000 tonnes in 2002/03 (May/April), most of which is expected to be imported commercially. A recent vulnerability assessment undertaken by the Government found that 500 000 people are food insecure as a result of the reduced harvest and need emergency food aid. The Government has appealed for international assistance.

Elsewhere in southern Africa, the food supply situation is tight in **Lesotho** and **Swaziland** where, respectively, about 445 000 and 140 000 people are in need of food assistance. WFP has started food distributions in both countries. Emergency assistance with agricultural inputs such as seeds and fertilizer is also required to enable disaster-affected farming families to restart agricultural production in the next planting season starting in October.

DETERIORATING CROP AND FOOD SUPPLY PROSPECTS IN PARTS OF EASTERN AFRICA

The early outlook for the 2002 crops in most countries of the sub-region is unfavourable due to late onset of the rainy season and extended dry spells. Serious food shortages have started to emerge in several parts of the sub-region, particularly in Eritrea, parts of Ethiopia and Kenya.

In **Eritrea**, prospects for the current main season crops are bleak following severe and prolonged drought conditions. The spring (short) rains from March to May totally failed, jeopardizing early land preparation for the main ("kiremti") cropping season and regeneration of pastures. This has been followed by a long dry

spell in the important planting months of June and July. The country already faces a tight food supply situation due to the displacement of large numbers of people by the war with Ethiopia, the effects of earlier successive years of drought and continuing repatriation of refugees from neighbouring Sudan. Over one million people are now estimated to be in need of food assistance. The slow response to the 2002 UN Consolidated Appeal (CAP) also remains a major concern to both the Government and humanitarian agencies.

In **Ethiopia**, an alarming humanitarian situation is emerging in some areas, particularly in the eastern and north-eastern pastoral areas due to drought. In the severely affected Afar Region, large numbers of livestock are reported to have perished and people have started migrating in search food and water. The secondary (belg) season crop, which accounts for up to 10 percent of annual grain production, has also partially failed. The number of people in need of assistance has increased to about 8 million people from 6.5 million in April 2002.

In **Kenya**, prospects for the 2002 main "long rains" season crops have deteriorated following an early cessation of the rains. Optimistic crop prospects earlier in the year have been dampened following erratic rains, including in some key maize growing areas in the Rift Valley Province. In several pastoral areas previously affected by drought, unusually heavy rains have improved food supply prospects. However, food insecurity persists in the districts of Mandera, Moyale, southern parts of Tana River, West Pokot, Koibatek, Marakwet and Baringo.

In **Somalia**, prospects for the current main "gu" season cereal crops are generally favourable following good rains at end-April/early-May. However, serious food supply difficulties are reported in northern Gedo, Garbaharay and Burdhubo due to successive years of drought and insecurity. An upsurge in the long conflict and limited access by humanitarian agencies to some areas is cause for serious concern. In north-western Somalia (Somaliland), the food situation is worsening in Sool, Sanag and Nugal regions where below average rains have affected crop and livestock production. The continuing ban on livestock imports from eastern Africa by countries along the Arabian Peninsula has reduced foreign exchange earnings and affected the livelihoods of a large number of pastoralists.

In **Sudan**, early crop prospects are unfavourable due to below-normal rains in May and June which affected land preparation and planting in parts. Continuous population displacements in the south are also adversely affecting the cropping season. Recent escalation of the long-running conflict is exacerbating an already precarious food security situation. An estimated 3 million IDPs, drought-affected and vulnerable people in different parts of the country depend on food assistance.

In **Tanzania**, preliminary estimates indicate that food production in 2002 has improved considerably on last year with national maize prices reported to be declining. Adequate availability of water and forage has also improved the food security of most pastoralists. However, localised food shortages are anticipated in some northern parts of the country during the 2002/03 marketing year due to poor short (vuli) rains and the long (masika) rains.

In **Uganda**, prospects for the 2002 main season crops are generally favourable and the overall food supply situation is satisfactory. Stable, and in most cases reduced, crop prices compared to last year are improving household access to food. However, an escalation of the conflict and insecurity in northern parts of the country has displaced a large number people, adding to the large IDP and refugee population. Overall, nearly 1.5 million people, consisting mainly of IDPs and refugees, are receiving food assistance from humanitarian agencies.

IMPROVED FOOD SUPPLY SITUATION IN THE GREAT LAKES BUT DIFFICULTIES PERSIST IN THE DEMOCRATIC REPUBLIC OF CONGO

In the **Democratic Republic of Congo**, persistent fighting continues to displace rural populations, aggravating the already serious food situation. In late July, a large number of new IDPs was reported to have arrived to the town of Kindu fleeing fighting in surrounding areas, where severe food shortages are reported.

There are over 1 million internally displaced people whose food and nutritional situation gives cause for serious concern. The food situation is also precarious in the rest of the country, particularly in the capital city, Kinshasa. A recent consumption survey by FAO in poor and densely populated areas of Kinshasa found significant levels of caloric deficiency and food insecurity. The study also indicated that consumption of

protein is marginal in these areas. The main constraint to adequate food consumption was found to be the lack of purchasing power.

In **Burundi**, the food supply situation has further improved with a good harvest of the 2002 second season foodcrops. Overall, the 2002 aggregate food output is 4 percent higher than last year and 6 percent above the average of the five-year pre-crisis period (1988-93). Prices of basic food commodities remain stable.

While food production has recovered to the levels before the crisis, volumes remain short of the growing population's requirements. The food deficit has grown over the past years, particularly in terms of cereal equivalent. This reflects an improved production of root and tubers and bananas, and declining outputs of cereals and pulses. Due to successive droughts and a volatile security situation, farmers have switched to crops that are drought resistant or require relatively less crop husbandry. Substantial amounts of food assistance continue to be required for vulnerable populations.

In **Rwanda**, the output of the recently harvested 2002 second season foodcrops was satisfactory. Abundant rains benefited root and tuber and banana crops, although they adversely affected yields of sorghum and beans in some areas. The food situation has continued to improve following a succession of good harvests, particularly in medium and low altitude areas which were previously affected by dry weather.

Adequate and timely food and non-food assistance has been provided to the population affected by severe floods in April and early May in western areas of the country. However, assistance is needed for the rehabilitation of damaged transport infrastructure.

IN WESTERN AFRICA, CROP PROSPECTS HAVE DETERIORATED IN PARTS DUE TO EXTENDED DRY WEATHER

In the **Sahel**, prolonged dry weather over most parts of the Gambia, Guinea-Bissau, Mauritania and Senegal has adversely affected crop prospects and raised serious concerns over the food supply outlook. Following the first rains in early June, a dry spell from late June through July has seriously affected growing crops. Re-plantings were carried out in several areas but yield potential has been seriously compromised. In Cape Verde, prospects for the maize crop, normally planted from July, are unfavourable due to delayed onset of rains. A recovery in crop prospects will heavily depend on the performance of rainfall in August. By contrast, crop growing conditions have improved in central and eastern parts of the Sahel with increased and better distributed rainfall in most agricultural regions of Burkina Faso, Chad, Mali and Niger.

Following above-average or record crops in the 2001/2002 growing season in all Sahelian countries except Mauritania, the overall food supply situation is satisfactory. Households were able to replenish their stocks, which had been depleted in several countries. However, access to food for some sections of the population may be difficult as above-normal grain prices have been reported in most countries. The sharp rise in cereal prices is mainly due to very low levels of cereal carryover stocks, and activities of speculators as well as outflows to neighbour countries.

In **Liberia**, following an upsurge of civil strife, the Government declared a state of emergency on 8 February 2002, which was extended by the parliament in mid-May for six months. Increasing clashes between Government forces and rebels in the north, north-west and central regions have displaced over 120 000 people. Some 40 000 Liberian refugees have crossed into Sierra Leone so far this year, while 37 000 have fled to Guinea, Côte d'Ivoire and Ghana. The farming season has been disrupted and many people are now dependent on food assistance. WFP is currently assisting some 100 000 people throughout the country.

In **Mauritania**, droughts, shortage of irrigation water, and poor distribution of rainfall during the 2001/02 growing season, combined with exceptionally heavy rain and cold temperatures in mid-January, have led to the risk of an unprecedented food crisis. Following release of final production estimates by national statistical services, the aggregate 2001 cereal production is estimated at some 122 177 tonnes, 32 percent lower than the previous year and 27 percent lower than average. Prices of cereals have risen considerably in most markets. In April, WFP launched an Emergency Operation for US\$7.5 million (16 230 tonnes of food) to help 250 000 people threatened by serious food shortages.

In **Sierra Leone**, cereal production in 2001 is estimated at 348 000 tonnes. Rice production should further increase this year reflecting an improved security situation, increased plantings by returning refugees and farmers previously displaced, as well as better conditions for the distribution of agricultural inputs. In an effort to

continue helping the country, a UN Consolidated Inter-Agency Appeal was launched late 2001, including an agricultural component with five projects proposed by FAO to facilitate recovery of food production thus reducing dependence on food aid. The intensifying conflict in Liberia has led to an influx of Liberian refugees, while some 55 000 Sierra Leoneans who had been living in Liberia returned home as fighting intensified. This has increased the country's food aid needs.

In **Guinea**, the overall food supply situation is favourable following satisfactory harvests in 2000 and 2001. Markets are well supplied, except in the south-east where recurrent rebel incursions from Sierra Leone have severely affected agricultural and marketing activities. The presence of a large refugee population and the persistent instability in neighbouring countries have exacted a heavy toll on the country. According to UNICEF, at least 13 000 new Liberian refugees entered the country in May and June, of whom 80 percent were women and children. Armed clashes in and around the country have also resulted in increasing numbers of internally displaced persons (IDPs).

UPDATE ON FOOD AID PLEDGES AND DELIVERIES

Cereal import requirements in sub-Saharan Africa in 2002 are set to remain high, reflecting the sharp falls in cereal production in southern Africa mainly due to drought, expected reduced production in eastern Africa and increased population displacements in other parts due to escalation of conflicts. GIEWS latest estimates of 2001 cereal production and 2001/02 import and food aid requirements are summarized in Table II. The total food aid requirement is estimated at 1.81 million tonnes. Food aid pledges for 2001/02, including those carried over from 2000/01, amount to 1.22 million tonnes of which 1.06 million tonnes have been delivered so far.

AREAS OF PRIORITY ACTION

The food situation in southern Africa is very serious and needs urgent concerted action to stave off large scale starvation. There are also clear indications of imminent serious food shortages in Eritrea, parts of Ethiopia and Kenya due to poor rainfall. Recent escalation of conflicts in Liberia, Somalia and parts of Sudan and Uganda have displaced large numbers of rural people, while insecurity continues to hamper food production in a number of countries. The outlook for current crops is also unfavourable in a number of Sahelian countries, particularly in Senegal, Gambia and Guinea-Bissau.

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

First, all possible efforts should be made to contain the food crisis in southern Africa.

Second, food assistance continues to be needed in several countries of sub-Saharan Africa affected by conflict or adverse weather, including Angola, Burundi, the Democratic Republic of Congo, Eritrea, Ethiopia, Kenya, Liberia, Sierra Leone, Somalia and Sudan.

Third, the unfavourable food outlook in several countries of eastern Africa and the Sahel calls for early contingency planning for food assistance. These countries include Eritrea, Ethiopia, Kenya, Senegal, Gambia and Guinea-Bissau.

Fourth, countries which have suffered serious falls in food production this year will also need assistance with agricultural inputs for the next cropping season. These include Malawi, Zambia, Zimbabwe, Lesotho and Swaziland.

PART II : POSITION BY SUB-REGION

The harvesting of the 2001/02 coarse grain crops is virtually complete in southern Africa. In several countries of eastern Africa, the main season crops are either being harvested or are in the ground. However, the planting season for the main cereal crops has started in Ethiopia, Eritrea and Sudan. Coarse grain crops are maturing in parts of the coastal countries of western Africa and are at flowering or grain formation stages in parts of central Africa. In the Sahelian countries of western Africa main season cereal crops have recently been planted.

Table I: Cereal Crop Calendar

Sub-Region	Cereal Crops	
	Planting	Harvesting
Eastern Africa ^{1/}	March-June	August-December
Southern Africa	October-December	April-June
Western Africa		
- Coastal areas (first season)	March-April	July-September
- Sahel zone	June-July	October-November
Central Africa ^{1/}	April-June	August-December

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

In **eastern Africa**, with poor rainfall so far in most parts during the current agricultural season, the early outlook for the 2002 crops is generally unfavourable. In Eritrea, the outlook for this year's agricultural season, which has just started, is bleak due to the failure of the short (azmera) rains. Continued drought into the important early months of the main (kiremti) season has exacerbated the problem. In Ethiopia, severe drought conditions in the eastern and north-eastern pastoral regions have severely affected pastoralists and caused the death of large numbers of livestock. The partial failure of the short rains (belg) season and the continued dry conditions into the early months of the main (meher) season have also given rise to bleak food supply prospects. In Kenya, the current "long rains" have been inadequate in several parts, leading to a poor food outlook for 2002/03. The food supply situation is quite alarming in the districts of Mandera, Moyale, southern parts of Tana River, West Pokot, Koibatek, Marakwet and Baringo. In Somalia, favourable prospects for the current main season ("Gu") crops are reported. However, continued insecurity and escalation of conflict in parts with the attendant population displacement are cause for serious concern. In Sudan, early crop prospects are unfavourable due to delayed onset of rains and low water levels in major rivers that may affect irrigated crops. In Tanzania and Uganda, overall food outlook is favourable. However, a large number of food insecure people in both countries due to civil strife in parts (Uganda) and localized crop failures (Tanzania) depend on food assistance.

The aggregate cereal import requirement of the countries of the sub-region in 2002 is estimated at 4.1 million tonnes. Anticipated commercial imports are estimated at 3.1 million tonnes and the food aid requirements at one million tonnes. Food aid pledges reported to GIEWS as of late July amount to 0.5 million tonnes of which 0.45 million tonnes had been delivered.

In **southern Africa**, harvesting of the 2002 main season cereal crops is completed. Crops were adversely affected by a prolonged dry spell from January to March in large areas of the sub-region or by excessive rains in parts. Production declined for the second consecutive year in most countries, except in South Africa, Mozambique and Angola. Output of maize, the sub-region's main staple is estimated at 13.6 million tonnes, only slightly above the 2001 level. The dry conditions in the sub-region this year did not affect the main growing areas in South Africa and the maize output is forecast at 9.09 million tonnes, 22 percent above last year's reduced crop. By contrast, in Zimbabwe the combined effects of widespread drought and a decline in plantings in the commercial sector due to land reform activities, resulted in a maize output only one-quarter of the normal level two years ago. In Zambia, prolonged dry weather in five of the nine provinces, sharply reduced crop yields. Production of maize is estimated at 606 000 tonnes, 24 percent lower than the reduced level of 2001 and 42 percent below the normal level of 2000. In Malawi, maize production declined 10 percent from last year's poor harvest to about 1.5 million tonnes. This mainly reflects

dry weather during February-March and early cessation of rains in April. Consumption of green maize before the harvest, due to the severe food shortages early in the year, further diminished the output. Severe dry weather and reductions in coarse grain production were also experienced in Swaziland, Botswana and Namibia. In Lesotho, excessive rains at planting, followed by hail and frost, resulted in a decline of one-third in maize output from the already poor level of the previous year. By contrast, in Mozambique this year's maize production increased 8 percent from the previous year to 1.2 million tonnes. However, production was sharply reduced in southern provinces. In Angola, the millet and sorghum harvest declined by 6 percent due to late rains and military activities, but the output of the main maize crop remained unchanged. In Madagascar, excessive precipitation from a recent cyclone has disrupted the 2002 paddy harvest, leading to concerns over both the quantity and quality of the crop. Paddy output is forecast at 2.4 million tonnes, down by 200 000 tonnes from 2001.

The sub-region's aggregate cereal import requirement in marketing year 2002/03 (May/April) is estimated at 7.1 million tonnes. Anticipated commercial imports are estimated at 4.7 million tonnes, leaving 2.4 million tonnes to be covered by food aid. Food aid pledges reported to GIEWS as of late July amounted to 300 000 tonnes.

In **western Africa**, the rainy season in the coastal countries has generally been normal so far, except in Guinea, Sierra Leone and Liberia where precipitation was below average until early July. In addition, agricultural activities in Liberia have been disrupted by renewed civil strife since January, pointing to a reduced rice crop this year. The 2001 aggregate cereal output for the eight coastal countries along the Gulf of Guinea (Benin, Côte d'Ivoire, Ghana, Guinea, Liberia, Nigeria, Sierra Leone and Togo) is estimated at some 29.5 million tonnes compared to 29.4 million tonnes in 2000. Average to above-average harvests were gathered in all the coastal countries, except in Ghana and Sierra Leone.

In the Sahel, extended dry weather conditions over most parts of the Gambia, Guinea-Bissau, Mauritania and Senegal have damaged crop prospects and raised serious concerns over the food supply outlook. Following the first rains in June, a dry spell through late June and July has seriously affected growing crops. Re-plantings were carried out in several areas but overall yield potential was seriously compromised. In Cape Verde, prospects for the maize crop, normally planted from July, are unfavourable due to delayed onset of rains. A recovery in crop prospects will heavily depend on the performance of rainfall in August. By contrast, crop growing conditions have improved in central and eastern parts of the Sahel with increased and better distributed rainfall in most agricultural regions of Burkina Faso, Chad, Mali and Niger. However, substantial replantings were necessary.

Following the release of final production estimates for 2001 in most CILSS member countries, the aggregate output of cereals (including rice in milled equivalent) has been put at about 12 million tonnes. This is about 30 percent higher than in 2000 and 24 percent above the average for the last five years. Record crops were harvested in Burkina Faso, Gambia and Niger, while output was above average in Chad, Mali and Senegal. Production in Cape Verde was lower than the previous year but above average.

In the countries along the Gulf of Guinea, the food supply situation is expected to remain satisfactory through the 2002 marketing year, except in Liberia, Guinea and Sierra Leone where production and marketing activities have been affected by current or past civil strife. In the Sahel, the food supply situation is expected to be stable until the next harvest from October, except in Mauritania where thousands of people are threatened by serious food shortages. Elsewhere in the Sahel, farmers' stocks have been replenished and markets are well supplied. However, access to food for some sections of the population may be difficult, following above-normal cereal prices in most countries. Several areas within countries also remain at risk of food shortages and may require some assistance, notably in Cape Verde, Chad, Niger and Senegal. Localised deficits can be covered by transfers from surplus areas or through triangular transactions.

The aggregate cereal import requirement of the western Africa sub-region in the 2001/2002 marketing year is estimated at 7.4 million tonnes. Commercial imports are estimated at 7.0 million tonnes and food aid requirement at 0.4 million tonnes, mainly wheat and rice.

