Food and Agriculture Organization of the United Nations

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CROP PROSPECTS and FOOD SITUATION

Quarterly Global Report

Countries in need of external assistance for food

44

COUNTRIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD

FAO assesses that globally 44 countries, of which 34 are in Africa, continue to be in need of external assistance for food. The effects of the COVID-19 pandemic are causing wide-ranging and severe negative impacts on food security, particularly through the loss of income. Conflicts and weather shocks remain critical factors that underpin the current high levels of severe food insecurity.

Asia	1.4
Africa	0.9
Central America and the Caribbean	1.8
South America	0.4
North America	13.2
Europe	-2.9
Oceania	45.6
World	**3.0**

WORLD

Cereal production 2020 over 2019

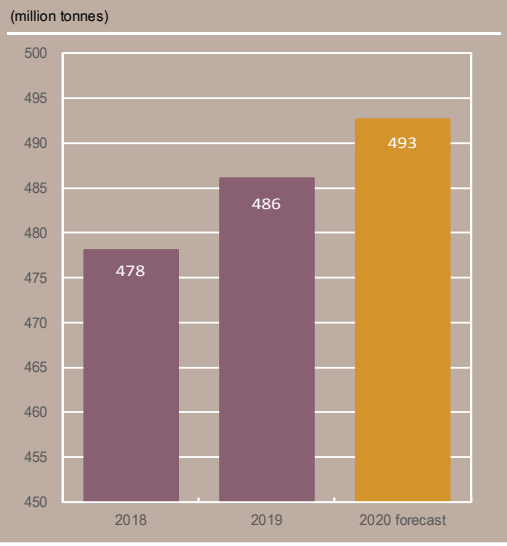
(yearly percentage change)

+3.0%

LIFDC

Cereal production 2020 over 2019

+1.4%



REGIONAL HIGHLIGHTS

AFRICA The risks associated with outbreaks of desert locusts in East Africa still remain high, although control measures have contained impacts on crops and pastures. Cereal production in Southern Africa recovered strongly in 2020, while adverse weather resulted in a below-average output in North Africa. Planting of the 2020 crops are ongoing in West and Central Africa, and the early production outlook is mostly favourable.

ASIA Production is set to increase to an above-average level in the Near East in 2020, partly reflecting improved security conditions and favourable weather in the Syrian Arab Republic and Iraq, and a production recovery in Turkey. Generally conducive weather conditions are expected to result in large harvests in the Far East, while area contractions in CIS countries is foreseen to result in a slightly below-average output.

LATIN AMERICA AND THE CARIBBEAN Encouraged by the high prices, farmers in South America expanded plantings and are expected to gather a near-record cereal output in 2020, with conducive weather supporting good yields. In Central America and the Caribbean, periods of adverse weather conditions are foreseen to keep cereal harvests in 2020 at a near-average level.

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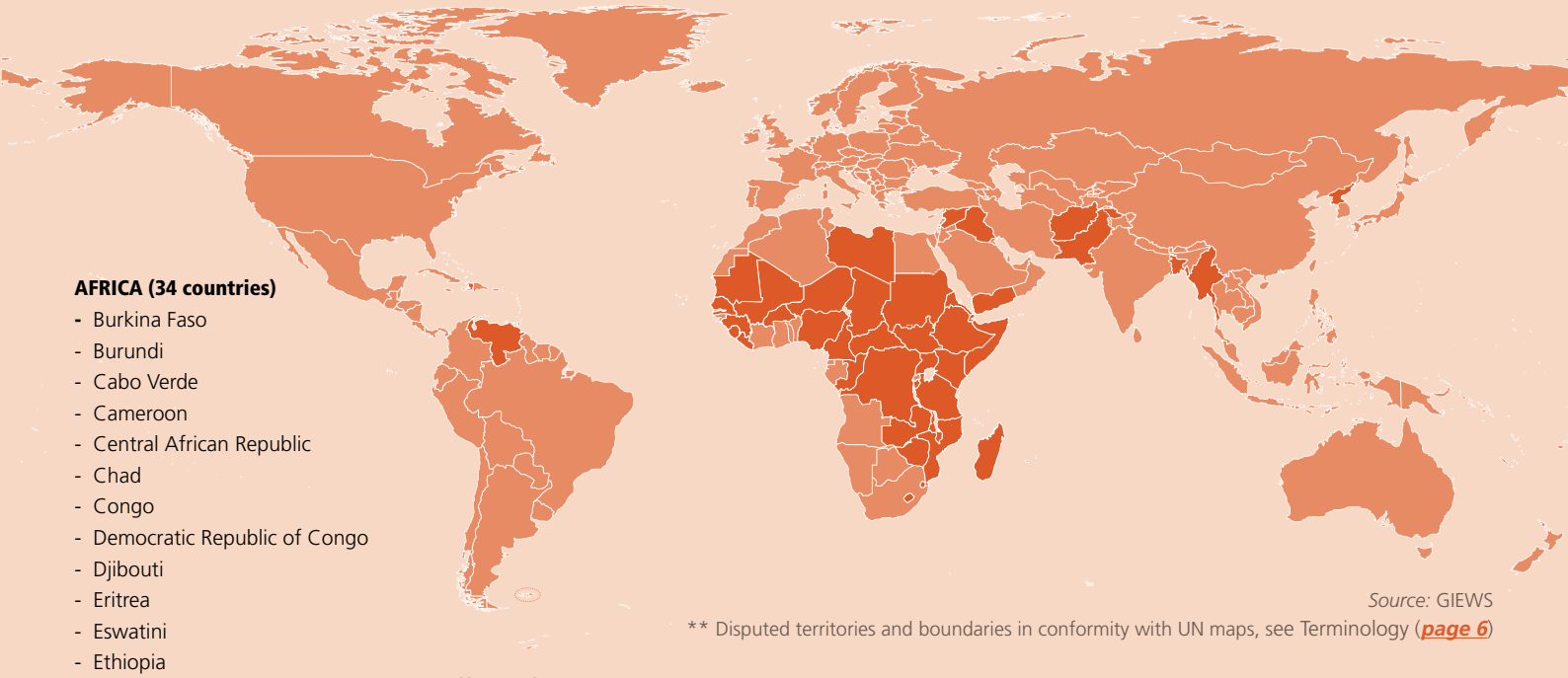
COUNTRIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD



AFRICA (34 countries)
- Burkina Faso
- Burundi
- Cabo Verde
- Cameroon
- Central African Republic
- Chad
- Congo
- Democratic Republic of Congo
- Djibouti
- Eritrea
- Eswatini
- Ethiopia
- Guinea
- Kenya
- Lesotho
- Liberia
- Libya
- Madagascar
- Malawi
- Mali
- Mauritania
- Mozambique
- Namibia
- Niger
- Nigeria
- Senegal
- Sierra Leone
- Somalia
- South Sudan
- Sudan
- Uganda
- United Republic of Tanzania
- Zambia
- Zimbabwe

ASIA (8 countries)
- Afghanistan
- Bangladesh
- Democratic People's Republic of Korea
- Iraq
- Myanmar
- Pakistan
- Syrian Arab Republic
- Yemen

LATIN AMERICA AND THE CARIBBEAN (2 countries)
- Haiti
- Venezuela

Source: GIEWS

** Disputed territories and boundaries in conformity with UN maps, see Terminology (***page 6***)

The effects of the COVID-19 pandemic, primarily channeled through economic shocks, are expected to cause a deterioration in food insecurity conditions across the globe. While agricultural production has been comparatively unaffected and supplies of staple foods are reported to be generally ample or stable, income losses due to the measures implemented to contain the spread of disease and the overall economic downturn are likely to increase the severity and prevalence of food insecurity. With different degrees, all countries listed in the following section have been affected by the COVID-19 pandemic and it must be considered as a factor that will trigger an increase in the need for humanitarian assistance. It should be noted that the pandemic's impacts have not yet been systematically captured in the food insecurity estimates, with most in-country assessments still underway or yet to be conducted. Therefore, the numbers presented in this section do not comprehensively reflect the prevailing food security situation and are likely to only provide an indication of the minimum number of people who are in need of assistance for food. Only where a national food insecurity estimate has incorporated the impacts of the COVID-19 pandemic is it mentioned as a factor in this section.

AFRICA (34 COUNTRIES)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/ SUPPLIES

Central African Republic

Conflict, displacements with food supply constraints

- According to the latest Integrated Food Security Phase Classification (IPC) analysis, the number of severely food insecure people (IPC Phase 3: "Crisis" and above) is estimated at 2.4 million during the lean season (May-August 2020), a 15 percent increase compared to the 2.1 million forecast prior to the COVID-19 pandemic.

Kenya

Floods, desert locusts

- About 980 000 people are estimated to be severely food insecure in the April-July 2020 period, mainly located in northern and eastern areas as a result of livelihood losses due to floods in late 2019 and localized damages to crops and pastures due to desert locusts.
- As of May, about 393 000 individuals had been affected by the floods, which were triggered by torrential rains since March.

Somalia

Floods, civil insecurity, desert locusts, lingering impact of consecutive unfavourable rainy seasons on pastoral livelihoods

- About 2.7 million people are estimated to be in need of emergency assistance for the April-June 2020 period. The areas of major concern are the flood-affected riverine areas, urban IDP settlements and northwestern Awdal and Woqooyi Galbeed regions, where the most vulnerable households are facing IPC Phase 4: "Emergency" levels of food insecurity.
- As of May, floods, which were triggered by torrential rains in April, affected about 919 000 people.

Zimbabwe

Below-average cereal harvest, high food prices

- The number of food insecure people was estimated at 4.3 million in the first half of 2020.
- The number of food insecure is expected to remain high and could increase later in 2020, reflecting the impact of a consecutive below-average cereal harvest in 2020 and persisting high food prices; food availability and access will remain poor for many households.

WIDESPREAD LACK OF ACCESS

Burundi

Floods, landslides

- About 0.85 million people were estimated to be severely food insecure in the June-August 2020 period, mainly due to livelihood losses caused by floods and landslides triggered by torrential rains since March.

Chad

Civil insecurity

- According to the last "Cadre Harmonisé" analysis, about 1 million people are estimated to be food insecure between June and August 2020.
- Nearly 236 500 people remained internally displaced, almost entirely on account of the insurgency in the northeast. In addition, the country hosts about 470 000 refugees.

Democratic Republic of the Congo

Persisting civil insecurity

- About 13.6 million people are estimated to be severely food insecure, mostly residing in the areas with a high concentration of Internally Displaced Persons (IDPs) and refugees, including the eastern provinces of Ituri, North Kivu and South Kivu, where the security situation remains precarious and households face serious food access constraints.

Djibouti

Consecutive unfavourable rainy seasons

- About 175 000 people were estimated to be severely food insecure in January 2020, mainly due to consecutive unfavourable rainy seasons.
- The regions most affected by food insecurity were Dikhil and Obock, where 45-50 percent of the population were acutely food insecure.
- As of May, floods, which were triggered by torrential rains since March, affected about 110 000 people.

Eritrea

Economic constraints have increased the population's vulnerability to food insecurity

Ethiopia

High food prices, floods, desert locusts, impact of previous droughts

- About 8.5 million people were estimated to be severely food insecure between February and June 2020, mainly in eastern agricultural areas and in northern and southeastern agro-pastoral areas due to poor 2019 "Karan/Belg/Gu/Genna" seasonal rains between early and mid-2019.
- As of May, about 219 000 people have been affected by floods triggered by torrential rains since March.

Niger

Civil conflict

- According to the latest "Cadre Harmonisé" analysis, about 2 million people in the June-August 2020 period are assessed to be in need of immediate humanitarian assistance.
- Due to the civil conflict in neighbouring countries, the country hosts 223 000 refugees, of which 162 961 are from Nigeria and 58 813 from Mali, while an estimated 265 522 people are internally displaced.

Nigeria

Persisting conflict in northern areas

- According to the latest "Cadre Harmonisé" analysis, about 7 million people are assessed to need humanitarian assistance between June and August 2020.
- Over 2.6 million people are estimated to be internally displaced due to persisting civil insecurity. The areas inaccessible to humanitarian interventions are facing the worst food security conditions.

South Sudan

Severe economic downturn, civil insecurity, lingering impact of prolonged conflict

- Despite sustained humanitarian assistance, food insecurity still affects large segments of the population, driven by insufficient food supplies, an economic downturn and soaring food prices.
- About 6.48 million people (55 percent of the total population) are estimated to be severely food insecure in the May-July period. The highest prevalence of food insecurity is reported in Jonglei State, the area worst affected by the floods, where more than 70 percent of the population are severely food insecure. In May 2020, the number of internally displaced people was estimated at 1.6 million.
- About 12 000 people have been affected by floods triggered by torrential rains in May.

SEVERE LOCALIZED FOOD INSECURITY

Burkina Faso

Civil insecurity in the north

- According to the last "Cadre Harmonisé" analysis, the number of people in need of humanitarian assistance is estimated at 2.1 million for the June-August 2020 period, mainly due to civil insecurity in the north.
- An estimated 21 000 refugees, most of them from Mali, are living in the country, while about 921 500 individuals are internally displaced.

Cabo Verde

Poor performance of the 2019 agro-pastoral cropping season

- Based on the latest "Cadre Harmonisé" analysis, about 10 000 people (approximately 2 percent of the total population) are estimated to be in Phase 3: "Crisis" and above in the June-August 2020 period.

Cameroon

Civil insecurity

- According to the March 2020 "Cadre Harmonisé" analysis, about 2.6 million people were estimated to be severely food insecure (Phase 3 or higher) in the second quarter of 2020. About 45 percent of the food insecure population are located in the Northwest and Southwest Anglophone regions, where fighting is still ongoing between the security forces and separatist armed groups. Increased levels of insecurity in the Far North Region in March and April 2020 triggered new population displacements.

Congo

Influx of refugees, floods

- The country is estimated to host about 20 000 refugees from the Democratic

Republic of the Congo and about 22 000 refugees from the Central African Republic. Between October 2019 and January 2020, heavy rainfall triggered flooding that affected approximately 170 000 people, including 30 000 refugees from the Central African Republic and the Democratic Republic of the Congo, in northern and eastern areas.
- Host communities face food shortages and limited livelihood opportunities, and refugees' food security is essentially guaranteed by continued humanitarian assistance.

Eswatini
Localized shortfalls in production
- In the first quarter of 2020, an estimated 232 000 people were in need of humanitarian assistance. The expected upturn in cereal production is likely to improve food availability, but localized harvest shortfalls will adversely affect food insecurity.

Guinea
Localized shortfalls of cereal production
- About 267 000 people are estimated to need food assistance during the June-August 2020 period.

Lesotho
Localized shortfalls in production
- Between October 2019 and March 2020, an estimated 433 000 people required food assistance. A foreseen upturn in cereal production in 2020 is likely to improve conditions, but localized harvest shortfalls in southern areas will adversely affect food insecurity in these areas.

Liberia
High food prices
- According to the last "Cadre Harmonisé" analysis, about 41 000 people were estimated to be in Phase 3: "Crisis" and above in the June-August 2020 period. The country is hosting approximately 8 700 refugees.

Libya
Civil insecurity, political instability, low oil prices
- The total number of people in need of humanitarian assistance in 2020 was estimated at 0.9 million, of which 0.34 million require food assistance. Refugees, asylum seekers and internally displaced are among the most vulnerable. The number is likely to increase as the local currency depreciates, food prices increase and opportunities for casual labour decrease.

Madagascar
Reduced harvests in southern areas
- Reflecting the impact of dry weather conditions in southern regions on agricultural production, food insecurity is expected to worsen in 2020.

Malawi
Localized production shortfalls
- The national upturn in cereal production in 2020 is expected to improve the overall food security, however, in southern parts of the country, localized shortfalls in cereal production are estimated for a second consecutive year and this is expected to maintain high levels of food insecurity in these areas.

Mali
Civil insecurity
- The country is hosting approximately 45 000 refugees, while 251 000 internally displaced people and 84 000 returnees rely on humanitarian assistance.
- About 1.3 million people are estimated to need food assistance between June and August 2020, according to the most recent "Cadre Harmonisé" analysis, mainly as a result of the civil conflict.

Mauritania
Poor performance of the agro-pastoral cropping season
- According to the last "Cadre Harmonisé" analysis, about 609 000 people are assessed to need assistance between June and August 2020.
- About 63 000 refugees, mostly from Mali and who require assistance, reside in the country.

Mozambique
Shortfalls in staple food production
- Cereal production in southern regions is estimated to be below average in 2020 for a second consecutive year due to rainfall deficits and this is expected to maintain a high level of food insecurity in these areas.
- Nationwide, nearly 2 million people were assessed to be food insecure during the January-February 2020 period.

Namibia
Shortfalls in agricultural production
- An estimated 430 000 people were already facing IPC Phase 3: "Crisis" between January and March 2020. Although an estimated increase in agricultural production will improve food availability, localized production shortfalls will stress conditions in affected areas.

Senegal
Localized shortfalls in cereal production
- According to the latest "Cadre Harmonisé" analysis, about 767 000 people are estimated to need assistance between June and August 2020.
- An estimated 14 500 refugees, mostly from Mauritania, are residing in the country.

Sierra Leone
High food prices
- About 1.3 million people are estimated to be severely food insecure during the June-September 2020 period.

Sudan
Conflict, civil insecurity, soaring food prices
- The number of severely food insecure people was estimated at 9.6 million for the June-September 2020 period. The areas most affected by food insecurity are South Kordofan and Blue Nile State, and most of the Greater Darfur region.

Uganda
Localized crop production shortfalls, refugee influx, floods
- About 500 000 people were estimated to be severely food insecure in eastern Teso Region and northeastern Karamoja Region in early 2019 (latest available information).
- About 881 000 refugees from South Sudan and about 415 000 refugees from the Democratic Republic of the Congo are hosted in camps and rely on humanitarian assistance.
- As of May, about 177 000 people have been affected by floods triggered by torrential rains since October 2019.

United Republic of Tanzania
Localized crop production shortfalls
- About 499 000 people are estimated to be in need of emergency assistance in the May-September 2020 period, mainly in northeastern Manyara and Kilimanjaro regions and in central Dodoma and Singida regions, where 2019 harvests were affected by prolonged dry spells that resulted in significant cereal production losses.
- As of May, about 31 000 people have been affected by floods triggered by torrential rains since March.

Zambia

Localized production shortfalls, high food prices

- The upturn in cereal production in 2020 is expected to improve households' food availability and ease supply pressures on maize prices, which had reached record highs earlier in the year.
- Moreover, in southern parts of the country, localized production shortfalls are estimated for a second consecutive year and this is likely to sustain the high levels of food insecurity in these areas.

ASIA (8 COUNTRIES)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/SUPPLIES

Syrian Arab Republic

Civil conflict, stagnant economy

- In 2019, there were 7.9 million people unable to meet their food needs and a further 1.9 million at risk of food insecurity. This figure is likely to increase in 2020 as a result of the high food prices, stagnant wages and limited livelihood opportunities, amplified by containment measures introduced to limit the spread of the COVID-19 pandemic.
- Although some international food assistance is being provided, Syrian refugees are also pressuring host communities' resources in neighbouring countries.

WIDESPREAD LACK OF ACCESS

Democratic People's Republic of Korea

Low food consumption levels, poor dietary diversity, economic downturn

- During the lean season, which stretches from May to August, a large portion of the population suffers from low levels of food consumption and very poor dietary diversity.
- The economic constraints have increased the population's vulnerability to food insecurity.

Yemen

Conflict, poverty, floods, high food and fuel prices

- Over 80 percent of the total population, about 24.3 million people, require some form of humanitarian assistance. The Food Security Cluster estimates that 20.1 million people are in need of food security and agriculture interventions from June to December 2020, out of which 10 million people are in acute need. These figures are like to increase with limited income-earning opportunities and declines in remittances.

SEVERE LOCALIZED FOOD INSECURITY

Afghanistan

Civil conflict, population displacement, stagnant economy

- The food security situation worsened in recent months due to the impact of the COVID-19 pandemic as informal labour opportunities and remittances declined. Between April and May 2020, about 10.9 million people (35 percent of the population) were estimated to be in acute food insecurity and required urgent humanitarian action. These include around 7.4 million people in IPC Phase 3: "Crisis" and 3.5 million people in IPC Phase 4: "Emergency".

Bangladesh

Large numbers of people affected by Tropical Cyclone Amphan, refugees continue to put strain on host communities

- Tropical Cyclone Amphan, which made landfall in May 2020, severely affected the livelihoods of at least 1 million people, destroyed houses and infrastructure, including irrigation facilities.
- According to the latest figures from UNHCR (May 2020), about 860 000 Rohingya refugees from Myanmar were sheltering in Bangladesh, mainly in the Cox's Bazar District. The large number of refugees have put a strain on the local community as well as existing facilities and services.

Iraq

Civil conflict, low oil prices, stagnant economy

- About 4.1 million people, mostly IDPs and returnees, are in need of humanitarian assistance. The number of severely food insecure people is estimated at about 920 000, while 1.7 million are vulnerable to food insecurity, mostly IDPs and returnees, with the majority concentrated in the governorates of Diyala, Nineveh, Salah Al-Din, Anbar and Kirkuk.

Myanmar

Conflict in parts of Chin, Kachin, Shan, Kayin and Rakhine states

- Persistent conflicts in Rakhine, Chin, Kachin, Kayin and Shan states have triggered large-scale population displacement particularly since 2017. As of June 2020, an estimated 235 000 people, mostly women and children, are internally displaced, with the largest share of these IDPs sheltering in Rakhine and Kachin states.

Pakistan

Population displacement

- The country hosts close to 1.4 million registered and unregistered Afghan refugees. Most of these people are in need of humanitarian assistance and are straining the already limited resources of the host communities.
- Wheat and wheat flour prices, the country's main staple, have been at high levels since the beginning of the year, constraining access to food.

LATIN AMERICA AND THE CARIBBEAN (2 COUNTRIES)

WIDESPREAD LACK OF ACCESS

Venezuela

Severe economic crisis

- Amid the severe and protracted economic crisis, the number of refugees and migrants from Venezuela is estimated at 5.1 million. They have settled in neighbouring countries, including Colombia (1.8 million) and Peru (829 000). Humanitarian assistance needs to assist residents in Venezuela as well as refugees and migrants in host countries are significant.
- According to WFP's Food Security Assessment, conducted in the third quarter of 2019, about 2.3 million people (8 percent of the total population) are severely food insecure in the country, mainly as a result of the high food prices.

SEVERE LOCALIZED FOOD INSECURITY

Haiti

Prolonged dry spells and high inflation

- About 4.1 million people were projected to be facing severe acute food insecurity and thus in need of urgent food assistance in the March-June period due to the low 2019 cereal production, coupled with the high food prices and the economic downturn.

Terminology

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

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

*** Unfavourable Production Prospects**
Countries facing unfavourable crop production prospects are countries where forecasts point to a decrease in the cereal output compared to the five-year average, as a result of a reduction of the area planted and/or yields due to adverse weather conditions, plant pests and diseases, conflicts and other negative factors. This list does not include countries where production declines are mainly driven by deliberate/predetermined economic and/or policy decisions (see Regional Reviews pages):

page 14 (Africa)
page 24 (Asia)
page 31 (Latin America and the Caribbean)

****** The boundaries shown and the designations used on the **maps** do not imply the expression of any opinion whatsoever on the part of FAO concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers and boundaries. Dashed lines on the maps represent approximate border lines for which there may not yet be full agreement. Disputed territories and boundaries are in conformity with UN maps.

