



CROP PROSPECTS and FOOD SITUATION

Quarterly Global Report

Countries in need of
external assistance
for food

42

COUNTRIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD

FAO assesses that globally 42 countries, of which 32 are in Africa, continue to be in need of external assistance for food. Conflict-driven crises are the main cause of the high levels of severe food insecurity. Additionally, agricultural droughts and floods have sharply reduced harvests and contributed to abrupt spikes in food prices significantly aggravating food insecurity.

Asia	1.0
Africa	-3.9
Central America and the Caribbean	-2.8
South America	15.5
North America	-3.3
Europe	8.1
Oceania	-0.8
World	2.1

WORLD

Cereal production 2019 over 2018

(yearly percentage change)

+2.1%

REGIONAL HIGHLIGHTS

AFRICA Floods and earlier severe dryness in East Africa cut harvest expectations for the 2019 cereal crops, while similarly adverse weather conditions caused a steep production decline in Southern Africa, where planting of the 2020 crops is underway. Average outputs are estimated in North Africa and Central Africa.

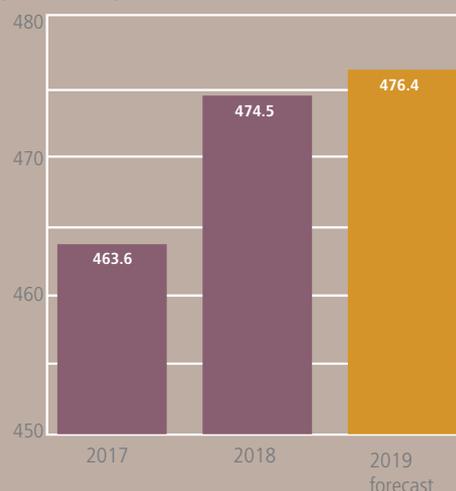
ASIA Improved security contributed to a production increase in the Syrian Arab Republic in 2019, while conducive weather supported harvest upturns across the Near East. A record-high wheat output in India helped maintain an above-average subregional cereal output in the Far East. In CIS Asia, a reduced harvest in Kazakhstan was offset by production upturns elsewhere.

LATIN AMERICA AND THE CARIBBEAN Record cereal harvest estimated in South America in 2019, due to bumper outputs in Argentina and Brazil. In Central America and the Caribbean, unfavourable weather reduced harvests in most countries of the subregion.

LIFDCs
Cereal production 2019 over 2018

+0.4%

(million tonnes)



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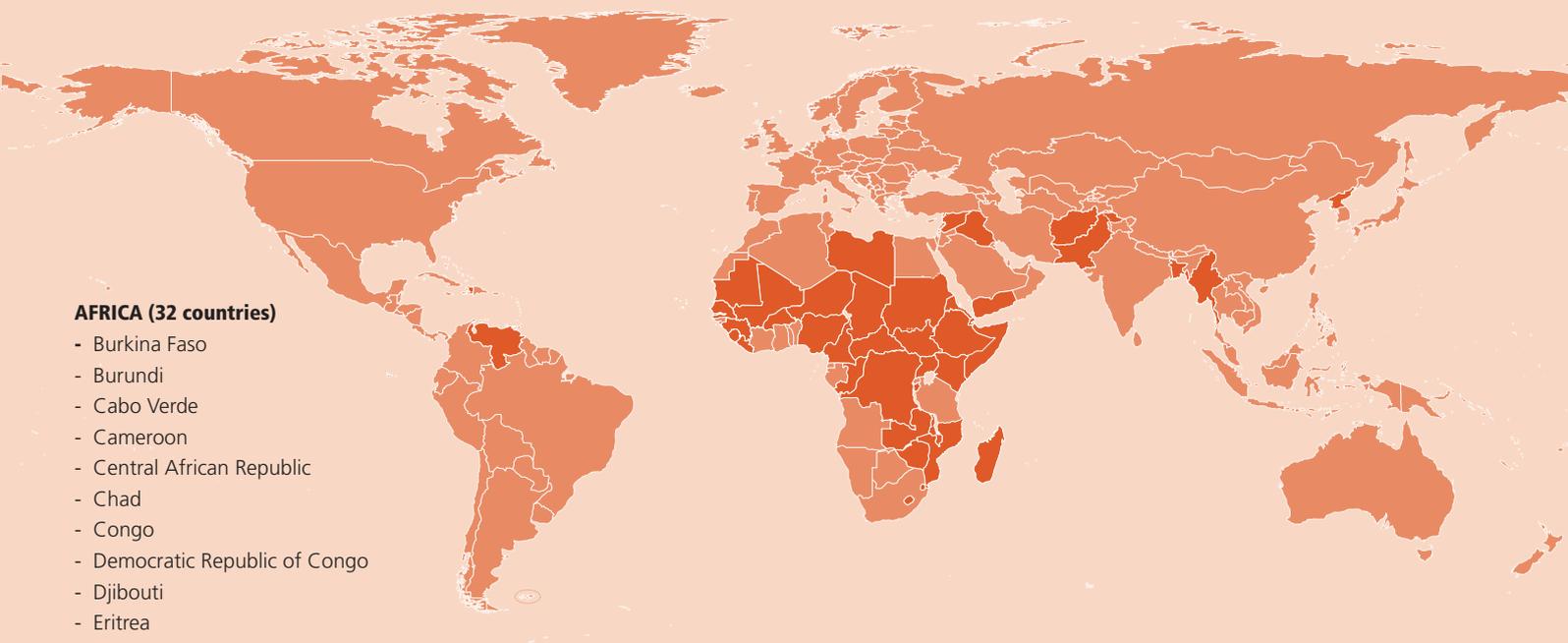
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COUNTRIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD



AFRICA (32 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
- Niger
- Nigeria
- Senegal
- Sierra Leone
- Somalia
- South Sudan
- Sudan
- Uganda
- 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

+ New Entry

Source: GIEWS (disputed territories and boundaries in conformity with UN maps)**

** See Terminology ([page 6](#))

AFRICA (32 COUNTRIES)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/ SUPPLIES

Central African Republic

Conflict, displacements and food supply constraints

- The number of severely food insecure people has decreased consistently since September 2018. According to the latest Integrated Food Security Phase Classification (IPC) analysis, an estimated 1.6 million people were in IPC Phase 3: "Crisis" and above. Of these, about 375 000 people were estimated to be in IPC Phase 4: "Emergency", as of September 2019, mainly located in the areas with high concentrations of Internally Displaced Persons (IDPs).