LOCUST SITUATION

The Desert Locust situation remained calm during July. Rainfall was generally poor in the summer breeding areas of the Sahel in West Africa but low numbers of adults are probably present in a few areas of south-eastern Mauritania and in northern Mali. Small-scale breeding is expected to occur in southern Mauritania, northern Mali and Niger as the rains increase in these areas. A few individual locust adults were reported in the summer breeding areas in Sudan during July.

In **central Africa**, average to above-average harvests were gathered in 2001 in most countries except the Democratic Republic of Congo affected by civil strife. Crops are currently growing under generally favourable conditions in Cameroon and Central African Republic. However, in the Republic of Congo, a resurgence of fighting in the Pool region (surrounding the capital Brazzaville) at the end of March led to new population displacements and disrupted agricultural and marketing activities. In Democratic Republic of Congo, persistent fighting continues to result in fresh waves of population displacements and increasing food insecurity. In late July, some 350 newly displaced people were reported to have arrived in the city of Kindu, fleeing fighting in surrounding areas where severe food shortages are also reported.

For the 2002 marketing year, the cereal import requirement for the seven countries of the sub-region is estimated at about 826 000 tonnes, to be met almost entirely through commercial channels.

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

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

Sub-region	2001 Production	2001/02 or 2002		
		Cereal import requirements	Anticipated commercial imports	Food aid requirements
Eastern Africa	24 043	4 071	3 087	984
Southern Africa	19 402	4 340	3 989	351
Western Africa	38 811	7 368	6 965	403
Central Africa	2 849	826	749	77
TOTAL	85 105	16 605	14 790	1 815

Table 1: Cereal Imports and Food Aid Requirements in 2002/03 for sub-Saharan Africa Countries
which have entered their 2002/03 marketing year (in thousand tonnes)

Sub-Region/ Country	Marketing year	2002 Cereal production 1/		Position for 2002/03						
		Total	As %of average of previous 5 years	Cereal import require- ments 2/	Antici- pated com- mer- cial imports	Food aid require- ments	Commer- cial imports already made or contracted	Food aid		
								Pledges	of which received so far	Uncov. food aid require- ments
Eastern Africa		4 549	#DIV/0!	570	450	120	-	9	2	111
Somalia	Aug./July	259	#DIV/0!	300	230	70	-	-	-	70
Tanzania	June/May	4 290	#DIV/0!	270	220	50	-	9	2	41
Southern Africa		19 030	#DIV/0!	6 584	4 304	2 280	1 125	292	162	1 996
Angola	April/March	549	#DIV/0!	725	504	221	-	88	62	133
Botswana	April/March	25	#DIV/0!	266	266	-	-	-	-	-
Lesotho	April/March	54	#DIV/0!	338	191	147	-	7	7	140
Madagascar	April/March	1 812	#DIV/0!	315	308	7	5	15	2	-
Malawi	April/March	1 661	#DIV/0!	510	302	208	250	14	14	194
Mozambique	April/March	1 715	#DIV/0!	642	592	50	43	41	41	9
Namibia	May/April	69	#DIV/0!	156	156	-	-	-	-	-
South Africa	May/April	11 646	#DIV/0!	1 026	1 026	-	177	-	-	-
Swaziland	May/April	68	#DIV/0!	111	96	15	-	-	-	15
Zambia	May/April	744	#DIV/0!	626	401	225	350	17	17	208
Zimbabwe	April/March	687	#DIV/0!	1 869	462	1 407	300	110	20	1 297
TOTAL		23 579	#DIV/0!	7 154	4 754	2 400	1 125	301	164	2 107

1/ Including rice in milled equivalent.

2/ Excluding re-exports.

Table 2: Cereal Imports and Food Aid Requirements in sub-Saharan Africa, 2001/02 or 2002 (in thousand tonnes)

Sub-Region/ Country	Marketing year	2001 Cereal production 1/		2000/01 or 2001 imports			Position for 2001/02 or 2002						
		Total	As % of average of previous 5 years	Total imports	As % of average of previous 5 years	Food aid	Cereal import require- ment 2/	Antici- pated commer- cial imports	Food aid require- ment	Commer- cial imports already made or contracted	Food aid		
											Pledges 3/	of which received so far	Uncov. food aid require- ments
Countries still in 2001/02 or 2002 marketing year													
Eastern Africa		19 879	111	5 433	163	1 759	3 292	2 494	798	992	405	317	395
Burundi	Jan./Dec.	277	106	110	222	46	65	30	35	-	6	3	29
Comoros	Jan./Dec.	6	100	46	103	-	46	46	-	13	-	-	-
Djibouti	Jan./Dec.	-	-	68	77	9	63	55	8	15	10	10	-
Eritrea	Jan./Dec.	220	108	362	155	270	140	75	65	55	21	21	45
Ethiopia 4/	Jan./Dec.	8 827	105	883	142	845	300	125	175	11	140	67	35
Kenya	Oct./Sept.	3 205	122	2 060	160	348	1 080	810	270	344	111	111	159
Rwanda	Jan./Dec.	252	125	175	71	31	190	150	40	-	16	16	24
Seychelles	Jan./Dec.	-	-	13	102	-	13	13	-	-	-	-	-
Sudan	Nov./Oct.	5 354	121	1 570	243	158	1 270	1 130	140	555	60	49	80
Uganda	Jan./Dec.	1 738	103	146	151	52	125	60	65	0.3	41	40	24
Southern Africa		2	100	290	108	-	248	248	-	91	-	-	-
Mauritius	Jan./Dec.	2	100	290	108	-	248	248	-	91	-	-	-
Western Africa		38 811	109	9 549	150	378	7 368	6 965	403	2 030	253	186	153
Coastal countries		27 310	104	6 833	160	176	5 236	5 022	214	1 485	118	108	98
Benin	Jan./Dec.	884	101	122	94	14	114	100	14	4	17	12	-
Côte d'Ivoire	Jan./Dec.	1 363	111	1 421	188	6	1 025	1 020	5	172	5	5	-
Ghana	Jan./Dec.	1 525	93	535	118	54	461	372	89	185	36	34	53
Guinea	Jan./Dec.	763	106	427	114	33	331	300	31	13	27	27	4
Liberia	Jan./Dec.	94	82	204	98	16	210	180	30	7	8	8	22
Nigeria	Jan./Dec.	21 764	104	3 757	189	-	2 770	2 770	-	1 083	-	-	-
Sierra Leone	Jan./Dec.	224	97	277	112	47	225	185	40	10	26	23	14
Togo	Jan./Dec.	693	104	91	70	6	100	95	5	14	-	-	5
Sahelian countries		11 501	124	2 716	130	202	2 132	1 943	189	545	135	78	55
Burkina Faso	Nov./Oct.	3 071	128	236	139	19	171	148	23	11	12	12	11
Cape Verde	Nov./Oct.	19	136	91	102	50	93	45	48	-	40	17	8
Chad	Nov./Oct.	1 282	124	103	135	34	71	57	14	11	1	1	13
Gambia	Nov./Oct.	186	151	164	144	1	124	119	5	15	5	5	-
Guinea-Bissau	Nov./Oct.	134	106	59	76	7	70	60	10	2	6	6	4
Mali	Nov./Oct.	2 597	117	115	102	7	90	85	5	28	1	1	4
Mauritania	Nov./Oct.	103	73	328	109	33	318	281	37	161	23	14	15
Niger	Nov./Oct.	3 083	131	652	181	30	345	313	32	11	32	8	-
Senegal	Nov./Oct.	1 026	120	969	123	22	850	835	15	306	15	15	-
Central Africa		2 849	99	997	49	75	826	749	77	162	63	61	15
Cameroon	Jan./Dec.	1 242	101	387	146	6	300	298	2	53	2	2	-
Cent.Afr.Rep.	Jan./Dec.	141	103	53	153	1	36	35	1	6	1	1	-
Congo, Dem. Rep of	Jan./Dec.	1 429	96	250	99	29	250	198	52	24	53	52	-
Congo, Rep of	Jan./Dec.	4	100	197	148	34	125	110	15	58	2	2	13
Equat. Guinea	Jan./Dec.	-	-	18	154	2	15	14	1	0.3	-	-	1
Gabon	Jan./Dec.	32	103	82	103	-	88	88	-	20	-	-	-
Sao Tome	Jan./Dec.	1	-	11	106	5	12	6	6	-	5	5	1
Sub-total		61 541	109	16 269	151	2 212	11 734	10 456	1 278	3 275	721	564	563
Countries which have entered their 2002/03 marketing year													
Eastern Africa		4 164	101	784	125	67	779	593	186	641	134	134	52
Somalia	Aug./July	257	97	241	93	34	320	250	70	282	18	18	52
Tanzania	June/May	3 907	102	543	147	33	459	343	116	360	116	116	-
Southern Africa		19 400	87	4 077	96	422	4 092	3 741	351	3 697	366	366	6
Angola	April/March	537	103	553	112	201	581	405	176	352	170	170	6
Botswana	April/March	12	32	255	120	-	267	267	-	267	-	-	-
Lesotho	April/March	81	42	228	118	3	181	178	3	178	3	3	-
Madagascar	April/March	1 939	104	395	240	26	205	198	7	101	29	29	-
Malawi	April/March	1 834	86	39	23	27	125	118	7	110	7	7	-
Mozambique	April/March	1 632	107	427	132	156	684	550	134	550	134	134	-
Namibia	May/April	107	100	82	78	1	135	135	-	79	0.4	0.4	-
South Africa	May/April	10 331	85	1 790	96	-	1 226	1 226	-	1 396	-	-	-
Swaziland	May/April	83	67	87	120	-	78	77	1	77	1	1	-
Zambia	May/April	985	85	76	23	3	270	252	18	252	18	18	-
Zimbabwe	April/March	1 859	76	144	46	4	340	335	5	335	5	5	-
Sub-total		23 564	90	4 861	100	489	4 871	4 334	537	4 338	501	501	58
TOTAL		85 105	103	21 130	135	2 701	16 605	14 790	1 815	7 613	1 221	1 064	621

1/ Including rice in milled equivalent.

2/ Excludes re-exports.

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

4/ Includes refugee needs.

Table 3: Utilization of 2001/02 or 2002 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 require- ment	Surpluses utilized or committed so far			Remain- ing surpluses
	Wheat and rice	Coarse grains			Donor financed local purchases	Exports		
						Commer- cial	Trian- gular trans- actions 1/	
Eastern Africa	3 036	1 035	1 197	637	81	100	3	1 013
Burundi	30	35	-	-	-	-	-	-
Comoros	46	-	-	-	-	-	-	-
Djibouti	60	3	-	-	-	-	-	-
Eritrea	105	35	2	2	2	-	-	-
Ethiopia 2/	275	25	350	200	7	50	-	293
Kenya	680	400	110	100	20	-	1	89
Rwanda	25	165	-	-	-	-	-	-
Seychelles	7	6	-	-	-	-	-	-
Somalia	200	120	-	-	-	-	-	-
Sudan	1 180	90	500	300	21	50	-	429
Tanzania	368	91	150	30	27	-	2	121
Uganda	60	65	85	5	5	-	-	80
Southern Africa	2 262	2 078	1 754	58	60	1 466	55	173
Angola	357	224	5	5	5	-	-	-
Botswana	70	197	-	-	-	-	-	-
Lesotho	53	128	3	3	3	-	-	-
Madagascar	192	13	2	2	2	-	-	-
Malawi	37	88	16	16	16	-	-	-
Mauritius	228	20	-	-	-	-	-	-
Mozambique	552	132	162	12	12	-	-	150
Namibia	60	75	2	2	2	-	-	-
South Africa	350	876	1 521	-	-	1 466	55	-
Swaziland	40	38	-	-	-	-	-	-
Zambia	68	202	43	18	18	-	-	25
Zimbabwe	255	85	-	-	-	-	-	-
Western Africa	6 909	459	530	65	15	-	-	515
Coastal countries	5 046	190	270	-	-	-	-	270
Benin	112	2	55	-	-	-	-	55
Côte d'Ivoire	1 020	5	10	-	-	-	-	10
Ghana	379	82	25	-	-	-	-	25
Guinea	325	6	-	-	-	-	-	-
Liberia	200	10	-	-	-	-	-	-
Nigeria	2 700	70	180	-	-	-	-	180
Sierra Leone	210	15	-	-	-	-	-	-
Togo	100	-	-	-	-	-	-	-
Sahelian countries	1 863	269	260	65	15	-	-	245
Burkina Faso	170	1	100	20	-	-	-	100
Cape Verde	53	40	-	-	-	-	-	-
Chad	68	3	40	20	-	-	-	40
Gambia	122	2	-	-	-	-	-	-
Guinea-Bissau	70	-	-	-	-	-	-	-
Mali	90	-	85	10	6	-	-	79
Mauritania	290	-	-	-	-	-	-	-
Niger	175	170	30	10	6	-	-	24
Senegal	825	25	5	5	3	-	-	2
Central Africa	743	83	5	-	-	-	-	5
Cameroon	290	10	5	-	-	-	-	5
Cent. Afr. Rep.	33	3	-	-	-	-	-	-
Congo, Dem. Rep. of	190	60	-	-	-	-	-	-
Congo, Rep. of	120	5	-	-	-	-	-	-
Equat. Guinea	15	-	-	-	-	-	-	-
Gabon	85	3	-	-	-	-	-	-
Sao Tome	10	2	-	-	-	-	-	-
TOTAL	12 950	3 655	3 486	760	156	1 566	58	1 706

Note: Totals computed from unrounded data.

1/ Referring to supplying countries

2/ Includes refugee needs.

**Table 4: Triangular Transactions within sub-Saharan Africa in 2001/02 or 2002
(in thousand tonnes) 1/**

Donor	Source of supply	Recipient Country	Total by donor
EC	South Africa	Angola (8.2)	8.2
NGOs	South Africa	Kenya (0.3)	0.3
WFP	Kenya South Africa	Somalia (0.7), Angola (3.1), Congo, Dem. Rep. (0.9), Madagascar (0.7), Somalia (3.4), Tanzania (4.4)	13.2
TOTAL			21.7

1/ Based on information reported by donors to GIEWS as of late July 2002.

**Table 5: Local Purchases within sub-Saharan Africa in 2001/02 or 2002
(in thousand tonnes) 1/**

Donor	Recipient Country	Total by donor
EC	Mali (0.8), Sudan (1.5)	2.3
Germany	Kenya (1.0), Malawi (1.5), Sudan (0.1)	2.6
Iran, Isl. Rep. of	Niger (0.5)	0.5
NGOs	Niger (2.4), Tanzania (0.1)	2.5
Netherlands	Niger (0.7)	0.7
WFP	Angola (5.4), Chad (0.4), Eritrea (1.7), Ethiopia (6.8), Kenya (18.8), Lesotho (3.0), Madagascar (2.3), Malawi (14.6) Mali (5.1), Mozambique (11.8), Namibia (2.3), Niger (2.5), Senegal (3.1), Sudan (19.2), Tanzania (26.7), Uganda (5.0), Zambia (18.4), Zimbabwe (0.3)	147.4
TOTAL		156.0

1/ Based on information reported by donors to GIEWS as of late July 2002.

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

Current situation (in thousand tonnes)

Sub-Region / Country	Availabilities for export		Local Purchase Requirements	
	Total	Contracted so far	Total	Utilized so far
<i>Countries still in 2001/02 or 2002 marketing year</i>				
Eastern Africa	440	101	607	55
Eritrea	-	-	2	2
Ethiopia	150	50	200	7
Kenya	10	1	100	20
Sudan	200	50	300	21
Uganda	80	-	5	5
Western Africa	465	-	65	15
<i>Coastal countries</i>	270	-	-	-
Benin	55	-	-	-
Côte d'Ivoire	10	-	-	-
Ghana	25	-	-	-
Nigeria	180	-	-	-
<i>Sahelian countries</i>	195	-	65	15
Burkina Faso	80	-	20	-
Chad	20	-	20	-
Mali	75	-	10	6
Niger	20	-	10	6
Senegal	-	-	5	3
Central Africa	5	-	-	-
Cameroon	5	-	-	-
Sub-total	910	101	672	70
<i>Countries which have entered their 2002/03 marketing year</i>				
Eastern Africa	50	-	-	-
Tanzania	50	-	-	-
Southern Africa	1 260	254	28	8
Angola	-	-	2	2
Lesotho	-	-	3	3
Malawi	-	-	3	3
Mozambique	100	-	20	-
South Africa	1 150	254	-	-
Zambia	10	-	-	-
Sub-total	1 310	254	28	8
TOTAL	2 220	355 1/	700	78

Table 7: Cereal Food Aid Pledges to Sub-Saharan Africa for 2001/02 or 2002 and Triangular

Transactions/Local Purchases known to FAO as of late July 2002 (in thousand tonnes).