GLOBAL CEREAL OVERVIEW

Cereal Supply and Demand Overview[1]

Record global cereal production forecast boosts stock-to-use ratio to a twenty-year high

FAO's latest forecast for world cereal **production** in 2020 has been revised upward by 9.3 million tonnes in July and now stands at almost 2 790 million tonnes, with the global output set to surpass the record high reached in 2019 by as much 3.0 percent (81.3 million tonnes). Global wheat production is pegged at 761.5 million tonnes, up 3.2 million tonnes from the earlier projection in June and now is at par with last year's above-average outturn. The bulk of the monthly increase reflects an upward revision to Australia's wheat production forecast (+5.5 million tonnes), mostly resting on improved yield prospects underpinned by earlier widespread rainfall and favourable weather forecasts for the remainder of the season. This, combined with a larger-than-initially foreseen wheat acreage, is expected to lead to a more pronounced production rebound in 2020, which would mark a significant turnaround compared to the previous two years of drought-reduced harvests. Wheat production forecasts have also been raised for India (+2.2 million tonnes), based on recent official data pointing to a larger sown area and higher yields, and for the Russian Federation, where conducive weather boosted yield expectations, resulting in higher production prospects (+2.0 million tonnes). These increases more than offset a cutback to the European Union's wheat production forecast (-5.5 million tonnes) and the United Kingdom (-1.5 million tonnes) on reduced yield expectations. The forecast of world coarse grains production in 2020 has also been raised to 1 519 million tonnes, up 5.7 million tonnes

Table 1. World cereal production[1]
(million tonnes)

	2018	2019 estimate	2020 forecast	Change: 2020 over 2019 (%)
Asia	*1 188.3*	*1 199.8*	*1 217.1*	*1.4*
Far East	*1 089.1*	*1 093.4*	*1 107.8*	*1.3*
Near East	*65.0*	*72.6*	*74.8*	*2.9*
CIS in Asia	*34.2*	*33.8*	*34.5*	*1.9*
Africa	*198.0*	*190.6*	*192.4*	*0.9*
North Africa	*38.0*	*36.1*	*33.2*	*-8.3*
West Africa	*65.9*	*65.9*	*61.8*	*-6.3*
Central Africa	*5.7*	*5.8*	*5.7*	*-0.8*
East Africa	*56.6*	*54.1*	*56.2*	*3.9*
Southern Africa	*31.9*	*28.7*	*35.5*	*23.9*
Central America and the Caribbean	*42.5*	*42.1*	*42.8*	*1.8*
South America	*197.4*	*227.9*	*228.7*	*0.4*
North America	*495.2*	*478.7*	*542.1*	*13.2*
Europe	*497.3*	*541.5*	*526.1*	*-2.9*
European Union[2]	*294.2*	*323.8*	*287.7*	*-11.2*
CIS in Europe	*188.0*	*202.6*	*204.0*	*0.7*
Oceania	*30.9*	*27.9*	*40.7*	*45.6*
World	*2 649.6*	*2 708.5*	*2 789.8*	*3.0*
Developing countries	*1 617.6*	*1 651.5*	*1 672.2*	*1.2*
Developed countries	*1 032.0*	*1 057.0*	*1 117.7*	*5.7*
- wheat	*761.6*	*732.4*	*761.5*	*4.0*
- coarse grains	*1 436.0*	*1 410.9*	*1 446.2*	*2.5*
- rice (milled)	*499.4*	*506.3*	*500.8*	*-1.1*

Note: Totals and percentage change computed from unrounded data.

[1] Includes rice in milled terms.

[2] Data for the European Union from the year 2020 (including the 2020/21 marketing year) excludes the United Kingdom of Great Britain and Northern Ireland.

[1] Based on the FAO Cereal Supply and Demand Brief released on 2 July 2020.

from the previous figure of June and 5.0 percent (73.0 million) from 2019. Larger outputs of barley in Australia, the European Union and Turkey are mainly behind the monthly upturn. By a lesser extent, the forecast of world maize production has also been lifted since the earlier forecast in June, reflecting modest increases in the European Union, where recent rains, following several weeks of dry weather, benefited crops especially in southern France and northern Italy. Likewise, Brazil's maize output has been increased, now slightly exceeding the previous year's outturn and marking an all-time high. FAO's global rice production forecast for 2020 is now pegged at 509.2 million tonnes, up 1.7 percent from 2019 and 400 000 tonnes above June's expectations. The slight upward revision primarily reflects improved prospects for South American countries, where conducive weather raised yield expectations to all-time highs, promoting a partial output recovery from last year's reduced harvest.

The forecast for world cereal **utilization** in 2020/21 has also been lifted in July, to 2 735 million tonnes, just over 43 million tonnes (1.6 percent) above the 2019/20 level. The upward revision stems mostly from an increase in the coarse grains utilization forecast of nearly 3.0 million tonnes, driven by an upturn in feed and industrial uses compared to earlier expectations. Now forecast at an all-time high of 1 471 million tonnes, total coarse grains utilization in 2020/21 is seen up 2.7 percent (38 million tonnes) from the 2019/20 level, with the United States of America accounting for almost 40 percent (14.4 million tonnes) of the projected year-on-year increase and China (Mainland) over 20 percent (9.0 million tonnes). World rice utilization is also predicted to reach a fresh peak of 510.4 million tonnes in 2020/21, up 1.6 percent from 2019/20 based on expanding food use. By contrast, the 2020/21 global wheat utilization forecast is pointing to a slight (0.4 percent) decline from the 2019/20 level, largely on expected loss of feed market share to coarse grains as well as lower industrial use.

FAO's forecast of world cereal **stocks** by the close of the seasons in 2021 has been raised by 2 million tonnes compared to the figure in June to 929 million tonnes, representing a robust year-on-year expansion of 52.3 million tonnes (6.0 percent). At this level, the global cereal stock-to-use ratio in 2020/21 would reach a twenty-year high of 33.0 percent, highlighting the comfortable supply prospects in the new season. Larger wheat supplies owing to improved production prospects in several countries have led to a further upward revision to 2020/21 wheat inventories, raising the 2020/21 forecast to nearly 284 million tonnes, up almost 9 million tonnes (3.2 percent) from the opening levels but still below the record level registered in 2017/18. Most of the year-on-year expansion is expected in China (Mainland) where stocks are projected to reach a new record of 138 million tones, almost 11 million tonnes higher than their opening level and more than offsetting foreseen declines in the European Union and the United States of America. In comparison to wheat, coarse grains inventories are forecast to expand even more significantly in 2020/21, rising by nearly 45 million tonnes (10.8 percent), with large increases expected for both maize and barley stocks. The bulk of the anticipated expansion in maize inventories is concentrated in the United States of America, while buildups of barley are expected in Australia and the European Union. World rice stocks at the close of 2020/21 are forecast at 182.2 million tonnes, down 0.7 percent from their opening levels and only little changed from previous expectations. Much of the forecast drawdown is expected in China (Mainland), where a large 2020 crop is nonetheless seen keeping inventories at abundant levels. This, combined with expected reductions in Bangladesh and Indonesia, will likely more than offset a third consecutive annual increase in stockpiles held by the major rice exporters.

FAO's latest forecast for world **trade** in cereals in 2020/21 stands at 435.0 million tonnes, representing an increase of 9.0 million tonnes (2.1 percent) from the 2019/20 volume and a new record high. At almost 209 million tonnes, trade in coarse grains in 2020/21 (July/June) is forecast to increase by 2.4 percent from the 2019/20 estimated level, supported by expectations of stronger import demand for sorghum by China (Mainland). World wheat trade in 2020/21 is forecast at an all-time high of 178.7 million tonnes, up 1.5 million tonnes (just under 1 percent) from 2019/20, based on anticipated larger export supplies, particularly on expectations of strong production recoveries in Australia and Canada, more than offsetting the reduced export availabilities foreseen in the European Union and Ukraine. A revival in African import demand is expected to drive up rice trade in 2021 (calendar year) to 47.6 million tonnes, up 6 percent from 2020 and marking a three-year high.

Table 2. Basic facts of world cereal situation

(million tonnes)

	2018/19	2019/20 estimate	2020/21 forecast	Change: 2020/21 over 2019/20 (%)
Production[1]	*2 649.6*	*2 708.5*	*2 789.8*	*3.0*
Developing countries	*1 617.6*	*1 651.5*	*1 672.2*	*1.2*
Developed countries	*1 032.0*	*1 057.0*	*1 117.7*	*5.7*
Trade[2]	*410.4*	*426.0*	*435.1*	*2.1*
Developing countries	*144.3*	*160.4*	*156.7*	*-2.3*
Developed countries	*266.1*	*265.6*	*278.4*	*4.8*
Utilization	*2 678.0*	*2 692.2*	*2 735.4*	*1.6*
Developing countries	*1 817.2*	*1 827.6*	*1 863.1*	*1.9*
Developed countries	*860.8*	*864.6*	*872.4*	*0.9*
Per caput cereal food use (kg per year)	*149.5*	*149.6*	*149.8*	*0.1*
Stocks[3]	*870.0*	*876.6*	*928.9*	*6.0*
Developing countries	*678.9*	*690.2*	*699.5*	*1.3*
Developed countries	*191.1*	*186.4*	*229.5*	*23.1*
World stock-to-use ratio (%)	***32.3***	***32.0***	***33.0***	***3.0***

Note: Totals and percentage change computed from unrounded data.

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

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

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

LOW-INCOME FOOD-DEFICIT COUNTRIES' FOOD SITUATION OVERVIEW[2]

Table 3. Basic facts of Low-Income Food-Deficit Countries (LIFDCs) cereal situation
(million tonnes, rice in milled basis)

	2018/19	2019/20 estimate	2020/21 forecast	Change: 2020/21 over 2019/20 (%)
Cereal production[1]	478.1	486.1	492.7	1.4
excluding India	254.9	259.8	261.5	0.7
Utilization	516.8	526.9	540.7	2.6
Food use	391.2	398.2	407.3	2.3
excluding India	222.0	226.9	229.8	1.3
Per caput cereal food use (kg per year)	151.7	152.1	153.1	0.7
excluding India	154.4	154.4	153.1	-0.8
Feed	56.3	58.2	59.9	3.0
excluding India	41.1	41.8	42.5	1.9
End of season stocks[2]	105.8	111.5	111.7	0.2
excluding India	58.5	56.1	55.6	-0.9

[1] Data refer to calendar year of the first year shown.
[2] May not equal the difference between supply and utilization because of differences in individual country marketing years.

Table 4. Cereal production[1] of LIFDCs
(million tonnes)

	5-year average	2019 estimate	2020 forecast	Change: 2020 over 2019 (%)
Africa (37 countries)	104.8	109.5	110.1	0.6
East Africa	52.6	54.1	56.2	3.9
Southern Africa	9.9	10.2	10.8	5.5
West Africa	36.6	39.4	37.4	-5.1
Central Africa	5.7	5.7	5.7	-0.8
Asia (11 countries)	357.2	375.5	381.4	1.6
CIS in Asia	10.7	11.1	10.5	-4.8
Far East	337.7	353.8	360.4	1.9
India	252.4	265.9	272.3	2.4
Near East	8.7	10.6	10.4	-1.4
Central America and the Caribbean (2 countries)	1.1	1.1	1.2	7.1
Oceania (1 country)	0.0	0.0	0.0	0.0
LIFDCs (51 countries)	463.1	486.1	492.7	1.4

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2015-2019 period.
[1] Includes rice in milled terms.

Production in Low-Income Food-Deficit Countries (LIFDCs) forecast to increase in 2020

FAO's forecast for the aggregate cereal output of LIFDCs in 2020 stands at 492.7 million tonnes, 6.4 percent above the average and, if it materialises, would mark a fifth consecutive annual production increase.

In Southern Africa, improved precipitation since the start of the year, following early seasonal rainfall deficits, revived crop conditions and resulted in an above-average aggregate harvest in 2020. In Zimbabwe, however, despite a modest increase in production, the harvest is still estimated to remain below average for a second consecutive year, due to poor rains throughout the season as well as economic difficulties that hindered farmers' access to agricultural inputs. Estimated production shortfalls in southern Mozambique and southern Madagascar, due to floods and dryness, are also foreseen to keep production at near-average levels in 2020. In East Africa, harvesting of the main season cereal crops is underway or about to start. Although the risks associated with desert locusts remain present, particularly in parts of Somalia, Kenya and Ethiopia, where abundant rains from March to May created conducive conditions to the formation of new swarms, large-scale control operations have helped to contain the outbreak and minimise damages on crops and pastures. In West Africa, planting of the main coarse grains and paddy

[2] The inclusion of a country in the Low-Income Food-Deficit Countries (LIFDCs) group is based on three criteria: 1) the level of the annual per capita Gross National Income (GNI); 2) the net food trade position; and 3) self exclusion (when countries that meet the first two criteria request to be excluded from the category). The current (2018) list of the LIFDCs includes 51 countries, one less than in the previous list but with some changes. For full details see: **www.fao.org/countryprofiles/lifdc**

crops, to be harvested from October, is underway. Although aggregate production among in West African LIFDCs is preliminarily forecast to remain above average in 2020, a small yearly decrease is expected. In Central Africa, production is anticipated to remain unchanged at a near-average level as conflicts in several countries, including the main producers, Cameroon and the Democratic Republic of the Congo, continue limit growth in agricultural production.

In Asia, aggregate cereal production is anticipated well above the average, mainly reflecting an all-time high wheat harvest in India, the largest cereal producer among the LIFDCs, and a slight increase in maize and wheat production in Bangladesh. Similarly, in the Syrian Arab Republic, the cereal harvest is expected to increase for a second consecutive year as improved security conditions, coupled with favourable weather conditions, helped farmers attain higher yields and maintain a near-average sown area but remain well below pre-crisis average.

Import requirements increase in 2020/21, driven by large needs in several African and Asian LIFDCs

Despite an increase in the aggregate output in 2020, the cereal import requirement for LIFDCs in the 2020/21 marketing year is estimated at 73.3 million tonnes, up 3.9 million tonnes on a yearly basis and about 5.5 percent above the five-year average.

Large import requirements are estimated in West Africa, reflecting early indications pointing to production declines in several countries. Other significant increases in import requirements are estimated in the Sudan, following a reduced harvest in 2019 that caused a significant drawdown of national stocks, and in Zimbabwe, reflecting a second consecutive below-average harvest and low domestic stocks. Import needs are also forecast to increase in some Asian countries, notably in Afghanistan and Nepal, reflecting foreseen production declines in 2020.

Table 5. Cereal imports of LIFDCs

(thousand tonnes)

	2018/19 or 2019	2019/20 or 2020		2020/21 or 2021	
	Actual imports	Import forecast	*of which food aid*	Import requirement[1]	*of which food aid*
Africa (37 countries)	*27 132*	*28 907*	*1 168*	*31 232*	*1 159*
East Africa	*11 070*	*11 850*	*818*	*12 312*	*818*
Southern Africa	*2 652*	*3 106*	*20*	*3 538*	*14*
West Africa	*10 719*	*11 347*	*174*	*12 664*	*170*
Central Africa	*2 692*	*2 604*	*156*	*2 718*	*156*
Asia (11 countries)	*40 885*	*39 041*	*1 038*	*40 576*	*1 022*
CIS in Asia	*4 910*	*4 826*	*0*	*5 035*	*0*
Far East	*24 553*	*24 709*	*218*	*25 430*	*202*
Near East	*11 422*	*9 507*	*820*	*10 112*	*820*
Central America and the Caribbean (2 countries)	*1 425*	*1 447*	*10*	*1 472*	*10*
Oceania (1 country)	*62*	*62*	*0*	*62*	*0*
LIFDC (51 countries)	*69 503*	*69 457*	*2 216*	*73 342*	*2 191*

Note: Totals computed from unrounded data.

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

SPECIAL FEATURE - Regional roundups of COVID-19 impacts

North Africa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Reports from the countries indicate that the main agricultural activities have not been disrupted by the implementation of COVID-19 containment measures. However, faced with the lockdown, consumers resorted to stockpiling food, leading to a sudden spike in demand that pressured supplies and prices. Countries responded by restricting exports and facilitating imports in order to bolster food supplies, as well as increasing the capacity of food processing factories to meet the heightened demand in retail markets; for example, in Algeria wheat mills operated for extended hours. As basic foods are subsidized in most countries, the increase in demand did not, however, trigger significant increases in food prices in general. However, prices of fresh foods rose steeply, particularly in countries that rely on imports, such as Libya, where land crossings with Tunisia were not systematically opened to allow for cargo traffic. The pandemic-induced economic slowdown is also expected to result in the loss of jobs and incomes particularly for casual labourers, which would curtail households' purchasing power. Despite government measures to offset income losses (for example in Morocco, Tunisia and Egypt through cash transfers), the most vulnerable segments of the population, including pensioners, informal and temporary workers, are likely to experience food access constraints.

West Africa

The COVID-19 pandemic has already and is anticipated to continue to affect the overall food security situation for the rest of 2020. The containment measures through quarantine and movement restrictions have reduced access to income-earning activities, limiting households' incomes and by extension diminishing purchasing power. Despite the widespread impact of the pandemic, market supplies of coarse grains have remained generally sufficient, partly reflecting two years of good domestic harvests. Nonetheless, disruptions to trade flows continued to be reported in the areas affected by conflicts and the containment measures are further limiting market availabilities in these areas, exerting added upward pressure on food prices. With plantings of the main season crops mostly complete, field reports indicated that access to inputs and labour were impacted by the COVID-19 restrictive measures especially in Nigeria, Senegal and Chad. This is expected to have curbed plantings and adversely impact crop yields, as well as pastoralists' livelihoods.

Central Africa

The implementation of border control procedures has reportedly hampered food trade in the subregion. These measures are reported to have negatively impacted households' livelihoods and agricultural activities, due to the impeded movements of workers to fields and markets, and consequently affected households' incomes, especially in the informal sector in urban areas. The restricted movement of food goods has also caused price increases that, combined with lower income-earning opportunities, have constrained access to food of the most vulnerable households.

East Africa

The lockdown measures caused localized price increases and reduced the availability of agricultural inputs in some areas due to trade disruptions, whilst also causing a reduction in employment opportunities and, therefore, incomes. In rural areas, the comparatively lower reliance on market supplies for food has limited the adverse effects on food access due to income losses, while food availability is anticipated to improve with the upcoming 2020 main season harvests. By contrast, in urban areas, where market-dependant poor households mainly rely on daily wages from casual labour activities the lockdown measures severely curtailed job opportunities and consequently led to a worsening of the food security situation. For example, in Somalia, according to the Food Security and Nutrition Working Group (FSNAU) and FEWS NET, incomes among the poor urban households and IDPs is estimated to have declined by 20-30 percent since April, due to reductions in casual labour opportunities and wages, petty trade and remittances. The significant decline in incomes, in conjunction with sharply rising prices of staple cereals between March and May in the capital, Mogadishu, is resulting in widening food consumption gaps for the most vulnerable urban households. Despite the recent phasing out of some restrictive measures in most countries of the subregion, the food security situation of the urban poor is not expected to improve in the short term as the restoration of economic activities is likely to be slow.

Southern Africa

The containment measures have so far had generally limited impacts on agricultural production, with the 2020 main cereal harvest virtually complete and estimated at a bumper level. The designation of food production as an essential service allowed entities in the food supply chain to continue to operate during the lockdowns. However, the imposition

of stricter sanitary measures impaired the movement of goods, including agricultural inputs, which could delay winter cropping activities, as has been reported in Lesotho. The mitigation measures have also disrupted the functioning of the informal food sector, with several countries banning street vendors, an important source of food supplies for many vulnerable and low-income households, particularly in urban areas. In addition, job losses are expected to be widespread due to the pandemic-induced economic slowdowns and consequently households are anticipated to suffer significant income reductions, lowering their ability to purchase food. As a result, and despite the positive impact of large harvests this year, food insecurity across the subregion is likely to worsen in 2020 compared to the already high levels of the previous year.

Far East Asia

Most countries implemented lockdown measures between early March and April, in some cases up to the end of May. Reports from the countries indicated that there were no major disruptions to harvesting operations as agricultural activities were authorized to continue in order to ensure adequate food availability. The pandemic has, however, lowered income-earning opportunities reflecting the adverse effects of the containment measures, with farmers often reporting impaired access to output markets, while opportunities for casual labourers have been reduced. In addition, remittances have fallen, representing an important loss of finance for vulnerable households. An additional negative impact has been the spike in prices of rice that reached record or near-record levels in several countries, following a surge in demand and COVID-19-related market disruptions. The high prices, combined with lower incomes, curtailed access to food for poor households. To counter the adverse effects on prices for consumers, a number of market interventions were implemented, including, for example, the establishment of a new maximum retail price for rice in Sri Lanka. Governments also took steps to guarantee adequate domestic supplies by imposing export restrictions, as was the case in Viet Nam and Cambodia. While other governments sought to bolster stocks through increased imports.

Near East

Despite some COVID-19 containment measures restricting the movement of people and closing non-essential businesses, no major disruptions in agricultural activities were reported across the subregion. The resilience capacities of the countries affected by conflicts have been significantly eroded and are, therefore, likely not to have access to the resources needed to overcome the pandemic and revive the economy. Although only some localized supply shortages of foods have been reported particularly in countries challenged by conflicts, high prices have severely limited households' access to food. Amid curfews and movement restrictions, consumers increased their food purchases to secure supplies, while in some countries the containment measures led to bottlenecks in the supply chains, particularly for fresh fruits and vegetables, further pressuring prices. However, not all food price increases were attributable to the pandemic, in many cases weak domestic currencies as well as seasonal increases during Ramadan pushed prices higher. The lockdown measures and closure of non-essential businesses have also resulted in employment and income losses, particularly in consideration that a large share of the labour force is employed in the informal sector. The pandemic has also affected the distribution of humanitarian aid in the most vulnerable countries, which is expected to further aggravate food security conditions.