Kenya

Consecutive unfavourable rainy seasons

- About 3.1 million people are severely food insecure, mainly located in northern and eastern areas as a result of the cumulative impact of poor 2018 October-December "short-rains" and severe dryness during most of the 2019 March-May "long-rains" season.
- As of early November, about 144 000 individuals had been affected by floods, which were triggered by torrential rains since October.

Somalia

Conflict, civil insecurity and consecutive unfavourable rainy seasons

- About 2.1 million people are estimated to be in need of emergency assistance, mainly agro-pastoral and pastoral communities affected by poor 2018 October-December "Deyr" rains and severe dryness during most of the 2019 April-June "Gu" season.
- As of mid-November, floods, which were triggered by torrential rains since October, affected about 540 000 people, of whom about 370 000 have been displaced.

Zimbabwe

Reduced cereal availability and extremely high food prices

- The number of food insecure people has risen significantly in 2019/20. The figure is projected to almost double to 5.5 million people on a yearly basis in the January-March 2020 period.
- The deterioration in food insecurity results from a sharply reduced cereal harvest in 2019, significantly high staple food prices and a poor economic environment that has diminished income-generating opportunities. The outlook for the 2020 crops is unfavourable due to poor weather forecasts, heightening the likelihood of a second consecutive reduced cereal harvest.

WIDESPREAD LACK OF ACCESS**Burundi**

Civil insecurity, economic downturn and localized crop production shortfalls

- Disruptions to markets, farming activities and livelihoods, coupled with limited humanitarian assistance and declining food import capacity, continue to seriously affect food security conditions.
- About 1.72 million people were estimated to be severely food insecure in late 2018 (latest available information).

Chad

Civil insecurity

- According to the last “Cadre Harmonisé”, about 594 000 people were estimated to be food insecure between October and December 2019.
- Nearly 170 280 people remained internally displaced, almost entirely on account of the insurgency in the northeast. In addition, the country hosts about 438 000 refugees.

Democratic Republic of the Congo

Conflict and displacements in eastern and southern areas straining resources of host communities

- Following an explosion of violence in June in the Ituri Province, about 300 000 people were displaced in Ituri and North Kivu provinces. Overall, 1.5 million IDPs were located in North Kivu Province as of October 2019, straining the already limited resources of the host communities.
- The Ebola Virus Disease (EVD) continues to be a growing and serious concern. As of November, WHO reported that a total of 3 291 people have been affected, of which nearly 2 193 have died.

Djibouti

Impact of consecutive unfavourable rainy seasons on pastoral livelihoods

- About 150 000 people were estimated to be severely food insecure in 2018 (latest available information) in rural areas, due to consecutive unfavourable rainy seasons.

Eritrea

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

Ethiopia

Impact of drought on local livelihood systems

- An estimated 6.7 million people were estimated to be severely food insecure in

early 2019, 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 mid-November, about 205 000 people have been displaced in southern and eastern areas due to floods triggered by torrential rains since October.

Niger

Civil conflict

- According to the last “Cadre Harmonisé” analysis, about 1.4 million people in the October-December 2019 period are assessed to be in need of immediate humanitarian assistance.
- Due to the civil conflict in neighbouring states, the country hosts 218 261 refugees, of which 161 359 are from Nigeria and 56 000 are from Mali, while an estimated 187 359 people are internally displaced.

Nigeria

Persisting conflict in northern areas

- According to the last “Cadre Harmonisé” analysis, about 4 million people were assessed to be in need of humanitarian assistance between October and December 2019.
- Due to persisting civil insecurity, over 2.3 million people are internally displaced. The areas inaccessible to humanitarian interventions are facing the worse food security conditions.

South Sudan

Conflict, civil insecurity and severe economic downturn

- Despite sustained humanitarian assistance, food insecurity still affects large segments of the population, driven by insufficient food supplies, an economic downturn, trade disruptions and high food prices.
- The number of severely food insecure people was projected in August to decline from 6.35 million to 4.54 million between September and December 2019. However, the current food insecure caseload is likely to be substantially higher, as widespread floods triggered by torrential rains in September and October affected about 900 000 individuals, of whom about 420 000 have been displaced, and resulted in significant crop and livestock losses.
- In October 2019 the number of internally displaced people was estimated at 1.47 million.

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 was estimated at 1.2 million people for the October-December 2019 period, mainly due to civil insecurity in the north.
- An estimated 26 000 refugees, most of them from Mali, are living in the country, while about 486 000 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) were estimated to be in Phase 3: “Crisis” and above in the October-December 2019 period.

Cameroon

Civil strife and influx of refugees putting strain on host communities

- In the Far North Region, the number of IDPs rose from 246 000 people in November 2018 to 271 000 in October 2019.
- In the Northwest and Southwest regions, 542 000 people were internally displaced as of October 2019.
- The country also hosts about 109 000 refugees from Nigeria and 293 000 refugees from the Central African Republic, as at the end of October.

Congo

Influx of refugees straining the already limited resources of host communities

- 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.
- Host communities, mainly in the northern and eastern areas of the country, face food shortages and limited livelihood opportunities, and refugees' food security is essentially guaranteed by continued humanitarian assistance.

Eswatini

Localized production shortfalls

- About 232 400 people are estimated to be in need of humanitarian assistance between October 2019 and March 2020, up from

an estimated 166 000 people estimated for the corresponding period in 2018/19.

- The lower cereal harvest, on account of adverse weather conditions, is the main cause of the aggravated food security situation.

Guinea

Localized shortfalls of cereal production

- About 72 000 people are estimated to be in need of food assistance during October to December 2019.

Lesotho

Reduced cereal production

- An estimated 433 410 people (about 30 percent of the rural population) are estimated to be food insecure between October 2019 and March 2020, up from the previous year's number.
- The aggravated food security situation was mostly caused by the weather-driven decline in cereal production.

Liberia

High food prices

- According to the last "Cadre Harmonisé" analysis, about 41 000 people are estimated to be in Phase 3: "Crisis" and above in the June-August 2019 period. The country is hosting approximately 8 700 refugees.

Libya

Civil insecurity

- The total number of people in need of humanitarian assistance is estimated at 0.82 million (11 percent of the population), of which 0.3 million persons require food assistance. Refugees, asylum seekers and internally displaced are among the most vulnerable.

Madagascar

Constrained access to food

- Nearly 1 million people are assessed to be food insecure, mostly located in the vulnerable southern regions. This number is, however, below the estimated figure from the previous year, reflecting a larger cereal harvest in 2019 and consequently improved food availability.