Donor	Wheat	Rice	Coarse grains	Total cereals	Of which: triangular	Local purchases
China	-	3.0	-	3.0	-	-
EC	30.6	9.2	23.1	62.9	8.2	5.6
of which:						
Community action	19.3	3.9	0.1	23.3	8.2	2.3
National action	11.3	5.3	23.0	39.6	-	3.3
Austria	-	-	3.2	3.2	-	-
Belgium	-	1.9	-	1.9	-	-
France	3.3	-	2.0	5.3	-	-
Germany	-	0.1	12.3	12.4	-	2.6
Italy	-	3.3	-	3.3	-	-
Luxembourg	8.0	-	-	8.0	-	-
Netherlands	-	-	5.5	5.5	-	0.7
Egypt	0.1	-	-	0.1	-	-
Iran, Islamic Rep. of	-	-	-	-	-	0.5
Japan	-	195.9	3.0	198.9	-	-
Libyan Arab Jamahiriya	4.3	4.3	-	8.6	-	-
NGOs	0.6	-	5.4	6.0	0.3	2.5
Pakistan	-	1.1	-	1.1	-	-
Qatar	1.2	1.1	-	2.3	-	-
United States	250.2	17.2	61.7	329.1	-	-
World Food Programme	103.7	40.9	464.7	609.3	13.2	147.4
TOTAL	390.7	272.7	557.9	1 221.3	21.7	156.0

Table 8: Food Aid Pledges in Cereals for 2001/02 or 2002 by Donor and by Recipient (in thousand tonnes)

Donor/Recipient	Total	delivered	China	EC	Japan	NGOs	U.S.A.	WFP	Others
Eastern Africa	539.3	450.9	-	13.7	37.2	0.3	153.5	334.6	-
Burundi	5.9	2.9	-	2.7	-	-	-	3.2	-
Comoros	-	-	-	-	-	-	-	-	-
Djibouti	10.2	10.2	-	-	-	-	-	10.2	-
Eritrea	20.5	20.5	-	-	-	-	-	20.5	-
Ethiopia 1/	140.3	67.3	-	-	-	-	101.0	39.3	-
Kenya	111.0	111.0	-	-	-	0.3	35.0	75.7	-
Rwanda	16.4	16.4	-	-	-	-	-	16.4	-
Seychelles	-	-	-	-	-	-	-	-	-
Somalia	18.1	18.1	-	-	-	-	5.5	12.6	-
Sudan	59.7	48.7	-	11.0	-	-	7.7	41.0	-
Tanzania	116.3	116.3	-	-	37.2	-	-	79.1	-
Uganda	40.9	39.5	-	-	-	-	4.3	36.6	-
Southern Africa	366.4	366.4	-	24.5	86.0	3.2	110.7	142.0	-
Angola	169.7	169.7	-	17.8	38.4	0.4	13.1	100.0	-
Botswana	-	-	-	-	-	-	-	-	-
Lesotho	2.8	2.8	-	-	-	2.8	-	-	-
Madagascar	28.6	28.6	-	5.4	9.9	-	7.3	6.0	-
Malawi	6.6	6.6	-	1.3	-	-	5.3	-	-
Mauritius	-	-	-	-	-	-	-	-	-
Mozambique	133.7	133.7	-	-	34.7	-	85.0	14.0	-
Namibia	0.4	0.4	-	-	-	-	-	0.4	-
South Africa	-	-	-	-	-	-	-	-	-
Swaziland	1.2	1.2	-	-	-	-	-	1.2	-
Zambia	18.4	18.4	-	-	3.0	-	-	15.4	-
Zimbabwe	5.0	5.0	-	-	-	-	-	5.0	-
Western Africa	252.6	185.7	3.0	23.5	70.9	2.5	64.9	75.7	12.1
Coastal countries	118.1	108.0	-	-	32.2	0.4	32.0	53.5	-
Benin	16.6	11.5	-	-	7.8	-	6.7	2.1	-
Côte d'Ivoire	4.6	4.6	-	-	-	-	-	4.6	-
Ghana	35.9	34.2	-	-	10.6	-	23.7	1.6	-
Guinea	26.7	26.7	-	-	13.8	-	-	12.9	-
Liberia	8.3	8.3	-	-	-	0.4	1.6	6.3	-
Nigeria	-	-	-	-	-	-	-	-	-
Sierra Leone	26.0	22.7	-	-	-	-	-	26.0	-
Togo	-	-	-	-	-	-	-	-	-
Sahelian countries	134.5	77.7	3.0	23.5	38.7	2.1	32.9	22.2	12.1
Burkina Faso	12.3	11.9	-	0.4	8.0	0.1	3.8	-	-
Cape Verde	39.7	16.5	-	20.6	5.4	-	13.0	0.7	-
Chad	1.3	1.3	-	-	-	-	-	1.3	-
Gambia	5.3	5.3	-	-	-	-	-	5.3	-
Guinea-Bissau	5.7	5.7	3.0	0.6	-	-	-	2.1	-
Mali	0.9	0.6	-	0.3	-	-	0.6	-	-
Mauritania	22.5	13.7	-	-	8.8	-	7.7	6.0	-
Niger	32.1	8.0	-	-	7.2	2.0	7.8	3.0	12.1 2/
Senegal	14.7	14.7	-	1.6	9.3	-	-	3.8	-
Central Africa	63.0	61.4	-	1.2	4.8	-	-	57.0	-
Cameroon	1.8	1.8	-	-	-	-	-	1.8	-
Cent.Afr.Rep.	0.7	0.7	-	-	-	-	-	0.7	-
Congo, Dem.Rep.of	53.3	51.7	-	1.2	-	-	-	52.1	-
Congo, Rep.of	2.0	2.0	-	-	-	-	-	2.0	-
Equat. Guinea	-	-	-	-	-	-	-	-	-
Gabon	-	-	-	-	-	-	-	-	-
Sao Tome	5.2	5.2	-	-	4.8	-	-	0.4	-
TOTAL	1 221.3	1 064.4	3.0	62.9	198.9	6.0	329.1	609.3	12.1

1/ Includes refugee needs.

2/ Includes 8.6 from Libya, 1.1 from Pakistan, 2.3 from Qatar, 0.1 from Egypt.

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

(situation as of late July 2002)

ANGOLA

Area:	1 247 000 sq km
Climate:	Coastal desert, south-west semi-arid, rest tropical wet-dry. Rainy season: September-May
Population:	14.90 million (2002 estimate), G.N.P. per caput US\$290 (2000)
Specific characteristics of the country:	Low-income food-deficit country; infrastructure devastated by prolonged civil strife
Logistics:	Inadequate port, rail and road facilities
Major foodcrops:	Roots, tubers, maize, plantains
Marketing year:	April/March; Lean season: January-April
Share of cereals in total calorie intake:	35 percent

CURRENT SITUATION

An FAO/WFP Crop and Food Supply Assessment Mission in May/June 2002 estimated the 2002 cereal harvest at 549 000 tonnes, slightly down on last year. Cassava production was estimated 7 percent higher at 5 620 000 tonnes. The cease-fire agreement signed in April between the UNITA and the Angolan Government came too late to make a significant difference to the area planted to foodcrops, which however increased by 6 percent from the previous year. The country was spared by the drought which affected much of southern Africa in the 2001/02 cropping season, although rains were uneven and late and yields of all crops generally below potential. Cereal import requirements for 2002/03 are estimated at 725 000 tonnes, of which 504 000 tonnes are expected as commercial imports and 221 000 tonnes as emergency food aid.

The number of people in urgent need of food assistance is estimated at 1.42 million. WFP plans to assist 1.24 million people, including IDPs with insufficient or no access to land, the families of UNITA soldiers, the vulnerable population in previously inaccessible areas and refugees returning to Angola.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	5	7	527	539
Previous five years average imports	264	104	181	549
<u>2002/03 Domestic Availability</u>	-	3	546	549
2002 Production (rice in paddy terms)	-	4	546	550
2002 Production (rice in milled terms)	-	3	546	549
Possible stock drawdown	-	-	-	-
<u>2002/03 Utilization</u>	280	160	834	1 274
Food use	280	160	725	1 165
of which: local purchase requirement	-	-	2	2
Non-food use	-	-	109	109
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002/03 Import Requirement</u>	280	157	288	725
Anticipated commercial imports	280	157	67	504
Food aid needs	-	-	221	221
<u>Current Aid Position</u>				
Food aid pledges	21	-	67	88
of which: delivered	-	-	62	62
Donor-financed purchases	-	-	2	2
of which: for local use	-	-	2	2
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	19	11	49	78
<u>Indexes</u>				
2002 Production as % of average:				102
2002/03 Import requirement as % of average:				132

BENIN

Area:	112 620 sq km
Climate:	Tropical wet-dry; two rainy seasons in south (March-July and October) and one in north (May-October)
Population:	6.43 million (2002 estimate); G.N.P. per caput US\$370 (2000)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports, roads, rail adequate; gateway to Niger
Major foodcrops:	Roots and tubers, maize
Marketing year:	January/December; Lean season: April-June
Share of cereals in total calorie intake:	37 percent

CURRENT SITUATION

First rains started in the south in early April, allowing land preparation and planting of the first maize crop. They progressed to the north in April and were widespread and above average in early May, allowing planting and emergence of millet and sorghum crops in the north. Rainfall decreased somewhat in late May, became generally below average in mid-June, but resumed in late June. Precipitation remains abundant in early July in the north but decreased significantly in the south.

Following an average cereal harvest in 2001, estimated at about 900 000 tonnes, the overall food supply situation remains satisfactory. Cereal imports for domestic use and re-exports during the 2002 marketing year are estimated at 144 000 tonnes, including 14 000 tonnes of food aid.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	34	855	889
Previous five years average imports	53	97	4	154
<u>2002 Domestic Availability</u>	<u>-</u>	<u>29</u>	<u>910</u>	<u>939</u>
2001 Production (rice in paddy terms)	-	49	855	904
2001 Production (rice in milled terms)	-	29	855	884
Possible stock drawdown	-	-	55	55
<u>2002 Utilization</u>	<u>58</u>	<u>113</u>	<u>912</u>	<u>1 083</u>
Food use	52	81	647	780
of which: local purchase requirement	-	-	-	-
Non-food use	1	7	210	218
Exports or re-exports	5	25	55	85
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>58</u>	<u>84</u>	<u>2</u>	<u>144^{1/}</u>
Anticipated commercial imports	55	75	-	130
Food aid needs	3	9	2	14
<u>Current Aid Position</u>				
Food aid pledges	3	11	3	17
of which: delivered	-	9	2	12
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>8</u>	<u>13</u>	<u>101</u>	<u>121</u>
<u>Indexes</u>				
2001 Production as % of average:				102
2002 Import requirement as % of average:				94

^{1/} Includes 5 000 tonnes of wheat and 25 000 tonnes of rice for re-exports.

BOTSWANA

Area:	567 000 sq km
Climate:	South-western part arid (Kalahari desert); rest semi-arid with some rains in December-February
Population:	1.68 million (2002 estimate); G.N.P. per caput: US\$3 300 (2000)
Specific characteristics of the country:	East; swamps in the northern parts; desert in the west
Logistics:	Imports through South Africa
Major foodcrops:	Sorghum, pulses, vegetables
Marketing year:	April/March; Lean season: January-March
Share of cereals in total calorie intake:	55 percent

CURRENT SITUATION

Final official production estimates indicate a 2002 cereal crop of 25 000 tonnes. Output of sorghum, at 23 000 tonnes, more than doubled last year's reduced crop of 10 000 tonnes. However, at this level it remained below normal. Yields of sorghum and maize crops were reduced by a prolonged dry spell in January.

Cereal import requirements in marketing year 2002/03 (April/March) are estimated by FAO at 266 000 tonnes, which are expected to be covered as usual on commercial basis.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	-	19	19
Previous five years average imports	69	-	185	254
<u>2002/03 Domestic Availability</u>	=	=	29	29
2002 Production (rice in paddy terms)	-	-	25	25
2002 Production (rice in milled terms)	-	-	25	25
Possible stock drawdown	-	-	4	4
<u>2002/03 Utilization</u>	78	=	217	295
Food use	71	-	215	286
<i>of which: local purchase requirement</i>	-	-	-	-
Non-food use	-	-	2	2
Exports or re-exports	7	-	-	7
Possible stock build up	-	-	-	-
<u>2002/03 Import Requirement</u>	78	=	188	266
Anticipated commercial imports	78	-	188	266
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
<i>of which: delivered</i>	-	-	-	-
Donor-financed purchases	-	-	-	-
<i>of which: for local use</i>	-	-	-	-
<i>for export</i>	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	42	=	128	170
<u>Indexes</u>				
2002 Production as % of average:				132
2002/03 Import requirement as % of average:				105

BURKINA FASO

Area:	274 000 sq km
Climate:	Tropical wet-dry in south, semi-arid in north; rainy season: May-October
Population:	11.74 million (2002 estimate); G.N.P. per caput: US\$210 (2000)
Specific characteristics of the country:	Low-income food-deficit country; Sahelian land-locked country
Logistics:	Roads inadequate during rainy season; adequate rail link to Abidjan (Côte d'Ivoire)
Major foodcrops:	Millet, sorghum, pulses, maize
Marketing year:	November/October; Lean season: July-September
Share of cereals in total calorie intake:	73 percent

CURRENT SITUATION

Rainfall was generally erratic and below average until late June, when the Government officially declared 14 provinces (out of 45) water-deficient. However rains increased significantly in July over the entire country, particularly in the north. With this improvement, millet and sorghum crops, which are generally emerging/tillering, have recovered and are developing quite satisfactorily. However, reflecting the erratic installation of the rainy season, stages of development vary greatly in the regions and plantings and replantings are still underway in several localities of the northern, eastern and central plateau regions. Due to the delayed rains and the earlier drier conditions, rainfall in August will be decisive for the output of the season.

The final 2001 production estimates released by the statistical services indicate that 2001 aggregate production of cereals reached a record of 3.11 million tonnes, 36 percent higher than the previous year and 28 percent above average

The overall food supply situation is satisfactory. Markets are well supplied. However, above-normal cereal prices have been reported and localized food shortages may persist in areas which harvested poor crops due to early cession of the rains.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	98	2 330	2 428
Previous five years average imports	63	110	19	192
<u>2001/02 Domestic Availability</u>	<u>63</u>	<u>208</u>	<u>2 349</u>	<u>2 620</u>
2001 Production (rice in paddy terms)	-	113	2 996	3 109
2001 Production (rice in milled terms)	-	75	2 996	3 071
Possible stock drawdown	-	2	-	2
<u>2001/02 Utilization</u>	<u>60</u>	<u>187</u>	<u>2 997</u>	<u>3 243</u>
Food use	59	173	2 175	2 407
of which: local purchase requirement	-	-	20	20
Non-food use	1	14	461	476
Exports or re-exports	-	-	80	80
Possible stock build up	-	-	280	280
<u>2001/02 Import Requirement</u>	<u>60</u>	<u>110</u>	<u>1</u>	<u>171</u>
Anticipated commercial imports	50	98	-	148
Food aid needs	10	12	1	23
<u>Current Aid Position</u>				
Food aid pledges	-	12	-	12
of which: delivered	-	12	-	12
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>5</u>	<u>15</u>	<u>185</u>	<u>205</u>
<u>Indexes</u>				
2001 Production as % of average:				128
2001/02 Import requirement as % of average:				89

BURUNDI

Area:	25 700 sq km
Climate:	Highland rainy climate with moderate temperature (20°C); two rainy seasons: Feb.-May and September-November
Population:	6.8 million (2002 estimate); G.N.P. per caput: US\$110 (2000)
Specific characteristics of the country:	Low-income food-deficit country; land-locked country
Logistics:	Ports: Mombasa (Kenya) and Dar es Salaam (Tanzania); rail and road connections inadequate
Major foodcrops:	Pulses, plantains, roots, tubers, maize and sorghum
Marketing year:	January/December; Lean season: November-December
Share of cereals in total calorie intake:	34 percent

CURRENT SITUATION

The output of the recently harvested 2002 second season crops is estimated at about 1.985 million tonnes, 4 percent above the 2001 second season output. This includes 180 000 tonnes of cereals, 182 000 tonnes of pulses 909 000 tonnes of root and tubers and 713 000 tonnes of bananas and plantains.

An improved security situation during the cropping season in most provinces, except in Ruyigi, boosted agricultural activities. Rains were normal to above normal and in general benefited development of sorghum, tubers and banana crops. However, excessive precipitation in April/May in the provinces of Gitega and Kirundo resulted in yield reductions of beans, particularly those late-planted. Beans production was estimated 3 percent lower than last year's same season. The output of the 2002 first season crops was also good mainly for non-cereal foodcrops. Overall the 2002 foodcrop production is estimated 4 percent higher than last year and 6 percent higher than the average level of the pre-crisis period (1988-93).

Prices of food staples, that have been declining since harvest of the first 2002 season in January, remain stable with the exception of those of beans that have registered an increase. Food assistance continue to be necessary for vulnerable groups, including large numbers of internally displaced people.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	9	56	215	280
Previous five years average imports	23	3	38	64
<u>2002 Domestic Availability</u>	<u>9</u>	<u>49</u>	<u>235</u>	<u>293</u>
2002 Production (rice in paddy terms)	9	61	235	305
2002 Production (rice in milled terms)	9	41	235	285
Possible stock drawdown	-	8	-	8
<u>2002 Utilization</u>	<u>34</u>	<u>54</u>	<u>270</u>	<u>358</u>
Food use	32	52	238	322
of which: local purchase requirement	-	-	-	-
Non-food use	2	2	32	36
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>25</u>	<u>5</u>	<u>35</u>	<u>65</u>
Anticipated commercial imports	10	5	15	30
Food aid needs	15	-	20	35
<u>Current Aid Position</u>				
Food aid pledges	1	-	5	6
of which: delivered	1	-	2	3
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>5</u>	<u>7</u>	<u>34</u>	<u>46</u>
<u>Indexes</u>				
2002 Production as % of average:				109
2002 Import requirement as % of average:				102

CAMEROON

Area:	475 440 sq km
Climate:	North: tropical wet-dry, south: tropical wet; length of rainy season declines from 11 months in south to 4 months in extreme north
Population:	15.9 million (2002 estimate); G.N.P. per caput: US\$580 (2000)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports and roads adequate; gateway to Chad
Major foodcrops:	Roots and tubers, coarse grains, fruit
Marketing year:	January/December; Lean season: June-August
Share of cereals in total calorie intake:	39 percent

CURRENT SITUATION

Rains started in the south in March. They became particularly abundant in the south and centre in April and reached the north in late May, permitting land preparation and first plantings. Precipitation decreased and remained below average in June.

The overall food supply situation is satisfactory. Cereal imports (including re-exports) in the 2002 marketing year are estimated at 310 000 tonnes.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	86	1 183	1 269
Previous five years average imports	205	106	10	321
<u>2002 Domestic Availability</u>	<u>0</u>	<u>59</u>	<u>1 183</u>	<u>1 242</u>
2001 Production (rice in paddy terms)	0	86	1 183	1 270
2001 Production (rice in milled terms)	0	59	1 183	1 242
Possible stock drawdown	-	-	-	-
<u>2002 Utilization</u>	<u>220</u>	<u>139</u>	<u>1 193</u>	<u>1 552</u>
Food use	206	128	938	1 273
of which: local purchase requirement	-	-	-	-
Non-food use	4	10	250	264
Exports or re-exports	10	-	5	15
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>220</u>	<u>80</u>	<u>10</u>	<u>310^{1/}</u>
Anticipated commercial imports	220	78	10	308
Food aid needs	-	2	-	2
<u>Current Aid Position</u>				
Food aid pledges	-	2	-	2
of which: delivered	-	2	-	2
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>13</u>	<u>8</u>	<u>59</u>	<u>80</u>
<u>Indexes</u>				
2001 Production as % of average:				100
2002 Import requirement as % of average:				97

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

CAPE VERDE

Area:	4 033 sq km
Climate:	Semi-arid; rainfall increases with altitude; rainy season: July-December
Population:	457 000 (2002 estimate); G.N.P. per caput: US\$1 330 (2000)
Specific characteristics of the country:	Low-income food-deficit country; archipelago
Logistics:	Port capacity and roads adequate
Major foodcrops:	Maize, rice, pulses
Marketing year:	November/October; Lean season: n.a. since 90 percent of requirements covered by imports
Share of cereals in total calorie intake:	57 percent

CURRENT SITUATION

The weather remained mostly dry until early August on all islands. This situation may seriously affect crop production as planting of maize normally starts in July. Land preparation and early dry plantings are underway on most producing islands, notably on Santiago island. Following the 2001 reduced harvest, 45 830 kg of bean seeds and 67 000 kg of maize seeds have been distributed with the assistance of an FAO emergency project.