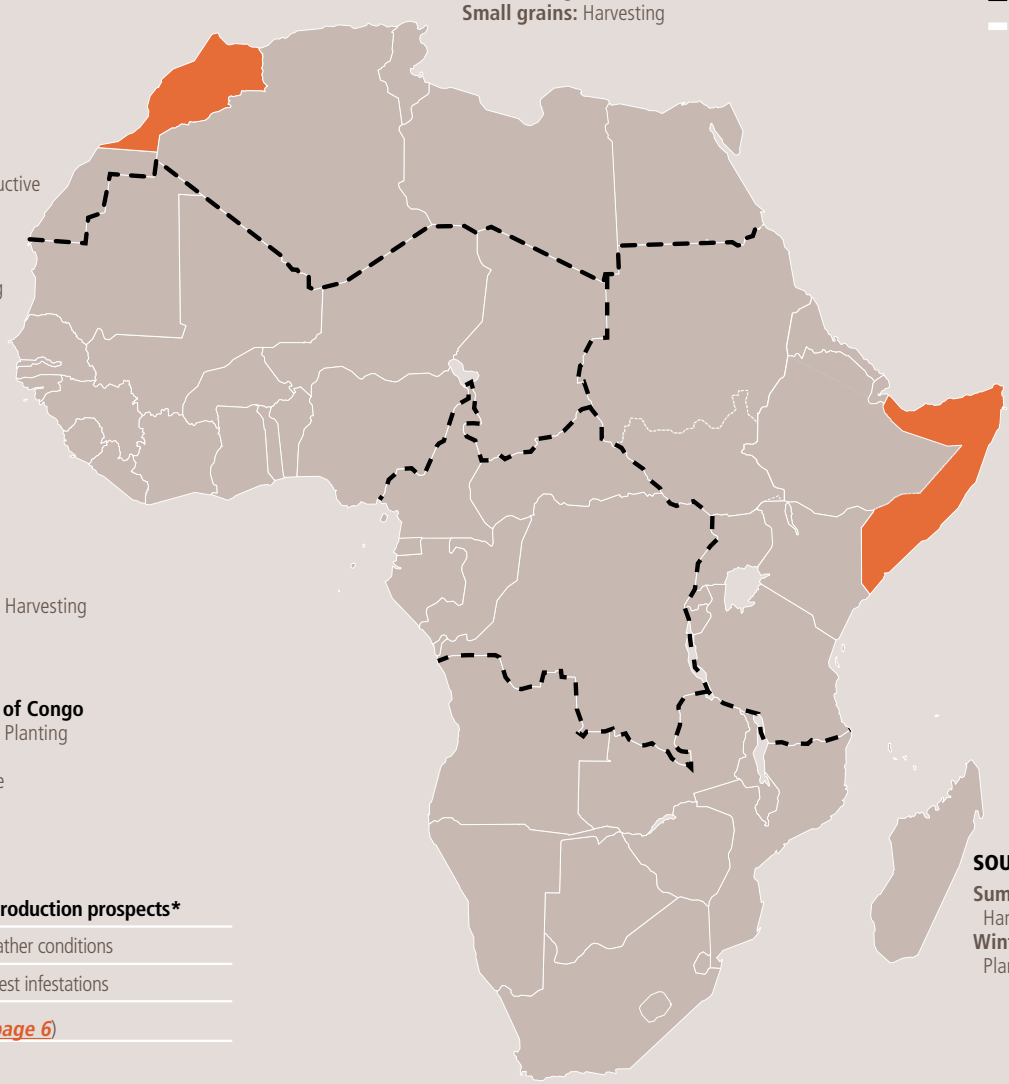
CIS in Asia

At the start of the COVID-19 outbreak, most governments implemented trade and non-trade policies to stabilize domestic supplies of staple foods and avert price increases. Export limitations were introduced in Armenia, Kazakhstan (subsequently removed), Kyrgyzstan and Tajikistan, while in Georgia and Uzbekistan the governments introduced specific measures to facilitate food imports. In addition, the governments of Georgia, Kazakhstan and Kyrgyzstan established price ceilings on food staples. Despite these measures, domestic prices of wheat and potatoes recorded sharp increases particularly in April, amid stronger consumer demand due to concerns over the effects of the pandemic.

Latin America and the Caribbean

Although some delays in logistics services were reported at the initial stage of the pandemic, there has been a comparatively limited impact on farming activities, as agricultural production and commercial activities along the food supply chain were exempt from the COVID-19 containment measures. To support agricultural activities, several governments provided financial and in-kind support to farmers. Regarding markets, prices of rice in South America and beans in Central America increased sharply in the March-May period, reflecting an increase in domestic demand and a slowdown in farm sales. As a response to the upsurge, some countries temporarily banned exports of a number of agricultural products to secure national supplies and reduced import tariffs to zero to boost domestic availabilities. The pandemic has also curbed incomes reflecting a reduction in remittances, restrictions on cross-border movements, that lowered income-earning opportunities and, more broadly, a generally increase in job losses particularly in the informal sector. These factors have negatively impacted food security, notably through a deterioration in households' capability to access food.

REGIONAL REVIEWS
AFRICA



Unfavourable 2020 production prospects*

Morocco: Adverse weather conditions

Somalia: Floods and pest infestations

*/** See Terminology (*page 6*)

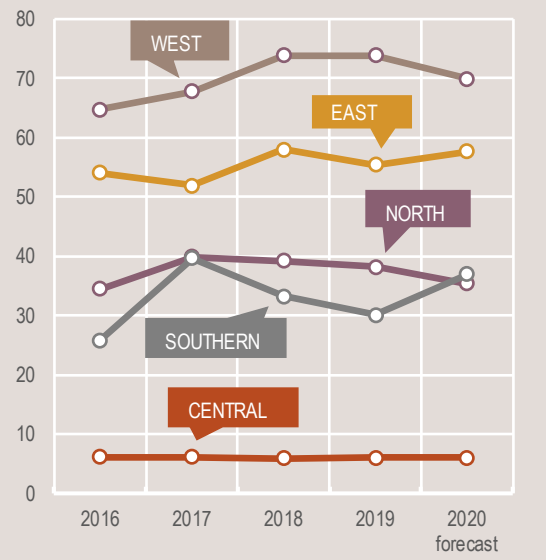
Source: GIEWS

Africa Production Overview

Aggregate cereal production in Africa is forecast at 206 million tonnes in 2020, 4 percent above the five-year average and broadly unchanged on a yearly basis. The above-average outturn reflects a bumper maize harvest in Southern Africa and favourable production prospects in East Africa, where large-scale control operations have largely mitigated the impact of the desert locust outbreaks on crops and pastures. However, serious concerns still remain for rural livelihoods in parts of Somalia, Kenya and Ethiopia due to the formation of new swarms of locusts. In West Africa, early production prospects point to an above-average output in 2020 mainly reflecting favourable weather conditions and average to above-average plantings.

In North Africa, cereal production is expected to fall to a below-average level, reflecting significant production declines in Morocco and Tunisia due to dry weather conditions. In Central Africa, production is anticipated to remain unchanged at a near-average level, as conflicts in several countries continue to limit growth in agricultural production.

Cereal production
(million tonnes)



NORTH AFRICA

Below-average 2020 cereal harvest expected

In **Egypt**, **Libya** and **Morocco**, harvesting of the 2020 winter wheat crop generally concludes in June, while it continues up to mid-August in **Algeria**. In all countries, a comparatively minor winter barley crop is harvested before wheat.

Rainfall amounts and temporal distribution in the 2019/20 agricultural season differed considerably across the subregion. In **Morocco**, a late onset of the rains delayed plantings followed by dry weather conditions, including high temperatures from January to March, affected crop growth and decreased yield potential. Beneficial rains in late March and April proved to be too late to fully revive crops, which were already at filling to maturing stages. As a result, total cereal production is forecast at 4 million tonnes, almost one-fourth lower than the previous year's already weather-stricken harvest and about 50 percent below the five-year average. Wheat production is expected to decrease from 4.1 million tonnes, gathered last year, to 3 million tonnes in 2020, a decline of almost 50 percent compared to the average. While southwestern parts of **Algeria** experienced weather conditions similar to Morocco, well-distributed rains provided favourable conditions for crop development in most eastern parts of the country. These conditions are expected to result in an above-average cereal output of 4.9 million tonnes, albeit about 20 percent below the record high in 2019. In **Tunisia**, the 2020 cereal production is preliminarily forecast at a near-average level of 1.5 million tonnes, as abundant rainfall from mid-March to early April helped to mostly counter the effects of the rainfall deficits at the start of 2020 and boost yield prospects compared to earlier poor expectations. In **Egypt**, the agricultural season proceeded smoothly and cereal production is expected at an above-average level of 24.8 million tonnes. In **Libya**, where cereal production is already constrained by geographical conditions, the ongoing conflict has affected availability and prices of inputs, curtailing production capacities.

Overall, the subregion's cereal production in 2020 is forecast at 35.4 million tonnes, about 9 percent below average and 7 percent lower than the 2019 harvest.

All countries in the subregion rely heavily on wheat imports from the international market to cover their domestic consumption needs. With a below-average 2020 output, the subregion's aggregate cereal import requirement, of which wheat accounts for about 60 percent, in the 2020/21 marketing year (July/June) is estimated at 51.4 million tonnes, about 2 percent above the import requirement of the previous year and 5 percent above the previous five-year average.

Subsidies curbed increases in food price inflation

Increases in the food price inflation in March 2020 largely reflected the higher prices of fresh foods, as increased consumer demand associated with the COVID-19 lockdown measures and localized supply chain bottlenecks exerted upward pressure. By April 2020, prices mostly levelled off as government subsidies on basic foods curbed further gains and consumer stockpiling subsided easing demand pressure.

In **Tunisia**, the food inflation rate increased from 3.7 percent in February 2020 to 5.1 percent in March 2020 and 6.2 percent in April 2020. However, it levelled off to 4.7 percent in May 2020. In **Egypt**, the annual food price inflation remained negative in February and March 2020, and increased to a modest 1.3 percent in April 2020. Up to April 2020 (latest available information), the food inflation rate in **Algeria** remained below 2.5 percent, although an increase from 1.7 to 2.4 percent was reported between February and March 2020, followed by a decrease to 2.3 percent in April 2020. Similar developments were recorded in **Morocco**, where the annual inflation increased slightly from 1.1 percent to 1.5 percent between February and March 2020, followed by a decline to 0.9 percent in April 2020.

No recent inflation information is reported from **Libya**. However, according to the Libya Joint Market Monitoring Initiative, in the first week of April 2020 (latest information available), the cost of the Minimum Expenditure Basket (MEB) increased, on average, by almost 30 percent, driven mostly by increases in cooking fuel. Some markets reported shortages of food supplies, such as eggs, vegetables and wheat products. The median price for wheat flour increased by 50 percent. Most Libyans are employed in the public sector where salaries have not been paid for months, resulting in a decreased purchasing power of the majority of the population.

Table 6. North Africa cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	Change: 2020/2019 (%)
North Africa	19.2	18.7	16.7	13.1	12.8	11.4	6.5	6.7	7.2	38.8	38.2	35.4	-7.4
Algeria	3.1	4.0	3.6	1.5	2.1	1.3	0.0	0.0	0.0	4.6	6.1	4.9	-19.8
Egypt	9.0	9.0	9.0	8.8	8.5	8.6	6.5	6.7	7.2	24.3	24.1	24.8	2.5
Morocco	5.9	4.1	3.0	2.2	1.2	1.0	0.1	0.1	0.0	8.2	5.4	4.0	-25.4
Tunisia	1.1	1.5	1.0	0.5	0.9	0.5	0.0	0.0	0.0	1.6	2.4	1.5	-36.2

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2015-2019 period.

WEST AFRICA

Favourable rains at the start of the 2020 cropping season

Following a timely onset of the rains in coastal countries across the southern bi-modal areas, including **Benin**, **Côte d'Ivoire**, **Ghana**, **Nigeria** and **Togo**, planting of the main season 2020 maize crops was completed in May and harvesting of early planted crops is expected to start in July. Planting operations of coarse grains continued in May in the Sudanian zone, including southern **Mali**, **Burkina Faso** and **Chad**, northcentral **Nigeria**, northern **Benin** and **Togo**. In the Sahel belt, in central **Mali**, northern **Burkina Faso**, central **Chad**, southern **Niger** and northern **Senegal**, planting operations for the main season crops, to be harvested from October, are underway and are expected to be finalized in July. Planting of the main rice crop, to be harvested from October, is underway in **Sierra Leone**, **Liberia**, **Ghana** and **Nigeria**, while the second season rice crops is being harvested in **Senegal**. Cumulative rainfall amounts since early March were average in most planted areas, which supported the development of crops at vegetative growth stages. Cumulative rainfall levels increased in recent weeks. According to the latest Forum of the Agro-Hydro-Climatic Seasonal Forecast in Sudano-Sahelian Africa (PRESASS), the June/October rainy season is likely to be characterized by above-average rainfall and will continue until October in most countries.

Despite the favourable weather forecast supporting good yield prospects for the 2020 cereal crops, there are several downside risks to production this year including insecurity, the effects of the COVID-19 outbreak and the impact of desert locusts and Fall Armyworms. Persisting insecurity conditions and large-scale population displacements in northeast **Nigeria**, the Lake **Chad** Basin, northern and central **Mali**, northeastern **Burkina Faso** and western **Niger** continue to severely affect agricultural activities and hinder access to fields and agricultural inputs. In these areas, it is likely that most farming households will not be able to cultivate in 2020. In addition, the heightened levels of fear surrounding the COVID-19 disease is severely limiting population movement and causing local labour supply shortages. In addition, the regular field surveys and crop assessments carried out jointly by CILSS/FAO/FEWS NET/WFP/governments to monitor the progress of the cropping season have been disrupted due to movement restrictions, resulting in some uncertainty in yield estimation. In June, the desert locust situation was generally calm across the subregion, with no swarm incursions reported. However, there is a risk that insects from East Africa may arrive in the July-August period depending on rainfall patterns and the direction of prevalent winds. Outbreaks during this period could negatively impact 2020 cereal crops, which would be at their reproductive growth stages (stem extension and heading stages in most cases).

The dry season in early 2020 has been characterized by the low availability of pasture and fodder for livestock due to insufficient and erratic rains recorded in 2019 in the pastoral areas of **Senegal**, **Mauritania**, **the Niger**, **Mali**, **Burkina Faso**, **Chad** and **Nigeria**. Recent rains have contributed to the recovery of pasture conditions and in June 2020 forage availability was satisfactory in the main grazing areas of the country, allowing animals to maintain good body conditions and enhance their market value. However, in some areas, access to pasture was hampered by the persisting civil insecurity which disrupted the cross-border transhumance routes and the closure of borders in relation to the COVID-19 containment measures. This has resulted to an atypically high concentration of animals in border areas, increasing the risk of conflicts between farmers and herders as well as disease outbreaks. Currently, the animal health situation is good, with only some localized outbreaks of seasonal diseases.

Prices of coarse grains remained mostly stable, but spikes were recorded in some countries

Despite the effects of the COVID-19 pandemic in the region, market food supplies have been generally adequate in recent months as movements of food commodities have been exempted from the restrictive measures and import flows from the international markets have been regular. In **Burkina Faso** and **Chad**, prices of coarse grains generally increased in May due to the strong food demand during the Ramadan festive period. Prices of coarse grains remained broadly stable and in **the Niger** on account of adequate market availabilities. In **Senegal**, prices of millet increased

Table 7. West Africa cereal production

(million tonnes)

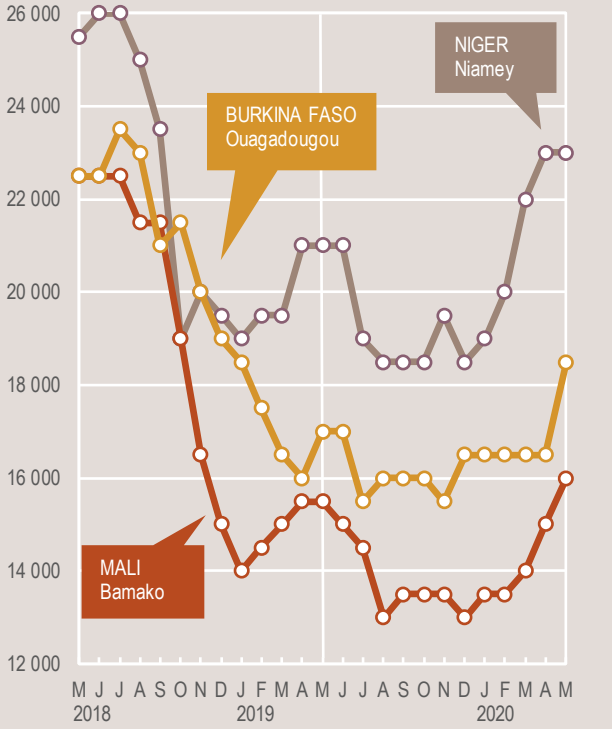
	Coarse grains			Rice (paddy)			Total cereals[1]			
	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	Change: 2020/2019 (%)
West Africa	48.0	52.4	48.1	20.2	21.4	21.7	68.2	73.9	69.9	-5.4
Burkina Faso	4.3	4.7	4.0	0.4	0.4	0.4	4.6	5.0	4.4	-13.7
Chad	2.5	2.7	2.5	0.3	0.3	0.3	2.8	3.0	2.8	-6.3
Ghana	2.6	3.3	2.6	0.8	1.0	1.0	3.3	4.3	3.6	-15.2
Mali	6.5	7.1	6.6	2.8	3.2	3.0	9.3	10.3	9.6	-6.3
Niger	5.7	5.5	5.7	0.1	0.1	0.1	5.8	5.7	5.8	1.8
Nigeria	19.2	21.4	19.2	8.1	8.4	8.5	27.3	29.9	27.8	-6.9

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2015-2019 period.

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

slightly in April, after declining in the past few months, with domestic availabilities reported to be reduced mainly reflecting a low output in 2019. In the conflict-related areas of **Chad** (Lake Chad Basin), northern and central **Mali** and the Liptako-Gourma Region of **Burkina Faso**, **Mali** and **the Niger**, the persisting conflicts continued to hamper market activities and trade flows, leading to atypically high prices. In coastal countries along the Gulf of Guinea, strong domestic demand for seeds and food amid movement restrictions, coupled with the high demand by importing countries, contributed to the upward trend in prices in recent months in **Benin** and **Togo**. In **Ghana**, prices of maize were stable in April, following the lifting of COVID-19-related restrictions, which allowed the resumption of market activities and consequently boosted supplies. In **Nigeria**, prices of locally-produced cereals increased steeply in April, underpinned by an uptick in purchases related to both concerns over the impact of the pandemic and for the Ramadan festive period. In addition the depreciation of the national currency (Naira) provided further upward pressure.

Millet prices in selected West African markets
(CFA Franc BCEAO (XOF)/100kg)



Source : Afrique Verte.

COVID-19 outbreak could exacerbate already alarming levels of food insecurity

According to the March 2020 "Cadre Harmonisé" analysis, the aggregate number of severely food insecure people (CH Phase 3: "Crisis" and above) was estimated at about 16.9 million during the lean season between June and August 2020, well above the 11.1 million estimated for the June-August 2019 period. The largest food insecure population is located in **Nigeria**, where about 7 million people need urgent food assistance, followed by **Burkina Faso** (2.1 million), **the Niger** (2 million), **Mali** and **Sierra Leone** (1.3 million) and **Chad** (1 million). A key driver of the current poor food security situation has been the lingering impact of persisting civil insecurity. The security situation remains precarious in northeast **Nigeria**, central and northern **Mali**, eastern **Niger**, northern **Burkina Faso**, Liptako-Gourma Region of **Mali** and **Burkina Faso** and the Lake Chad Basin and Tibesti Region in **Chad**, triggering new population displacements and restricting access to basic services in the affected areas. Many conflict-affected households have been deprived of their livelihoods and continue to highly rely on external food assistance to cover their basic food needs. According to the International Organization for Migration (IOM), the increase in terrorist attacks and threats have increased the number of IDPs in **Burkina Faso**, **Mali** and **the Niger** from 700 000 people in November 2019 to over 1.1 million in May 2020.

Overall food security conditions may worsen due to the impact of the COVID-19 pandemic, as the initial food insecure numbers were generated in March, prior to the full effects of the containment measures and its impacts on the local economy. Movement restrictions have already impeded some trade in food products and diminished access to pasture, whilst the overall negative impact on economic activities is likely to cause a reduction in incomes, causing a reduction in households' capacity to purchase food.

CENTRAL AFRICA

Agricultural production in 2020 expected at a near-average levels

In the northern uni-modal rainfall areas of **Cameroon** and in **the Central African Republic**, planting of the 2020 millet and sorghum crops was completed by June and harvesting is expected to begin in August, while harvesting of the 2020 early-planted main maize crops is already underway in central and southern areas of the two countries. In **Cameroon**, abundant rains between March and early May, particularly in central regions, resulted in cumulative precipitation amounts reaching levels more than twice the long-term average, raising concerns for the maize crops due to excessive water and potential flood damage. In **the Central African Republic**, latest weather forecasts point to average precipitation amounts between July and September 2020, with likely positive effects on yields.

Harvesting of the 2020 secondary maize crop is underway in **the Republic of the Congo**, **Gabon** and the northern provinces of **the Democratic Republic of the Congo** and the production outlook is generally favourable as precipitation amounts have been near average in most cropping areas. In the central provinces of **the Democratic Republic of the Congo**, harvesting of the 2020 secondary season maize crops finalized in May, under overall favourable weather conditions, except in South Kivu Province, where heavy rains in mid-April caused localized flooding, resulting in some damage to standing crops. In Maniema Province, an escalation of violence since February 2020 caused the displacement of about 47 000 people and disrupted agricultural operations, including harvesting of the 2020 secondary season maize crop and land preparation of the 2020 main season maize crops, currently underway.

In the southernmost uni-modal rainfall areas of **the Democratic Republic of the Congo**, harvesting of the 2020 maize crops was finalized in June. In the provinces of Tanganyika, Haut Lomami and Haut Katanga, heavy rains in the first quarter of 2020 resulted in flooding, which damaged large portions of standing cassava crops and other basic food staples and triggered the early harvest of the remaining crops.

If weather conditions will be favourable during the remainder of the season in **the Central African Republic**, **the Democratic Republic of the Congo** and **Cameroon**, agricultural outputs in 2020 are expected at levels near or above the five-year average. However, ongoing conflicts and displacements are expected to continue to affect agricultural activities and limit farmers' access to crop growing areas and agricultural inputs. These factors are expected to curb growth in agricultural production.

Prices of staple foods at high levels amid tight supplies and high demand

Prices of staple foods generally increased in the second quarter of 2020 with the start of the lean season in most countries of the subregion; the increase in prices were more pronounced in April. As of June were generally above their year-earlier levels due to high consumer demand and low supplies, reflecting trade disruptions caused by the imposition of tighter border controls and movement restrictions to contain the spread of COVID-19.

In **the Central African Republic**, during the first months of 2020, prices of staple foods were significantly higher on a yearly basis as insecurity continued to cause disruptions to supplies and trade. In April, with the implementation of the COVID-19 containment measures, prices increased further due to a slowdown in domestic and international trade, amid the partial closure of the borders with Cameroon and the Democratic Republic of the Congo. Prices of imported products, such as rice and beans, reached levels up to 80 percent higher on a yearly basis. Similarly, prices of locally-produced foods, such as maize, cassava and sorghum, were about 50 percent above those in April 2019. An outbreak of cassava mosaic disease in southern areas and consequently reduced availabilities exerted additional pressure on cassava prices, besides the effects associated with the COVID-19 pandemic. In **the Democratic Republic of the Congo**, prices of staple foods increased steeply between December 2019 and February 2020, mostly due to low supply and high demand following the reduced harvests. Prices of cereal products, mainly of maize flour, were reported to be particularly high in February in (former) Katanga Province and in parts of Kasai Province, due to a below-average local production, high import costs and reduced imports from Zambia. Floods in the southern provinces of Tanganyika, Haut Lomami and Haut Katanga triggered price increases for cassava and other basic food staples in the first quarter of 2020. In **Cameroon**, prices of some staple foods such as fish,

Table 8. Central Africa cereal production

(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals[1]			
	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	Change: 2020/2019 (%)
Central Africa	5.3	5.3	5.3	0.7	0.7	0.7	6.0	6.0	6.0	-0.7
Cameroon	3.1	3.1	3.0	0.3	0.4	0.4	3.4	3.4	3.4	-1.4
Central African Republic	0.1	0.1	0.1	0.0	0.0	0.0	0.1	0.2	0.2	-2.5
Democratic Republic of the Congo	2.1	2.0	2.0	0.3	0.3	0.3	2.4	2.4	2.4	0.4

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2015-2019 period.

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

plantains, cocoyam and meat were above their seasonal levels in April, particularly in the cities of Yaoundé and Douala, due to low supplies and strong demand. Similarly, prices of rice, beans and potatoes reached levels well above those of a year before across most markets in the country. In the Northwest and Southwest regions, the persisting conflict, increased demand and low supplies led to an overall increase in prices in the year to April 2020. Prices of yellow maize, for instance, were reported to be up to 30 percent higher year on year in the cities of Bamenda, Nkambe and Kumbo.