Malawi

Localized production shortfalls

- The number of people assessed to be food insecure has declined in 2019/20, on account of a larger agricultural output, which improved households' food availability.

- However, an estimated 1.1 million people, mostly located in southern districts, require assistance between October 2019 and March 2020, due to localized production shortfalls, while higher staple food prices are constraining access to food.

Mali

Persistent civil insecurity

- The country is hosting approximately 27 000 refugees, while 199 000 internally displaced people and 74 000 returnees rely on humanitarian assistance.
- About 648 000 people are estimated to be in need of food assistance between October and December 2019, according to the most recent "Cadre Harmonisé" analysis, as a result of the persisting civil conflict.

Mauritania

Reduced availability of pasture

- According to the last "Cadre Harmonisé" analysis, about 299 000 people were assessed to be in need of assistance between October and December 2019.
- About 58 000 refugees, mostly from Mali, reside in the country.

Mozambique

Cyclone damage and production shortfalls

- The impact of two major cyclones and severe dry conditions resulted in an increase in food insecurity in central and southern regions.
- In total, an estimated 1.9 million people are assessed to be food insecure.

Senegal

Localized shortfalls in cereal production

- According to the last "Cadre Harmonisé" analysis, about 359 000 people are estimated to be in need of assistance between October and December 2019.
- An estimated 14 500 refugees, mostly from Mauritania, are residing in the country.

Sierra Leone

High food prices

- About 254 000 people are estimated to be severely food insecure during October-December 2019.

Sudan

Conflict, civil insecurity and soaring food prices

- The number of severely food insecure people was estimated at 5.8 million for

the June-August 2019 period, mainly IDPs and host communities in conflict affected areas. Vulnerable households, affected by soaring food prices, are also of concern.

- As of early September, about 426 000 individuals have been affected by floods.

Uganda

Localized crop production shortfalls and refugee influx

- About 500 000 people are estimated to be severely food insecure in eastern Teso Region and northeastern Karamoja Region in early 2019 (latest available information).
- About 855 000 refugees from South Sudan and about 390 000 refugees from the Democratic Republic of the Congo are hosted in camps and rely on humanitarian assistance.

Zambia +

Reduced agricultural output and high food prices

- An estimated 2.3 million people are food insecure and in need of assistance, mainly as a result of the reduced 2019 cereal harvest and higher food prices.
- At the regional level, southern and western parts are facing the highest prevalence of food insecurity, corresponding to areas that suffered prolonged periods of dry weather conditions and consequently reduced harvests.

ASIA (8 COUNTRIES)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/SUPPLIES

Syrian Arab Republic

Civil conflict

- About 6.5 million people are estimated to be food insecure and in need of food and livelihood support. An additional 2.5 million people are at risk of food insecurity and need livelihood support to strengthen their resilience.
- Although some international food assistance is being provided, Syrian refugees are also straining host communities' resources in neighbouring countries.

WIDESPREAD LACK OF ACCESS

Democratic People's Republic of Korea

Production shortfalls of the 2019 main season crops and economic downturn

- The 2019 main season food crop production is estimated below the five-year average due to rainfall deficits and reduced water supplies for irrigation earlier in the year and, more recently, localized flooding that damaged standing crops.
- According to a joint FAO/WFP rapid Food Security Assessment Mission, conducted in April, 10.1 million people (40 percent of the total population) are estimated to be in urgent need of food assistance.

Yemen

Conflict, poverty and high food and fuel prices

- The IPC hot-spot analysis, carried out in April 2019 in 29 out of the 45 most affected districts, assessed that about 1.25 million people were severely food insecure (IPC Phases 3 "Crisis" and 4 "Emergency" combined), down from an estimated 1.55 million reported in December 2018 for those districts only. About 20 million people would be food insecure in the absence of sustained food assistance.

SEVERE LOCALIZED FOOD INSECURITY

Afghanistan

Civil conflict and population displacement

- Between August and October 2019, 10.23 million people (one-third of the total population) were in severe acute food insecurity, including 7.8 million in IPC Phase: 3 "Crisis situation and 2.4 million in IPC Phase: 4 "Emergency". Continuing conflict, natural hazards and limited economic opportunities have increased the vulnerability of the poorest households, including subsistence farmers.

Bangladesh

Large numbers of refugees putting strain on host communities

- According to the latest figures from UNHCR (September 2019), about 915 000 Rohingya refugees from Myanmar were sheltering in Bangladesh, mainly in the Cox's Bazar District. Most

refugees fled to Bangladesh following the resurgence of violence in Rakhine State in Myanmar in late August 2017. The large number of refugees have also put a strain on local resources and, as a result, humanitarian assistance is also required to meet the needs of host communities; about 336 000 Bangladeshis are estimated to be in need of assistance.

Iraq

Civil conflict

- An estimated 1.8 million people remained internally displaced.
- About 1.77 million people, mostly IDPs and returnees, are in need of food security and livelihood assistance.

Myanmar

Conflict in parts of Kachin, Shan and Rakhine states

- Persistent conflicts in Rakhine, Chin, Kachin and northern Shan states have triggered large-scale internal population displacement particularly since 2017. Most IDPs are affected by high levels of food insecurity as conflicts are hampering the free movement of people and their engagement in livelihood activities.

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 have strained the already limited resources of the host communities.

LATIN AMERICA AND THE CARIBBEAN (2 COUNTRIES)

WIDESPREAD LACK OF ACCESS

Venezuela

Severe economic crisis

- Amidst the severe and protracted economic crisis, the number of refugees and migrants from Venezuela is estimated at 4.6 million persons. They have settled in neighbouring countries in South America and the Caribbean. Humanitarian needs to assist residents in Venezuela and refugees and migrants in host countries are significant.
- On account of hyper inflation, purchasing power has been severely

eroded, resulting in acute constraints on households' access to food. In addition, cereal production in 2019 is expected to decline from last year's already low level, mostly reflecting the lack of agricultural inputs.

SEVERE LOCALIZED FOOD INSECURITY

Haiti

Prolonged dry spells and high inflation

- About 3.67 million people were forecast to be facing severe acute food insecurity and thus in need of urgent food assistance as of October 2019, due to the adverse impact of dry spells on cereal production (especially maize), coupled with high food prices, including mostly imported rice, due to a significant increase in inflation rate.