2001 maize production (virtually the only cereal produced in the country) has been estimated at 18 680 tonnes which is 23 percent lower than the previous year but some 5 000 tonnes higher than average. In early January 2002 the country experienced unseasonable heavy rains and floods which caused damage to infrastructure and farmland. In anticipation of a tight food supply situation in several areas, the Government has appealed for international food assistance, as well as agricultural inputs. In early June, WFP approved an emergency operation to assist some 30 000 people throughout the country.

Cereal import requirement in 2001/02 marketing year (November/October) is forecast at 93 000 tonnes, with food aid accounting for more than 50 percent.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	-	14	14
Previous five years average imports	21	31	38	90
<u>2001/02 Domestic Availability</u>	-	-	19	19
2001 Production (rice in paddy terms)	-	-	19	19
2001 Production (rice in milled terms)	-	-	19	19
Possible stock drawdown	-	-	-	-
<u>2001/02 Utilization</u>	23	30	59	112
Food use	23	30	51	104
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	3	3
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	5	5
<u>2001/02 Import Requirement</u>	23	30	40	93
Anticipated commercial imports	5	20	20	45
Food aid needs	18	10	20	48
<u>Current Aid Position</u>				
Food aid pledges	11	7	21	40
of which: delivered	4	5	7	17
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	50	66	111	227
<u>Indexes</u>				
2001 Production as % of average:				134
2001/02 Import requirement as % of average:				103

CENTRAL AFRICAN REPUBLIC

Area:	622 980 sq km
Climate:	North: tropical wet-dry, south: tropical wet; rainy season: March-November
Population:	3.75 million (2002 estimate); G.N.P. per caput: US\$280 (2000)
Specific characteristics of the country:	Low-income food-deficit country; land-locked country
Logistics:	Roads inadequate during rainy season; river transport important
Major foodcrops:	Roots and tubers, tree nuts, coarse grain, fruit
Marketing year:	January/December; Lean season: May-July
Share of cereals in total calorie intake:	21 percent

CURRENT SITUATION

Precipitation has been generally widespread and abundant since March, notably over the eastern half of the country, benefiting recently planted coarse grains.

Following an above-average harvest in 2001, the food supply situation is satisfactory. With an improvement of the overall security situation, a nation-wide curfew was lifted in mid-May nearly one year after its imposition. In late May, WFP began an Emergency Operation to provide food to some 6 000 IDPs displaced by armed conflict in the northern part of the country.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	19	125	144
Previous five years average imports	31	3	3	37
<u>2002 Domestic Availability</u>	<u>5</u>	<u>16</u>	<u>125</u>	<u>146</u>
2001 Production (rice in paddy terms)	-	25	125	150
2001 Production (rice in milled terms)	-	16	125	141
Possible stock drawdown	5	-	-	5
<u>2002 Utilization</u>	<u>35</u>	<u>19</u>	<u>128</u>	<u>182</u>
Food use	34	16	109	159
of which: local purchase requirement	-	-	-	-
Non-food use	1	3	18	22
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>30</u>	<u>3</u>	<u>3</u>	<u>36</u>
Anticipated commercial imports	30	3	2	35
Food aid needs	-	-	1	1
<u>Current Aid Position</u>				
Food aid pledges	-	-	1	1
of which: delivered	-	-	1	1
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>9</u>	<u>4</u>	<u>29</u>	<u>43</u>
<u>Indexes</u>				
2001 Production as % of average:				104
2002 Import requirement as % of average:				97

CHAD

Area:	1 284 000 sq km
Climate:	From north to south: arid, semi-arid and tropical wet-dry; rainy season: May-October.
Population:	7.76 million (2002 estimate); G.N.P. per caput: US\$200 (2000)
Specific characteristics of the country:	Low-income food-deficit country; land-locked Sahelian country.
Logistics:	Roads inadequate during rainy season
Major foodcrops:	Millet and sorghum, roots and tubers, tree nuts
Marketing year:	November/October; Lean season: August-September
Share of cereals in total calorie intake:	52 percent

CURRENT SITUATION

The start of the rainy season was somewhat erratic. Following the first rains in mid-March in the extreme south and in mid-April in the south-west, precipitation progressed northwards in the Sahelian zone in June. Rainfall was generally irregular and below average in May and June but improved in early July and remained abundant and quite regular in late July. However cumulative rainfall as of late July was generally below average in most meteorological stations due to earlier drier conditions. Millet and sorghum are generally emerging/tillering in the Sudanian zone, while plantings and replantings are still underway in the Sahelian zone. Pastures are regenerating in the Sudanian zone but remain poor in the Sahelian zone. Grasshopper infestations are reported on millet and sorghum in Guéra and Baguirmi regions, while army worms infestations are reported in a few areas of the Sudanian zone.

Following release of final production estimates by national statistical services, the aggregate 2001 cereal production is estimated at a record 1.32 million tonnes, 49 percent higher than the previous year and 23 percent above average. As a result, the overall food supply situation is satisfactory, especially in the chronically food deficit areas in the Sahelian zone which harvested poor crops in 2000. However, some 143 000 people in the Sudanian zone are at risk of food shortages as a result of floods that affected 144 000 hectares of arable land.

Import requirement of cereals in 2001/02 marketing year (November/October) is estimated at 71 000 tonnes, including 14 000 tonnes of food aid.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	3	112	959	1 074
Previous five years average imports	57	11	14	82
<u>2001/02 Domestic Availability</u>	<u>9</u>	<u>87</u>	<u>1 192</u>	<u>1 287</u>
2001 Production (rice in paddy terms)	4	127	1 192	1 322
2001 Production (rice in milled terms)	4	87	1 192	1 282
Possible stock drawdown	5	-	-	5
<u>2001/02 Utilization</u>	<u>62</u>	<u>102</u>	<u>1 195</u>	<u>1 358</u>
Food use	61	82	880	1 023
of which: local purchase requirement	-	-	20	20
Non-food use	1	15	224	240
Exports or re-exports	-	-	20	20
Possible stock build up	-	5	70	75
<u>2001/02 Import Requirement</u>	<u>53</u>	<u>15</u>	<u>3</u>	<u>71</u>
Anticipated commercial imports	45	10	2	57
Food aid needs	8	5	1	14
<u>Current Aid Position</u>				
Food aid pledges	-	-	1	1
of which: delivered	-	-	1	1
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>8</u>	<u>11</u>	<u>114</u>	<u>132</u>
<u>Indexes</u>				
2001 Production as % of average:				123
2001/02 Import requirement as % of average:				87

COMOROS

Area:	2 200 sq km
Climate:	Tropical wet-dry; one hot rainy season with cyclone probability; June-October dry and cool
Population:	0.815 million (2002 estimate); G.N.P. per caput: US\$380 (2000)
Specific characteristics of the country:	Low-income food-deficit country; archipelago of four small islands
Logistics:	-
Major foodcrops:	Rice, roots, tubers, bananas and coconuts
Marketing year:	January/December
Share of cereals in total calorie intake:	44 percent

CURRENT SITUATION

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

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	3	4	7
Previous five years average imports	6	40	-	46
<u>2002 Domestic Availability</u>	=	2	4	6
2001 Production (rice in paddy terms)	-	3	4	7
2001 Production (rice in milled terms)	-	2	4	6
Possible stock drawdown	-	-	-	-
<u>2002 Utilization</u>	6	42	4	52
Food use	6	40	2	48
of which: local purchase requirement	-	-	-	-
Non-food use	-	2	2	4
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	6	40	=	46
Anticipated commercial imports	6	40	-	46
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	7	49	3	59
<u>Indexes</u>				
2001 Production as % of average:				100
2002 Import requirement as % of average:				100

CONGO, DEMOCRATIC REPUBLIC OF

Area:	2 268 000 sq km
Climate:	Tropical wet climate in the central basin, tropical wet-dry in the extreme north and south
Population:	47.59 million (2002 estimate); G.N.P. per caput: US\$100 (1998)
Specific characteristics of the country:	Low-income food-deficit country; tropical country with access to sea
Logistics:	Roads inadequate
Major foodcrops:	Roots and tubers, coarse grains, fruit
Marketing year:	January/December; Lean season: October (north), November-December (south)
Share of cereals in total calorie intake:	15 percent

CURRENT SITUATION

Agricultural activities continue to be disrupted by the persistent civil conflict particularly in the eastern Kivu provinces. In spite of adequate rains in this region, plantings of the 2002 second season crops were reduced due to intensification of fighting in the past months. By contrast, in the Region of Katanga, where better security conditions prevail, maize and beans crops have been reduced by dry weather that affected large growing areas. Reduced food production in neighbouring countries, following dry weather in most of southern Africa, give concern for a decline of food exports to the Katanga Region, particularly to the city of Lubumbashi with over 1 million inhabitants.

An agreement signed in late July committing Rwanda to withdraw its troops from DRC raises hopes of restoration of peace in the country. On the economic side, the resumption of the commercial traffic along the River Congo for the first time since the war broke out in August 1998, and the recent approval of a US\$454 million World Bank loan for the rebuilding of transport infrastructure also rise hopes of a revitalization of the economic and trade activities.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	18	353	1 234	1 605
Previous five years average imports	145	50	52	247
<u>2002 Domestic Availability</u>	<u>18</u>	<u>220</u>	<u>1 194</u>	<u>1 432</u>
2001 Production (rice in paddy terms)	18	326	1 194	1 538
2001 Production (rice in milled terms)	18	217	1 194	1 429
Possible stock drawdown	-	3	-	3
<u>2002 Utilization</u>	<u>158</u>	<u>270</u>	<u>1 254</u>	<u>1 682</u>
Food use	150	228	990	1 367
<i>of which: local purchase requirement</i>	-	-	-	-
Non-food use	8	43	264	315
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>140</u>	<u>50</u>	<u>60</u>	<u>250</u>
Anticipated commercial imports	140	50	8	198
Food aid needs	-	-	52	52
<u>Current Aid Position</u>				
Food aid pledges	-	1	52	53
<i>of which: delivered</i>	-	-	52	52
Donor-financed purchases	-	-	-	-
<i>of which: for local use</i>	-	-	-	-
<i>for export</i>	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>3</u>	<u>5</u>	<u>21</u>	<u>29</u>
<u>Indexes</u>				
2001 Production as % of average:				96
2002 Import requirement as % of average:				101

CONGO, REPUBLIC OF

Area:	342 000 sq km
Climate:	Tropical wet climate in north, tropical wet-dry in south with main rainy season in October-April
Population:	3.11 million (2002 estimate); G.N.P. per caput: US\$570 (2000)
Specific characteristics of the country:	Low-income food-deficit country; tropical coastal country
Logistics:	Ports adequate; roads inadequate during rainy season
Major foodcrops:	Roots and tubers, fruit
Marketing year:	January/December; Lean season: September-November
Share of cereals in total calorie intake:	19 percent

CURRENT SITUATION

A resurgence of fighting in the Pool Region (surrounding the capital Brazzaville) at the end of March has led to new population displacements. About 66 000 IDPs have been reported in the region. Some areas have been cut off from humanitarian aid since late March. The displacement of people and disruption of marketing activities have seriously affected the food supply situation. In late May WFP has started assisting 20 000 IDPs, amidst growing concern about tens of thousands more people trapped in the conflict areas inaccessible to aid agencies. The Emergency Operation for the assistance of the Democratic Republic of Congo's refugees in the North of Congo Brazzaville that was due to end on 31 May 2002 has been extended until December 2002.

Cereal imports for the 2002 marketing year are estimated at 125 000 tonnes, mostly wheat and rice.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	1	3	4
Previous five years average imports	119	38	5	162
<u>2002 Domestic Availability</u>	<u>45</u>	<u>7</u>	<u>4</u>	<u>56</u>
2001 Production (rice in paddy terms)	-	1	4	5
2001 Production (rice in milled terms)	-	-	4	4
Possible stock drawdown	45	7	-	52
<u>2002 Utilization</u>	<u>130</u>	<u>42</u>	<u>9</u>	<u>181</u>
Food use	128	40	7	175
of which: local purchase requirement	-	-	-	-
Non-food use	2	2	2	6
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>85</u>	<u>35</u>	<u>5</u>	<u>125</u>
Anticipated commercial imports	80	25	5	110
Food aid needs	5	10	-	15
<u>Current Aid Position</u>				
Food aid pledges	-	2	-	2
of which: delivered	-	2	-	2
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>41</u>	<u>13</u>	<u>2</u>	<u>56</u>
<u>Indexes</u>				
2001 Production as % of average:				125
2002 Import requirement as % of average:				77

CÔTE D'IVOIRE

Area:	322 460 sq km
Climate:	Tropical wet-dry; two rainy seasons (March-July and September-December) in south and one in north (May-October)
Population:	15.32 million (2002 estimate); G.N.P. per caput: US\$600 (2000)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports and roads adequate; gateway to Burkina Faso and Mali
Major foodcrops:	Roots and tubers, fruit, rice, maize
Marketing year:	January/December; Lean season: April-July
Share of cereals in total calorie intake:	40 percent

CURRENT SITUATION

First rains in the south in late February permitted planting of the first maize crop. Abundant precipitation covered the entire country during April and May, benefiting planting and emergence of millet and sorghum crops in the north.

Following an above-average cereal harvest in 2001, the overall food supply situation is satisfactory. The cereal import requirement for the 2002 marketing year is estimated at 1 025 000 tonnes, mainly rice and wheat. There are some 140 000 Liberian refugees in the country, mainly in the west.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	998	730	1 728
Previous five years average imports	285	640	9	934
<u>2002 Domestic Availability</u>	<u>10</u>	<u>683</u>	<u>730</u>	<u>1 423</u>
2001 Production (rice in paddy terms)	-	1 055	730	1 785
2001 Production (rice in milled terms)	-	633	730	1 363
Possible stock drawdown	10	50	-	60
<u>2002 Utilization</u>	<u>280</u>	<u>1 433</u>	<u>735</u>	<u>2 448</u>
Food use	275	1 275	561	2 111
<i>of which: local purchase requirement</i>	-	-	-	-
Non-food use	5	158	164	327
Exports or re-exports	-	-	10	10
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>270</u>	<u>750</u>	<u>5</u>	<u>1 025</u>
Anticipated commercial imports	270	745	5	1 020
Food aid needs	-	5	-	5
<u>Current Aid Position</u>				
Food aid pledges	-	5	-	5
of which: delivered	-	5	-	5
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>18</u>	<u>83</u>	<u>37</u>	<u>138</u>
<u>Indexes</u>				
2001 Production as % of average:				103
2002 Import requirement as % of average:				110

DJIBOUTI

Area:	23 000 sq km
Climate:	Arid climate
Population:	0.641 million (2002 estimate); G.N.P. per caput: US\$880 (2000)
Specific characteristics of the country:	Low-income food-deficit country
Logistics:	Djibouti is one of the three gateways of Ethiopia
Major foodcrops:	Vegetables
Marketing year:	January/December
Share of cereals in total calorie intake:	52 percent

CURRENT SITUATION

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

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	-	-	-
Previous five years average imports	39	24	3	66
<u>2002 Domestic Availability</u>	=	=	=	=
2001 Production (rice in paddy terms)	-	-	-	-
2001 Production (rice in milled terms)	-	-	-	-
Possible stock drawdown	-	-	-	-
<u>2002 Utilization</u>	40	20	3	63
Food use	40	20	2	62
of which: local purchase requirement	-	-	1	1
Non-food use	-	-	1	1
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	40	20	3	63
Anticipated commercial imports	35	20	-	55
Food aid needs	5	-	3	8
<u>Current Aid Position</u>				
Food aid pledges	8	2	-	10
of which: delivered	8	2	-	10
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	62	31	3	97
<u>Indexes</u>				
2001 Production as % of average:				-
2002 Import requirement as % of average:				95

EQUATORIAL GUINEA

Area:	28 051 sq km
Climate:	Tropical wet climate
Population:	475 800 (2002 estimate); G.N.P. per caput: US\$800 (2000)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports and roads inadequate
Major foodcrops:	Cassava, sweet potatoes, bananas
Marketing year:	January/December; Lean season: September-November
Share of cereals in total calorie intake:	12 percent

CURRENT SITUATION

Precipitation has been widespread and abundant since March. The staple crops are sweet potatoes, cassava and plantains. Cereal import requirement for 2002 is estimated at 15 000 tonnes (10 000 tonnes of wheat and 5 000 tonnes of rice).

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	-	-	-
Previous five years average imports	8	6	-	14
<u>2002 Domestic Availability</u>	=	=	=	=
2001 Production (rice in paddy terms)	-	-	-	-
2001 Production (rice in milled terms)	-	-	-	-
Possible stock drawdown	-	-	-	-
<u>2002 Utilization</u>	10	5	=	15
Food use	10	5	-	15
<i>of which: local purchase requirement</i>	-	-	-	-
Non-food use	-	-	-	-
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	10	5	=	15
Anticipated commercial imports	10	4	-	14
Food aid needs	-	1	-	1
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
<i>of which: delivered</i>	-	-	-	-
Donor-financed purchases	-	-	-	-
<i>of which: for local use</i>	-	-	-	-
<i>for export</i>	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	21	11	=	32
<u>Indexes</u>				
2001 Production as % of average:				-
2002 Import requirement as % of average:				107

ERITREA

Area:	124 320 sq km
Climate:	Highland areas: tropical wet/dry with unreliable rains. Lowlands: semi-arid to arid
Population:	3.3 million (2002 estimate); G.N.P. per caput: US\$170 (2000)
Specific characteristics of the country:	Low-income food-deficit country
Logistics:	Roads inadequate, gateway to northern Ethiopia
Major foodcrops:	Sorghum, teff, millet, maize, pulses
Marketing year:	January/December; Lean season: August-November
Share of cereals in total calorie intake:	73 percent

CURRENT SITUATION

Prospects for the current 2002 main season crops are bleak following severe and prolonged drought conditions. The spring (short) rains from March to May have totally failed undermining the early land preparation and replenishment of pasture. This has been followed by a long dry spell in the important planting months of June and July. Alarmed by the grave domestic food supply outlook the Eritrean Government has issued a drought alert on 24 July 2002 calling for urgent contingency measures by both local and international organizations to mitigate the impending humanitarian crisis.