In **Gabon** and **Equatorial Guinea**, prices of livestock were reported at high levels in April, due to increased customs controls on the border with Cameroon, which impeded trade flows and increased transport costs.

Dire food insecurity conditions due to civil unrest, conflicts and high prices

The latest IPC analysis estimates the aggregate number of severely food insecure people in the subregion at about 18.6 million (excluding the Republic of the Congo, Gabon and Equatorial Guinea) in the second quarter of 2020. Ongoing conflicts continued to be the major cause of food insecurity as they triggered large-scale population displacements, leading to the widespread disruption of agricultural and marketing activities, with a severe negative impact on food availability and access. In addition, in March and April 2020, national governments introduced a range of restrictive measures to contain the COVID-19 outbreak, which are reported to have negatively impacted households' incomes, slowed down trade flows and triggered price increases, thus limiting access to food.

The largest food insecure population is located in **the Democratic Republic of the Congo**. According to the latest IPC analysis (issued in August 2019), about 13.6 million people (28 percent of the analysed population) were projected to be severely food insecure (IPC Phase 3: "Crisis" and IPC Phase 4: "Emergency") during the January-May 2020 period. The majority of the severely food insecure population is located in areas with a high concentration of Internally Displaced Persons (IDPs) and refugees, including the eastern provinces of Ituri, North Kivu and South Kivu. In **the Central African Republic**, 2.4 million people (51 percent of the analysed population) are estimated to be severely food insecure (IPC Phases 3 and 4) during the lean season between May and August 2020, a 15 percent increase compared to the 2.1 million forecast prior to the COVID-19 outbreak. About 753 000 people are estimated to be in IPC Phase 4: "Emergency" and are mainly located in the prefectures of Bangui, Ouaka and Ouham that host the highest number of IDPs. In Bangui, the number of food insecure people is estimated to be considerably higher than in previous years due to the impact of COVID-19-related containment restrictions and high food prices. In **Cameroon**, according to the March 2020 "Cadre Harmonisé" analysis, about 2.6 million people (11 percent of the analysed population) were estimated to be severely food insecure ("Cadre Harmonisé" Phase 3 or higher) in the second quarter of 2020. About 45 percent of this population are located in the Northwest and Southwest Anglophone regions, where fighting is still ongoing between the security forces and separatist armed groups. The security situation is also precarious in the Far North Region, where incursions of Boko Haram increased in March and April 2020 and triggered new population displacements.

EAST AFRICA

Abundant rains benefited crops and rangelands but also triggered widespread floods

In central and southern parts of the subregion, including **Burundi**, **Rwanda**, southeastern **Kenya**, **Somalia**, **the United Republic of Tanzania** and **Uganda**, harvesting of the 2020 main season cereal crops is underway or about to start. The March-May rainy season was characterized by abundant precipitation across the subregion, with cumulative rainfall in this period estimated to be the highest on record since 1981. Despite an early cessation of seasonal rains in mid-May, the substantial rainfall totals and consequently high soil moisture levels sustained good vegetation conditions. The significant rainfall amounts also triggered widespread flash floods and resulted in water bodies overflowing, including the Juba and Shabelle rivers in Somalia and Lake Victoria, inundating riverine and lakeshore areas, and causing the loss of lives, displacements, damages to farmland and livestock deaths. By contrast, some localized areas of northern Uganda, western Rwanda and southeastern Kenya recorded reduced rainfall that lowered yield potential.

Table 9. East Africa cereal production

(million tonnes)

	Wheat			Coarse grains			Total cereals[1]			
	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	Change: 2020/2019 (%)
East Africa	5.8	6.4	6.4	44.3	45.2	47.0	53.9	55.4	57.7	4.0
Ethiopia	4.8	5.3	5.3	22.1	24.2	24.1	27.0	29.7	29.5	-0.5
Kenya	0.2	0.2	0.3	3.9	3.7	4.0	4.2	4.1	4.5	8.8
Sudan	0.6	0.7	0.7	5.9	5.2	6.1	6.5	6.0	6.8	14.5
Uganda	0.0	0.0	0.0	3.3	3.2	3.3	3.5	3.5	3.5	2.5
United Republic of Tanzania	0.1	0.1	0.1	7.2	6.8	7.4	10.3	9.9	11.0	10.7

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2015-2019 period.

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

The severe desert locust outbreak that began in late 2019 continues to threaten rural livelihoods in the subregion. The most affected areas are central and northern **Somalia**, northern and eastern **Kenya** as well as southern, eastern and northern **Ethiopia**. Large-scale aerial and ground control operations carried out by governments, with the support of FAO, have mitigated the impact of the locusts on pastures and crops. However, the heavy March-May rains created conducive reproduction conditions and another generation of locusts recently matured, forming new swarms in northwestern **Kenya**. These are expected to migrate to the Sudan through northeastern Uganda, and eastern South Sudan and to Ethiopia, following the prevailing winds.

Overall, in southeastern **Kenya**, **the United Republic of Tanzania**, **Burundi**, **Rwanda** and **Uganda** production prospects for the 2020 main season crops remain generally favourable. By contrast, in **Somalia**, the 2020 "Gu" output is forecast to be 15-25 percent below the average due to the combined impact of severe flash flooding, river overflows, desert locusts and insecurity.

In northern parts of the subregion, including **Ethiopia**, **South Sudan** and **the Sudan**, crops are at varying stages of development. In **Ethiopia**, harvesting of the secondary season "Belg" crops started in June and the output from this season is expected to be below average in 2020. Although cumulative February-May seasonal rains were generally above average, in some areas of eastern Amhara and southern Tigray, below-average rains at the beginning of the season resulted in low and delayed plantings. The planted area was also constrained by a reduced availability of agricultural inputs as movement restrictions imposed to contain the COVID-19 pandemic caused trade disruptions. In addition, yields have been affected by desert locust infestations. In southern bi-modal rainfall areas of **South Sudan**, planting of the first season crops, to be harvested from July, was completed in April, while in central and northern uni-modal rainfall areas, planting of the 2020 crops, for harvest from September, was completed in May. In southern areas of the Greater Equatoria Region, above-average seasonal rains boosted yield prospects, while losses due to desert locusts have so far been localized. Cereal production in 2020 is expected to be similar to the average of the previous five years, but still below the pre-conflict levels. In northern uni-modal rainfall areas, the escalation of inter-communal violence since early 2020 has disrupted agricultural operations in some areas of Warrap, Lakes, and Jonglei states. In **the Sudan**,planting of the 2020 crops, for harvest from October, has just started. The planted area and yields are likely to be affected by fuel shortages and low availability and high prices of agricultural inputs. The desert locusts also pose a risk to production.

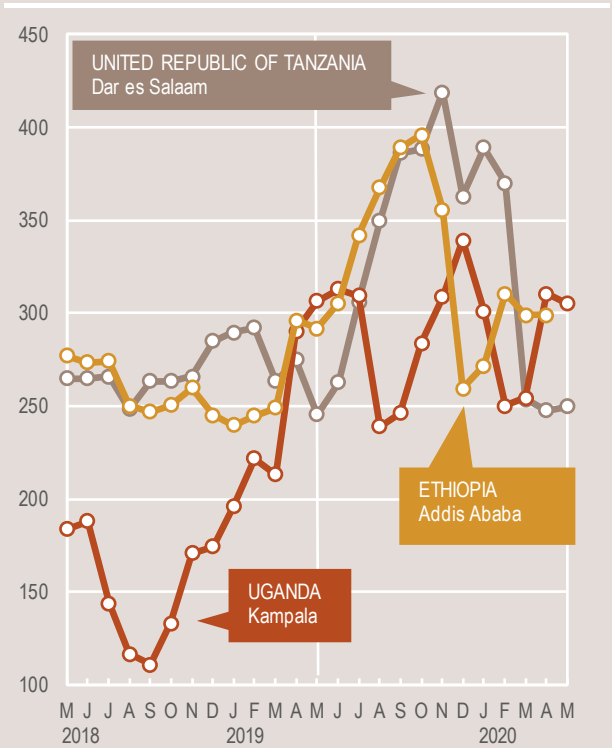
According to the latest weather forecast by the Greater Horn of Africa Climate Outlook Forum (GHACOF), average to above-average precipitation is forecast for the main June-September rainy season in **South Sudan**, **Eritrea**, **Uganda**, major growing areas of Rift Valley and Western provinces of **Kenya** as well as over most of **the Sudan** and **Ethiopia**. Weather conditions are likely to be drier than usual in some areas of western and eastern **Ethiopia** and western **South Sudan**.

In pastoral areas of northern and eastern **Kenya**, southeastern **Ethiopia** and central and northern **Somalia**, abundant rains both during the October-December 2019 "Deyr/short-rains" season and during the March-May 2020 "Gu/long-rains" season led to a significant improvement of vegetation conditions, which are currently well above average. Rainfall surpluses have also resulted in the complete recharge of water sources and consequently livestock trekking distances to watering points have decreased to well below-average levels. Livestock body conditions substantially improved and they are currently at average to above-average levels. Herd sizes are gradually increasing, but they have not yet fully recovered from the substantial livestock losses incurred during the 2017 drought. So far, pasture losses due to locusts have been localized as control measures and the regeneration of rangeland resources on account of the abundant seasonal rains, prevented widespread damages. However, the risk of substantial losses during the upcoming dry season is high if control measures are not adequate, as locust reproduction continues.

Food prices increased underpinned by restrictive measures related to the COVID-19 pandemic

In several countries, prices of cereals increased sharply in recent months as an uptick in consumer demand, speculative trading and supply chain disruptions following the implementation of restrictive measures to contain the spread of the COVID-19 pandemic exerted upward pressure and compounded seasonal patterns. In **South Sudan**, prices of maize, sorghum and wheat generally doubled between February and May in the capital, Juba, as COVID-19 screening measures at border points in Uganda, the country's main source for cereals, slowed commodity trade flows. In May 2020, cereal prices were exceptionally high, about three times the already elevated levels of the previous year, underpinned by inadequate domestic supplies, a difficult macro-economic situation and the lingering impact of the prolonged conflict. In **the Sudan**, prices of sorghum and millet continued to increase, surging between 35-60 percent between February

Maize prices in selected East African markets
(USD/tonne)



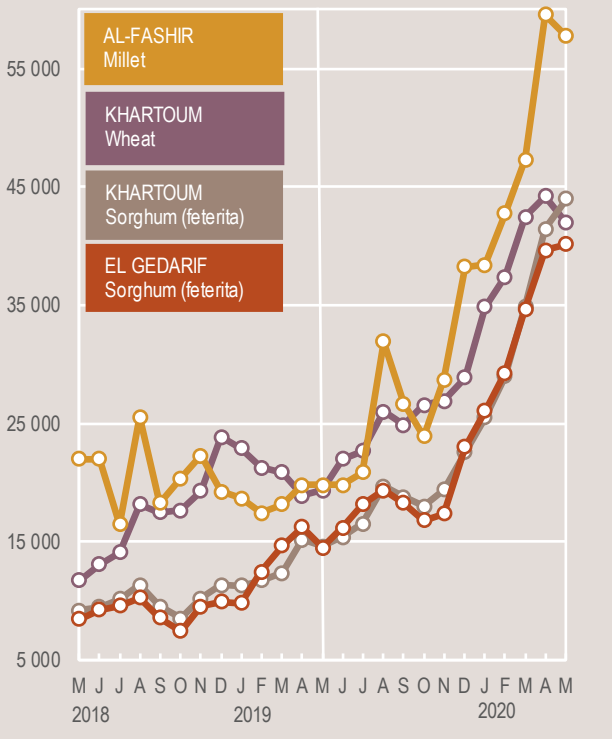
Sources : Regional Agricultural Trade Intelligence Network; Ethiopian Grain Trade Enterprise.

and May, when they reached record highs. However, prices of sorghum increased in May at slower rates than in previous months as an export ban, introduced in mid-April, helped to stabilize domestic availabilities. The exceptionally high prices, between two and three times their year-earlier values, were mainly driven by a reduced 2019 cereal output, currency weakness and trade disruptions due to COVID-19-related restrictive measures. In **Somalia**, prices of locally-produced maize and sorghum increased by up to 60 percent between March and May as seasonal patterns were compounded by trade disruptions due to floods. The sharpest increases were recorded in the capital, Mogadishu, where an increase in households' purchases in response to the COVID-19 emergency provided further upward pressure on prices. Despite the recent increases, sorghum prices in May were still around their year-earlier levels in several markets due to adequate domestic availabilities, while prices of maize were 20-30 percent higher than in May 2019 due to a below-average 2019 production, affected by floods in riverine key-growing. In **Uganda**, prices of maize rose by 20-40 percent between February and April, as an uptick in consumer demand, speculative trading and supply chain disruptions caused by COVID-19-associated lockdown measures led to an escalation in prices of the staple cereal. By May, prices of maize levelled off and were around their year-earlier levels, following the easing of restrictive measures and the release of stocks by traders in anticipation of the upcoming first season harvest. Similarly, in **Rwanda** and **Burundi**, prices of maize and beans, after increasing by 5-15 percent in April due to the effects of the COVID-19 pandemic, stabilized or declined in May, ahead of the "2020B season" harvests. In **the United Republic of Tanzania**, prices of maize declined by 35-45 percent between January and April 2020 with the commercialization of the "Vuli" season crops. Prices stabilized in May, when they were at the same levels of 12 months earlier in most markets. In **Ethiopia**, prices of maize, teff, sorghum and wheat were up to 60 percent higher than their year-earlier levels in April, reflecting higher transportation and agricultural production costs resulting from the depreciation of the national currency. Trade disruptions related to the COVID-19 pandemic provided further support to prices in cereal deficit areas.

Food security situation sharply deteriorating in Somalia and the Sudan

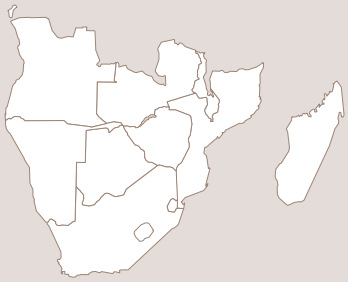
Food security situation sharply deteriorating in **Somalia** and **the Sudan**. The aggregate number of people in need of humanitarian assistance in the subregion is estimated at about 30 million. Most of this food insecure population are located in **Ethiopia**, **South Sudan** and **the Sudan**. However, in all countries except Somalia and the Sudan, the latest estimates of food insecurity were conducted before the COVID-19 outbreak, and since they do not take into account the adverse impact of restrictive measures on food availability, access and purchasing power, the current food insecurity levels are likely to be significantly higher than the current estimates. In **Somalia**, about 2.7 million people were estimated to be severely food insecure (IPC Phase 3: "Crisis" and IPC Phase 4: "Emergency") between April and June 2020. The number of people facing severe food insecurity is projected to increase to 3.5 million between July and September. This figure represents almost 30 percent of the total population and is more than three times the estimate of the food insecure people at the beginning of 2020. The worsening food insecurity situation is being driven by multiple shocks, including the desert locust outbreak, widespread floods since October 2019 and the COVID-19 outbreak. The pandemic is severely aggravating the food insecurity situation, as movement restrictions are resulting in reduced market availability, increasing prices of food and diminished labour opportunities, especially in urban areas. In addition, the global economic slowdown is causing a sharp decline in remittances, while reduced exports of livestock affected incomes of pastoralist households. The areas most affected by food insecurity are central and northern pastoral areas, southern flood-affected riverine areas along the Juba and Shabelle rivers and IDP settlements, especially those in urban areas. In **the Sudan**, 9.6 million people (about 60 percent of the total population) are estimated to be severely food insecure (IPC Phase 3: "Crisis" and IPC Phase 4: "Emergency") between June and September 2020. This figure accounts for more than 20 percent of the total population and is about 65 percent higher on a yearly basis. The current alarming food insecurity conditions are mainly driven by reduced domestic cereal supplies following a below-average 2019 harvest, increasing and protracted population displacements and high general inflation, including soaring food prices, exacerbated by the impacts of the COVID-19 pandemic. The lockdown measures to prevent the spread of the virus significantly impaired domestic and cross-border trade of food commodities, and affected the livelihoods of vulnerable households due to a reduction in daily labour opportunities that has curbed households' purchasing power. The areas most affected by food insecurity are south Kordofan and Blue Nile State, and most of the greater Darfur region, where 30-38 percent of the population is food insecure. In **South Sudan**, about 6.5 million people (55 percent of the total population) were projected in early 2020 to face Phase 3: "Crisis" or worse levels of acute food insecurity during the May-July 2020 period. However, this projection was conducted prior to the COVID-19 outbreak and the recent escalation of inter-communal violence. As a result, the current severity and prevalence of food insecurity is likely to be substantially higher.

Wholesale prices of selected cereals in the Sudan
(Sudanese Pound (SDG)/tonne)



Source: Food Security information for Action (SIFSIA).

SOUTHERN AFRICA



Production to rebound to an above-average level in 2020

Harvesting of the main 2020 summer cereal crops is mostly complete. At the aggregate level, production of cereals (predominantly maize) is estimated at 37 million tonnes in 2020, a recovery compared to the previous year's weather-reduced outturn and 18 percent larger than the five-year average. The production upturn is primarily the result of abundant rainfall in the second half of the season (January-April) that generally countered the effects of earlier precipitation deficits. As a result, final crop yields are expected to be average to above average, while an estimated expansion in the area harvested in several countries further contributed to the production gains. So far, the impact of the COVID-19 pandemic on agricultural production is estimated to have been limited.

The bulk of the subregional production increase reflects a larger output in **South Africa**, where aggregate maize production, the principal food crop, is estimated at 16.1 million tonnes in 2020, the second highest harvest on record and over 30 percent above the five-year average. The large harvest is a result of conducive weather conditions that pushed up yields to an above-average level and a price-driven expansion in plantings, with the sown area is estimated at an above-average level. Above-average maize harvests were also gathered in **Malawi** and **Zambia**, estimated at 3.6 million and 3.7 million tonnes, respectively. However, the southern areas of both countries experienced significant rainfall deficits which caused localized shortfalls in cereal production for a second consecutive year. Production upturns, but on a smaller scale, are estimated in **Angola**, **Botswana**, **Lesotho** and **Namibia** in 2020, with domestic harvests also surpassing the averages. Cereal outputs in **Madagascar** (primarily paddy) and **Mozambique** (mostly maize) are estimated to have remained broadly unchanged on a yearly basis, owing to adverse weather conditions which kept yields low. In **Zimbabwe**, production of maize is estimated at about 0.9 million tonnes in 2020, approximately 25 percent below the five-year average although higher than the previous year's low outturn. The reduced output is primarily the result of poor crop yields, owing to an erratic temporal distribution of rains that particularly affected crops in the communal farming sector. In addition, a modest contraction in the planted area, reflecting limited access to mostly imported agricultural inputs, amid sustained currency weakness and high inflation rates, further contributed to the reduced outturn in 2020.

African migratory locust and red locust hopper bands and active swarms were recently reported in areas of **Angola**, **Botswana**, **Namibia**, **Zambia** and **Zimbabwe**. Minimal damage was reported on the 2020 crops, however, if infestations remain present and expand, the locusts would pose a risk to irrigated winter crops and the 2021 main season crops, which will be planted from October this year. National governments, with support from FAO, are actively monitoring the situation.

Import needs lessen amid an increase in domestic harvests

The subregional cereal import requirement is estimated at a below-average level of 9.2 million tonnes in the 2020/21 marketing year (generally April/March) as the 2020 production upturns lessened import dependency in most countries. The bulk of the import requirement is made up of wheat grain, which is produced in limited volumes in the subregion. The remaining amount is comprised of rice (milled) and maize grain, the key food staple, import quantities of which vary substantially year-to-year reflecting the large variability in domestic outputs.

The aggregate import requirement for maize is estimated at 1.9 million tonnes in 2020/21, 25 percent below the five-year average and a decline compared to the previous year. The reduced needs at the aggregate level, are largely driven by lower requirements in **Namibia** and **South Africa**. By contrast, reflecting a second consecutive below-average output and minimal stocks to buffer this year's production shortfall, import requirements in **Zimbabwe** are estimated to rise sharply. However, there are concerns about the national capacity to access supplies on international markets given the shortage of foreign exchange reserves and the loss of value of the currency that has made

Table 10. Southern Africa cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	Change: 2020/2019 (%)
Southern Africa	2.0	1.8	2.0	25.1	23.9	30.6	4.2	4.5	4.4	31.3	30.1	37.0	22.7
excl. South Africa	0.3	0.3	0.3	12.4	11.5	13.9	4.2	4.5	4.4	16.8	16.3	18.7	14.7
Madagascar	0.0	0.0	0.0	0.3	0.2	0.2	3.6	3.9	3.7	3.8	4.1	3.9	-5.0
Malawi	0.0	0.0	0.0	3.1	3.6	3.9	0.1	0.1	0.1	3.2	3.7	4.0	8.9
Mozambique	0.0	0.0	0.0	2.2	2.5	2.5	0.4	0.3	0.5	2.7	2.8	3.0	4.5
South Africa	1.7	1.5	1.6	12.8	12.3	16.7	0.0	0.0	0.0	14.4	13.9	18.3	32.1
Zambia	0.2	0.2	0.2	2.8	2.1	3.5	0.0	0.0	0.0	3.0	2.3	3.7	62.5
Zimbabwe	0.1	0.1	0.1	1.3	0.9	1.1	0.0	0.0	0.0	1.4	1.0	1.2	23.4

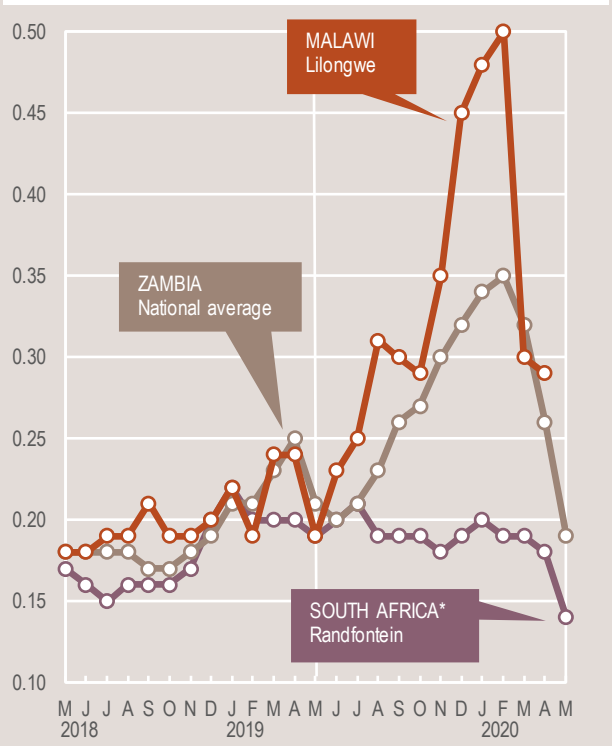
Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2015-2019 period.

imports more expensive. Several measures have been implemented by the Government of Zimbabwe to ease access constraints, including permitting the importation of genetically modified grain and switching from a managed floating exchange rate to a fixed rate system. Moreover, unlike the previous year, an exportable surplus in 2020/21 is expected in neighbouring **Zambia**, providing an additional source of grain supplies besides those produced in South Africa, the main exporter in the subregion.