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 12 \(Africa\)*](#)

[*page 23 \(Asia\)*](#)

[*page 30 \(Latin America and the Caribbean\)*](#)

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GLOBAL CEREAL OVERVIEW

Cereal Supply and Demand Overview¹

Global cereal production heading for a record high in 2019

FAO's latest forecast for 2019 world cereal production is pegged at an all-time high of 2 714 million tonnes, up some 0.4 percent from the November figure and now almost 57 million tonnes (2.1 percent) above the reduced outturn in 2018. The month-on-month increase primarily reflects an upward revision of the world coarse grains production forecast, associated with higher-than-previously predicted yields in China (Mainland), the Russian Federation and Ukraine. At the current level, the forecast for world production of coarse grains stands at nearly 1 433 million tonnes, 1.7 percent (24.5 million tonnes) higher year-on-year and marginally short of the record high level registered in 2017.

Global wheat production forecast for 2019 has also been raised slightly since the previous month, to 766.4 million tonnes, 4.8 percent (34.8 million tonnes) above the previous year's outturn. The bulk of the monthly revision resulted from upward adjustments to the production estimates in the European Union, which more than offset a trimming of the output estimate in the United States of America.

Planting of the 2020 wheat crops, for harvest next year, is well underway in Northern Hemisphere countries. In the United States of America, winter wheat sowings were almost complete at the end of November, a faster pace than the previous year but in line with the average timing. Early indications suggest that the area sown may contract on lower price prospects compared to last year, while crop conditions were reported to be slightly inferior to normal levels.

Table 1. World cereal production¹

(million tonnes)

	2017	2018 estimate	2019 forecast	Change: 2019 over 2018 (%)
Asia	1 202.3	1 200.6	1 212.4	1.0
Far East	1 100.2	1 102.5	1 106.0	0.3
Near East	67.3	63.8	72.1	13.0
CIS in Asia	34.7	34.2	34.3	0.2
Africa	188.8	193.2	185.6	-3.9
North Africa	36.3	37.7	36.8	-2.4
West Africa	59.5	63.1	62.1	-1.6
Central Africa	4.5	4.6	4.7	2.7
East Africa	50.1	56.0	53.3	-4.9
Southern Africa	38.4	31.9	28.8	-9.7
Central America and the Caribbean	44.1	42.2	41.0	-2.8
South America	215.5	196.6	227.0	15.5
North America	494.6	497.2	480.6	-3.3
Europe	523.8	497.5	537.7	8.1
European Union	309.7	294.4	320.0	8.7
CIS in Europe	202.6	188.0	203.2	8.1
Oceania	34.6	29.9	29.7	-0.8
World	2 703.6	2 657.2	2 714.0	2.1
Developing countries	1 641.9	1 624.0	1 657.4	2.1
Developed countries	1 061.7	1 033.2	1 056.6	2.3
- wheat	760.0	731.6	766.4	4.8
- coarse grains	1 433.7	1 408.2	1 432.7	1.7
- rice (milled)	509.9	517.5	515.0	-0.5

Note: Totals and percentage change computed from unrounded data.

¹ Includes rice in milled terms.

¹ Based on the [FAO Cereal Supply and Demand Brief](#) released on 5 December 2019.

In the European Union, following early-season rainfall deficits, improved precipitation in November helped to recuperate soil moisture levels, benefiting winter crop establishment. In far eastern and western parts of the European Union, however, dry weather persisted, resulting in suboptimal planting conditions that may impede early crop development. Conditions of the winter wheat crop were favourable in the Russian Federation, which, coupled with continued government support aiming to stimulate export growth, could boost the area sown. By contrast, in Ukraine, limited rains and warmer-than-average temperatures hampered planting of the winter wheat crop in key producing areas.

In the Southern Hemisphere, coarse grain crops are being currently sown while wheat crops will be planted later in the year. In South America, elevated grain prices, underpinned by robust export demand, are expected to sustain high levels of maize plantings in Argentina, despite unfavourable rainfall that hindered sowing operations, and in Brazil. Similarly, in South Africa, the largest maize producer on the Africa continent, remunerative grain prices are foreseen to spur an increase in maize sowings, with preliminary indications pointing to an area that would surpass the five-year average. However, the short-term weather forecast indicates likely reduced rains, a factor that may represent a downside risk to the production outlook in 2020.

FAO's forecast of world rice production in 2019 has been increased from November by 1.6 million tonnes to 515 million tonnes, implying a mere 0.5 percent output decline from the 2018 all-time high. Adverse weather and tight water supplies for irrigation dampened the outlook for off-season crops in Thailand and Viet Nam this month. However, these adjustments were outweighed by area-based output upward revisions for Pakistan and various African countries, namely Egypt and Nigeria, which together with Madagascar are now set to spearhead a rebound in African rice production this season.

World cereal **utilization** in 2019/20 is forecast at 2 709 million tonnes, nearly unchanged from the previous month; still a record of around 21 million tonnes higher than in 2018/19. At 758 million tonnes, the forecast for global wheat utilization in 2019/20 has been slightly lowered since last month, but still a record exceeding the 2018/19 estimated level by 1.4 percent. The forecast for total utilization of coarse grains in 2019/20 is pegged at 1 434 million tonnes, up only marginally from the previous season with an expected decline in feed use of maize more than outweighed by a foreseen rise in feed use of other coarse grains, barley in particular. Higher than previously predicted food intake is behind an almost 1 million tonne increase in FAO's latest forecast of global rice utilization in 2019/20, which now stands at a record 517 million tonnes.

Table 2. Basic facts of world cereal situation
(million tonnes)

	2017/18	2018/19 estimate	2019/20 forecast	Change: 2019/20 over 2018/19 (%)
Production ¹	2 703.6	2 657.2	2 714.0	2.1
Developing countries	1 641.9	1 624.0	1 657.4	2.1
Developed countries	1 061.7	1 033.2	1 056.6	2.3
Trade ²	422.5	411.6	416.1	1.1
Developing countries	154.4	145.8	162.0	11.1
Developed countries	268.1	265.8	254.1	-4.4
Utilization	2 655.4	2 688.1	2 709.0	0.8
Developing countries	1 795.6	1 821.4	1 842.7	1.2
Developed countries	859.9	866.7	866.4	0.0
Per caput cereal food use (kg per year)	149.4	149.3	149.4	0.1
Stocks ³	881.6	864.7	863.1	-0.2
Developing countries	683.0	679.8	672.6	-1.0
Developed countries	198.6	184.9	190.5	3.0
World stock-to-use ratio (%)	32.8	31.9	30.8	-3.4

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.