The overall food supply situation is already tight reflecting the displacement of large numbers of people by the war with Ethiopia, the effects of earlier successive years of drought and continued repatriation of refugees from neighbouring Sudan. Over 1 million people are now estimated to be in need of urgent assistance. The slow response to the 2002 UN Consolidated Appeal (CAP) also remains a major concern to both the Government and humanitarian agencies.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	13	-	191	204
Previous five years average imports	218	5	79	302
<u>2002 Domestic Availability</u>	<u>92</u>	<u>-</u>	<u>213</u>	<u>305</u>
2001 Production (rice in paddy terms)	10	-	210	220
2001 Production (rice in milled terms)	10	-	210	220
Possible stock drawdown	82	-	3	85
<u>2002 Utilization</u>	<u>182</u>	<u>15</u>	<u>248</u>	<u>445</u>
Food use	172	15	229	416
of which: local purchase requirement	-	-	2	2
Non-food use	10	-	19	29
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>90</u>	<u>15</u>	<u>35</u>	<u>140</u>
Anticipated commercial imports	30	15	30	75
Food aid needs	60	-	5	65
<u>Current Aid Position</u>				
Food aid pledges	10	-	11	21
of which: delivered	10	-	11	21
Donor-financed purchases	-	-	2	2
of which: for local use	-	-	2	2
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>52</u>	<u>5</u>	<u>69</u>	<u>125</u>
<u>Indexes</u>				
2001 Production as % of average:				108
2002 Import requirement as % of average:				46

ETHIOPIA

Area:	976 680 sq km
Climate:	Northern coastal area and lowlands in south and east are semi-arid to arid; rest of country has a highland rainy climate with mild winter.
Population:	66.5 million (2002 estimate); G.N.P. per caput: US\$100 (2000)
Specific characteristics of the country:	Low-income food-deficit country
Logistics:	Land-locked country, roads inadequate
Major foodcrops:	Maize, teff, barley, sorghum, wheat, pulses, enset (false banana)
Marketing year:	January/December; Lean season: August-November
Share of cereals in total calorie intake:	69 percent

CURRENT SITUATION

Despite a favourable onset of the 2002 secondary "belg" season rainfall and consequent optimistic crop prospects, its poor distribution and early withdrawal has created a rather alarming food situation in several parts of the country. The belg crop accounts for some 10 percent of total grain production but in some areas it provides most of the annual grain production. The main "meher" rainy season is also off to a poor start with the important July rainfall well below normal. Heavy rains were mainly confined to small areas in the western highlands, although moderate to heavy showers hit parts of north-central towards the end of July.

In response to this alarming situation the Government has launched a special alert on 12 July. Of immediate concern are Afar and Kereyu pastoralists in the east and north-eastern parts of the country. Large number of livestock deaths and unusual migrations in search of water and pasture were reported. Other areas of concern include, low lands of Bale and Hararghe in Oromia Region, and Shinile, Fik, Dagahbour, and Jijiga Zones in Somali Region. The sharp fall in prices following the bumper 2001 main "meher" season is now reversed with sharp rises reported in parts. The number of people in need of emergency food aid requirements in 2002, estimated earlier at some 5.2 million people, has been revised upwards to more than 8.5 million people. An Emergency Operation was jointly approved in May 2002 by FAO and WFP for food assistance to 2.1 million small scale farmers and drought-affected pastoralists, worth US\$51.1 million for a period of 12 months (1 April 2002 to 31 March 2003).

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	1 211	-	7 230	8 441
Previous five years average imports	697	13	58	768
<u>2002 Domestic Availability</u>	<u>1 800</u>	<u>-</u>	<u>7 527</u>	<u>9 327</u>
2001 Production (rice in paddy terms)	1 400	-	7 427	8 827
2001 Production (rice in milled terms)	1 400	-	7 427	8 827
Possible stock drawdown	400	-	100	500
<u>2002 Utilization</u>	<u>2 060</u>	<u>15</u>	<u>7 552</u>	<u>9 627</u>
Food use	1 920	15	6 507	8 442
of which: local purchase requirement	5	-	195	200
Non-food use	140	-	895	1 035
Exports or re-exports	-	-	150	150
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>260</u>	<u>15</u>	<u>25</u>	<u>300</u>
Anticipated commercial imports	110	15	-	125
Food aid needs	150	-	25	175
<u>Current Aid Position</u>				
Food aid pledges	115	1	25	140
of which: delivered	43	-	24	67
Donor-financed purchases	5	-	2	7
of which: for local use	5	-	2	7
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>29</u>	<u>0</u>	<u>98</u>	<u>127</u>
<u>Indexes</u>				
2001 Production as % of average:				105
2002 Import requirement as % of average:				39

GABON

Area:	267 670 sq km
Climate:	Tropical wet climate; most rainfall: October-May
Population:	1.30 million (2002 estimate); G.N.P. per caput: US\$3 190 (2000)
Specific characteristics of the country:	Coastal country
Logistics:	Ports and roads adequate
Major foodcrops:	Roots and tubers
Marketing year:	January/December; Lean season: September-November
Share of cereals in total calorie intake:	19 percent

CURRENT SITUATION

Precipitation has been widespread and abundant since March. The main foodcrops are cassava and plantains but some maize is also produced (around 31 000 tonnes).

The country imports commercially the bulk of its cereal requirement, estimated at around 88 000 tonnes for 2002.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	1	31	32
Previous five years average imports	44	34	2	80
<u>2002 Domestic Availability</u>	<u>44</u>	<u>35</u>	<u>33</u>	<u>112</u>
2001 Production (rice in paddy terms)	-	1	31	32
2001 Production (rice in milled terms)	-	1	31	32
Possible stock drawdown	-	-	-	-
<u>2002 Utilization</u>	<u>50</u>	<u>36</u>	<u>34</u>	<u>120</u>
Food use	49	36	26	110
of which: local purchase requirement	-	-	-	-
Non-food use	1	-	8	9
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>50</u>	<u>35</u>	<u>3</u>	<u>88</u>
Anticipated commercial imports	50	35	3	88
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>38</u>	<u>28</u>	<u>20</u>	<u>85</u>
<u>Indexes</u>				
2001 Production as % of average:				100
2002 Import requirement as % of average:				110

GAMBIA

Area:	11 300 sq km
Climate:	Tropical wet-dry climate; rainy season: May-October
Population:	1.50 million (2002 estimate); G.N.P. per caput: US\$340 (2000)
Specific characteristics of the country:	Low-income food-deficit country; coastal Sahelian country
Logistics:	Port capacity and roads adequate
Major foodcrops:	Rice, millet and sorghum
Marketing year:	November/October; Lean season: July-September
Share of cereals in total calorie intake:	63 percent

CURRENT SITUATION

Following above normal precipitation in mid-June which permitted the start of plantings, rains decreased during the last dekad and the weather remained mostly dry until early August. This dry spell may have affected recently planted crops and delayed transplanting of rice.

With three successive bumper crops in 1999, 2000 and 2001, the overall food supply situation is satisfactory. Cereal import requirement for the marketing year 2001/02 (November/October) is forecast at 124 000 tonnes.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	29	104	133
Previous five years average imports	42	84	2	128
<u>2001/02 Domestic Availability</u>	<u>5</u>	<u>23</u>	<u>163</u>	<u>191</u>
2001 Production (rice in paddy terms)	-	36	163	199
2001 Production (rice in milled terms)	-	23	163	186
Possible stock drawdown	5	-	-	5
<u>2001/02 Utilization</u>	<u>45</u>	<u>105</u>	<u>165</u>	<u>315</u>
Food use	29	91	122	242
of which: local purchase requirement	-	-	-	-
Non-food use	1	5	28	33
Exports or re-exports	15	10	-	25
Possible stock build up	-	-	15	15
<u>2001/02 Import Requirement</u>	<u>40</u>	<u>82</u>	<u>2</u>	<u>124</u>
Anticipated commercial imports	40	79	-	119
Food aid needs	-	3	2	5
<u>Current Aid Position</u>				
Food aid pledges	-	4	2	5
of which: delivered	-	4	2	5
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>19</u>	<u>60</u>	<u>81</u>	<u>161</u>
<u>Indexes</u>				
2001 Production as % of average:				149
2001/02 Import requirement as % of average:				97

GHANA

Area:	238 540 sq km
Climate:	Tropical wet-dry; two rainy seasons in south and one in north
Population:	19.4 million (2002 estimate); G.N.P. per caput: US\$340 (2000)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports and roads inadequate
Major foodcrops:	Roots and tubers, coarse grain, rice
Marketing year:	January/December; Lean season: April-June
Share of cereals in total calorie intake:	27 percent

CURRENT SITUATION

First rains in early March permitted planting of the first maize crop. Except in the extreme south, precipitation was generally above average until early June when floods caused by heavy rains displaced more than 2 000 people in the capital, Accra, and in the second largest central city of Kumasi. Rains decreased in June and remained below average. Planting of coarse grains is underway in the north.

In early February, an FAO/WFP Crop and Food Supply Assessment Mission visited northern Ghana where unusually dry weather conditions had affected crop production. The Mission estimated the 2001 cereal production at 1.525 million tonnes, which was below average. However the overall food supply situation is close to normal as reduced cereal production in northern regions will be covered by adequate availability of other foodcrops, anticipated commercial imports and food aid already pledged.

The Mission estimated total cereal import requirements in 2002 (January/December) at 461 200 tonnes including 89 000 tonnes of food aid. Worst affected areas and vulnerable groups will require food assistance estimated at about 5 000 tonnes to compensate for their reduced harvests.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	212	1 523	1 735
Previous five years average imports	234	176	41	451
<u>2002 Domestic Availability</u>	<u>10</u>	<u>173</u>	<u>1 352</u>	<u>1 535</u>
2001 Production (rice in paddy terms)	-	284	1 352	1 636
2001 Production (rice in milled terms)	-	173	1 352	1 525
Possible stock drawdown	10	-	-	10
<u>2002 Utilization</u>	<u>214</u>	<u>348</u>	<u>1 434</u>	<u>1 996</u>
Food use	211	315	1 209	1 734
of which: local purchase requirement	-	-	-	-
Non-food use	3	34	196	232
Exports or re-exports	-	-	25	25
Possible stock build up	-	-	5	5
<u>2002 Import Requirement</u>	<u>204</u>	<u>175</u>	<u>82</u>	<u>461</u>
Anticipated commercial imports	138	167	67	372
Food aid needs	66	9	15	89
<u>Current Aid Position</u>				
Food aid pledges	15	14	7	36
of which: delivered	15	12	7	34
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>11</u>	<u>16</u>	<u>62</u>	<u>89</u>
<u>Indexes</u>				
2001 Production as % of average:				94
2002 Import requirement as % of average:				102

GUINEA

Area:	245 860 sq km
Climate:	Tropical wet-dry; rainy season: March/June to October/November
Population:	7.57 million (2002 estimate); G.N.P. per caput: US\$450 (2000)
Specific characteristics of the country:	Low-income food-deficit country; mountainous coastal country
Logistics:	Ports and roads inadequate
Major foodcrops:	Rice, roots and tubers, coarse grains
Marketing year:	January/December; Lean season: July-September
Share of cereals in total calorie intake:	52 percent

CURRENT SITUATION

The first rains registered in the south in March covered the entire country only in early June. Precipitation remained below average until early July. The overall food supply situation is satisfactory following satisfactory harvests in 2000 and 2001. Markets are well supplied, except in the south-east where recurrent rebel incursions from Sierra Leone have severely affected agricultural and marketing activities.

The presence of a large refugee population and the persistent instability in the sub-region have exacted a heavy toll on the country. According to UNICEF, at least 13 000 new Liberians refugees entered the country in May and June of whom 80 percent were women and children. Armed clashes in and around the country have also resulted in increasing numbers of internally displaced persons (IDPs). Approximately 41 000 Liberians refugees in camps are currently receiving WFP assistance.

Cereal import requirement for the 2002 marketing year is estimated at 331 000 tonnes.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	769	215	984
Previous five years average imports	117	244	3	364
<u>2002 Domestic Availability</u>	<u>5</u>	<u>546</u>	<u>237</u>	<u>788</u>
2001 Production (rice in paddy terms)	-	789	237	1 026
2001 Production (rice in milled terms)	-	526	237	763
Possible stock drawdown	5	20	-	25
<u>2002 Utilization</u>	<u>115</u>	<u>761</u>	<u>243</u>	<u>1 119</u>
Food use	112	636	198	946
<i>of which: local purchase requirement</i>	-	-	-	-
Non-food use	3	115	45	164
Exports or re-exports	-	10	-	10
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>110</u>	<u>215</u>	<u>6</u>	<u>331</u>
Anticipated commercial imports	100	200	-	300
Food aid needs	10	15	6	31
<u>Current Aid Position</u>				
Food aid pledges	6	15	6	27
of which: delivered	6	15	6	27
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>15</u>	<u>84</u>	<u>26</u>	<u>125</u>
<u>Indexes</u>				
2001 Production as % of average:				104
2002 Import requirement as % of average:				91

GUINEA-BISSAU

Area:	36 125 sq km
Climate:	Tropical wet-dry; rainy season: May-October
Population:	1.20 million (2002 estimate); G.N.P. per caput: US\$180 (2000)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Roads inadequate, particularly during the rainy season; river transport important
Major foodcrops:	Rice, coarse grains, oils and fats, roots and tubers
Marketing year:	November/October; Lean season: May-August
Share of cereals in total calorie intake:	64 percent

CURRENT SITUATION

After mostly dry weather until early June, substantial rains in mid-June permitted land preparation and planting to start. However precipitation significantly decreased in July. Recently planted coarse grains are reportedly suffering water stress in several areas and transplanting of rice from seedbeds to swamp areas has been delayed.

Cereal import requirement in 2001/02 (November/October) is forecast at 70 000 tonnes, including 10 000 tonnes of food aid.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	91	60	151
Previous five years average imports	10	60	2	72
<u>2001/02 Domestic Availability</u>	<u>4</u>	<u>59</u>	<u>76</u>	<u>138</u>
2001 Production (rice in paddy terms)	-	88	76	164
2001 Production (rice in milled terms)	-	59	76	134
Possible stock drawdown	4	-	-	4
<u>2001/02 Utilization</u>	<u>14</u>	<u>119</u>	<u>76</u>	<u>208</u>
Food use	14	103	64	181
of which: local purchase requirement	-	-	-	-
Non-food use	-	11	12	22
Exports or re-exports	-	5	-	5
Possible stock build up	-	-	-	-
<u>2001/02 Import Requirement</u>	<u>10</u>	<u>60</u>	-	<u>70</u>
Anticipated commercial imports	5	55	-	60
Food aid needs	5	5	-	10
<u>Current Aid Position</u>				
Food aid pledges	-	5	1	6
of which: delivered	-	5	1	6
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>12</u>	<u>86</u>	<u>53</u>	<u>151</u>
<u>Indexes</u>				
2001 Production as % of average:				108
2001/02 Import requirement as % of average:				97

KENYA

Area:	570 000 sq km
Climate:	North-east is semi-arid to arid; mountainous central and south-western areas have two rainy seasons: March-May and November-December.
Population:	31.61 million (2002 estimate), GNP per caput US\$350 (2000)
Specific characteristics of the country:	Low-income food-deficit country; regular importer and occasional exporter of grain.
Logistics:	Good port (Mombasa) and extensive rail and road network. Gateway to Burundi, Rwanda and Uganda
Major foodcrops:	Maize, wheat, pulses, roots and tubers
Marketing year:	October/September; Lean season: June-July
Share of cereals in total calorie intake:	56 percent

CURRENT SITUATION

Prospects for the 2002 main "long rains" season crops have deteriorated following an early end to long season rains. Earlier optimistic crop prospects based on normal rainfall forecasts were dampened by actual erratic rains and some key maize growing areas in the Rift Valley Province have received poor rains. However, the maize harvest in Western and Nyanza provinces, with the exception of some flooded areas, is expected to be normal to above normal. Early estimates of the long rains maize crop indicate an output of about 1.89 million tonnes compared to 2.32 million tonnes in 2001.

Unusually heavy rains in several previously drought affected pastoralist areas have improved overall food supply prospects. However, continued food security concerns are reported in the districts of Mandera, Moyale, southern parts of Tana River, West Pokot, Koibatek, Marakwet and Baringo. An Emergency Operation was jointly approved in April 2002 by FAO and WFP for food assistance to 1.26 million drought-affected people, worth US\$36.26 million for a period of 6-1/2 months (15 April to 31 October).

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	230	52	2 357	2 639
Previous five years average imports	556	85	920	1 561
<u>2001/02 Domestic Availability</u>	<u>250</u>	<u>37</u>	<u>3 089</u>	<u>3 376</u>
2001 Production (rice in paddy terms)	230	55	2 939	3 224
2001 Production (rice in milled terms)	230	36	2 939	3 205
Possible stock drawdown	20	1	150	171
<u>2001/02 Utilization</u>	<u>790</u>	<u>177</u>	<u>3 489</u>	<u>4 456</u>
Food use	757	155	3 079	3 991
of which: local purchase requirement	-	-	100	100
Non-food use	33	21	400	454
Exports or re-exports	-	-	10	10
Possible stock build up	-	-	-	-
<u>2001/02 Import Requirement</u>	<u>540</u>	<u>140</u>	<u>400</u>	<u>1 080</u>
Anticipated commercial imports	470	140	200	810
Food aid needs	70	-	200	270
<u>Current Aid Position</u>				
Food aid pledges	38	-	74	111
of which: delivered	38	-	74	111
Donor-financed purchases	-	-	21	21
of which: for local use	-	-	20	20
for export	-	-	1	1
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>24</u>	<u>5</u>	<u>97</u>	<u>126</u>
<u>Indexes</u>				
2001 Production as % of average:				122
2001/02 Import requirement as % of average:				69

LESOTHO

Area:	30 000 sq km
Climate:	Highland rainy climate with mild winter. Rainy season: October-April. Cool temperatures in May-September with frost hazard
Population:	2.21 million (2002 estimate); G.N.P. per caput: US\$580 (2000)
Specific characteristics of the country:	Low-income food-deficit country; land-locked
Logistics:	All imports through South Africa
Major foodcrops:	Maize, sorghum, vegetables
Marketing year:	April/March; Lean season: February-April
Share of cereals in total calorie intake:	75 percent

CURRENT SITUATION

The 2002 cereal harvest was estimated by an FAO/WFP Crop and Food Supply Assessment Mission in April/May at 53 800 tonnes. Maize production was put at 34 500 tonnes, wheat at 14 100 tonnes and sorghum at 5 200 tonnes. At this level cereal production is 33 percent lower than the already reduced harvest of 2001. The drop mainly reflects a 60 percent decline in the area planted from normal years, due to heavy and widespread rains during the land preparation and planting period. Large areas in the lowlands with impermeable clay sub-soils were water-logged and took considerable time to drain and dry for tractors and machinery to operate. This was compounded by a shortage of tractors and oxen for ploughing in many areas. Frost in March curtailed the end of the growing season adversely affecting yields.