Harvest pressure triggered price declines

Prices of maize grain and maize meal products began to decline seasonally from March with the 2020 harvests. Downward price pressure from increased seasonal availabilities has more than outweighed the upward support by the impacts of the COVID-19 containment measures, mostly relating to logistical disruptions and a spike in domestic demand as households reportedly purchased in bulk to secure supplies amid the lockdowns. In **South Africa**, prices of white maize fell sharply in May, more than reversing the gains of the previous two months. The recent decline in maize prices was underpinned by the buoyant supply outlook, which also helped push prices below their year-earlier values. By contrast, prices of wheat reached record highs in May due to a sharp depreciation of the national currency as the country is a net importer of this cereal. Similar trends for maize grain were observed in **Zambia**, where prices declined steeply in April and May from their record highs in March. The substantial decreases were driven by a significant boost to domestic supplies from the ongoing 2020 harvest. Analogously, in **Malawi**, prices of maize grain have decreased seasonally since March, pressured by improved market availabilities from the ongoing harvest. However, several markets registered an uptick in prices in May as harvest pressure abated. In **Mozambique**, prices have generally declined seasonally since March, but remained above their year-earlier values, as the 2020 harvest is expected at only a near-average level. Food prices in **Zimbabwe** continued to increase, with the annual inflation rate estimated to be close to 800 percent in May. The high food prices have been driven by tight supplies and severe macro-economic instability, particularly related to the weak value of the country's currency that has continued to lose value on the parallel market. A continuation of supply shortages, on account of a second consecutive below-average harvest in 2020, is expected to sustain the upward pressure on prices in the medium term. In the import-dependent countries of **Botswana** and **Eswatini**, prices of maize meal were generally stable in April and are expected to come under downward pressure reflecting lower prices in South Africa, the main source of grains of these countries.

White maize prices in selected Southern African markets
(USD/kg)



* Wholesale prices, all others retail price.
Sources : Central Statistical Office, Zambia; Ministry of Agriculture and Food Security, Malawi; SAFEX Agricultural Products Division, South Africa.

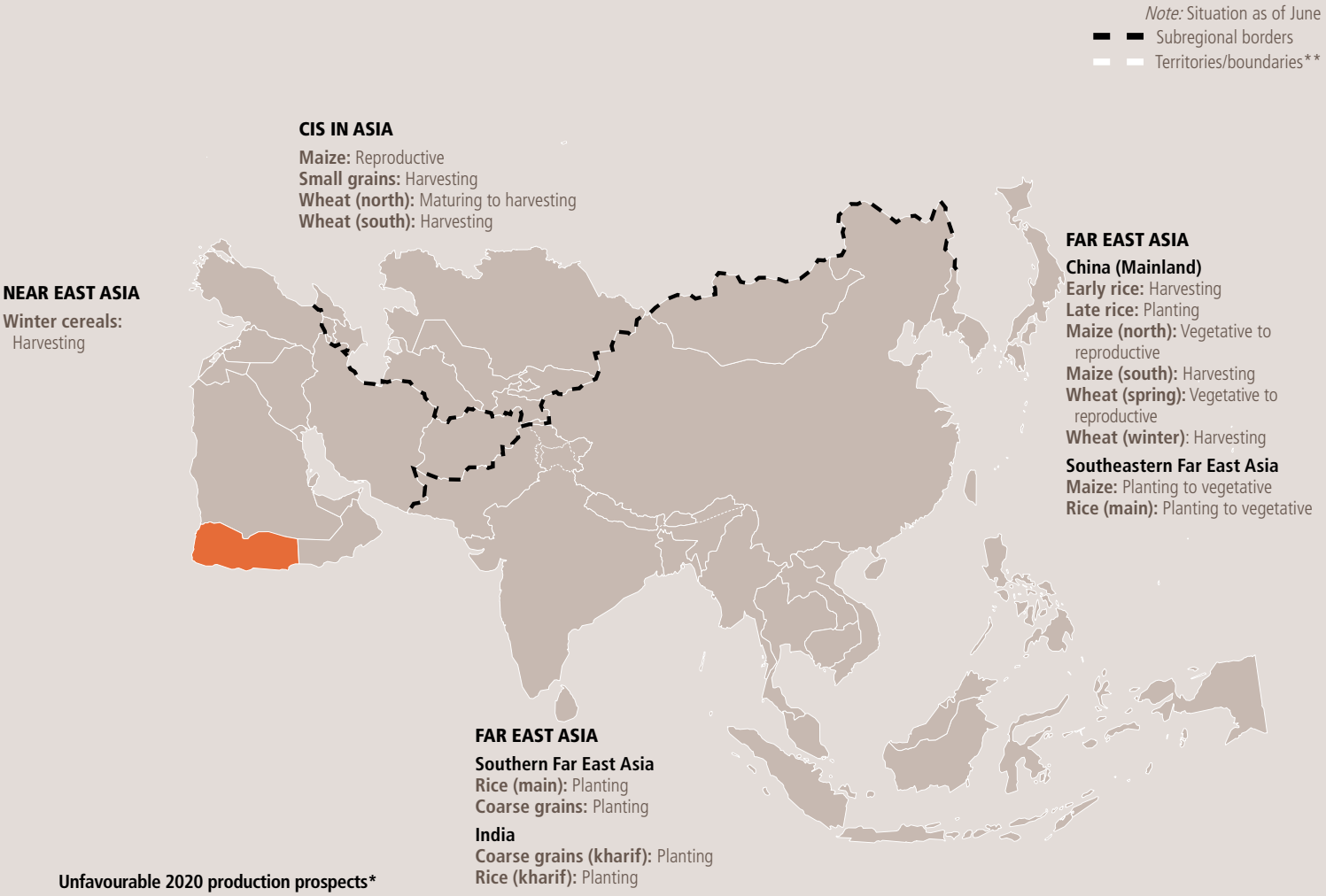
Despite an improved agricultural production, the COVID-19 pandemic is expected to heighten food insecurity

The large domestic harvests in 2020 are foreseen to boost food availability and farmers' incomes from increased crop sales, improving the food security situation of rural households. Moreover, the upturn in domestic cereal supplies has already triggered a reduction in retail prices of staple foods, partly alleviating food access constraints. However, despite the positive effects of the large harvest, the impacts of the COVID-19 pandemic, which are already being felt, could trigger an overall rise in the number of food insecure compared to the high levels of 2019/20. The impacts of the pandemic have so far largely been channeled through economic shocks pertaining to the lockdown measures that seek to contain the virus and safeguard health care systems but have simultaneously halted economic activities. The effects have largely manifested in the loss of employment and income, consequently causing a decline in purchasing power. In **South Africa**, which has low numbers of acute food insecurity and more robust safety-net mechanisms compared to neighbouring countries, the unemployment rate is expected to reach 40 percent in 2020. Most countries in the subregion are forecast to experience a sharp deceleration in economic growth, with the largest decline forecast in Zimbabwe, and this outlook portends to an increase in poverty across the subregion. In addition to lower incomes from job losses, remittances are forecast to fall in 2020, further diminishing households' capability to purchase food. Remittances are a particularly important source of foreign currency supplies and household incomes in **Lesotho**, **Madagascar** and **Zimbabwe**. Many governments, with assistance from international institutions, have implemented a wide range of measures to support vulnerable households, including cash and in-kind food transfers that will help to partly counter the adverse effects of the pandemic.

National vulnerability assessments to estimate the number of food insecure have been delayed in some countries and the results are not yet available. Food insecurity estimates are expected to be released by July and will provide an updated picture of the impact of the pandemic. During the peak of the 2019/20 lean season (January-March 2020), the number of food insecure people was estimated at 13.8 million, more than 20 percent above the figure in the corresponding period in 2019.[3]

[3] Excluding Mauritius and South Africa.

REGIONAL REVIEWS
ASIA



Unfavourable 2020 production prospects*

Yemen: Conflict

*/** See Terminology (*page 6*)

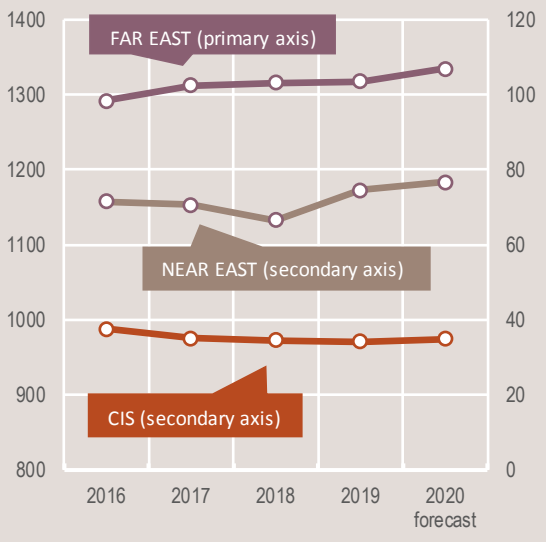
Source: GIEWS

Asia Production Overview

The aggregate 2020 cereal production is forecast at 1 447 million tonnes, a yearly increase of 20.4 million tonnes from the above-average output in 2019. The increase mainly reflects bumper paddy and wheat harvests in the Far East and Near East subregions, respectively.

In the Far East, harvesting of the winter crop is nearly complete and production is anticipated at a high level, mainly due to good yield prospects and increased plantings, while the production outlook of the paddy and maize crops are similarly positive. In CIS Asia, harvesting of the main winter crops is underway and aggregate production is forecast to remain virtually stable at a near-average level, as good yields are foreseen to offset a contraction in wheat sowings. In the Near East, the cereal output is forecast at an above-average level, mainly reflecting a production recovery in the subregion's main producer, Turkey, and improved security conditions in the Syrian Arab Republic and Iraq.

Cereal production
(million tonnes)



FAR EAST

Aggregate cereal production in 2020 forecast to surpass previous year's record high

Harvesting of the 2020, predominantly irrigated, wheat crop is almost complete, and the subregion's aggregate production is forecast at a record high of about 272 million tonnes. Bumper outputs are anticipated in most countries reflecting generally favourable weather conditions, in the form of above-average precipitation and snowfall during the winter months, which protected crops from freezing temperatures and provided adequate soil moisture in the spring. In addition, supplies of agricultural inputs, such as high-yielding seed varieties, irrigation water and fertilizers were reportedly sufficient. In **China (Mainland)**, the subregion's main producer, the 2020 wheat output is forecast at a near-average level of 134 million tonnes. In **India**, wheat production is officially estimated at an all-time high of 107.2 million tonnes, reflecting record plantings driven by remunerative minimum support prices guaranteed by the Government. Overall, yields are forecast above the five-year average, despite localized damages to standing crops in the main producing northern states of Punjab, Haryana, Uttar Pradesh and Rajasthan due to heavy rains and hailstorms in March. In **Pakistan**, favourable weather conditions and adequate supplies of agricultural inputs are expected to lead to a near-average output of 26 million tonnes. There have been reports of desert locust outbreaks, but precautionary control measures undertaken by the Government have successfully contained the crop losses. The remaining countries, which are mostly small wheat producers, including **Bangladesh**, **Mongolia** and **the Republic of Korea**, are also expected to harvest bumper wheat crops.

In the Northern Hemisphere, land preparation and early planting of the 2020 main season rainfed crops, mostly rice and coarse grains, for harvest towards the end of the year, is progressing at a normal pace, supported by favourable weather conditions. The 2020 secondary season crops are expected to be planted towards the end of the year. Countries along or south of the Equator, namely **Indonesia**, **Sri Lanka** and **Timor-Leste**, have recently concluded their 2020 main season harvests, without major delays due to movement restrictions and lockdowns related to the COVID-19 pandemic. Farmers are currently engaged in planting activities of the 2020 secondary season crops.

The subregion's aggregate 2020 paddy output is preliminarily forecast at about 680 million tonnes, marginally above the 2019 reduced level. The increase mostly rests on expectations that the area planted will recover in 2020, driven by remunerative producer prices and official agricultural support programmes promoting rice production. In **India**, government assistance, in the form of large-scale purchases at minimum support prices, and improved weather condition are expected to support production growth. In **China (Mainland)**, the area sown is forecast to stabilize, after contractions registered in 2018 and 2019, as the Government approved for the first time in six years, an increase in government purchase prices for Indica paddy. The 2020 paddy output in the countries that were affected by unfavourable weather conditions in 2019, including **the Lao People's Democratic Republic**, **Myanmar** and **Thailand**, are expected to recover from last year's below-average outputs, assuming normal weather conditions throughout the cropping season. Above-average outputs are forecast in **Cambodia**, **the Philippines**, **Sri Lanka** and **Timor-Leste**, while the production in **Viet Nam** is forecast close to five-year average. In Indonesia, a well below-average 2020 paddy output is projected, mostly reflecting a reduced main season harvest owing to dry weather conditions. Production of coarse grains in 2020, mostly maize, is forecast to remain close to the 2019 above-average level as the area planted is anticipated to remain at

Table 11. Far East cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	Change: 2020/2019 (%)
Far East	259.4	267.3	272.4	375.3	379.3	382.9	667.9	670.9	679.8	1302.6	1317.5	1335.0	1.3
Bangladesh	1.2	1.0	1.3	2.9	3.5	3.8	53.3	55.4	55.3	57.5	59.9	60.3	0.7
Cambodia	0.0	0.0	0.0	0.9	0.9	1.0	10.3	10.9	11.1	11.2	11.8	12.1	2.3
China (Mainland)	133.1	133.6	134.0	270.1	269.7	270.2	211.5	209.6	210.5	614.7	612.9	614.7	0.3
India	96.2	103.6	107.2	44.0	44.3	45.9	168.4	176.9	178.8	308.5	324.8	331.9	2.2
Japan	0.9	1.0	1.0	0.2	0.2	0.2	10.8	10.5	10.6	11.9	11.8	11.8	0.6
Myanmar	0.1	0.1	0.1	2.4	2.7	2.8	26.1	25.6	26.4	28.7	28.5	29.4	3.2
Nepal	2.0	2.2	2.2	2.8	3.0	3.0	5.2	5.6	5.4	9.9	10.8	10.6	-1.4
Pakistan	25.5	25.2	26.0	6.5	7.0	7.2	10.7	11.1	11.9	42.8	43.3	45.1	4.2
Philippines	0.0	0.0	0.0	7.7	8.1	8.1	18.6	18.8	19.0	26.2	26.9	27.1	0.8
Republic of Korea	0.0	0.0	0.0	0.2	0.2	0.2	5.4	5.0	5.1	5.6	5.3	5.4	1.9
Sri Lanka	0.0	0.0	0.0	0.3	0.3	0.3	4.0	4.6	4.7	4.3	4.9	4.9	0.5
Thailand	0.0	0.0	0.0	4.8	4.4	5.2	30.6	28.4	32.3	35.4	32.8	37.5	14.2
Viet Nam	0.0	0.0	0.0	5.1	4.8	4.7	43.7	43.4	43.6	48.7	48.2	48.3	0.1

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2015-2019 period.

a high level, due to strong demand from the feed industry. In **China (Mainland)**, the subregion's main maize producer, amid concerns over the effects of the COVID-19 pandemic, the Government enacted several policies to maintain the acreage with maize, marking a reversal of the preceding strategies in place since 2015 that sought to reduce the large national maize stocks and contributed to the below-average plantings between 2016 and 2019. The high level of plantings is expected to result in bumper outputs in **India**, **Pakistan** and **the Philippines**. A below-average 2020 output is projected in **Viet Nam**, as country reports indicate that farmers are switching to more profitable crops and vegetables.

Production of coarse grains in 2020, mostly maize, is forecast to remain close to the 2019 above-average level as the area planted is anticipated to remain at a high level, due to strong demand from the feed industry. In **China (Mainland)**, the subregion's main maize producer, amid concerns over the effects of the COVID-19 pandemic, the Government enacted several policies to maintain the acreage with maize, marking a reversal of the preceding strategies in place since 2015 that sought to reduce the large national maize stocks and contributed to the below-average plantings between 2016 and 2019. The high level of plantings is expected to result in bumper outputs in **India**, **Pakistan** and **the Philippines**. A below-average 2020 output is projected in **Viet Nam**, as country reports indicate that farmers are switching to more profitable crops and vegetables.

Subregional cereal trade forecast at a high level in 2020/21 marketing year

Aggregate wheat import requirements are estimated at 50.8 million tonnes, close to the five-year average. Above-average wheat imports from **Bangladesh**, **Indonesia**, **the Philippines** and **Malaysia**, which together account for almost 50 percent of the subregion's total imports, are expected to be offset by the large decreases in import demand by **the Republic of Korea**, **Thailand** and **Viet Nam**. Aggregate imports of coarse grains, mostly maize, are forecast at a record high of 72.8 million tonnes, reflecting strong demand from the largest importers, including **Bangladesh**, **China (Mainland)**, **the Republic of Korea**, **Malaysia**, **Thailand** and **Viet Nam**. Imports of rice, which account for a small share of the subregion's total imports, are forecast at 12.2 million tonnes in the 2020 calendar year, up 5 percent from 2019. Exports of rice, accounting for the bulk of the subregional export quantity, are forecast at 36.8 million tonnes in 2020up 2 percent from 2019.

Exports of rice, accounting for the bulk of the subregional export quantity, are forecast at a near-record level of 39.1 million tonnes in 2020, due to higher expected exports by **Cambodia**, **China (Mainland)**, **India**, **Myanmar**, **Pakistan** and **Viet Nam**.

Prices of rice increased between March and May, while wheat prices were stable

Prices of rice surged in the March-April period supported by a spike in demand and market disruptions related to the COVID-19 pandemic. Subsequently, prices levelled off or increased at only a moderate pace in May reflecting a cutback in demand and the onset of the harvests. The lifting of trade limitations, imposed in March/April by the exporting countries: **Viet Nam**, **Cambodia** and **Myanmar**, also eased supply concerns for importing countries. However, prices in May 2020 remained above their year-earlier levels in most countries. In **Thailand**, after strong increases since the beginning of the year, domestic prices dropped in May as a result of the arrival of the 2019/20 secondary harvest. Price declines were also recorded in **Cambodia** and **China (Mainland)**. In **India**, prices remained relatively stable between March and May despite the progressive arrival of the record 2019/20 secondary output, reflecting large Government purchases. In **Viet Nam**, prices increased sharply in March and April, and continued to increase in May, although at a slower pace, as sustained export demand offset the seasonal pressure on prices from the 2020 "winter-spring" harvest. Also in **Myanmar**, prices of rice increased for the third consecutive month in May, due to a reduced 2019 output. In the importing countries of the subregion, prices decreased in May in **Bangladesh** with the 2020 main harvest. In **Indonesia**, prices were stable and close to last year's level on account of adequate domestic supplies. Prices of wheat grain and wheat flour were stable in most countries between March and May, with a few exceptions. Prices of wheat grain remained mostly unchanged in **China (Mainland)**, reflecting

Table 12. Far East cereal production and anticipated trade in 2020/21[1]
(thousand tonnes)

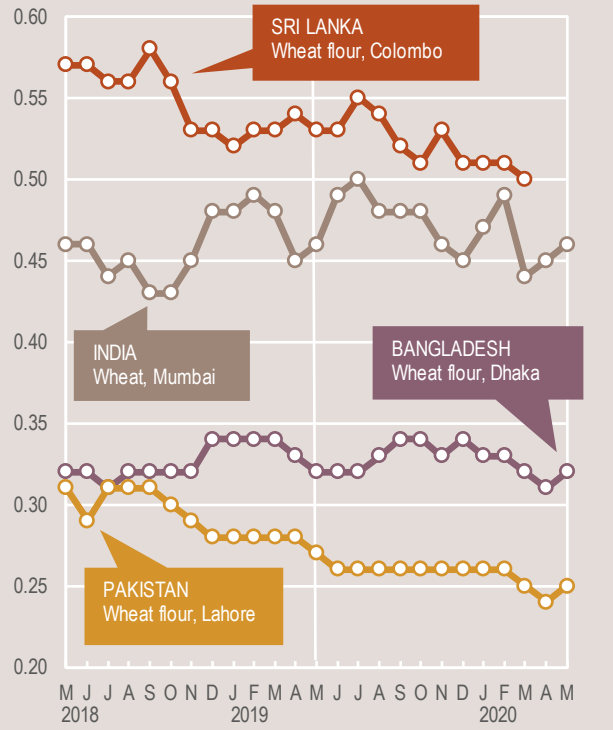
	Avg 5-yrs (2015/16 to 2019/20)	2019/20	2020/21	2020/21 over 2019/20 (%)	2020/21 over 5-yr avg (%)
Coarse grains					
Exports	*3 462*	*2 852*	*2 902*	*1.8*	*-16.2*
Imports	*66 064*	*69 330*	*72 809*	*5.0*	*10.2*
Production	*375 297*	*379 310*	*382 898*	*0.9*	*2.0*
Rice (millled)					
Exports	*37 383*	*36 764*	*39 693*	*8.0*	*6.2*
Imports	*13 611*	*12 203*	*11 859*	*-2.8*	*-12.9*
Production	*444 187*	*446 745*	*452 574*	*1.3*	*1.9*
Wheat					
Exports	*2 435*	*2 006*	*2 246*	*12.0*	*-7.8*
Imports	*50 897*	*50 969*	*50 759*	*-0.4*	*-0.3*
Production	*259 414*	*267 308*	*272 356*	*1.9*	*5.0*

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

good market availabilities and favourable production prospects for the 2020 crops. In **Pakistan**, prices increased between November 2019 and March 2020, reaching record highs in most markets due to below-average outputs in 2018 and 2019. Subsequently, prices levelled off in April and May 2020 due to improved market availabilities from the 2020 harvest and the release of Government's grain supplies to millers. In early June, the Government abolished import duties in order to encourage an upturn in imports to bolster domestic supplies. In **India**, prices of wheat were stable since the start of 2020 and declined in May on account of improved market availabilities following the start of the 2020 harvest. Prices of wheat flour were relatively stable in **Indonesia** and **Bangladesh** as a result of above-average imports.

Prices of wheat grain and wheat flour were stable in most countries between March and May, with a few exceptions. Prices of wheat grain remained mostly unchanged in **China (Mainland)**, reflecting good market availabilities and favourable production prospects for the 2020 crops. In **Pakistan**, prices increased between November 2019 and March 2020, reaching record highs in most markets due to below-average outputs in 2018 and 2019. Subsequently, prices levelled off in April and May 2020 due to improved market availabilities from the 2020 harvest and the release of the Government's grain supplies to millers. In early June, the Government abolished import duties in order to encourage an upturn in imports to bolster domestic supplies. In **India**, prices of wheat were stable since the start of 2020 and declined in May on account of improved market availabilities following the start of the 2020 harvest. Prices of wheat flour were relatively stable in **Indonesia** and **Bangladesh** as a result of above-average imports.

Wheat and wheat flour retail prices in selected Far East countries
(USD/kg)

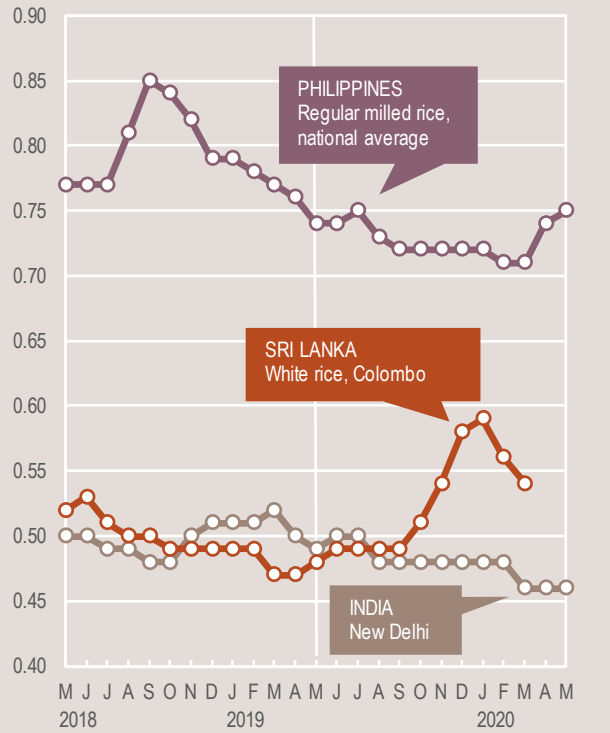


Sources : Pakistan Bureau of Statistics; Ministry of Consumer Affairs, India; Department of Census and Statistics, Sri Lanka; Management Information System and Monitoring, Bangladesh.