The forecast for world cereal **stocks** by the close of seasons in 2020 has been raised by almost 14 million tonnes (1.6 percent) since the previous month to 863 million tonnes; marginally down from the previous season and the third highest on record. At this level, the global cereal stock-to-use ratio would also approach a relatively high level of 31 percent, underscoring a comfortable supply situation. The forecast for world wheat inventories has been scaled up by 3 million tonnes since the previous month to close to 278 million tonnes, mainly on expectations of larger stock build-ups in several major exporting countries. At just over 403 million tonnes, total coarse grain inventories are also seen higher than earlier anticipated by almost 10 million tonnes, reflecting upward revisions to maize inventories especially in China (Mainland) and, to a lesser extent, in the United States of America. Despite another small upward revision, world rice stocks at the close of 2019/20 could still fall by 0.8 percent from their record opening levels to 182 million tonnes; on expected stock reductions in rice importing countries, in particular China (Mainland) and Indonesia.

World **trade** in cereals in 2019/20 is forecast at 416 million tonnes, up slightly from last month and now 1.3 percent (5.5 million tonnes) higher than the 2018/19 level. At 172 million tonnes, world wheat

trade in 2019/20 (July/June) would be up 2.3 percent from the sharply reduced volume registered in the previous season. While the latest global forecast is close to last month's, revisions were made to some individual countries. Imports by Algeria were trimmed by almost 1 million tonnes to reflect the recent Government decision to restrict soft wheat purchases from world markets to 4 million tonnes, down from over 6 million tonnes. On the other hand, Kazakhstan, a major wheat exporting country, is seen to import at least 1.5 million tonnes of wheat because of a reduced domestic production. At 197.5 million tonnes, the forecast for world trade in coarse grains in 2019/20 (July/June) is up 2 million tonnes from the previous month and now close to the 2018/19 record level. This month's upward revision primarily stems from a stronger pace in exports from Brazil and Ukraine, more than offsetting a slowdown in sales by the United States of America. By contrast, the forecast of world rice trade in 2020 (January-December) has been lowered by 1.0 million tonnes to 47 million tonnes, reflecting improved prospects for domestic supplies in several countries in Africa, but also efforts to curb unofficial inflows, namely by Nigeria. The revised forecast suggests that world rice trade in 2020 would likely recover only partially (by around 2.5 percent) from the 2019 reduced level.

LOW-INCOME FOOD-DEFICIT COUNTRIES' FOOD SITUATION OVERVIEW²

Table 3. Basic facts of Low-Income Food-Deficit Countries (LIFDCs) cereal situation

(million tonnes, rice in milled basis)

	2017/18	2018/19 estimate	2019/20 forecast	Change: 2019/20 over 2018/19 (%)
Cereal production¹	463.6	474.5	476.4	0.4
excluding India	246.3	251.9	253.8	0.8
Utilization	504.1	514.7	521.9	1.4
Food use	382.3	390.0	396.1	1.6
excluding India	215.2	220.9	224.9	1.8
Per caput cereal food use (kg per year)	149.5	150.1	150.0	-0.1
excluding India	152.1	152.8	152.3	-0.3
Feed	55.2	55.4	57.7	4.1
excluding India	40.0	40.3	40.8	1.4
End of season stocks²	98.0	103.6	104.7	1.0
excluding India	61.3	57.1	54.5	-4.6

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

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

Table 4. Cereal production¹ of LIFDCs

(million tonnes)

	5-year average	2018 estimate	2019 forecast	Change: 2019 over 2018 (%)
Africa (37 countries)	100.6	109.8	105.2	-4.2
East Africa	51.7	56.0	53.3	-4.9
Southern Africa	10.0	10.8	10.2	-5.4
West Africa	34.2	38.4	37.0	-3.6
Central Africa	4.7	4.5	4.6	2.7
Asia (11 countries)	351.9	363.6	370.1	1.8
CIS in Asia	10.6	9.5	10.7	12.0
Far East	332.5	347.6	348.9	0.4
- India	248.0	261.7	262.1	0.1
Near East	8.8	6.5	10.6	63.9
Central America and the Caribbean (2 countries)	1.1	1.1	1.1	-6.0
Oceania (1 country)	0.0	0.0	0.0	0.0
LIFDCs (51 countries)	453.6	474.5	476.4	0.4

Note: Totals and percentage change computed from unrounded data.

The five-year average refers to the 2014-2018 period.

¹ Includes rice in milled terms.

Adverse weather curbs outputs in African LIFDCs, but production rises in Asian countries

FAO's forecast for aggregate cereal production of Low-Income Food-Deficit Countries (LIFDCs) in 2019 stands at 476.4 million tonnes, a comparable level to the well above-average output in 2018. The stable year-on-year outturn largely reflects an increase in production in *Asian* countries that is foreseen to offset a decline in *African* countries.

In *Asian* LIFDCs, a notable production upturn was registered in **the Syrian Arab Republic** in 2019 as improved security conditions, coupled with well-distributed rainfall, led to an expansion in plantings. Notwithstanding this yearly increase, the national harvest still remained well below the pre-crisis level (2002-2011), reflecting the effects of the conflict. Favourable weather conditions lifted cereal production in **Afghanistan**, while in **Yemen**, the conflict continued to severely debilitate the agriculture sector, limiting production. In the largest cereal-producing countries in *Asia*, located in the *Far East* subregion, outputs remained at near-average levels in **Bangladesh** and **Viet Nam**. In **India**, by far the largest cereal producer among all LIFDCs, the total harvest is forecast to be well above the average, underpinned by a bumper wheat outturn.

By contrast, cereal production is expected to decline in most *African* LIFDCs, primarily on account of adverse weather conditions. The largest production declines in *sub-Saharan Africa* are estimated in *East Africa*, where drought conditions earlier in the year depressed first season outputs in **Uganda**,

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

Kenya and the United Republic of Tanzania. Abundant rainfall in the second semester, which boosted crop prospects in some countries, also caused widespread flooding that is likely to curtail outputs in **the Sudan and South Sudan.** Harvesting of the 2019 crop in *Southern African* countries was completed earlier in the year and cereal production was estimated to be sharply down in **Lesotho, Mozambique and Zimbabwe** due to significant rainfall deficits and the impact of two cyclones. Mostly beneficial weather conditions supported production rebounds in **Madagascar and Malawi**, where above-average harvests were attained. In *West Africa*, where harvesting operations are ongoing, cereal production in 2019 is forecast to remain above average, supported by mostly beneficial rains. Localized shortfalls in cereal production are expected in parts of **Mauritania, Senegal, the Gambia and Guinea-Bissau**, where weather conditions have been detrimental to crops. Moreover, persisting insecurity and large scale population displacements have continued to disrupt agricultural activities and affect crop production in **Chad and Mali.** Generally good cropping conditions prevailed in *Central Africa* and, despite the persisting conflicts and civil unrest, a production upturn is foreseen.