The cereal import requirement in 2002/03 (April/May) is estimated at an increased level of 338 000 tonnes. Commercial imports are expected at 191 000 tonnes and food aid, for 445 000 most affected people, at 147 000 tonnes. Following the second consecutive poor harvest the Government of Lesotho declared a state of famine and requested international food assistance.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	24	-	133	157
Previous five years average imports	57	4	157	218
<u>2002/03 Domestic Availability</u>	<u>27</u>	<u>-</u>	<u>47</u>	<u>74</u>
2002 Production (rice in paddy terms)	14	-	40	54
2002 Production (rice in milled terms)	14	-	40	54
Possible stock drawdown	13	-	7	20
<u>2002/03 Utilization</u>	<u>94</u>	<u>3</u>	<u>318</u>	<u>415</u>
Food use	93	3	316	412
of which: local purchase requirement	-	-	3	3
Non-food use	1	-	2	3
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002/03 Import Requirement</u>	<u>66</u>	<u>-</u>	<u>272</u>	<u>338</u>
Anticipated commercial imports	66	-	125	191
Food aid needs	-	-	147	147
<u>Current Aid Position</u>				
Food aid pledges	-	-	7	7
of which: delivered	-	-	7	7
Donor-financed purchases	-	-	3	3
of which: for local use	-	-	3	3
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>42</u>	<u>1</u>	<u>143</u>	<u>186</u>
<u>Indexes</u>				
2002 Production as % of average:				34
2002/03 Import requirement as % of average:				155

LIBERIA

Area:	97 750 sq km
Climate:	Southern half tropical wet, northern half tropical wet-dry; rainy season: March-November
Population:	3.0 million (2002 estimate); G.N.P. per caput: n.a.
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports and roads adequate
Major foodcrops:	Rice, roots and tubers, oils
Marketing year:	January/December; Lean season: July-August
Share of cereals in total calorie intake:	48 percent

CURRENT SITUATION

First rains were registered in early March in the south, becoming widespread in late March. However, precipitation remained generally below average until early July.

Following a deterioration of the general security situation, the Government declared a state of emergency on 8 February 2002, which was extended by the parliament in mid-May for six months.

Increasing clashes between Government forces and rebels in the north, north-west and central regions have displaced over 120 000 people. Some 40 000 Liberian refugees have streamed into Sierra Leone already this year, while 37 000 have fled to Guinea, Côte d'Ivoire and Ghana. Moreover, some 39 000 Sierra Leoneans who had been living in camps in Liberia and 15 000 who had lived outside the camps returned home as fighting intensified. The farming season has been disrupted and many people are now dependent on food aid than before.

WFP is currently assisting at least 100 000 people throughout the country.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	115	-	115
Previous five years average imports	61	101	17	179
<u>2002 Domestic Availability</u>	-	94	-	94
2001 Production (rice in paddy terms)	-	145	-	145
2001 Production (rice in milled terms)	-	94	-	94
Possible stock drawdown	-	-	-	-
<u>2002 Utilization</u>	55	239	10	304
Food use	53	218	10	281
of which: local purchase requirement	-	-	-	-
Non-food use	2	21	-	23
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	55	145	10	210
Anticipated commercial imports	40	140	-	180
Food aid needs	15	5	10	30
<u>Current Aid Position</u>				
Food aid pledges	7	-	2	8
of which: delivered	7	-	2	8
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	18	72	3	93
<u>Indexes</u>				
2001 Production as % of average:				126
2002 Import requirement as % of average:				117

MADAGASCAR

Area:	582 000 sq km
Climate:	Eastern coast is tropical wet, the rest tropical wet-dry. Rainy season: October-March; tropical cyclones
Population:	16.34 million (2002 estimate); G.N.P. per caput: US\$250 (2000)
Specific characteristics of the country:	Low-income food-deficit country
Logistics:	Dilapidated roads and lack of spare parts and tyres
Major foodcrops:	Rice, roots, tubers, maize, fruit
Marketing year:	April/March; Lean season: February/March
Share of cereals in total calorie intake:	60 percent

CURRENT SITUATION

Excessive precipitation from a recent cyclone has disrupted the 2002 main paddy crop harvest, leading to concerns over both the quantity and quality of the crop. There are also concerns about disruption of the harvest due to effects of the political crisis of the past six months, mainly shortages of fuel for field operations. The paddy output is forecast at 2.4 million tonnes, down by 200 000 tonnes from 2001. However, a final assessment is still pending.

The tight food supply situation of the past months, with shortages of basic food and increasing food prices in the capital city, have eased with the solution of the political crisis. To assist the country in its economic recovery, international donors in late July pledged US\$2.3 billion in aid over four years. In May, WFP extended its feeding scheme to the country's urban centres following reports of a sharp rise in malnutrition in children under five.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	9	2 495	164	2 668
Previous five years average imports	88	118	11	217
<u>2002/03 Domestic Availability</u>	<u>10</u>	<u>1 637</u>	<u>175</u>	<u>1 822</u>
2002 Production (rice in paddy terms)	10	2 400	170	2 580
2002 Production (rice in milled terms)	10	1 632	170	1 812
Possible stock drawdown	-	5	5	10
<u>2002/03 Utilization</u>	<u>90</u>	<u>1 859</u>	<u>188</u>	<u>2 137</u>
Food use	90	1 759	167	2 016
of which: local purchase requirement	-	-	-	-
Non-food use	-	100	21	121
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002/03 Import Requirement</u>	<u>80</u>	<u>222</u>	<u>13</u>	<u>315</u>
Anticipated commercial imports	78	220	10	308
Food aid needs	2	2	3	7
<u>Current Aid Position</u>				
Food aid pledges	-	15	-	15
of which: delivered	-	2	-	2
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>5</u>	<u>105</u>	<u>10</u>	<u>120</u>
<u>Indexes</u>				
2002 Production as % of average:				97
2002/03 Import requirement as % of average:				145

MALAWI

Area:	94 000 sq km
Climate:	Tropical wet-dry climate; rainy season: November-May
Population	11.44 million (2002 estimate); G.N.P. per caput: US\$170 (2000)
Specific characteristics of the country:	Low-income food-deficit country; land-locked country; importer and exporter of grain
Logistics:	Imports/exports through Beira (Mozambique) or Dar es Salaam (Tanzania)
Major foodcrops:	Maize, pulses, roots, tubers, rice
Marketing year:	April/March; Lean season: February-March
Share of cereals in total calorie intake:	70 percent

CURRENT SITUATION

An FAO/WFP Crop and Food Supply Assessment Mission in April/ May 2002 estimated the 2002 maize production at 1 539 000 tonnes, 10 percent below last year's poor harvest. This reflects a late start of the rainy season followed by localized floods, a long dry spell during February-March, and the early cessation of the rains in April. Reduced input supplies, mainly fertilizers, also adversely affected yields. Consumption of green maize before the harvest, due to severe food shortages in the first months of the year, further diminished the output. The cereal import requirement in 2002/03 marketing year (April/March) is currently estimated at 510 000 tonnes. Commercial imports of cereals are anticipated at some 302 000 tonnes and food aid requirements for 3.2 million vulnerable population at 208 000 tonnes.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	2	82	2 065	2 149
Previous five years average imports	40	1	86	127
<u>2002/03 Domestic Availability</u>	<u>2</u>	<u>63</u>	<u>1 597</u>	<u>1 662</u>
2002 Production (rice in paddy terms)	2	95	1 597	1 694
2002 Production (rice in milled terms)	2	62	1 597	1 661
Possible stock drawdown	-	1	-	1
<u>2002/03 Utilization</u>	<u>50</u>	<u>67</u>	<u>2 055</u>	<u>2 172</u>
Food use	50	55	1 776	1 881
of which: local purchase requirement	-	-	3	3
Non-food use	-	12	274	286
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	5	5
<u>2002/03 Import Requirement</u>	<u>48</u>	<u>4</u>	<u>458</u>	<u>510</u>
Anticipated commercial imports	48	4	250	302
Food aid needs	-	-	208	208
<u>Current Aid Position</u>				
Food aid pledges	-	-	14	14
of which: delivered	-	-	14	14
Donor-financed purchases	-	-	3	3
of which: for local use	-	-	3	3
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>4</u>	<u>5</u>	<u>155</u>	<u>164</u>
<u>Indexes</u>				
2002 Production as % of average:				79
2002/03 Import requirement as % of average:				402

MALI

Area:	1 240 190 sq km
Climate:	From north to south: arid, semi-arid and tropical wet-dry; rainy season: May-October
Population:	10.68 million (2002 estimate); G.N.P. per caput: US\$240 (2000)
Specific characteristics of the country:	Low-income food-deficit country; land-locked Sahelian country
Logistics:	Roads inadequate during rainy season; river transport important; rail link to Dakar (Senegal)
Major foodcrops:	Millet, sorghum, rice, maize
Marketing year:	November/October; Lean season: July-September
Share of cereals in total calorie intake:	75 percent

CURRENT SITUATION

Following the first significant rains in the extreme south in April, precipitation progressed northwards but remained erratic in most regions until late June when growing conditions improved considerably in the central, eastern and northern regions. Floods are reported in the northern locality of Goundan (Tombouctou) and the capital Bamako. By contrast, rainfall decreased during the last decade of July in the western region of Kayes where planted coarse grains are reportedly suffering water stress. Due to the earlier drier weather, cumulative rainfall as of late July was below the same period last year and below average in most meteorological stations. Plantings and replantings are still underway. Crops are generally emerging but early planted maize, millet and sorghum are tillering/elongating. Rice is emerging or being transplanted in the "office du Niger" and the "office de développement rural de Sélingué". Pastures are generally growing well but remain poor in the northern part of Kayes and Koulikoro.

Following well above-average cereal harvest in 2001, estimated at 2.87 million tonnes (including paddy), the overall food situation is satisfactory. Cereal import requirement in 2001/02 (November/October) is estimated at 90 000 tonnes, including 5 000 tonnes of wheat as food aid.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	5	678	1 752	2 435
Previous five years average imports	49	59	4	112
<u>2001/02 Domestic Availability</u>	<u>11</u>	<u>571</u>	<u>2 016</u>	<u>2 599</u>
2001 Production (rice in paddy terms)	9	840	2 016	2 866
2001 Production (rice in milled terms)	9	571	2 016	2 597
Possible stock drawdown	2	-	-	2
<u>2001/02 Utilization</u>	<u>61</u>	<u>611</u>	<u>2 016</u>	<u>2 689</u>
Food use	60	436	1 635	2 131
of which: local purchase requirement	-	-	10	10
Non-food use	1	105	306	413
Exports or re-exports	-	50	75	125
Possible stock build up	-	20	-	20
<u>2001/02 Import Requirement</u>	<u>50</u>	<u>40</u>	<u>-</u>	<u>90</u>
Anticipated commercial imports	45	40	-	85
Food aid needs	5	-	-	5
<u>Current Aid Position</u>				
Food aid pledges	1	-	-	1
of which: delivered	1	-	-	1
Donor-financed purchases	-	-	6	6
of which: for local use	-	-	6	6
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>6</u>	<u>41</u>	<u>153</u>	<u>200</u>
<u>Indexes</u>				
2001 Production as % of average:				118
2001/02 Import requirement as % of average:				80

MAURITANIA

Area:	1 025 520 sq km
Climate:	Mostly a Saharian country; semi-arid fringe in extreme south with rains in June-September
Population:	2.80 million (2002 estimate); G.N.P. per caput: US\$370 (2000)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Port capacity adequate, though storms during January-March sometimes cause difficulties
Major foodcrops:	Wheat, rice, millet and sorghum
Marketing year:	November/October; Lean season: July-September
Share of cereals in total calorie intake:	54 percent

CURRENT SITUATION

The first significant rains received in June in Gorgol, Guidimakha, Hodh El Gharbi and Assaba permitted an early planting of coarse grains. However, precipitation decreased considerably and mostly dry weather persisted in July. Cumulative rainfall as of late July was below average in most meteorological stations. As a result, most rainfed crops plantings failed. Replantings are necessary but seed shortages are likely following the 2001 reduced harvest. Aerial and ground treatments against grain-eating birds are continuing in Trarza department where pest control teams have treated 2 897 hectares as of 30 July. No Desert Locust activity has been reported. However, low numbers of adults are likely to be present in the summer breeding areas of the two Hodhs where small-scale breeding could be in progress.

Seasonal droughts and the poor distribution of rainfall in the 2001/2002 growing season, combined with exceptionally strong rain and cold in mid-January, have created the risk of an unprecedented food crisis. Following release of final production estimates by national statistical services, the aggregate 2001 cereal production is estimated at some 122 177 tonnes, 32 percent lower than the previous year and 27 percent lower than average. Prices of cereals have risen considerably on most markets. In April, WFP approved an Emergency Operation for US\$7.5 million (16 230 tonnes of food) and in mid-May, issued an urgent appeal for funds to help 250 000 people threatened by serious food shortages.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	82	86	168
Previous five years average imports	245	59	9	313
<u>2001/02 Domestic Availability</u>	<u>28</u>	<u>39</u>	<u>64</u>	<u>132</u>
2001 Production (rice in paddy terms)	3	59	60	122
2001 Production (rice in milled terms)	3	39	60	103
Possible stock drawdown	25	-	4	29
<u>2001/02 Utilization</u>	<u>248</u>	<u>124</u>	<u>92</u>	<u>465</u>
Food use	213	108	82	404
of which: local purchase requirement	-	-	-	-
Non-food use	20	15	10	45
Exports or re-exports	15	1	-	16
Possible stock build up	-	-	-	-
<u>2001/02 Import Requirement</u>	<u>220</u>	<u>85</u>	<u>28</u>	<u>333^{1/}</u>
Anticipated commercial imports	200	70	26	296
Food aid needs	20	15	2	37
<u>Current Aid Position</u>				
Food aid pledges	10	11	2	23
of which: delivered	10	2	2	14
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>76</u>	<u>39</u>	<u>29</u>	<u>144</u>
<u>Indexes</u>				
2001 Production as % of average:				73
2001/02 Import requirement as % of average:				106

^{1/} Includes 15 000 tonnes of wheat for re-export.

MAURITIUS

Area:	1 850 sq km
Climate:	No dry months, most rainfall in November-July; tropical cyclones
Population:	1.15 million (2002 estimate); G.N.P. per caput: US\$3 750 (2000)
Specific characteristics of the country:	Cereal consumption covered almost entirely by imports
Logistics:	Inadequate port handling capacity; road system good
Major foodcrops:	Vegetables
Marketing year:	January/December
Share of cereals in total calorie intake:	48 percent

CURRENT SITUATION

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

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	-	2	2
Previous five years average imports	151	78	26	255
<u>2002 Domestic Availability</u>	<u>0</u>	<u>0</u>	<u>2</u>	<u>2</u>
2001 Production (rice in paddy terms)	-	-	2	2
2001 Production (rice in milled terms)	-	-	2	2
Possible stock drawdown	-	-	-	-
<u>2002 Utilization</u>	<u>150</u>	<u>78</u>	<u>22</u>	<u>250</u>
Food use	104	78	3	185
<i>of which: local purchase requirement</i>	-	-	-	-
Non-food use	6	-	19	25
Exports or re-exports	40	-	-	40
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>150</u>	<u>78</u>	<u>20</u>	<u>248</u>
Anticipated commercial imports	150	78	20	248
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
<i>of which: delivered</i>	-	-	-	-
Donor-financed purchases	-	-	-	-
<i>of which: for local use</i>	-	-	-	-
<i>for export</i>	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>90</u>	<u>68</u>	<u>3</u>	<u>161</u>
<u>Indexes</u>				
2001 Production as % of average:				100
2002 Import requirement as % of average:				97

MOZAMBIQUE

Area:	784 000 sq km
Climate:	Tropical wet-dry; coast is semi-arid
Population:	18.19 million (2002 estimate); G.N.P. per caput: US\$210 (2000)
Specific characteristics of the country:	Low-income food-deficit country; exposed to tropical storms and cyclones
Logistics:	Dilapidated rail and road transport fleet; lack of fuel and spares; poor roads; substantial Deliveries by coastal vessels
Major foodcrops:	Roots, tubers, maize
Marketing year:	April/March; Lean season: February-April
Share of cereals in total calorie intake:	53 percent

CURRENT SITUATION

An FAO/WFP Crop and Food Supply Assessment Mission in April/May 2002 estimated the 2002 cereal output at 1.71 million tonnes, 5 percent above the good level of last year. Maize production increased by 8 percent to 1.24 million tonnes. This mainly reflects abundant and well-distributed rains during the season in the main growing areas of the Northern and Central regions, where the exportable maize surplus is projected at 100 000 tonnes. By contrast, prolonged severe dry weather led to almost crop failure in the provinces of the Southern and parts of Central regions. Approximately 515 000 people in these areas are estimated to be in need of emergency food aid during marketing year 2002/03 (April/May) following a succession of poor harvests.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	2	175	1 463	1 640
Previous five years average imports	201	123	66	390
<u>2002/03 Domestic Availability</u>	-	109	1 606	1 715
2002 Production (rice in paddy terms)	-	164	1 606	1 770
2002 Production (rice in milled terms)	-	109	1 606	1 715
Possible stock drawdown	-	-	-	-
<u>2002/03 Utilization</u>	260	371	1 726	2 357
Food use	255	341	1 318	1 914
of which: local purchase requirement	-	-	20	20
Non-food use	5	30	293	328
Exports or re-exports	-	-	100	100
Possible stock build up	-	-	15	15
<u>2002/03 Import Requirement</u>	260	262	120	642
Anticipated commercial imports	260	262	70	592
Food aid needs	-	-	50	50
<u>Current Aid Position</u>				
Food aid pledges	-	-	41	41
of which: delivered	-	-	41	41
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	14	19	72	105
<u>Indexes</u>				
2002 Production as % of average:				108
2002/03 Import requirement as % of average:				165

NAMIBIA

Area:	823 000 sq km
Climate:	Mostly arid (south-west and coast) or semi-arid. Only north and north-east gets regular rainfall in November-April
Population:	1.98 million (2002 estimate); G.N.P. per caput: US\$2 030 (2000)
Specific characteristics of the country:	Arid to semi-arid country; cereal production mainly in the north
Logistics:	Good road and railway network
Major foodcrops:	Millet, maize, sorghum, wheat
Marketing year:	May/April;
Share of cereals in total calorie intake:	48 percent

CURRENT SITUATION

The 2002 cereal crop was sharply reduced. Final official estimates indicate a cereal output of 69 000 tonnes, 36 percent below last year's normal level. Insufficient rains at planting time sharply reduce the area sown to millet/sorghum and maize, while a dry spell in January adversely affected yields. Subsequent precipitation arrived too late to prevent yield reductions. The cereal import requirement in 2002/03 (May/April) is estimated at 156 000 tonnes. The food supply situation is anticipated to be tight in the remainder of the year, particularly for farmers who gathered a poor harvest last year and for vulnerable groups in urban areas.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	5	-	105	110
Previous five years average imports	56	-	92	148
<u>2002/03 Domestic Availability</u>	<u>6</u>	<u>=</u>	<u>75</u>	<u>81</u>
2002 Production (rice in paddy terms)	6	-	63	69
2002 Production (rice in milled terms)	6	-	63	69
Possible stock drawdown	-	-	12	12
<u>2002/03 Utilization</u>	<u>54</u>	<u>=</u>	<u>183</u>	<u>237</u>
Food use	53	-	176	229
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	7	7
Exports or re-exports	-	-	-	-
Possible stock build up	1	-	-	1
<u>2002/03 Import Requirement</u>	<u>48</u>	<u>=</u>	<u>108</u>	<u>156</u>
Anticipated commercial imports	48	-	108	156
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>28</u>	<u>=</u>	<u>95</u>	<u>124</u>
<u>Indexes</u>				
2002 Production as % of average:				63
2002/03 Import requirement as % of average:				105

NIGER

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

CURRENT SITUATION

After the first rains in the south in mid-May, precipitation covered the centre in early June. In late June and early July, precipitation generally remained irregular and below normal. The dry spell has stressed crops and recently planted crops have failed in several villages, necessitating replantings. However the last decade registered abundant rains over most producing areas which will benefit crops stressed by earlier drier conditions. Flooding is even reported in Zinder department. Millet and sorghum are generally emerging/tillering, but plantings and replantings are still underway in several villages. Pastures are regenerating. Grasshopper infestations have been reported in Dosso, Maradi, Tahoua and Zinder departments. Insect attacks are also reported in Dosso and Tahoua, while grain-eating birds have been seen in Diffa. The Desert Locust situation is reported to be calm.