Food security generally stable, but concerns remain in some countries

Overall, the food security situation in the subregion is stable. However, pockets of severe food insecurity conditions persisted in some countries. In **Bangladesh**, on 20 May 2020, Tropical Cyclone Amphan severely affected the livelihoods of at least 1 million people, destroying houses and infrastructure, including irrigation facilities. The most affected areas are located in the southwestern parts of the country. In the Cox's Bazar District of Bangladesh, about 860 000 refugees from Myanmar still reside in temporary settlements and require humanitarian assistance to cover their basic needs. On 8 April 2020, operations in the Rohingya refugee camps were restricted to only critical services and assistance with the aim to minimize the risks associated with an outbreak of COVID-19 pandemic. At the end of May, the first cases of COVID-19 were confirmed in the camps, raising serious concerns over the spread of the disease among the refugees. In addition, movement restrictions may severely affect the capability of humanitarian organizations to provide basic services and goods, including food, water and health care. In **Myanmar**, as of June 2020, an estimated 235 000 people, mostly women and children, were internally displaced, with the largest share of these IDPs sheltering in Rakhine and Kachin states. Most IDPs are affected by high levels of food insecurity, with the COVID-19 restrictions on movements hampering the deployment of adequate humanitarian assistance and impeding the restoration of livelihoods. In **the Democratic People's Republic of Korea**, large numbers of people continue to suffer from low levels of food consumption and very poor dietary diversity. The economic constraints have increased the population's vulnerability to food insecurity. In **Pakistan**, in rural communities in the Balochistan and Sindh districts, persisting dry weather conditions in 2018 and 2019 led to a reduction in the cereal outputs and losses of livestock, raising serious concerns over food insecurity. In addition, about 1.4 million Afghan refugees are sheltering in Pakistan.

Rice retail prices in selected Far East countries
(USD/kg)



Sources : Department of Census and Statistics, Sri Lanka; Ministry of Consumer Affairs, India; Bureau of Agriculture Statistics, the Philippines.

NEAR EAST

Above-average 2020 cereal output expected despite persistent conflicts in parts of the subregion

Harvesting of the 2020 winter cereal crops began in May and is expected to be finalized in July in most counties of the subregion. Spring cereals, planted between March and May, will be harvested from August.

Although early season dryness was reported in parts of **Turkey**, **Iran (Islamic Republic of)** and **Iraq** up to December 2019, generally adequate rains since January replenished soil moisture across the subregion. With the exception of the northern provinces of **Afghanistan**, where crop conditions have remained below average due to limited precipitation, weather conditions for crop development elsewhere have been generally favourable. Significant outbreaks of desert locusts were reported in **Iran (Islamic Republic of)** and **Yemen** as abundant rainfall benefited breeding. While damages to crops were limited, there is a significant risk that swarms may migrate towards other countries in July.

Total cereal production in 2020 is forecast at an above-average level of 76.7 million tonnes, about 3 percent more than in the previous year and 8 percent above the average. The year-on-year increase of 2 million tonnes is almost entirely on the account of the production recovery in **Turkey**, the subregion's main cereal producer. Here, the preliminary official production forecast indicates a cereal output of 36.5 million tonnes, about 7 percent more than in the previous year, including 20.5 million tonnes of wheat, 8.3 million tonnes of barley and 6 million tonnes of maize. In **the Syrian Arab Republic** and **Iraq**, where an improved security situation in the last two years has been encouraging farmers to return to their land, cereal production is forecast to be similar to the previous year, but over 50 percent higher than the five-year average. In **Yemen**, the conflict continues to debilitate agricultural livelihoods by limiting the availability of inputs and constraining access to fields. In **Afghanistan**, structural issues, including the lack of agricultural inputs, are likely to constrain production potential despite favourable weather conditions.

Subregional cereal imports in the 2020/21 (July/June) marketing year are forecast at 75 million tonnes, approximately 1 million tonnes above the previous year and about 9 percent above the five-year average. At 30.6 million tonnes, the wheat import requirement is estimated to remain similar to the previous year's level and 6 percent above the five-year average, supported by population growth.

Persisting conflict and measures to contain COVID-19 pandemic worsen food security outcomes

The already unfavourable food security situation has worsened in recent months in several countries due to the impact of COVID-19 pandemic as curfews and restrictions on movements to contain the disease outbreak have limited employment opportunities for casual labourers. Remittances have also declined, further tightening households' incomes.

In **Yemen**, the weak fiscal position has been further eroded by the current low prices of oil, the depletion of hard currency reserves and the decline in remittances. Over 80 percent of the total population, about 24.3 million people, require some form of humanitarian assistance. The Food Security Cluster estimates that 20.1 million people are in need of food security and agriculture interventions from June to December 2020, out of which 10 million people are in acute need. In April 2020, as households stockpiled ahead of Ramadan while facing the COVID-19 containment measures, prices of mostly imported and locally produced goods increased compared to March 2020. Prices of sugar and cooking oil increased by almost 10 percent, while the price of rice increased by 5 percent. In many cases, prices exceeded their pre-crisis levels (February 2015) by two to three times.

According to the latest nationwide assessment conducted by the World Food Programme (WFP) in **the Syrian Arab Republic** in 2019, there were 7.9 million people unable to meet their food needs and a further 1.9 million are at risk of food insecurity. This figure is likely to increase in 2020 as a result of the high food prices, stagnant wages and limited livelihood opportunities, while the effects of the COVID-19 pandemic could aggravate conditions further. The weak economy, combined with the spillover effects from the financial crisis in Lebanon, put an upward pressure on the exchange rate, affecting the purchasing power of consumers as well as the ability of industrial producers to procure inputs. In September 2019, USD 1 was traded for SYP 600, while in June 2020 the rate was SYP 2 650 for USD 1.

In **Afghanistan**, between April and May 2020, about 10.9 million people (35 percent of the population) were estimated to be in acute food insecurity and required urgent humanitarian action. It included around 7.4 million people in IPC Phase 3: "Crisis" and 3.5 million people in IPC Phase 4: "Emergency". The food

Table 13. Near East cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	Change: 2020/2019 (%)
Near East	44.5	45.6	47.3	21.8	23.7	24.1	4.6	5.3	5.3	70.9	74.6	76.7	2.9
Afghanistan	4.4	5.1	4.7	0.5	0.4	0.5	0.6	0.6	0.5	5.5	6.1	5.7	-6.6
Iran (Islamic Republic of)	13.8	14.5	14.0	4.4	4.1	4.3	2.9	3.1	3.2	21.1	21.7	21.5	-0.9
Iraq	3.0	4.3	4.5	0.9	1.9	1.6	0.2	0.6	0.6	4.2	6.8	6.8	-0.5
Turkey	20.7	19.0	20.5	14.1	14.3	15.1	0.9	1.0	1.0	35.7	34.3	36.5	6.5

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2015-2019 period.

security situation in rural areas is likely to improve with the completion of the harvest and about 10.3 million people are forecast to be in IPC Phases 3 and 4 between June and November 2020. However, the food security of the vulnerable populations, including IDPs and the urban poor, is likely to deteriorate due to limited employment opportunities for casual labourers due to the stagnant economy and the COVID-19 containment measures.

In **Iraq**, according to the 2020 Humanitarian Needs Overview (HNO) released in November 2019, the number of people in need of humanitarian assistance was forecast to decrease from 6.7 million in 2019 to 4.1 million in 2020. The actual numbers are likely to be higher as opportunities for casual labour decreased. More than half of them are concentrated in the governorates of Nineveh and Anbar. The number of severely food insecure people is estimated at about 920 000, while 1.7 million are vulnerable to food insecurity, mostly IDPs and returnees, with the majority concentrated in the governorates of Diyala, Nineveh, Salah Al-Din, Anbar and Kirkuk. The 2020 Iraqi budget was prepared with the assumption of a USD 56 per barrel of crude oil price, while in April 2020, Iraqi oil was sold for an average of USD 13.80, down from USD 51.37 in February. The first week of June averaged about USD 40 per barrel. Oil revenues account for 90 percent of total national revenue. The uncovered shortages in the budget could impair the functions of the Public Distribution System and the payment of salaries to civil servants, which is likely to worsen food insecurity.

CIS IN ASIA[4]

Near-average cereal production forecast in 2020

Harvesting of the 2020 winter cereal crops started in June under favourable weather conditions and is expected to finalize by mid-August. In the Caucasian countries, limited precipitation affected crops and, according to satellite-based imagery, vegetation conditions were below average in late May, just before the harvest, particularly in northwestern **Azerbaijan**, northeastern **Armenia** and southern **Georgia**. By contrast, in the eastern part of the subregion, weather conditions have been overall favourable throughout the season and, based on remote sensing analysis and information, vegetation conditions in late May were good across most croplands.

Planting of the 2020 spring cereals is virtually complete in the subregion. In **Kazakhstan**, sowing of spring cereals, which account for about 90 percent of the annual domestic cereal output, took place under favourable weather conditions and the area planted is estimated at a slightly above-average level of 14.5 million hectares.

The 2020 subregional cereal output, including an expected average production of spring crops to be harvested between August and September, is preliminarily forecast at a near-average level of 34.5 million tonnes. Wheat production, which accounts for 70 percent of the total, is forecast at 24 million tonnes, 5 percent below the five-year average. The lower output is mainly due to a below-average wheat production in **Kazakhstan**, expected at 13 million tonnes, on account of reduced plantings. Below-average wheat harvests are also expected in **Armenia** and **Turkmenistan** following a gradual decline in planted areas in the preceding years, due to farmers switching to more profitable crops. The 2020 subregional barley and maize outputs are expected at 6 million and 2.6 million tonnes, respectively, well above the five-year averages mainly due to large plantings in **Kazakhstan**.

Slightly above-average import requirements forecast in 2020/21

The subregional cereal import requirement is forecast at an above-average level of 8 million tonnes in the 2020/21 marketing year (July/June), owing to robust import demand for wheat in **Kyrgyzstan** and **Tajikistan**. A reduced import requirement is foreseen in **Turkmenistan**, amid high carryover stocks from the 2019 bumper output.

Total cereal exports from **Kazakhstan** are forecast at a near-average level of 9 million tonnes. Most of this quantity is wheat grain, forecast at 7.5 million tonnes, slightly

Table 14. CIS in Asia cereal production

(million tonnes)

	Wheat			Coarse grains			Total cereals[1]			
	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	Change: 2020/2019 (%)
CIS in Asia	25.3	23.7	24.0	8.8	9.4	9.7	35.2	34.2	34.9	1.9
Armenia	0.2	0.1	0.1	0.2	0.1	0.1	0.4	0.2	0.2	24.5
Azerbaijan	1.9	2.2	1.9	1.2	1.3	1.3	3.1	3.5	3.2	-7.8
Georgia	0.1	0.1	0.1	0.3	0.3	0.2	0.4	0.4	0.3	-13.6
Kazakhstan	13.8	11.5	13.0	4.7	5.2	5.5	18.9	17.1	19.0	10.7
Kyrgyzstan	0.6	0.6	0.6	1.1	1.2	1.1	1.8	1.8	1.8	-2.4
Tajikistan	0.9	0.8	0.8	0.4	0.3	0.3	1.3	1.2	1.3	1.9
Turkmenistan	1.3	1.6	1.2	0.1	0.1	0.1	1.5	1.8	1.4	-21.1
Uzbekistan	6.4	6.8	6.3	1.0	1.0	1.0	7.8	8.2	7.7	-6.3

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2015-2019 period.

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

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

below the average volume on account of reduced national supplies. An increase in barley exports is expected in 2020/21, partly offsetting the foreseen decline wheat shipments.

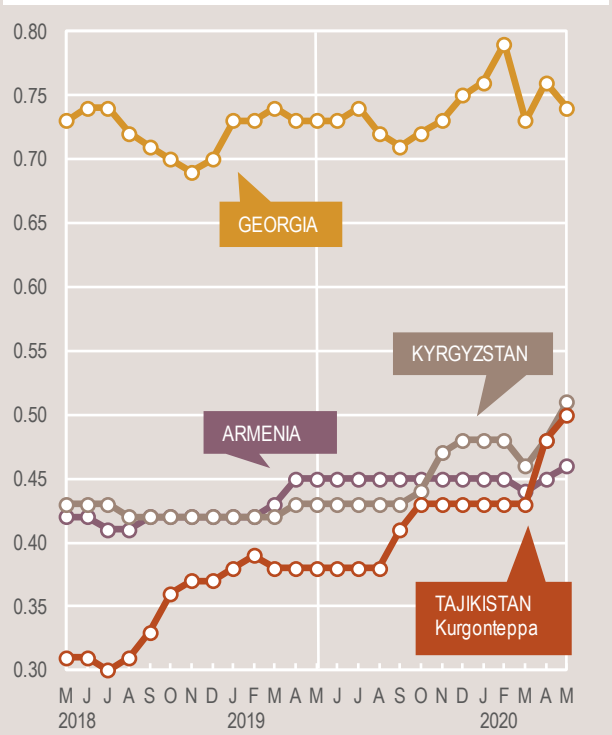
Export and domestic prices of wheat have been generally increasing since March

In **Kazakhstan**, export prices of wheat increased between March and May, reflecting strong import demand amid trade restrictions, which were lifted on 1 June 2020, and decreasing supplies of high quality wheat. The reduced harvest obtained in 2019, a weaker domestic currency and a strong pace of exports during the season, kept prices well above their year-earlier levels in both export and domestic markets.

In the importing countries of the subregion, retail prices of wheat flour generally increased from mid-March, mainly due to an uptick in consumer demand following the outbreak of the COVID-19 pandemic and the weakening of the local currencies, which also contributed to sustaining year-on-year higher price levels. In April, prices increased particularly in **Kyrgyzstan** and **Tajikistan** due to strong retail demand amid export limitations in **Kazakhstan**, the main wheat supplier to both countries, and in **Georgia**, on account of an increase in demand. Prices of wheat flour continued to increase in **Tajikistan** in May, due to tight domestic supplies, higher export quotations from Kazakhstan and logistical disruptions resulting from the COVID-19 containment measures that allowed only central markets to operate and not at their full capacity. By contrast, prices in May remained stable or decreased slightly in **Georgia** and **Kyrgyzstan** as a result of the temporary measures put in place by the governments to prevent price increases, including setting ceiling prices for a number of food items in wholesale and retail markets. In **Armenia**, prices of wheat flour increased only slightly in April and remained relatively stable in May, following the introduction of export restrictions on staple foods in mid-April until 30 June 2020.

Prices of potatoes, also a staple food in the subregion, increased between March and April due to stronger demand amid concerns over the impact of the pandemic, which exacerbated seasonal trends. In May, however, prices decreased in **Georgia**, **Kyrgyzstan** and **Tajikistan** reflecting market regulations implemented by the government, while they continued to seasonally increase in **Kazakhstan**.

Retail wheat flour prices in selected CIS in Asia countries
(national averages)
(USD/kg)



Sources : National Statistical Service of the Republic of Armenia; National Statistical Committee of the Kyrgyz Republic; National Statistics Office of Georgia; Statistical Agency under the President of the Republic of Tajikistan.

REGIONAL REVIEWS
LATIN AMERICA AND THE CARIBBEAN

Note: Situation as of June
Subregional borders
Territories/boundaries**

CENTRAL AMERICA AND THE CARIBBEAN

Mexico
Coarse grains (summer): Planting
Paddy (summer): Planting

Central America
Maize (main season): Planting

SOUTH AMERICA

Brazil
Maize (main season): Harvesting

Centresouthern states
Wheat (winter): Planting

Uruguay
Barley: Planting
Wheat (winter): Planting

Argentina
Wheat (winter): Planting

Unfavourable 2020 production prospects*

Ecuador: Below-average rainfall

*/** See Terminology (*page 6*)

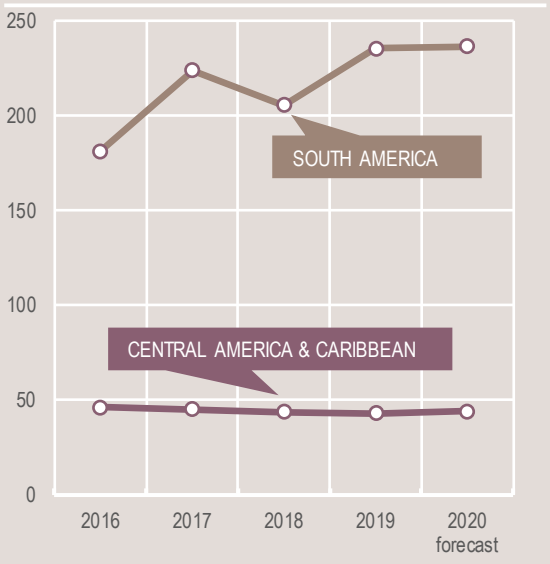
Source: GIEWS

Latin America and the Caribbean Production Overview

Cereal production in Latin America and the Caribbean is forecast at a record high of 280 million tonnes in 2020, about 11 percent above the five-year average. The expected large outturn mainly reflects a near-record maize output in South America's main producers, Brazil and Argentina, spurred by high domestic prices and strong export demand. An upturn in wheat production, provisionally forecast at an all-time high, has also reinforced the positive outlook.

In Central America, the 2020 main season maize crop, to be harvested from August, is at the developing stage and the preliminary production forecast points to an average output.

Cereal production
(million tonnes)



CENTRAL AMERICA AND THE CARIBBEAN

Wheat production forecast below average due to reduced plantings in Mexico

In **Mexico**, virtually the only wheat producer in the subregion, harvesting of the 2020 main winter crop, which accounts for about 95 percent of the annual output, is underway. Overall, aggregate production is forecast at a below-average level of 3.1 million tonnes. The expected low output reflects a reduction in wheat plantings, with the area sown in the 2020/21 main cropping season estimated to be nearly 20 percent below the average.

Maize production forecast at a near-average level in 2020

For the subregion as a whole, maize production is forecast at an average level of 31.7 million tonnes in 2020 mainly reflecting expectations of an average output in **Mexico**, which accounts for 85 percent of the subregion's total maize output.

In **Mexico**, harvesting of the minor season maize crop is underway and the output is expected to be near average as slightly below-average sowings were offset by good yields. Planting of the main season maize crop is ongoing, but activities were delayed in the main producing central-western region due to soil moisture deficits in the March-April period. However, rainfall amounts increased from mid-May 2020, replenishing soil moisture and supporting crop germination. The official survey on planting intentions indicates that an average area to maize is likely to be sown in the main season. As a result, the preliminary production forecast is pegged at an average level of 27 million tonnes.

Elsewhere in the subregion, planting of the 2020 main season maize crop is ongoing and the sown area is expected to increase on a yearly basis in **Guatemala**, **Honduras** and **Nicaragua**, driven by higher domestic prices. Following scarce rainfall during land preparation, precipitation increased in May creating more conducive conditions for crop germination. In **El Salvador**, torrential rains triggered floods in early June and some replanting activities took place in the affected areas with the support of the Government in terms of distribution of seeds and fertilizers. Meteorological forecasts point to above-average levels of rainfall in the third quarter of 2020, with likely positive effects on yields of the 2020 main maize crop. However, forecasts of above-average temperatures, coupled with abundant rains, also raises the risk of an increased prevalence of pest infestations. In **Haiti**, planting of the 2020 main maize and rice crops was completed in June with some delays caused by soil moisture deficits. Early forecasts point to a below-average production due to the low levels of sowings of the main maize and rice crops, as a result of higher production costs underpinned by a significant depreciation of the national currency. Following reduced rains up to mid-June 2020, weather forecasts point to an increase in precipitation in the July-September period that have lifted yield prospects. In **the Dominican Republic**, where harvesting of the paddy crop takes place all year around, production prospects of the 2020 paddy crop were boosted by an expansion in plantings and good yields.

Cereal imports forecast to increase in 2020/21

Cereal imports have been increasing in the subregion for more than five consecutive years, mainly due to the increasing demand of yellow maize by the feed industry and of wheat for food use. Cereal import requirements in the 2020/21 marketing year (September/August) are forecast at an above-average level of about 38 million tonnes.

Prices of beans increased significantly

In **El Salvador** and **Honduras**, prices of white maize increased rapidly in the March-April period due to an upsurge in domestic demand amid the COVID-19 pandemic. Following a return to normal levels of demand, prices declined in May.

Table 15. Latin America and the Caribbean cereal production

(million tonnes)

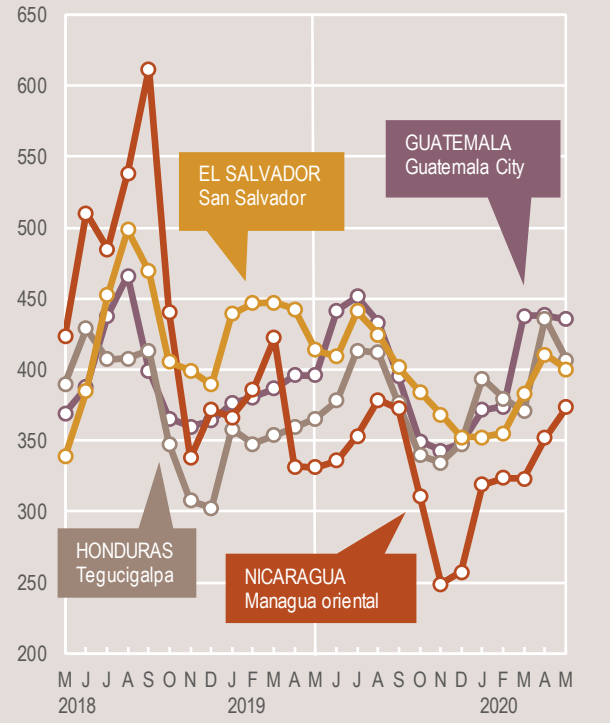
	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	Change: 2020/2019 (%)
Central America and the Caribbean	3.5	3.3	3.1	37.6	36.9	37.8	2.9	2.9	3.1	43.9	43.1	44.0	1.9
El Salvador	0.0	0.0	0.0	0.9	0.9	0.9	0.0	0.0	0.0	0.9	1.0	1.0	1.6
Guatemala	0.0	0.0	0.0	1.9	1.9	2.0	0.0	0.0	0.0	2.0	2.0	2.0	2.8
Honduras	0.0	0.0	0.0	0.6	0.5	0.7	0.1	0.1	0.1	0.7	0.6	0.7	33.2
Mexico	3.5	3.3	3.1	32.8	32.3	32.9	0.3	0.3	0.3	36.5	35.8	36.3	1.2
Nicaragua	0.0	0.0	0.0	0.5	0.5	0.5	0.4	0.4	0.4	0.8	0.9	0.9	3.9
South America	26.7	28.5	29.6	157.2	183.7	182.8	24.4	23.0	24.0	208.2	235.3	236.5	0.5
Argentina	17.5	19.8	20.3	52.0	63.2	62.1	1.4	1.2	1.2	70.8	84.1	83.6	-0.6
Brazil	5.4	5.2	5.7	88.4	103.5	105.1	11.6	10.4	11.1	105.5	119.1	121.9	2.3

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2015-2019 period.