In *Central America and the Caribbean*, prolonged dry spells in the June-August period, coupled with elevated temperatures, curbed cereal outputs in **Nicaragua and Haiti**; however, the harvest in the latter country is still expected to surpass the average.

Reduced harvests boost import needs in sub-Saharan Africa

Overall, the aggregate cereal import requirement for LIFDCs is estimated to have increased in 2019/20 marketing years to 71.3 million tonnes compared to the volume imported in 2018/19. Most of the expected growth in imports is associated with *African* countries on account of the weather-reduced harvests. Notable increases in import needs are estimated in **Zimbabwe and Kenya**, where harvests are below the five-year average and national stocks are low, lessening the countries' internal capacity to compensate for production shortfalls.

Decreases in import quantities are forecast in several *Asian* countries, notably **Bangladesh, Nepal and Uzbekistan**, as larger domestic harvests bolstered national supplies and consequently lowered import needs. Similarly, the larger outputs in the *Near East* countries have cutback import requirements in 2019/20.

Table 5. Cereal imports of LIFDCs
(thousand tonnes)

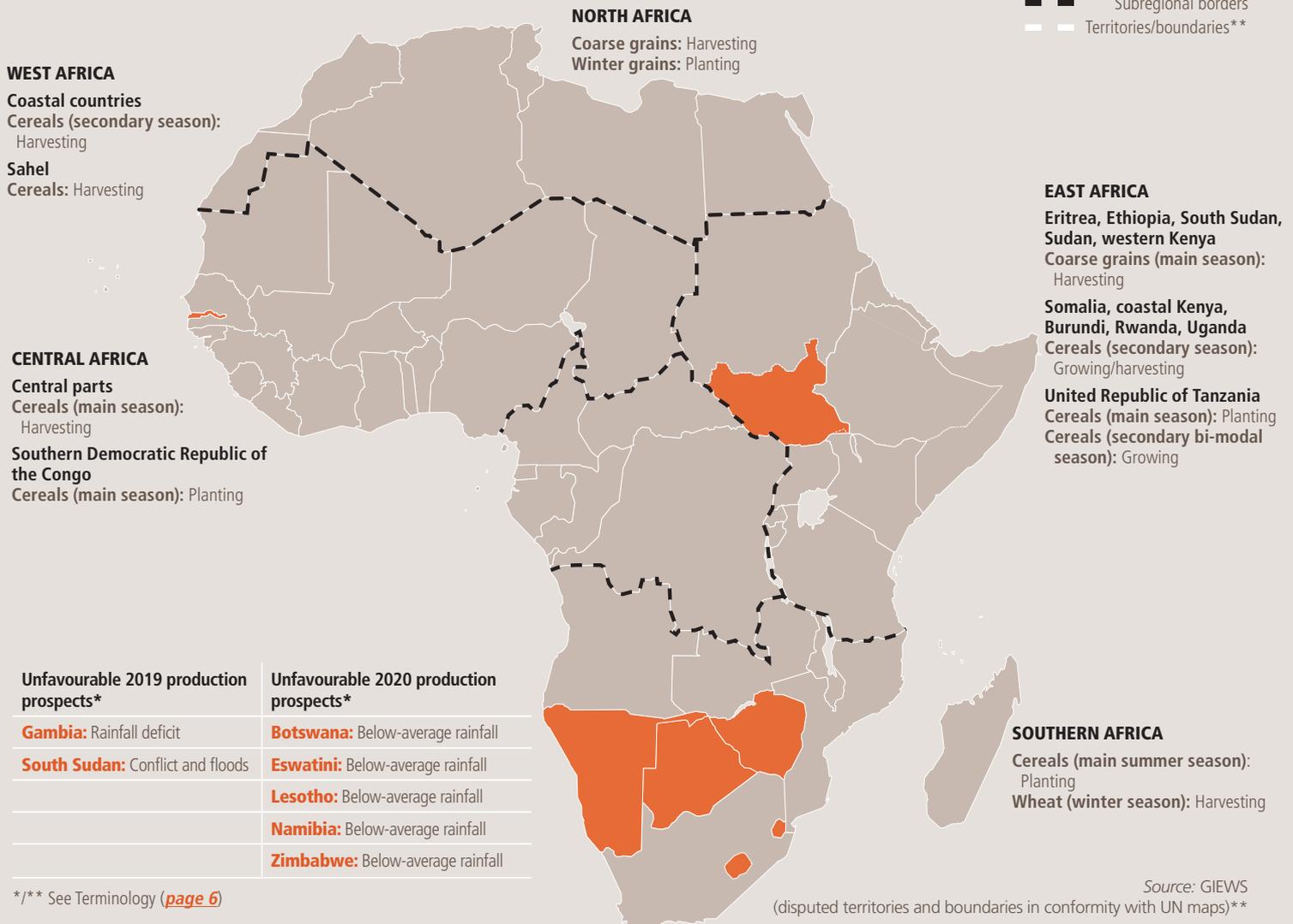
	2017/18 or 2018	2018/19 or 2019		2019/2020 or 2020	
	Actual imports	Import forecast	of which food aid	Import requirement ¹	of which food aid
Africa (37 countries)	29 319	27 536	1 008	30 420	1 178
East Africa	12 207	11 162	698	12 055	833
Southern Africa	2 927	2 571	15	3 408	19
West Africa	11 617	11 142	139	12 215	170
Central Africa	2 567	2 661	156	2 741	156
Asia (11 countries)	44 818	40 979	993	39 317	824
CIS in Asia	4 857	4 919	0	4 810	0
Far East	29 459	24 693	366	25 051	197
Near East	10 502	11 367	627	9 457	627
Central America and the Caribbean (2 countries)	1 401	1 355	10	1 465	10
Oceania (1 country)	64	64	0	62	0
LIFDC (51 countries)	75 601	69 934	2 011	71 264	2 012

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).