The final official aggregate 2001 cereal production is estimated at 3.11 million tonnes, 46 percent higher than the poor crop in the previous year and about one-third more than average.

Following this good harvest, the overall food supply situation is satisfactory. However, an untimely sharp rise in cereal prices on all markets across the country has been reported, which makes access to food difficult. The above-normal cereal prices are mainly due to activities of speculators and outflows to Nigeria.

Cereal import requirement in 2001/02 (November/October) is estimated at some 345 000 tonnes, almost half actual imports in the previous year.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	8	65	2 316	2 389
Previous five years average imports	50	113	279	442
<u>2001/02 Domestic Availability</u>	<u>5</u>	<u>60</u>	<u>3 029</u>	<u>3 093</u>
2001 Production (rice in paddy terms)	5	76	3 029	3 110
2001 Production (rice in milled terms)	5	50	3 029	3 083
Possible stock drawdown	-	10	-	10
<u>2001/02 Utilization</u>	<u>61</u>	<u>179</u>	<u>3 199</u>	<u>3 438</u>
Food use	55	169	2 534	2 758
of which: local purchase requirement	-	-	10	10
Non-food use	1	9	465	475
Exports or re-exports	5	-	20	25
Possible stock build up	-	-	180	180
<u>2001/02 Import Requirement</u>	<u>56</u>	<u>119</u>	<u>170</u>	<u>345</u>
Anticipated commercial imports	50	95	168	313
Food aid needs	6	24	2	32
<u>Current Aid Position</u>				
Food aid pledges	6	25	2	32
of which: delivered	-	8	-	8
Donor-financed purchases	-	-	6	6
of which: for local use	-	-	6	6
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>5</u>	<u>16</u>	<u>238</u>	<u>259</u>
<u>Indexes</u>				
2001 Production as % of average:				130
2001/02 Import requirement as % of average:				78

NIGERIA

Area:	923 770 sq km
Climate:	Mostly tropical wet-dry, south-west tropical wet, extreme north semi-arid
Population:	116.8 million (2002 estimate); G.N.P. per caput: US\$260 (2000)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports adequate, roads inadequate during rainy season
Major foodcrops:	Roots and tubers, coarse grains, rice
Marketing year:	January/December; Lean season: April-May
Share of cereals in total calorie intake:	43 percent

CURRENT SITUATION

First rains in the south in late February/early March permitted land preparation and planting of the first maize crop. Rains reached northern areas in late April/early May where they permitted planting of coarse grains. However, the weather remained mostly dry until early July in the extreme north-east. The overall food supply situation is satisfactory. Some population groups, however, remain vulnerable following communal conflicts notably in the states of Benue, Nasarawa and Taraba. From April to June, more than 85 000 IDPs have been resettled in their home villages in the central region.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	49	3 301	1 8797	22 147
Previous five years average imports	1 604	793	87	2 484
<u>2002 Domestic Availability</u>	<u>150</u>	<u>2 200</u>	<u>19 614</u>	<u>21 964</u>
2001 Production (rice in paddy terms)	50	3 500	19 614	23 164
2001 Production (rice in milled terms)	50	2 100	19 614	21 764
Possible stock drawdown	100	100	-	200
<u>2002 Utilization</u>	<u>1 850</u>	<u>3 200</u>	<u>1 9684</u>	<u>24 734</u>
Food use	1 798	2 780	15 083	19 661
of which: local purchase requirement	-	-	-	-
Non-food use	52	420	3 921	4 393
Exports or re-exports	-	-	180	180
Possible stock build up	-	-	500	500
<u>2002 Import Requirement</u>	<u>1 700</u>	<u>1 000</u>	<u>70</u>	<u>2 770</u>
Anticipated commercial imports	1 700	1 000	70	2 770
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>15</u>	<u>24</u>	<u>129</u>	<u>168</u>
<u>Indexes</u>				
2001 Production as % of average:				105
2002 Import requirement as % of average:				112

RWANDA

Area:	25 000 sq km
Climate:	Highland rainy climate with moderate temperature (20°C); two rainy seasons: February-May and September-November
Population:	8.36 million (2002 estimate); G.N.P. per caput: US\$230 (2000)
Specific characteristics of the country:	Low-income food-deficit country; land-locked country
Logistics:	Ports: Mombasa (Kenya) and Dar es Salaam (Tanzania); roads and railway inadequate
Major foodcrops:	Roots, tubers, pulses, plantains, sorghum, maize
Marketing year:	January/December; Lean season: November-December
Share of cereals in total calorie intake:	25 percent

CURRENT SITUATION

A final assessment of the recently harvested 2002 B season is not yet available. Abundant rains during the cropping season benefited root and tubers and banana crops, and their outputs are anticipated to be good. However, excessive precipitation in early May coupled with an early cessation of the rains, is likely to have reduced yields of beans and sorghum crops in high altitude areas. The output of the 2002 first season foodcrops was also satisfactory and about one-third higher than in the 2001 first season.

Prices of basic food remain at low levels and stable.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	5	11	203	219
Previous five years average imports	15	14	170	199
<u>2002 Domestic Availability</u>	<u>6</u>	<u>12</u>	<u>264</u>	<u>282</u>
2002 Production (rice in paddy terms)	6	18	249	273
2002 Production (rice in milled terms)	6	12	249	267
Possible stock drawdown	-	-	15	15
<u>2002 Utilization</u>	<u>21</u>	<u>22</u>	<u>429</u>	<u>472</u>
Food use	21	21	347	389
of which: local purchase requirement	-	-	-	-
Non-food use	-	1	82	83
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>15</u>	<u>10</u>	<u>165</u>	<u>190</u>
Anticipated commercial imports	-	-	150	150
Food aid needs	15	10	15	40
<u>Current Aid Position</u>				
Food aid pledges	-	-	16	16
of which: delivered	-	-	16	16
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>2</u>	<u>2</u>	<u>40</u>	<u>45</u>
<u>Indexes</u>				
2002 Production as % of average:				125
2002 Import requirement as % of average:				95

SAO TOME AND PRINCIPE

Area:	964 sq km
Climate:	Tropical wet; rainfall increases with altitude and towards southern parts of the islands
Population:	153 300 (2002 estimate); G.N.P. per caput: US\$290 (2000)
Specific characteristics of the country:	Low-income food-deficit country; archipelago
Logistics:	Ports and roads adequate
Major foodcrops:	Bananas, breadfruit, cocoyam
Marketing year:	January/December
Share of cereals in total calorie intake:	36 percent

CURRENT SITUATION

The staple foodcrops are roots, plantains and tubers. The cereal import requirement in 2002 is estimated at 12 000 tonnes.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	-	1	1
Previous five years average imports	3	5	2	10
<u>2002 Domestic Availability</u>	=	=	1	1
2001 Production (rice in paddy terms)	-	-	1	1
2001 Production (rice in milled terms)	-	-	1	1
Possible stock drawdown	-	-	-	-
<u>2002 Utilization</u>	3	7	3	13
Food use	3	6	3	12
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	-	-
Exports or re-exports	-	-	-	-
Possible stock build up	-	1	-	1
<u>2002 Import Requirement</u>	3	7	2	12
Anticipated commercial imports	3	2	1	6
Food aid needs	-	5	1	6
<u>Current Aid Position</u>				
Food aid pledges	-	5	-	5
of which: delivered	-	5	-	5
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	20	39	20	78
<u>Indexes</u>				
2001 Production as % of average:				100
2002 Import requirement as % of average:				120

SENEGAL

Area:	196 720 sq km
Climate:	Semi-arid in north, tropical wet-dry in south, with rains in June-October
Population:	10.00 million (2002 estimate); G.N.P. per caput: US\$490 (2000)
Specific characteristics of the country:	Low-income food-deficit country; coastal Sahelian country
Logistics:	Port capacity adequate; gateway to Mali.
Major foodcrops:	Millet and sorghum, rice, maize, wheat
Marketing year:	November/October; Lean season: August-September
Share of cereals in total calorie intake:	61 percent

CURRENT SITUATION

Following substantial early rains in the south-east in mid-May, precipitation covered the rest of the country in June. However, rains were erratic in most regions, decreased significantly in early July and the weather remained almost dry until the end of the month. Cumulative rainfall as of late July was below the same period last year and below average almost everywhere. The dry spell has resulted in crop failure in several regions, necessitating replantings and earlier planted crops are suffering water stress. Grain eating birds are reported on off-season rice in the Senegal River valley. Grasshopper infestations are also reported in the centre, while army worms are present in the centre and the south.

A sharp rise in cereal prices on all markets across the country has been reported, which makes access to food difficult. In early August, the "Conseil national de concertation et de cooperation des ruraux" a grouping of about 20 farmers organizations launched an appeal to the Government to help the rural population "threatened by the drought and the famine". Cereal import requirements in 2001/02 (November/October) are forecast at 850 000 tonnes.

Following renewed fighting between government troops and rebels in the southern Senegalese Province of Casamance, at least 9 000 refugees have reportedly crossed into The Gambia in early-May. In early July, WFP distributed emergency food rations to 2 047 people, mostly women and children, who had settled in 25 villages along the border.

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	200	737	937
Previous five years average imports	230	528	47	805
<u>2001/02 Domestic Availability</u>	<u>15</u>	<u>187</u>	<u>860</u>	<u>1 061</u>
2001 Production (rice in paddy terms)	-	267	840	1 107
2001 Production (rice in milled terms)	-	187	840	1 026
Possible stock drawdown	15	-	20	35
<u>2001/02 Utilization</u>	<u>265</u>	<u>762</u>	<u>885</u>	<u>1 911</u>
Food use	260	720	746	1 726
of which: local purchase requirement	-	-	5	5
Non-food use	5	42	138	185
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2001/02 Import Requirement</u>	<u>250</u>	<u>575</u>	<u>25</u>	<u>850</u>
Anticipated commercial imports	250	560	25	835
Food aid needs	-	15	-	15
<u>Current Aid Position</u>				
Food aid pledges	-	15	-	15
of which: delivered	-	15	-	15
Donor-financed purchases	-	-	3	3
of which: for local use	-	-	3	3
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>26</u>	<u>72</u>	<u>75</u>	<u>173</u>
<u>Indexes</u>				
2001 Production as % of average:				118
2001/02 Import requirement as % of average:				106

SEYCHELLES

Area:	455 sq km
Climate:	Tropical wet; rains throughout the year, peaking in October-May
Population:	78 000 (2002 estimate); G.N.P. per caput: US\$7 050 (2000)
Specific characteristics of the country:	Consists of about 100 islands scattered over more than 1 million sq km. Tourism provides 50 percent of G.D.P.
Logistics:	-
Major foodcrops:	Coconuts, fruit, vegetables
Marketing year:	January/December
Share of cereals in total calorie intake:	49 percent

CURRENT SITUATION

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

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	-	-	-
Previous five years average imports	2	5	6	13
<u>2002 Domestic Availability</u>	-	-	-	-
2001 Production (rice in paddy terms)	-	-	-	-
2001 Production (rice in milled terms)	-	-	-	-
Possible stock drawdown	-	-	-	-
<u>2002 Utilization</u>	2	5	6	13
Food use	2	5	1	8
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	5	5
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	2	5	6	13
Anticipated commercial imports	2	5	6	13
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	26	64	13	102
<u>Indexes</u>				
2001 Production as % of average:				-
2002 Import requirement as % of average:				100

SIERRA LEONE

Area:	71 740 sq km
Climate:	Mostly tropical wet-dry; extreme south tropical wet; rainy season: March-October
Population:	5.15 million (2002 estimate); G.N.P. per caput: US\$130 (2000)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Roads inadequate
Major foodcrops:	Rice, roots and tubers
Marketing year:	January/December; Lean season: July-August
Share of cereals in total calorie intake:	57 percent

CURRENT SITUATION

Rains started in late April but remained generally below average. Rice production should further increase this year reflecting better security situation, increased plantings by returning refugees and farmers previously displaced, as well as comparatively improved conditions for the distribution of agricultural inputs. Cereal production in 2001 is estimated at 348 000 tonnes.

In an effort to continue helping the country, a UN Consolidated Inter-Agency Appeal was launched on 26 November 2001, including an agricultural component with five projects proposed by FAO to facilitate recovery of food production and reduce dependence on food aid.

The intensifying conflict in Liberia has caused at least 40 000 Liberians to cross into the country since the beginning of the year, while some 39 000 Sierra Leoneans who had been living in camps in Liberia and 15 000 who had lived outside the camps returned home as fighting intensified.

Sierra Leone's cereal import requirement for 2002 is estimated at 225 000 tonnes including 40 000 tonnes of food aid.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	316	40	356
Previous five years average imports	70	127	23	220
<u>2002 Domestic Availability</u>	=	186	37	224
2001 Production (rice in paddy terms)	-	311	37	348
2001 Production (rice in milled terms)	-	186	37	224
Possible stock drawdown	-	-	-	-
<u>2002 Utilization</u>	60	336	52	449
Food use	60	280	39	378
of which: local purchase requirement	-	-	-	-
Non-food use	-	47	9	55
Exports or re-exports	-	-	-	-
Possible stock build up	-	10	5	15
<u>2002 Import Requirement</u>	60	150	15	225
Anticipated commercial imports	35	150	-	185
Food aid needs	25	-	15	40
<u>Current Aid Position</u>				
Food aid pledges	22	-	4	26
of which: delivered	20	-	2	23
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	12	54	8	73
<u>Indexes</u>				
2001 Production as % of average:				98
2002 Import requirement as % of average:				102

SOMALIA

Area:	627 000 sq km
Climate:	Semi-arid in the south; rest arid
Population:	6.54 million (2002 estimate); G.N.P. per caput; n.a.
Specific characteristics of the country:	Low-income food-deficit country
Logistics:	Inadequate port facilities; serious shortage of fuel and spare parts
Major foodcrops:	Maize, sorghum, sesame
Marketing year:	August/July; Lean season: June-August
Share of cereals in total calorie intake:	45 percent

CURRENT SITUATION

Prospects for the current main "gu" season cereal crops are generally favourable following good rains in end-April/early-May. However, poor crop establishments were reported in Bakool and Hiran regions, while in northern Gedo Region, despite good rains, insecurity hampered crop cultivation.

Despite the improvement in the overall food supply situation earlier this year in parts of southern Somalia, due to good secondary "deyr" season harvest in February 2002, serious food supply difficulties remain in northern Gedo, as well as in Garbaharay and Burdhubo due to successive years of drought and insecurity. Recent escalation of conflict, particularly around Baidoa, north-eastern Somalia (Puntland) and in Mogadishu has displaced large number of people and has prevented the delivery of food assistance to vulnerable groups raising serious humanitarian concerns.

Elsewhere, in north-western Somalia (Somaliland) poor rains have adversely affected the establishment of the gu crop. The food situation is worsening in Sool, Sanag and Nugal regions where below-average rains have affected crop and livestock production. The continued ban on livestock imports from eastern Africa by countries along the Arabian Peninsula has reduced foreign exchange earnings and affected the livelihoods of large number of pastoralists.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	2	260	262
Previous five years average imports	111	106	74	291
<u>2002/03 Domestic Availability</u>	<u>20</u>	<u>1</u>	<u>258</u>	<u>279</u>
2002 Production (rice in paddy terms)	-	2	258	260
2002 Production (rice in milled terms)	-	1	258	259
Possible stock drawdown	20	-	-	20
<u>2002/03 Utilization</u>	<u>120</u>	<u>91</u>	<u>368</u>	<u>579</u>
Food use	120	91	333	544
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	35	35
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002/03 Import Requirement</u>	<u>100</u>	<u>90</u>	<u>110</u>	<u>300</u>
Anticipated commercial imports	100	90	40	230
Food aid needs	-	-	70	70
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>18</u>	<u>14</u>	<u>51</u>	<u>83</u>
<u>Indexes</u>				
2002 Production as % of average:				99
2002/03 Import requirement as % of average:				103

SOUTH AFRICA

Area:	1.22 million sq km
Climate:	Sub-tropical with rains concentrated in the summer months (November-April); occasional snow in winter over higher parts of plateau and Cape ranges; an average of 120 days frost in the interior plateau
Population:	41.35 million (2002 estimate); GNP per caput US\$3 020 (2000)
Specific characteristics of the country:	Normally net food exporter, notably maize
Logistics:	Adequate port, rail and road facilities
Major foodcrops:	Maize, wheat
Marketing year:	May/April; Lean season: February-April
Share of cereals in total calorie intake:	54 percent

CURRENT SITUATION

Harvest of the 2002 coarse grains is completed. Final official production forecast of the 2002 maize crop have been revised upwards to 9.09 million tonnes, which is 22 percent above the below-average level of the previous year. The increase in production reflects a rise of 4 percent in the area planted and favourable weather conditions in the main growing areas. Output of sorghum is estimated at 197 000 tonnes, 9 percent higher than in 2001 despite. Despite this year's good maize harvest, the available exportable surplus is not expected to meet the increased import needs of other countries of the sub-region, affected by dry conditions during the 2001/02 cropping season. Output of the 2002 wheat crop, to be harvested from October, is forecast at 2.298 million tonnes, 8 percent below last year's level reflecting lower plantings and yields.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	2 178	2	9 596	11 776
Previous five years average imports	130	-	1 166	1 296
<u>2002/03 Domestic Availability</u>	<u>2 348</u>	<u>-</u>	<u>9 553</u>	<u>11 901</u>
2002 Production (rice in paddy terms)	2 298	-	9 348	11 646
2002 Production (rice in milled terms)	2 298	-	9 348	11 646
Possible stock drawdown	50	-	205	255
<u>2002/03 Utilization</u>	<u>2 748</u>	<u>-</u>	<u>10 179</u>	<u>12 927</u>
Food use	2 520	-	4 618	7 138
of which: local purchase requirement	-	-	-	-
Non-food use	98	-	4 541	4 639
Exports or re-exports	130	-	1 020	1 150
Possible stock build up	-	-	-	-
<u>2002/03 Import Requirement</u>	<u>400</u>	<u>-</u>	<u>626</u>	<u>1 026</u>
Anticipated commercial imports	400	-	626	1 026
Food aid needs	-	-	-	-
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	19	19
of which: for local use	-	-	-	-
for export	-	-	19	19
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>61</u>	<u>-</u>	<u>112</u>	<u>173</u>
<u>Indexes</u>				
2002 Production as % of average:				99
2002/03 Import requirement as % of average:				79

SUDAN

Area:	2.4 million sq km
Climate:	From north to south, arid, semi-arid and tropical wet-dry. Rainy season: May-October
Population:	32.81 million (2002 estimate); GNP per caput: US\$310 (2000)
Specific characteristics of the country:	Low-income food-deficit country; cereal production mainly in eastern and central areas.
Logistics:	Roads, railway and river transport inadequate
Major foodcrops:	Sorghum, millet, wheat, roots and tubers, oils
Marketing year:	November/October; Lean season: September-October
Share of cereals in total calorie intake:	51 percent

CURRENT SITUATION

Planting of the 2002 main season cereal crop is in progress in central and northern growing areas. Early prospects are unfavourable due to below normal rains in May and June which affected planting. More rains are needed in the coming weeks to avoid further reductions in yield potential. In southern Sudan prospects are also unfavourable. The area planted has been reduced by continuous population displacements due to recent upsurge in conflict coupled with late and insufficient rains in parts. However, recent reports indicate that heavy rains and floods have displaced large number of people in West Kordofan and White Nile States. A thorough needs assessment is planned by the UN local team as soon as roads are safe for travel.