In Honduras, prices were about 10 percent higher year on year reflecting last year's drought-reduced harvest, while prices in **El Salvador** were slightly lower than a year earlier due to good 2019 outputs. Prices of maize followed similar patterns in **Mexico**, as improved market supplies from the ongoing minor season harvest exerted downward pressure on prices in May, after sharp increases during the previous two months. In **Guatemala**, after a spike in March, prices were stable in the April-May period as imports from Mexico eased supply pressure. By contrast, in **Nicaragua**, prices increased in May for the second consecutive month due to tighter domestic availabilities.

Prices of red and black beans increased in the March-May period in **El Salvador**, **Guatemala** and **Mexico**, as seasonally low availabilities were compounded by strong domestic demand triggered by the COVID-19 pandemic. In **Nicaragua** and **Honduras**, prices of red beans increased in the March-April period reflecting the high domestic demand. In Nicaragua, prices increased further in May, supported by strong import demand by neighbouring deficit countries, while in Honduras, prices remained stable in May due to a return to normal levels of demand as well as increased supplies from the recent harvest. Overall, prices of beans in May were well above those of year-earlier values.

Wholesale white maize prices in selected Central America countries
(USD/tonne)



Sources : Secretaria de Agricultura y Ganaderia, Honduras; Ministerio de Agricultura, Ganadería y Alimentación, Guatemala; Ministerio agropecuario y forestal, Nicaragua, Dirección General de Economía Agropecuaria, El Salvador.

In **Haiti**, prices of maize meal and black beans increased in the March-April period due to seasonal pressure compounded by concerns over the impact of the poor precipitation on the 2020 first season plantings. The implementation of movement restrictions and trade disruptions as a result of the COVID-19 pandemic also supported the increase in prices. Prices of rice, mostly imported, were stable during this period reflecting a more stable currency and larger imports in the first quarter of 2020, compared to the same period last year. However, prices of staple grains remained higher year on year, following a decline in the 2019 production and high production costs, supported by a weak national currency, which lost more than 15 percent of its value against the US dollar over the past 12 months.

SOUTH AMERICA

Larger plantings expected to result in near-record maize output

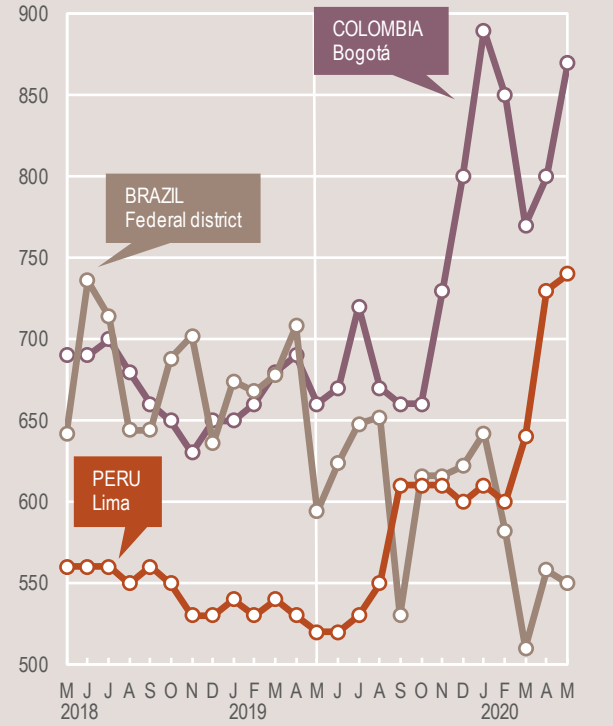
In *South America*, harvesting is underway in the major producing countries and production prospects for the 2020 maize crop are favourable. The subregion's maize output in 2020 is forecast at 169 million tonnes, about 18 percent above the previous five-year average. In **Argentina**, plantings remained at a high level of 9 million hectares for the third consecutive year, instigated by high domestic prices and strong export demand. Production is officially estimated at 55.5 million tonnes, nearly 24.1 percent higher than the previous five-year average as large sowings more than offset a yearly decline in crop yields in western and northern producing areas which have been affected by rainfall deficits. In **Brazil**, the official forecast of the 2020 aggregate production, including the first season crops harvested in the April-May period, points to a record output of 101 million tonnes. The buoyant production outlook is driven by large sowings, which increased by 5 percent compared to last year's record level, reflecting high prices and sustained export demand. Harvesting of the 2020 main maize crop is ongoing and yields, however, are expected to be generally lower than the high levels obtained in 2019 due to persistent dry

weather conditions in the key producing southern region. In **Uruguay**, production is estimated at a well above-average level as the near-record sowings outweighed the negative effects of poor rains in the first quarter of 2020 on crop yields. Production prospects are generally favourable in **Bolivia (Plurinational State of)**, while the 2020 output is forecast at a slightly below-average level in **Colombia** and **Peru** due to soil moisture deficits at planting stages during the first quarter of 2020 in the main producing regions. Similarly, in **Chile** and **Ecuador**, a below-average production is forecast resting on a contraction in plantings and dry weather conditions. In **Venezuela (Bolivarian Republic of)**, planting of the main maize crop started in late May following the timely onset of seasonal rains. Production prospects are unfavourable as the level of plantings is likely to continue following the declining trend since the economic crisis in 2014 and yields are expected to be constrained by the acute scarcity of agricultural inputs and fuel.

Planting of the 2020 wheat crop is underway in most of countries of the subregion. In **Argentina**, the major producer of the subregion, plantings are officially forecast at 7 million hectares, similar to last year's record high. The large sowings have been spurred by high domestic prices, which reflect the strong demand by importing countries due to the significant depreciation of the country's currency. Average precipitation amounts are forecast during the third quarter of 2020, boosting yield expectations of the 2020 wheat crop. The area planted is expected to increase in **Brazil** and **Chile** driven by remunerative prices, while plantings are anticipated to decline in **Paraguay** and **Uruguay** due to delayed harvests of the soybean crop that precedes the planting of the wheat crop. Weather forecasts for the July-September period indicate generally conducive conditions for crop development, except in Chile and Brazil, where dry weather conditions are expected to persist. Outbreaks of locusts were reported in June in eastern areas of **Argentina** and pose a risk to wheat and barley crops, currently being planted. While locust populations could move to northern **Uruguay** and southern **Brazil**, the low temperatures during the coming winter months are expected to help contain further outbreaks.

Harvesting of the 2020 paddy crop is complete in **Brazil**, the major rice producer of the subregion, and production is officially estimated at an average level, as a contraction in plantings was offset by record-high yields. In **Uruguay**, harvesting is nearing completion and the 2020 paddy output is anticipated to remain below average owing to a gradual contraction in plantings, driven by high production costs that incentivized farmers to shift to more profitable crops. Similarly, plantings are anticipated to decline in **Ecuador** due to reduced rainfall at planting and germination stages in the first quarter of 2020. By contrast, the 2020 main season paddy crop in **Colombia**, to be harvested from July, is forecast at an above-average level, underpinned by large sowings due to favourable prices.

Wholesale rice prices in selected countries in South America
(USD/tonne)



Sources : Departamento Administrativo Nacional de Estadística (DANE), Colombia; Instituto de Economía Agrícola, Brazil; Ministerio de Agricultura y Riego, Peru.

Cereal exports forecast at well above-average levels in 2020/21

Aggregate cereal exports in the 2020/21 marketing year (March/February), mainly maize, are forecast at 91 million tonnes, about 20 percent higher than the previous five-year average. The large quantity mainly reflects the expected bumper outputs in **Argentina** and **Brazil**, coupled with weak local currencies, which have enhanced both countries' export competitiveness. Of the total export forecast, maize exports are forecast at 69 million tonnes, 24 percent above the average, and wheat exports are forecast at a record high of 15 million tonnes, mainly reflecting large exportable supplies in Argentina due to the bumper harvests.

Rice prices eased in May following an upsurge in preceding months

After sharp increases in March and April, prices of rice levelled off in May in **Colombia**, **Ecuador** and **Uruguay**, and increased only slightly in **Peru**, reflecting a slowdown in domestic buying and improved market availabilities from the new harvests. In **Brazil**, prices increased for the third consecutive month in May despite the recent completion of the 2020 harvest due to the strong demand amid the COVID-19 pandemic. Demand by importing countries, underpinned by the weak national currency, also exerted upward pressure on domestic prices, which were 20 percent higher on a yearly basis in May.

In line with seasonal trends, prices of yellow maize have generally decreased in the March-May period in **Argentina**, **Chile** and **Ecuador**. In **Brazil**, after sustained increases in the past months, prices decreased in May due to reduced export sales amid the COVID-19 pandemic that caused a slowdown in demand for industrial use, and the availability of grain from the ongoing main season harvest. By contrast, prices of maize increased during the March-May period in **Uruguay** reflecting the concerns over the impact of dryness on the 2020 crop, compounded by higher production costs that reflected the weaker currency.

Prices of wheat grain strengthened seasonally in the March-May period in **Argentina** and **Brazil**. Prices were stable during this period in **Uruguay** on account of adequate domestic supplies and reduced exports in the current marketing year. By contrast, in **Chile**, prices declined in May reflecting large import quantities in March and April compared to the same period in 2019. However, prices remained more than 15 percent higher year on year due to a reduced 2019 output and a weak currency.

In **Ecuador** and **Peru**, prices of wheat flour were overall stable between March and May, and were near their year-earlier values. Prices were also stable in **Colombia**, but were higher year on year, underpinned by the depreciation of the national currency.

REGIONAL REVIEWS
NORTH AMERICA, EUROPE AND OCEANIA

Note: Situation as of June

Territories/boundaries**

NORTH AMERICA

Canada
Maize: Planting
Small grains: Vegetative

United States of America
Maize: Vegetative
Small grains: Maturing to harvesting

EUROPE

Northern Europe
Small grains: Reproductive

Southern Europe
Maize: Vegetative to reproductive
Small grains: Maturing to harvesting

CIS in Europe:
Maize: Reproductive
Small grains: Maturing to harvesting
Wheat: Maturing to harvesting

OCEANIA

Australia
Cereals (summer): Vegetative
Cereals (winter): Planting

Source: GIEWS

** See Terminology (*page 6*)

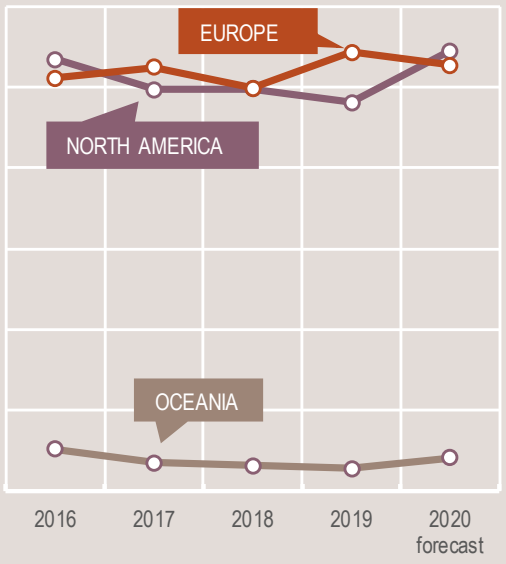
North America, Europe and Oceania Production Overview

In the United States of America, the 2020 wheat output is anticipated to fall to a below-average level owing to lower plantings and yields. By contrast, maize production, with the crops to be harvested from September, is forecast to recover from the low level in 2019 and reach a record high, mostly driven by an expansion in plantings. In Canada, cereal production is forecast above the average.

In the European Union, wheat production, mostly produced in the winter months, is expected at a reduced level in 2020 due to adverse weather that curbed plantings and yields, while production of maize is expected to increase to an above-average level. In the CIS countries in Europe, wheat production is forecast to remain broadly stable on a yearly basis and at a near-average level, as production gains in the Russian Federation are expected to be outweighed by reduced outputs in other countries of the subregion.

In Oceania, reflecting a return to favourable weather conditions, wheat production in Australia is foreseen to recover strongly in 2020 to a well above-average level, following the drought-reduced harvests obtained in 2018 and 2019.

Cereal production
(million tonnes)



NORTH AMERICA

Maize production in the United States of America expected to hit a record high

In **the United States of America** harvesting of the 2020 main winter wheat crop is ongoing. Aggregate wheat production in 2020, including the spring crop to be harvested in August, is forecast at 51.1 million tonnes, about 2 percent lower year on year and 5 percent below the previous five-year average. The forecasted decrease reflects reduced winter sowings, spurred by lower crop prices in 2019, and a reduction in yields due to adverse weather conditions, including freezing temperatures and early-seasonal rainfall deficits. Preliminary projections for the spring output point to a moderate increase, based on average plantings and good yield prospects, which would partly compensate the reduction in winter production.

Harvesting of the maize crops, which are currently at the vegetative stage, is expected to take place from September and production is forecast to rise steeply in 2020 to a level well above the five-year average. The anticipated increase primarily reflects an expansion in the sown area and a likely return to trend yields compared to the low levels in 2019, owing to mostly beneficial weather conditions.

In **Canada**, harvesting of the 2020 winter wheat crop is underway. The aggregate wheat output, including the spring crop to be harvested from August, is forecast at 34 million tonnes, nearly 10 percent above the five-year average. The expected increase is mostly on account of a price-induced expansion in winter plantings, with yields anticipated to remain near average and the spring wheat output expected to remain stable year on year. Planting of the 2020 maize crops is underway and production is forecast at 14.7 million tonnes, 10 percent above the average, as an expected upturn in yields is foreseen to more than offset an expected small reduction in the area sown.

EUROPE

EUROPEAN UNION

Unfavourable weather conditions curb wheat production in the European Union

In the *European Union* (EU27 excluding the United Kingdom), harvesting of the winter cereal crops (mainly wheat and barley) is underway, while planting of the summer cereal crops (mostly maize) concluded in May. Production of wheat is forecast at 125.5 million tonnes in 2020, 17 percent below the previous five-year average, mainly reflecting reduced acreage, particularly in **France**, the largest producer in the *European Union*, due to excessive rainfall at planting. Lower yield prospects, owing to adverse weather conditions in other key-producing countries, have further curbed production expectations. Barley production is forecast to decline to a below-average level of 56.7 million tonnes, similarly due to reduced plantings and yields.

Aggregate production of maize among the European Union countries is preliminarily forecast at 72.5 million tonnes in 2020, broadly unchanged on a yearly basis and 10.8 percent above the five-year average. The broadly stable year-to-year output reflects likely productions increases in **France** and **Romania**, where farmers expanded maize cultivation into land not sown with the 2020 wheat crop, which are foreseen to offset lower outputs expected in several southern and western countries.

CIS IN EUROPE

Cereal production in 2020 forecast above average due to large maize output

Harvesting of the 2020 winter crops, accounting for about 60 percent of the total subregional cereal output, started in

Table 16. North America, Europe and Oceania cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	5-yr Avg.	2019 estim	2020 f'cast	Change: 2020/2019 (%)
North America	*84.9*	*84.6*	*85.0*	*405.4*	*388.3*	*450.2*	*9.1*	*8.4*	*9.8*	*499.4*	*481.3*	*545.0*	*13.2*
Canada	*30.9*	*32.3*	*33.9*	*26.8*	*28.6*	*29.3*	*0.0*	*0.0*	*0.0*	*57.7*	*61.0*	*63.2*	*3.7*
United States of America	*54.0*	*52.3*	*51.1*	*378.6*	*359.7*	*420.9*	*9.1*	*8.4*	*9.8*	*441.7*	*420.3*	*481.8*	*14.6*
Europe	*257.9*	*265.9*	*247.9*	*254.4*	*273.1*	*275.7*	*4.1*	*4.1*	*4.1*	*516.3*	*543.1*	*527.6*	*-2.8*
Belarus	*2.4*	*2.3*	*2.2*	*4.7*	*4.6*	*4.8*	*0.0*	*0.0*	*0.0*	*7.1*	*6.9*	*7.0*	*2.3*
European Union[1]	*150.2*	*155.6*	*125.5*	*157.0*	*166.5*	*160.4*	*2.9*	*2.9*	*2.9*	*310.2*	*325.0*	*288.8*	*-11.1*
Russian Federation	*73.5*	*74.5*	*79.0*	*41.2*	*42.3*	*42.2*	*1.1*	*1.1*	*1.1*	*115.8*	*117.9*	*122.3*	*3.8*
Serbia	*2.6*	*2.5*	*2.6*	*6.8*	*7.9*	*6.8*	*0.0*	*0.0*	*0.0*	*9.4*	*10.4*	*9.4*	*-10.1*
Ukraine	*26.3*	*28.3*	*25.0*	*39.7*	*46.4*	*47.1*	*0.1*	*0.1*	*0.1*	*66.1*	*74.8*	*72.2*	*-3.5*
Oceania	*22.0*	*15.6*	*27.1*	*14.1*	*12.2*	*13.5*	*0.5*	*0.1*	*0.1*	*36.6*	*27.9*	*40.7*	*45.6*
Australia	*21.6*	*15.2*	*26.7*	*13.4*	*11.6*	*12.9*	*0.5*	*0.1*	*0.1*	*35.5*	*26.8*	*39.6*	*47.6*

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2015-2019 period.

[1] Data for the European Union from the year 2020 (including the 2020/21 marketing year) excludes the United Kingdom of Great Britain and Northern Ireland.

July, while planting of the spring crops is almost complete.

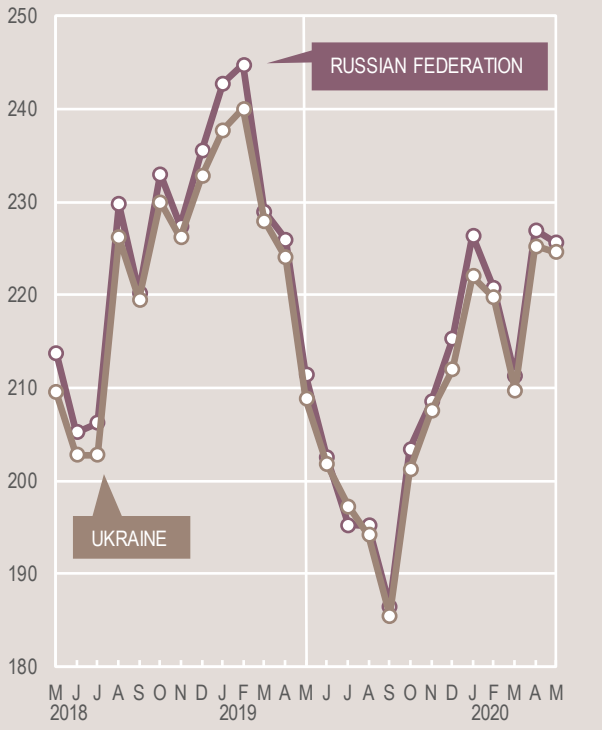
The early forecast of the 2020 aggregate cereal output is set at 204 million tonnes, 6 percent above the five-year average. The generally buoyant production outlook mainly rests on an expected increase in maize production, forecast at about 54 million tonnes, 19.4 percent above the average, as countries expanded the sown area to record levels amid favourable weather conditions. The subregional wheat production, combining winter and spring crops, is forecast at a near average of 107 million tonnes, as an above-average production in **the Russian Federation**, the main wheat-producing country in the subregion , is expected to be outweighed by reduced outputs in **Ukraine**, **Belarus** and **the Republic of Moldova**.

In **the Russian Federation**, despite more recent favourable rains, drier-than-average weather conditions in March and April 2020 adversely affected the winter wheat crops in the key producing Southern Federal District, curbing yield expectations. In the other main winter wheat producing North Caucasus, Volga and Central Federal districts, however, cumulative seasonal rains have been slightly above average, inferring to good yield prospects. Given that the total area planted with wheat, winter and spring crops, is estimated at a record high of 29 million hectares, if weather conditions remain favourable for the remainder of the season, the aggregate 2020 wheat output is expected at 79 million tonnes, exceeding the five-year average by 7 percent. Maize and barley outputs are also expected at above-average levels in 2020. As a result, total cereal production in the Russian Federation is forecast at about 122 million tonnes, 6 percent above the five-year average.

In **Ukraine's** key wheat producing southeastern regions, despite favourable rains in May, the effects of earlier precipitation deficits in March and April are expected to cause a reduction in yields. Combined with a near average sown area, forecast at 6.6 million hectares, the 2020 aggregate wheat output is tentatively expected to fall by 5 percent compared to the average, to 25 million tonnes. However, reflecting expectations of a record maize crop, forecast at 37 million tonnes, total cereal production is forecast at an above-average level of 72 million tonnes.

In **Belarus**, according to satellite-based imagery, conditions of winter and spring grain crops at the end of May 2020 were near average in most cropped areas, except for southeastern regions. In these areas and particularly in the Gomel Region, which contributes an average of 15 percent to the total annual cereal output, crop conditions have been affected by reduced seasonal precipitation. The preliminary forecast for the 2020 aggregate cereal production is pegged at 7 million tonnes, just below the five-year average. Similarly, the early forecast for the 2020 aggregate cereal production in **the Republic of Moldova** stands at a slightly below-average level of 2.9 million tonnes mainly due to reduced cereal plantings. In addition, production of wheat in 2020, which generally accounts for about 40 percent of the total annual domestic cereal output, is expected to be below average due to scarce precipitation in April, particularly in southeastern areas.

Wheat export prices in the Russian Federation and Ukraine
(USD/tonne)



Source : International Grains Council.

Above-average cereal exports forecast in 2020/21

Total subregional cereal exports in the 2020/21 marketing year (July/June) are forecast at 96 million tonnes, 8 percent above the five-year average. This is mainly due to the expectation of large maize exports, forecast at 35 million tonnes. Of this amount, 30 million tonnes are expected to be shipped from Ukraine, reflecting the country's already ample supplies and a likely record maize harvest in 2020. Subregional wheat exports are forecast at a near-average level of 51 million tonnes, slightly below the average level. Wheat shipments from **Ukraine** are forecast at 16.5 million tonnes, 8 percent below the five-year average amid unfavourable production prospects in 2020. Wheat exports from **the Russian Federation** are expected to reach 34 million tonnes, an above-average volume, due to the overall good prospects for the 2020 domestic production and strong import demand.

Export and domestic prices of wheat increased

In **Ukraine** and **the Russian Federation**, the main wheat exporting countries of the subregion, export prices of milling quality wheat rose abruptly between mid-March and April, following the introduction of COVID-19-related export restrictions and the weakening of national currencies, which triggered an uptick in import demand reflecting the decline in US dollar-denominated export quotations. Prices remained relatively stable in May as downward pressure, due to a decline in demand compared to the previous month, was offset by the production forecast downgrades following dry weather conditions in March and April.

In these countries, domestic wholesale prices of wheat grain and flour increased in March and April 2020 due to robust demand and tightening supplies of high quality wheat. In May, prices generally continued to strengthen in **the Russian Federation**, while they weakened in **Ukraine** amid the implementation of price regulations for buckwheat, wheat flour and some other staple food commodities.

Prices of potatoes, a key food staple in the subregion, increased strongly since April 2020 in **the Russian Federation** and in **Belarus**, the main exporter in the subregion, due to strong consumer demand amid concerns over the epidemic, which exacerbated seasonal trends.