REGIONAL REVIEWS

AFRICA



Africa Production Overview

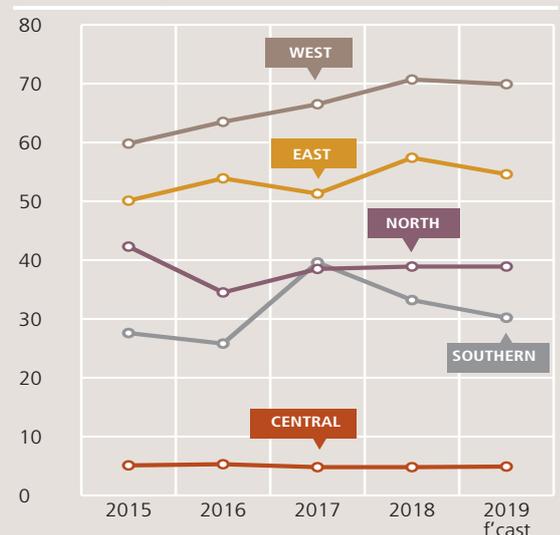
In 2019, aggregate cereal production in Africa is estimated at 198.5 million tonnes, 6.5 million tonnes below the previous year's high level but still well above the five-year average.

In Southern and Eastern Africa, aggregate cereal outputs in 2019 are estimated to have declined by 2.9 million and 2.8 million tonnes, respectively, year on year, on account of extreme weather events, including dry weather conditions in both subregions and two cyclones in Southern Africa.

An average cereal output is estimated in North Africa, as production gains in Tunisia and Egypt offset the sharp production decline in Morocco. Favourable weather conditions supported above-average plantings in West Africa and production is foreseen to remain close to last year's above-average level.

Beneficial weather also favoured crop production in Central Africa in 2019, however, conflicts in several areas have continued to hamper agricultural activities and limit production increases.

Cereal production (million tonnes)



NORTH AFRICA



Mixed planting conditions for the 2020 winter crops

Planting of the 2020 winter wheat and coarse grains crops started in late October and will continue until the end of the year. As of mid-November, planting conditions differed between eastern and western growing areas. In **Egypt, Algeria** and **Tunisia**, abundant seasonal rainfall since September replenished soil moisture and, in some areas, even hampered sowing activities. Showers in the second decade of November in northern and northeastern **Morocco** provided some moisture to initiate plantings, while sowing remains on hold in southwest Morocco constrained by dry conditions.

Average cereal production gathered in 2019

The subregion's aggregate cereal production is estimated at an average level of 38.9 million tonnes, including 19.3 million tonnes of wheat and 4.2 million tonnes of barley in 2019. The total cereal production

is fractionally below the output of the previous year.

In **Morocco**, production declined sharply, due to below-average rainfall and above-average temperatures that constrained crop yields, particularly in the northeast (Oriental) and central parts of the country. At 6 million tonnes, the 2019 cereal production in Morocco is more than 40 percent below the bumper harvest in 2018 and 30 percent lower than the average. By contrast, bumper outputs were estimated in **Tunisia**, supported by favourable weather conditions, and in **Egypt**, where widespread use of improved seed varieties resulted in a larger wheat harvest that was 5 percent above the average.

The subregion's aggregate cereal import requirement (of which wheat accounts for about 60 percent) for the 2019/20 marketing year (July/June), is estimated at approximately 49.2 million tonnes, 1.2 million more than the previous five-year average and the previous year, reflecting decreased domestic availabilities (particularly in **Morocco**) and steady population growth in the subregion.

Food inflation rates eased or remained stable in the third quarter of 2019

Year-on-year food inflation rates in the third quarter of 2019 eased or remained stable,

supported by generally lower international food and fuel prices, and the continuation of food price subsidies provided by governments. In **Egypt, Morocco** and **Libya**, the annual food price inflation rates were at negative levels. The largest decrease was recorded in **Egypt** in October 2019, where the annual food inflation was estimated at -6 percent, down from the two-digit levels recorded until August 2019. In addition to easing international prices, the decrease is attributed to a stronger currency as well as to the change of the base year in inflation calculations made in September 2019. In **Morocco**, between late 2018 and September 2019 (latest available information) consumer food prices have been declining. This follows generally subdued food inflation rates in the last ten years, below 4 percent, amid continuous government price subsidies. The food inflation rate also decreased in **Libya**, down from between 10 percent and 20 percent in 2018 to negative 9 percent in July 2019 (latest available data). The decrease was supported by improved hard currency distribution and lower import costs. In **Algeria** and **Tunisia**, positive but low food inflation rates were reported. Although the Government of Tunisia continues to subsidize food prices, a weakening currency has underpinned food inflation that was estimated at 6.6 percent in October 2019, down from 7.3 percent one month earlier. Food inflation in **Algeria** remains at about 2 percent.

Table 6. North Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	Change: 2019/2018 (%)
North Africa	19.2	21.0	19.3	12.7	13.8	12.8	6.6	4.1	6.7	38.5	38.9	38.9	-0.2
Algeria	2.8	3.9	4.0	1.2	2.0	2.1	0.0	0.0	0.0	4.0	6.0	6.1	1.7
Egypt	9.0	8.6	9.0	8.6	8.3	8.4	6.6	4.0	6.7	24.2	20.8	24.1	15.7
Morocco	6.1	7.3	4.5	2.4	3.1	1.4	0.0	0.1	0.1	8.5	10.5	6.0	-42.7
Tunisia	1.1	1.1	1.7	0.5	0.4	0.8	0.0	0.0	0.0	1.6	1.4	2.5	72.2

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2014-2018 period.

WEST AFRICA



Civil insecurity and localized dry weather conditions constrain crop production in 2019

The 2019 coarse grains harvest is nearly complete in the Sahel, while in coastal countries along the Gulf of Guinea harvesting of the second season cereal crops has just started. At the subregional level, the forecast for the aggregate cereal output stands at 69.9 million tonnes in 2019, marginally below the 2018 record high, but 9 percent above the average of the previous five years, supported by beneficial and well-distributed rains. However, localized shortfalls in cereal production are expected in **Mauritania, Senegal, the Gambia, Cabo Verde and Guinea-Bissau**, due to unfavourable seasonal rainfall that is expected to lower yields. In addition, persisting insecurity and large-scale population displacements continued to disrupt agricultural activities and affect crop production in northeast **Nigeria**, the Lake Chad Basin, the Lac and Tibesti regions of **Chad**, northern and central **Mali** and the Liptako Gourma Region, which includes parts of **Burkina Faso, Mali and Niger**. Moreover, outbreaks

of Fall Armyworm and locusts have caused localized crop losses in several countries, including **Chad, Burkina Faso, Mali and Niger**.