Escalation of conflict in parts of southern Sudan is set to exacerbate an already poor food security situation due to continuing civil strife and adverse weather. Large numbers of people have been displaced and hundreds of thousands cut off from humanitarian access. Already an estimated 3 million IDPs, drought-affected and vulnerable people in different parts of the country depend on food assistance.

An Emergency Operation was jointly approved in April 2002 by FAO and WFP for food assistance for 2.9 million people, worth US\$132.8 million for a period of 12 months (1 April 2002 to 31 March 2003).

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

	Wheat	Rice	Coarse grains	Total
Previous five years average production	385	5	3 994	4 384
Previous five years average imports	967	31	88	1 086
<u>2001/02 Domestic Availability</u>	<u>247</u>	<u>6</u>	<u>5 101</u>	<u>5 354</u>
2001 Production (rice in paddy terms)	247	10	5 101	5 358
2001 Production (rice in milled terms)	247	6	5 101	5 354
Possible stock drawdown	-	-	-	-
<u>2001/02 Utilization</u>	<u>1 397</u>	<u>36</u>	<u>5 191</u>	<u>6 624</u>
Food use	1 336	35	3 173	4 544
of which: local purchase requirement	-	-	300	300
Non-food use	31	1	918	950
Exports or re-exports	-	-	200	200
Possible stock build up	30	-	900	930
<u>2001/02 Import Requirement</u>	<u>1 150</u>	<u>30</u>	<u>90</u>	<u>1 270</u>
Anticipated commercial imports	1 100	30	-	1 130
Food aid needs	50	-	90	140
<u>Current Aid Position</u>				
Food aid pledges	29	-	31	60
of which: delivered	18	-	31	49
Donor-financed purchases	-	-	21	21
of which: for local use	-	-	21	21
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>41</u>	<u>1</u>	<u>97</u>	<u>139</u>
<u>Indexes</u>				
2001 Production as % of average:				122
2001/02 Import requirement as % of average:				117

SWAZILAND

Area:	17 000 sq km
Climate:	Highland rainy climate. Rainy season: October-April; cool temperatures in May- September
Population:	1.06 million (2002 estimate); G.N.P. per caput: US\$1 390 (2000)
Specific characteristics of the country:	Low-income food-deficit country; land-locked country
Logistics:	Good road network; imports through Mozambique or South Africa
Major foodcrops:	Maize
Marketing year:	May/April; Lean season: February-April
Share of cereals in total calorie intake:	55 percent

CURRENT SITUATION

An FAO/WFP Crop and Food Supply Assessment Mission in April estimated the 2002 cereal crop, mainly maize at 68 000 tonnes. This is 18 percent below last year's poor harvest and 37 percent lower than the average of the last five years. Despite an increase of 4 percent in the area planted, prolonged dry spells severely affected crops during their critical flowering stage. Production in the dry Middleveld, Lowveld and the Lobombo Plateau, which experienced dry weather from December to February, has been particularly poor.

The cereal import requirement in marketing year 2002/03 (April/May) is estimated at of 111 000 tonnes. Commercial cereal imports are forecast at 96 000 tonnes and food aid for 144 000 most vulnerable population at 15 000 tonnes, which will need to be covered by the Government and external assistance.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	1	108	109
Previous five years average imports	40	7	30	77
<u>2002/03 Domestic Availability</u>	<u>9</u>	<u>-</u>	<u>68</u>	<u>77</u>
2002 Production (rice in paddy terms)	-	-	68	68
2002 Production (rice in milled terms)	-	-	68	68
Possible stock drawdown	9	-	-	9
<u>2002/03 Utilization</u>	<u>45</u>	<u>4</u>	<u>139</u>	<u>188</u>
Food use	45	4	135	184
of which: local purchase requirement	-	-	-	-
Non-food use	-	-	4	4
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	-	-
<u>2002/03 Import Requirement</u>	<u>36</u>	<u>4</u>	<u>71</u>	<u>111</u>
Anticipated commercial imports	36	4	56	96
Food aid needs	-	-	15	15
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>42</u>	<u>4</u>	<u>127</u>	<u>173</u>
<u>Indexes</u>				
2002 Production as % of average:				62
2002/03 Import requirement as % of average:				144

TANZANIA

Area:	886 000 sq km
Climate:	Tropical wet-dry climate with two rainy seasons in north (November-December and March-May) and one in south (November-April)
Population:	34.77 million (2002 estimate); G.N.P. per caput: US\$270 (2000)
Specific characteristics of the country:	Low-income food-deficit country; cereal surplus production in south and south-west; cereal deficit in central and north-west. Distribution difficulties
Logistics:	Serious shortage of rolling stock, fuel and spare parts
Major foodcrops:	Maize, roots, tubers, sorghum, pulses, plantains, rice
Marketing year:	June/May; Lean season: February-April
Share of cereals in total calorie intake:	60 percent

CURRENT SITUATION

The harvesting season is near completion and official reports indicate improved overall crop production. Preliminary estimates indicate total cereal production (maize, rice, wheat, sorghum and millet) in 2002 at 4.3 million tonnes, about 10 percent above last year's output due to favourable rains. Similarly, prospects for non-cereal crops (pulses, potatoes, cassava and plantains) are reported to be good.

The overall food situation remains satisfactory with increased on-farm stocks and market supplies. Nationally maize prices have declined since April with the harvest. Adequate availability of water and forage has also improved the food security of most pastoralists. However, localized food shortages are anticipated in some northern parts of the country during the 2002/03 marketing year due to poor performance of the short (vuli) rains and the long (masika) rains. Insufficient pasture and water is also predicted in these areas.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	89	788	3 135	4 012
Previous five years average imports	209	72	74	355
<u>2002/03 Domestic Availability</u>	<u>149</u>	<u>507</u>	<u>3 704</u>	<u>4 360</u>
2002 Production (rice in paddy terms)	79	780	3 704	4 563
2002 Production (rice in milled terms)	79	507	3 704	4 290
Possible stock drawdown	70	-	-	70
<u>2002/03 Utilization</u>	<u>269</u>	<u>587</u>	<u>3 774</u>	<u>4 630</u>
Food use	241	537	3 294	4 072
of which: local purchase requirement	-	-	-	-
Non-food use	8	50	370	428
Exports or re-exports	20	-	50	70
Possible stock build up	-	-	60	60
<u>2002/03 Import Requirement</u>	<u>120</u>	<u>80</u>	<u>70</u>	<u>270</u>
Anticipated commercial imports	120	80	20	220
Food aid needs	-	-	50	50
<u>Current Aid Position</u>				
Food aid pledges	-	-	9	9
of which: delivered	-	-	2	2
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>7</u>	<u>15</u>	<u>95</u>	<u>117</u>
<u>Indexes</u>				
2002 Production as % of average:				114
2002/03 Import requirement as % of average:				76

TOGO

Area:	56 790 sq km
Climate:	Tropical wet-dry; two rainy seasons in south (March-June and October) and one in North (May-October)
Population:	4.87 million (2002 estimate) G.N.P. per caput: US\$290 (2000)
Specific characteristics of the country:	Low-income food-deficit country; coastal country
Logistics:	Ports and roads adequate; gateway to Burkina Faso and Niger
Major foodcrops:	Roots and tubers, coarse grains, fruit
Marketing year:	January/December; Lean season: April-July
Share of cereals in total calorie intake:	40 percent

CURRENT SITUATION

First rains were received in the south and the centre in early March, allowing land preparation and planting of the first maize crop. They progressed to the north in April and permitted planting of millet and sorghum. Climatic conditions have been globally favourable so far.

Following an average cereal harvest in 2001, estimated at about 0.7 million tonnes, the overall food situation is satisfactory.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	-	74	612	686
Previous five years average imports	56	157	15	228
<u>2002 Domestic Availability</u>	=	41	651	693
2001 Production (rice in paddy terms)	-	61	651	712
2001 Production (rice in milled terms)	-	41	651	693
Possible stock drawdown	-	-	-	-
<u>2002 Utilization</u>	60	151	651	863
Food use	56	69	413	538
of which: local purchase requirement	-	-	-	-
Non-food use	2	12	213	228
Exports or re-exports	2	70	15	87
Possible stock build up	-	-	10	10
<u>2002 Import Requirement</u>	60	110	=	170^{1/}
Anticipated commercial imports	60	105	-	165
Food aid needs	-	5	-	5
<u>Current Aid Position</u>				
Food aid pledges	-	-	-	-
of which: delivered	-	-	-	-
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	12	14	85	110
<u>Indexes</u>				
2001 Production as % of average:				104
2002 Import requirement as % of average:				75

^{1/} Includes 70 000 tonnes of rice for re-export.

UGANDA

Area:	200 000 sq km
Climate:	North-east is semi-arid, rest of the country is tropical wet-dry; main rainy period is March-October
Population:	22.39 million (2002 estimate); G.N.P. per caput: US\$300 (2000)
Specific characteristics of the country:	Low-income food deficit country
Logistics:	Ports: Mombasa (Kenya) and Dar es Salaam (Tanzania); roads and railways inadequate
Major foodcrops:	Roots, tubers, plantains, pulses, maize, millet, sorghum
Marketing year:	January/December; Lean season: April-May
Share of cereals in total calorie intake:	35 percent

CURRENT SITUATION

Prospects for the 2002 main season cereal crops are generally favourable. However, a dry spell in May that coincided with critical maize grain formation and filling stages is likely to affect yields. Livestock in much of the country have adequate access to drinking water and pasture. However, pasture conditions in the north-eastern Karamoja Region (Kotido, Moroto and Nakapiripirit districts) have deteriorated due to severe moisture stress.

The overall food supply situation is seasonably satisfactory. Stable, and in most cases lower, crop prices compared to last year continue to favour household access to food. However, recent conflict and insecurity in northern parts of the country have displaced large number people, adding to the large IDP population. Nearly 1.5 million people are currently benefiting from WFP programmes in several parts of the country.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	10	91	1 615	1 716
Previous five years average imports	35	41	42	118
<u>2002 Domestic Availability</u>	<u>30</u>	<u>76</u>	<u>1 712</u>	<u>1 818</u>
2002 Production (rice in paddy terms)	10	114	1 652	1 776
2002 Production (rice in milled terms)	10	76	1 652	1 738
Possible stock drawdown	20	-	60	80
<u>2002 Utilization</u>	<u>50</u>	<u>116</u>	<u>1 777</u>	<u>1 943</u>
Food use	49	116	1 496	1 661
of which: local purchase requirement	-	-	5	5
Non-food use	1	-	201	202
Exports or re-exports	-	-	80	80
Possible stock build up	-	-	-	-
<u>2002 Import Requirement</u>	<u>20</u>	<u>40</u>	<u>65</u>	<u>125</u>
Anticipated commercial imports	20	40	-	60
Food aid needs	-	-	65	65
<u>Current Aid Position</u>				
Food aid pledges	4	0	37	41
of which: delivered	4	0	36	40
Donor-financed purchases	-	-	5	5
of which: for local use	-	-	5	5
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>2</u>	<u>5</u>	<u>67</u>	<u>74</u>
<u>Indexes</u>				
2002 Production as % of average:				103
2002 Import requirement as % of average:				106

ZAMBIA

Area:	741 000 sq km
Climate:	Tropical wet-dry; rainy season: November-April
Population:	10.87 million (2002 estimate); G.N.P. per caput: US\$300 (2000)
Specific characteristics of the country:	Low-income food-deficit country; land-locked country
Logistics:	Imports through Dar es Salaam (Tanzania); inadequate rail and road connections
Major foodcrops:	Maize, roots, tubers
Marketing year:	May/April; Lean season: March-May
Share of cereals in total calorie intake:	70 percent

CURRENT SITUATION

The 2002 cereal crop was reduced for the second consecutive year. A prolonged dry spell from January to March, the critical period for development of the crops, sharply reduced yields. An FAO/WFP Crop and Food Supply Assessment Mission in April 2002 estimated the output of the main staple maize at 606 000 tonnes, 24 percent below last year's poor harvest and 42 percent lower than the normal crop of 2000. Most affected areas were the Southern, Western, Eastern, Lusaka and Central provinces. Cereal import requirements for marketing year 2002/03 (May/April) were estimated at 626 000 tonnes. Commercial imports are expected to reach some 400 000 tonnes, leaving 225 000 tonnes to be covered by food aid. Emergency food aid requirements for 2.329 million most affected people was estimated at 174 000 tonnes. Emergency supply of seeds (maize, sorghum, groundnuts) to drought affected farming families is also urgently needed for planting of the next season starting in October 2002.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	77	17	1004	1 098
Previous five years average imports	44	20	243	307
<u>2002/03 Domestic Availability</u>	<u>75</u>	<u>6</u>	<u>673</u>	<u>754</u>
2002 Production (rice in paddy terms)	75	10	663	748
2002 Production (rice in milled terms)	75	6	663	744
Possible stock drawdown	-	-	10	10
<u>2002/03 Utilization</u>	<u>115</u>	<u>17</u>	<u>1 248</u>	<u>1 380</u>
Food use	111	17	1 067	1 195
of which: local purchase requirement	-	-	-	-
Non-food use	4	-	171	175
Exports or re-exports	-	-	10	10
Possible stock build up	-	-	-	-
<u>2002/03 Import Requirement</u>	<u>40</u>	<u>11</u>	<u>575</u>	<u>626</u>
Anticipated commercial imports	40	11	350	401
Food aid needs	-	-	225	225
<u>Current Aid Position</u>				
Food aid pledges	-	-	17	17
of which: delivered	-	-	17	17
Donor-financed purchases	-	-	-	-
of which: for local use	-	-	-	-
for export	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>10</u>	<u>2</u>	<u>98</u>	<u>110</u>
<u>Indexes</u>				
2002 Production as % of average:				68
2002/03 Import requirement as % of average:				204

ZIMBABWE

Area:	387 000 sq km
Climate:	Centre and north-east tropical wet-dry; south and west semi-arid; rainy season: November-March
Population:	13.02 million (2002 estimate); G.N.P. per caput: US\$460 (2000)
Specific characteristics of the country:	Land-locked country; exporter and importer of grain
Logistics:	Exports and imports through Mozambique or South Africa
Major foodcrops:	Maize, wheat, millet, sorghum
Marketing year:	April/March; Lean season: February-April
Share of cereals in total calorie intake:	66 percent

CURRENT SITUATION

An FAO/WFP Crop and Food Supply Assessment Mission estimated the 2002 maize output at 0.48 million tonnes, down by 67 percent on last year and by 77 percent on 1999/00. Production was adversely affected by drought between January and March, which wiped out crops in most parts of the country, coupled with land reform activities which disrupted agricultural production on large-scale commercial farms. Cereal import requirements for the marketing year 2002/03 (April/March) are estimated at an unprecedented level of 1.869 million tonnes, of which maize accounts for 91 percent or 1.705 million tonnes. Emergency food assistance in the amount of 705 000 tonnes of cereals is needed for approximately 6.074 million people as a result of insufficient production or income.

The food supply situation continues to deteriorate following the poor cereal crop of last year, the country's financial difficulties to import and slow delivery of food aid. Shortages of basic food and non-food goods are reported in urban and rural areas.

CEREAL SUPPLY/DEMAND BALANCE FOR THE 2002/03 MARKETING YEAR (in thousand tonnes)

	Wheat	Rice	Coarse grains	Total
Previous five years average production	285	-	1 889	2 174
Previous five years average imports	142	25	140	307
<u>2002/03 Domestic Availability</u>	<u>245</u>	<u>1</u>	<u>536</u>	<u>782</u>
2002 Production (rice in paddy terms)	150	2	536	688
2002 Production (rice in milled terms)	150	1	536	687
Possible stock drawdown	95	-	-	95
<u>2002/03 Utilization</u>	<u>397</u>	<u>13</u>	<u>2 241</u>	<u>2 651</u>
Food use	387	13	1 775	2 175
<i>of which: local purchase requirement</i>	-	-	-	-
Non-food use	10	-	319	329
Exports or re-exports	-	-	-	-
Possible stock build up	-	-	147	147
<u>2002/03 Import Requirement</u>	<u>152</u>	<u>12</u>	<u>1 705</u>	<u>1 869</u>
Anticipated commercial imports	-	12	450	462
Food aid needs	152	-	1 255	1 407
<u>Current Aid Position</u>				
Food aid pledges	-	-	110	110
<i>of which: delivered</i>	-	-	20	20
Donor-financed purchases	-	-	-	-
<i>of which: for local use</i>	-	-	-	-
<i>for export</i>	-	-	-	-
<u>Estimated Per Caput Consumption (kg/year)</u>	<u>29</u>	<u>1</u>	<u>133</u>	<u>163</u>
<u>Indexes</u>				
2002 Production as % of average:				32
2002/03 Import requirement as % of average:				609

TERMINOLOGY

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

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

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

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

"Low-Income Food-Deficit Countries" (LIFDCs): Includes all food deficit countries with per caput income below the level used by the World Bank to determine eligibility for IDA assistance (e.g. US\$1 445 in 2000), 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.