OCEANIA

Wheat production expected to recover strongly following two years of drought-reduced harvests

In **Australia**, planting of the 2020 wheat crop, the main winter cereal, is underway and is expected to conclude in August. Production is forecast at the high level of 26.7 million tonnes, nearly 25 percent above the previous five-year average and showing a significant recovery following the drought-reduced harvests obtained in 2018 and 2019. The buoyant production outlook is based on an expansion in plantings, officially estimated at an above-average level of 13 million hectares, supported by well-distributed and abundant rains. Additionally, weather forecasts indicate average to above-average rainfall in the coming months, inferring an upturn in in yields in 2020, further reinforcing the optimistic production outlook. Similarly, barley production is forecast at 10.6 million tonnes, a 17 percent year-on-year increase and 6 percent above the five-year average, reflecting increased plantings and good yield prospects.

SPECIAL FEATURE - The GEOGLAM Crop Monitor: Reducing uncertainty in support of agricultural decision making

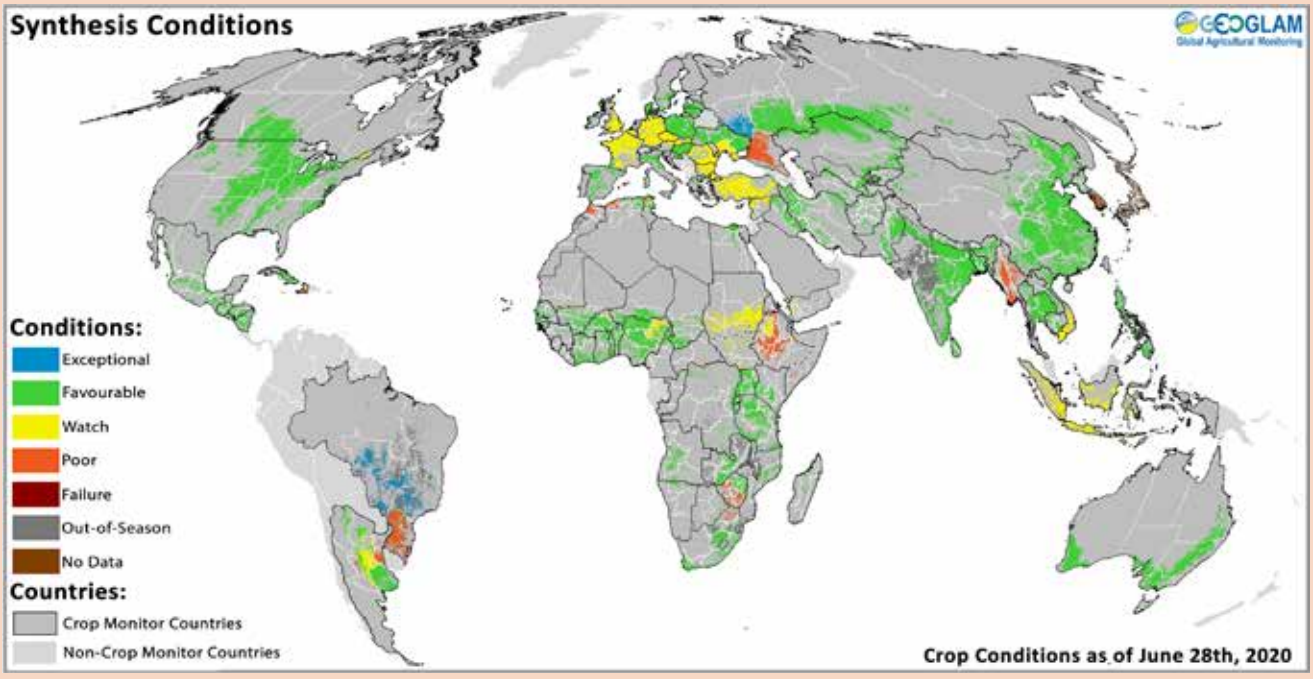
The Group on Earth Observations Global Agricultural Monitoring (GEOGLAM) Crop Monitor (https://cropmonitor.org/) is an international initiative that was developed under the framework of the 2011 G-20 Action Plan on Food Price Volatility in Agriculture in response to the need for timely and science-driven information on global crop conditions that would strengthen existing monitoring systems, support market transparency and provide early warnings on potential production shortfalls. The main objective of the GEOGLAM Crop Monitor initiative is to reduce uncertainty in global food markets by providing a monthly consensus on global crop conditions, which additionally gives critical support to humanitarian decision making.

Partners of the GEOGLAM Crop Monitor community, which represent the main agricultural monitoring agencies, agricultural ministries, governments and space agencies, come together monthly, coordinated by NASA Harvest (https://nasaharvest.org/), to discuss current crop assessments based on satellite observations, meteorological information, field observations and ground reports, and through an evidence building process reach an international and multi-source consensus on global crop conditions. This information is then summarized in two monthly bulletins on crop conditions published on the first Thursday of each month: the Crop Monitor for the Agricultural Market Information System (AMIS) covers the major agricultural production and export countries, while the Crop Monitor for Early Warning covers countries at risk of food insecurity.

The GEOGLAM Crop Monitor for Early Warning (CM4EW) bulletin was launched in 2016 in response to the need for consensus-based crop assessments in countries at risk of severe food insecurity, where early warning of potential impacts to production is critical to trigger early actions by humanitarian organizations. The CM4EW focuses on monitoring the main food security crops within each region. Partners of the CM4EW include some of the major global food security organizations, including the Global Information and Early Warning System on Food and Agriculture (GIEWS), Famine Early Warning Systems Network (FEWS NET), the World Food Programme's Vunerability Analysis and Mapping (WFP/VAM), the European Community's Joint Research Centre (EC-JRC), the GEOGLAM Asia-Rice Crop Estimation & Monitoring (Asia-RiCE) and the Inter-governmental Authority of Drought and Development Climate Prediction and Applications Centre (IGAD/ICPAC), among others. Additionally, the Crop Monitor for AMIS was developed earlier to provide crop condition assessments, focusing on four main crops of wheat, maize, soybean and rice in the major producing and exporting countries which together are responsible for over 80 percent of global production.

Combined, the GEOGLAM Crop Monitor bulletins report monthly consensus-based information on crop conditions for about 93 percent of all global agricultural lands. These bulletins provide important updates to markets and the humanitarian community. In times of international crisis and heightened uncertainty, there is a need for greater international cooperation and for the international community to work together to build consensus and reduce speculation.

GEOGLAM Crop monitor global conditions as of 28 June 2020



Source: GEOGLAM Crop Monitor coordinated by NASA Harvest, 2020.
Adapted from United Nations World map, 2020.

STATISTICAL APPENDIX

Table A1. Global cereal supply and demand indicators

	Average 2015/16 - 2019/20	2016/17	2017/18	2018/19	2019/20	2020/21
Ratio of world stocks to utilization (%)						
Wheat	*35.9*	*36.0*	*38.3*	*35.9*	*36.5*	*36.8*
Coarse grains	*28.5*	*28.4*	*29.3*	*28.8*	*28.4*	*30.3*
Rice	*35.5*	*34.8*	*35.3*	*36.8*	*35.9*	*35.3*
Total cereals	***31.9***	***31.7***	***32.9***	***32.3***	***32.0***	***33.0***
Ratio of major cereal exporters' supplies to market requirements (%)[1]	*121.4*	*123.6*	*122.9*	*116.8*	*118.7*	*118.4*
Ratio of major exporters' stocks to their total disappearance (%)[2]						
Wheat	*18.5*	*19.8*	*21.0*	*18.2*	*15.7*	*16.7*
Coarse grains	*15.1*	*14.8*	*15.7*	*16.1*	*15.6*	*20.2*
Rice	*20.9*	*18.9*	*18.1*	*22.6*	*25.2*	*25.2*
Total cereals	***18.2***	***17.8***	***18.3***	***19.0***	***18.9***	***20.7***

	Annual trend growth rate 2010-2019	Change from previous year 2016	2017	2018	2019	2020
Changes in world cereal production (%)	*2.0*	*3.0*	*1.4*	*-1.8*	*2.2*	*3.0*
Changes in cereal production in the LIFDCs (%)	*2.1*	*3.7*	*3.6*	*2.5*	*1.7*	*1.4*
Changes in cereal production in the LIFDCs excluding India (%)	*2.0*	*2.1*	*1.0*	*3.4*	*2.0*	*0.1*

	2017	2018	2019	2020*	Change 2020* over 2019*
Selected cereal price indices[3]					
Wheat	*89.0*	*99.0*	*95.3*	*98.0*	*0.4%*
Maize	*88.6*	*99.1*	*94.6*	*92.5*	*-4.4%*
Rice	*99.0*	*106.3*	*101.5*	*109.9*	*9.9%*

Source: FAO

Notes: Utilization is defined as the sum of food use, feed and other uses. Cereals refer to wheat, coarse grains and rice; grains refer to wheat and coarse grains (barley, maize, millet, sorghum and cereals NES).

[1] Major wheat exporters are: Argentina, Australia, Canada, the European Union, Kazakhstan, the Russian Federation, Ukraine and the United States of America. Major coarse grains exporters are Argentina, Australia, Brazil, Canada, the European Union, the Russian Federation, Ukraine and the United States of America. Major rice exporters are India, Pakistan, Thailand, the United States of America and Viet Nam.

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

[3] Price indices: The Wheat Price Index has been constructed based on the International Grains Council Wheat Price Index, rebased to 2014-2016=100; for maize, the US maize No.2 Yellow (delivered US Gulf ports) with base 2014-2016=100; for rice, the FAO Rice Price Index, 2014-2016=100, is based on 16 rice export quotations.

*January-June average.

Table A2. World cereal stocks[1]
(million tonnes)

	2016	2017	2018	2019	2020 estimate	2021 forecast
TOTAL CEREALS	***795.3***	***840.6***	***881.5***	***870.0***	***876.6***	***928.9***
Wheat	***243.0***	***265.9***	***287.7***	***272.1***	***275.0***	***283.8***
held by:						
- main exporters[2]	*70.4*	*79.9*	*84.3*	*71.4*	*63.8*	*64.0*
- others	*172.6*	*186.0*	*203.4*	*200.7*	*211.2*	*219.8*
Coarse grains	***380.3***	***401.8***	***417.5***	***413.3***	***418.1***	***462.9***
held by:						
- main exporters[2]	*106.4*	*119.8*	*130.4*	*132.2*	*132.9*	*174.4*
- others	*273.9*	*282.0*	*287.1*	*281.1*	*285.2*	*288.5*
Rice (milled basis)	***172.0***	***173.0***	***176.3***	***184.6***	***183.5***	***182.2***
held by:						
- main exporters[2]	*34.5*	*33.2*	*32.3*	*39.6*	*44.2*	*46.2*
- others	*137.5*	*139.8*	*144.0*	*145.0*	*139.3*	*136.0*
Developed countries	***170.7***	***196.8***	***198.3***	***191.1***	***186.4***	***229.5***
Australia	*7.2*	*9.5*	*7.3*	*8.8*	*8.2*	*11.7*
Canada	*10.0*	*12.5*	*11.1*	*9.4*	*10.2*	*11.1*
European Union[3]	*40.8*	*35.2*	*45.3*	*44.6*	*46.9*	*48.1*
Japan	*7.3*	*6.6*	*6.7*	*6.5*	*6.7*	*6.7*
Russian Federation	*11.9*	*20.2*	*22.9*	*14.2*	*12.8*	*13.5*
South Africa	*3.7*	*1.8*	*5.1*	*3.6*	*2.6*	*4.1*
Ukraine	*9.7*	*8.4*	*8.0*	*7.2*	*6.1*	*6.8*
United States of America	*76.1*	*95.8*	*88.8*	*91.3*	*84.4*	*115.9*
Developing countries	***624.5***	***643.8***	***683.1***	***678.9***	***690.2***	***699.5***
Asia	***527.7***	***546.8***	***566.4***	***564.9***	***583.2***	***591.4***
China (Mainland)	*378.2*	*409.4*	*424.4*	*421.9*	*433.3*	*438.8*
India	*42.3*	*34.6*	*42.1*	*50.8*	*57.6*	*58.4*
Indonesia	*10.2*	*9.2*	*10.2*	*11.3*	*9.1*	*7.8*
Iran (Islamic Republic of)	*9.9*	*11.6*	*10.6*	*9.1*	*9.7*	*10.9*
Korea, Republic of	*4.9*	*4.5*	*4.2*	*3.2*	*3.2*	*3.4*
Pakistan	*5.8*	*5.8*	*5.1*	*3.5*	*2.2*	*2.3*
Philippines	*4.0*	*3.7*	*4.1*	*4.7*	*4.4*	*4.4*
Syrian Arab Republic	*1.7*	*1.3*	*1.7*	*1.5*	*2.2*	*3.0*
Turkey	*7.4*	*6.0*	*7.1*	*6.7*	*8.3*	*9.4*
Africa	***56.6***	***54.6***	***61.2***	***62.1***	***58.0***	***56.6***
Algeria	*5.7*	*5.6*	*5.3*	*6.6*	*6.2*	*4.1*
Egypt	*7.7*	*7.4*	*6.8*	*5.6*	*6.4*	*6.7*
Ethiopia	*4.2*	*4.8*	*5.6*	*6.3*	*7.1*	*7.3*
Morocco	*8.4*	*5.9*	*6.7*	*7.3*	*6.0*	*4.5*
Nigeria	*2.9*	*2.5*	*2.9*	*3.8*	*3.3*	*3.2*
Tunisia	*1.0*	*1.0*	*1.1*	*1.0*	*1.2*	*1.2*
Central America	***8.1***	***10.5***	***11.2***	***10.6***	***9.8***	***9.4***
Mexico	*4.6*	*6.5*	*7.6*	*7.5*	*7.2*	*6.9*
South America	***31.7***	***31.4***	***43.9***	***40.9***	***38.8***	***41.7***
Argentina	*7.7*	*7.4*	*12.4*	*13.0*	*12.8*	*13.7*
Brazil	*14.2*	*12.7*	*19.9*	*16.8*	*16.5*	*19.2*

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

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

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

[3] Data for the European Union from the year 2020 (including the 2020/21 marketing year) excludes the United Kingdom of Great Britain and Northern Ireland.

Table A3. Selected international prices of wheat and coarse grains

(USD/tonne)

	Wheat			Maize		Sorghum
	US No.2 Hard Red Winter Ord. Protein[1]	US Soft Red Winter No.2[2]	Argentina Trigo Pan[3]	US No.2 Yellow[2]	Argentina[3]	US No.2 Yellow[2]
Annual (July/June)						
2007/08	361	311	318	200	192	206
2008/09	270	201	234	188	180	170
2009/10	209	185	224	160	168	165
2010/11	316	289	311	254	260	248
2011/12	300	256	264	281	269	264
2012/13	348	310	336	311	278	281
2013/14	318	265	335	217	219	218
2014/15	266	221	246	173	177	210
2015/16	211	194	208	166	170	174
2016/17	197	170	190	156	172	151
2017/18	230	188	203	159	165	174
2018/19	232	210	233	166	166	163
2019/20	220	219	231	163	163	163
Monthly						
2018 - June	241	205	268	166	170	167
2018 - July	235	207	245	157	165	147
2018 - August	250	215	242	162	168	165
2018 - September	242	203	235	156	160	165
2018 - October	240	210	233	160	162	159
2018 - November	232	210	220	160	161	157
2018 - December	240	217	228	167	171	164
2019 - January	238	219	234	166	173	162
2019 - February	234	217	244	170	170	170
2019 - March	223	201	231	167	163	170
2019 - April	213	195	220	161	155	164
2019 - May	212	203	218	172	166	164
2019 - June	227	222	243	196	183	164
2019 - July	216	202	244	188	177	158
2019 - August	203	197	238	162	151	147
2019 - September	200	200	228	157	145	149
2019 - October	212	213	229	168	157	164
2019 - November	220	225	198	167	167	162
2019 - December	225	238	203	168	173	165
2020 - January	237	249	226	172	185	167
2020 - February	230	240	240	170	179	165
2020 - March	227	230	243	162	170	165
2020 - Aprill	232	222	244	145	155	165
2020 - May	223	211	239	144	146	176
2020 - June	216	200	241	149	149	173

Sources: International Grains Council and USDA.

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

[2] Delivered United States Gulf.

[3] Up River f.o.b.

Table A4a. Estimated cereal import requirements of Low-Income Food-Deficit Countries[1] in 2019/2020 or 2020
(thousand tonnes)

		2018/19 or 2019			2019/20 or 2020
	Marketing year	Commercial purchases	Food aid	Total imports (commercial and aid)	Total import requirements (excl. re-exports)
AFRICA		***26 122.4***	***1 009.6***	***27 132.0***	***28 906.6***
East Africa		***10 371.7***	***698.0***	***11 069.7***	***11 850.0***
Burundi	Jan/Dec	*164.1*	*16.0*	*180.1*	*185.0*
Comoros	Jan/Dec	*58.0*	*0.0*	*58.0*	*61.5*
Djibouti	Jan/Dec	*83.0*	*4.0*	*87.0*	*89.0*
Eritrea	Jan/Dec	*448.3*	*0.0*	*448.3*	*458.5*
Ethiopia	Jan/Dec	*1 810.0*	*54.0*	*1 864.0*	*1 840.0*
Kenya	Oct/Sept	*2 929.3*	*80.0*	*3 009.3*	*3 658.0*
Rwanda	Jan/Dec	*190.0*	*0.0*	*190.0*	*210.0*
Somalia	Aug/Jul	*645.0*	*190.0*	*835.0*	*905.0*
South Sudan	Nov/Oct	*590.0*	*90.0*	*680.0*	*680.0*
Sudan	Nov/Oct	*2 005.0*	*230.0*	*2 235.0*	*2 230.0*
Uganda	Jan/Dec	*495.0*	*23.0*	*518.0*	*548.0*
United Republic of Tanzania	Jun/May	*954.0*	*11.0*	*965.0*	*985.0*
Southern Africa		***2 637.1***	***14.7***	***2 651.8***	***3 105.6***
Lesotho	Apr/Mar	*164.8*	*0.6*	*165.4*	*187.9*
Madagascar	Apr/Mar	*683.0*	*8.0*	*691.0*	*733.7*
Malawi	Apr/Mar	*145.0*	*2.0*	*147.0*	*183.0*
Mozambique	Apr/Mar	*1 367.7*	*1.0*	*1 368.7*	*1 430.0*
Zimbabwe	Apr/Mar	*276.6*	*3.1*	*279.7*	*571.0*
West Africa		***10 577.7***	***140.9***	***10 718.6***	***11 347.4***
Coastal Countries		***5 947.7***	***48.5***	***5 996.2***	***6 005.5***
Benin	Jan/Dec	*511.0*	*6.0*	*517.0*	*347.0*
Côte d'Ivoire	Jan/Dec	*1 910.0*	*5.5*	*1 915.5*	*2 160.5*
Ghana	Jan/Dec	*1 646.7*	*5.0*	*1 651.7*	*1 425.0*
Guinea	Jan/Dec	*782.0*	*5.5*	*787.5*	*957.5*
Liberia	Jan/Dec	*495.0*	*12.0*	*507.0*	*478.0*
Sierra Leone	Jan/Dec	*311.0*	*14.0*	*325.0*	*347.0*
Togo	Jan/Dec	*292.0*	*0.5*	*292.5*	*290.5*
Sahelian Countries		***4 630.0***	***92.4***	***4 722.4***	***5 341.9***
Burkina Faso	Nov/Oct	*713.0*	*11.0*	*724.0*	*732.0*
Chad	Nov/Oct	*151.0*	*38.6*	*189.6*	*194.6*
Gambia	Nov/Oct	*244.0*	*1.5*	*245.5*	*253.0*
Guinea-Bissau	Nov/Oct	*123.0*	*6.3*	*129.3*	*174.3*
Mali	Nov/Oct	*461.2*	*0.0*	*461.2*	*461.2*
Mauritania	Nov/Oct	*531.8*	*13.0*	*544.8*	*545.8*
Niger	Nov/Oct	*600.0*	*18.0*	*618.0*	*696.0*
Senegal	Nov/Oct	*1 806.0*	*4.0*	*1 810.0*	*2 285.0*
Central Africa		***2 535.9***	***156.0***	***2 691.9***	***2 603.6***
Cameroon	Jan/Dec	*1 360.0*	*10.0*	*1 370.0*	*1 280.0*
Congo	Jan/Dec	*334.0*	*2.0*	*336.0*	*306.0*
Central African Republic	Jan/Dec	*73.0*	*23.0*	*96.0*	*95.4*
Democratic Republic of the Congo	Jan/Dec	*750.0*	*120.0*	*870.0*	*900.0*
Sao Tome and Principe	Jan/Dec	*18.9*	*1.0*	*19.9*	*22.2*

Source: FAO
[1] The Low-Income Food-Deficit Countries (LIFDCs) group includes net food deficit countries with annual per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. USD 1 905 in 2018); for full details see http://www.fao.org/countryprofiles/lifdc

Table A4b. Estimated cereal import requirements of Low-Income Food-Deficit Countries[1] in 2019/2020 or 2020

(thousand tonnes)

		2018/19 or 2019			2019/20 or 2020
	Marketing year	Commercial purchases	Food aid	Total imports (commercial and aid)	Total import requirements (excl. re-exports)
ASIA		***39 703.7***	***1 180.8***	***40 884.5***	***39 041.3***
Cis in Asia		***4 909.6***	***0.1***	***4 909.7***	***4 825.5***
Kyrgyzstan	Jul/Jun	*611.9*	*0.1*	*612.0*	*638.5*
Tajikistan	Jul/Jun	*1 203.0*	*0.0*	*1 203.0*	*1 135.0*
Uzbekistan	Jul/Jun	*3 094.7*	*0.0*	*3 094.7*	*3 052.0*
Far East		***24 187.1***	***365.7***	***24 552.8***	***24 708.8***
Bangladesh	Jul/Jun	*7 573.3*	*92.7*	*7 666.0*	*7 692.0*
Democratic People's Republic of Korea	Nov/Oct	*1 314.0*	*271.0*	*1 585.0*	-*
India	Apr/Mar	*302.7*	*0.0*	*302.7*	*486.0*
Nepal	Jul/Jun	*1 183.8*	*2.0*	*1 185.8*	*1 080.8*
Viet Nam	Jul/Jun	*13 813.3*	*0.0*	*13 813.3*	*15 450.0*
Near East		***10 607.0***	***815.0***	***11 422.0***	***9 507.0***
Afghanistan	Jul/Jun	*3 212.0*	*100.0*	*3 312.0*	*2 292.0*
Syrian Arab Republic	Jul/Jun	*3 415.0*	*290.0*	*3 705.0*	*2 775.0*
Yemen	Jan/Dec	*3 980.0*	*425.0*	*4 405.0*	*4 440.0*
CENTRAL AMERICA AND THE CARIBBEAN		***1 414.6***	***10.1***	***1 424.7***	***1 447.1***
Haiti	Jul/Jun	*784.9*	*10.1*	*795.0*	*782.1*
Nicaragua	Jul/Jun	*629.7*	*0.0*	*629.7*	*665.0*
OCEANIA		***62.0***	***0.0***	***62.0***	***62.0***
Solomon Islands	Jan/Dec	*62.0*	*0.0*	*62.0*	*62.0*
TOTAL		***67 302.7***	***2 200.5***	***69 503.2***	***69 457.0***

Source: FAO

[1] The Low-Income Food-Deficit Countries (LIFDCs) group includes net food deficit countries with annual per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. USD 1 905 in 2018); for full details see http://www.fao.org/countryprofiles/lifdc

* Estimates not yet available.

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

This report is based on information available as of **June 2020.**

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