In pastoral areas, the poor rains resulted in inadequate pasture availability in western **Mali**, parts of **Burkina Faso, Niger, Chad** and particularly in western **Mauritania** and northern **Senegal**, which recorded a third consecutive year of fodder deficits. In addition, civil insecurity continued to significantly hamper the transhumance movement and the access to grazing areas in parts of **Mali, Burkina Faso, Niger, Nigeria and Chad**.

Prices of coarse grains declined to low levels, except in conflict-affected areas

In most countries of the subregion, prices of coarse grains remained stable or declined in recent months and were well below their year-earlier levels, reflecting increased supplies from the 2019 harvests. However, market disruptions and price increases were reported in the conflict-affected areas of the Lake Chad basin, and in Tibesti and Liptako-Gourma regions. In **Burkina Faso, Chad, Mali and Niger**, prices of coarse grains were stable or declined in September and October with the start of the 2019 harvests and were lower than a year earlier on account of adequate domestic availabilities from imports and carryover stocks. In addition, food distribution programmes and government food sales at subsidized prices exerted further downward pressure on retail prices. In **Senegal**, prices of millet increased

in September and October in line with seasonal trends and were generally above their year-earlier levels, while prices of locally-produced rice remained relatively stable. In coastal countries along the Gulf of Guinea, recently-harvested maize crops improved market availabilities and exerted downward pressure on prices. In **Ghana, Togo and Benin**, prices of maize declined for the third consecutive month in October as a result of improved market availabilities from the recent 2019 main season harvests. In **Nigeria**, prices have been generally stable since August and were lower than a year earlier due to adequate domestic availabilities. However, in the conflict-affected northeastern states, as a result of disruptions to trade flows and marketing activities, prices were at high levels. The recent closure of the land borders with Niger, Chad, Cameroon and Benin has curbed trade activity and added additional upward pressure on prices, with prices of imported food commodities in particular surging in September in border markets.

High food insecurity levels in conflict-affected areas

In spite of the expected above-average 2019 aggregate cereal production, food insecurity levels remain high in conflict-affected northern Nigeria, Lake Chad Basin and Liptako Gourma Region. Specifically, the escalation of the conflict in the subregion has resulted in increasing population displacements both internally and in the neighbouring areas, mainly the Tillabery region of **Niger**, the Tibesti region of **Chad**, and the Soum province

Table 7. West Africa cereal production
(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals ¹			
	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	Change: 2019/2018 (%)
West Africa	45.7	50.1	48.8	18.1	20.5	21.0	64.0	70.7	69.9	-1.1
Burkina Faso	4.1	4.8	4.3	0.3	0.4	0.4	4.5	5.2	4.7	-9.9
Chad	2.5	2.8	2.6	0.3	0.3	0.3	2.8	3.0	2.9	-5.6
Ghana	2.3	2.7	2.4	0.7	0.8	0.9	3.0	3.5	3.3	-3.3
Mali	6.1	7.0	7.1	2.6	3.2	2.9	8.8	10.2	10.0	-1.7
Niger	5.5	6.0	5.7	0.1	0.1	0.1	5.7	6.1	5.8	-4.3
Nigeria	18.3	19.2	19.3	7.8	8.9	9.6	26.2	28.2	28.9	2.3

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2014-2018 period.

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

and surrounding areas of **Burkina Faso**. According to the United Nations Office for the Coordination of Humanitarian Affairs (UNOCHA), as of October 2019, about 2.5 million people were estimated to be internally displaced in the Lake Chad Basin Region, with an additional 243 000 people residing in the area as refugees. In northeast **Nigeria**, high levels of food insecurity continued to prevail due to severe disruptions of livelihoods, following recent attacks that also led to population displacements. Most households affected by the conflict are highly food insecure, and restricted access means they receive limited humanitarian assistance. In addition, households affected by intercommunal conflict between farmers and pastoralists in the northwest and central parts of the country are facing severe food insecurity due to significant animal losses. In **Chad**, the conflict in Tibesti and Lac regions has constrained food availability and reduced employment opportunities. In addition, the civil conflict in the Sudan, the Central African Republic and Libya led to an increase in the number refugees about 440 000 individuals. Similarly, a rise in the number of security incidents in parts of **Mali** (mostly concentrated in Mopti and Gao regions), **Burkina Faso** (Sahel, North, North-Centre and East regions) and Western **Niger** (Tillabery and Tahoua regions) has resulted in a deterioration of the food security situation

due to increased population displacements, reduced harvests, and disruptions to livelihoods. As of October 2019, the United Nations High Commissioner for Refugees (UNHCR) reported that over 109 000 people have been displaced in Diffa Region and 78 000 in Tillabery and Tahoua regions. In addition, Niger hosts approximately 218 300 refugees, mainly from Nigeria (161 000) and Mali (56 000). In **Burkina Faso**, the number of security-related incidents has more than tripled between late 2018 and October 2019, driving a surge in the number of IDPs to about 486 000 people in October, more than ten times the estimate in late 2018. The escalation of violence resulted in a significant slowdown of economic activities, a reduction in employment opportunities and a decline in the purchasing power of vulnerable households in Soum, Oudalan, Sanmatenga, Bam, Loroum provinces. According to UNOCHA, about 750 000 people are internally displaced in the Liptako-Gourma Region (Burkina Faso, Mali, Niger), while about 109 000 people reside as refugees as of November 2019. The persisting conflict has continued to significantly erode the resilience capacity of

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



Source: Afrique Verte.

displaced households, and most are highly dependent on humanitarian assistance to meet their basic food needs. According to the latest estimates, 6.1 million people in the affected regions of Liptako Gourma Region need urgent assistance, including 3.9 million people in Mali, 1.5 million people in Burkina Faso, and 700 000 people in western Niger.

CENTRAL AFRICA



Cereal production in 2019 continues to be affected by widespread conflict

Harvesting of the 2019 main season maize crop was completed in September in central and southern bi-modal rainfall areas of Cameroon and the Central African Republic. In the northern Equatorial and Oriental provinces of the Democratic Republic of the Congo, the harvest of the 2019 main season maize crops concluded in November, while it is underway in the central provinces and will be completed by January 2020. Harvesting of millet and sorghum finished in October in northern uni-modal rainfall areas of the Central African Republic, while it is expected to be completed by January in the Far-North Region of Cameroon.

In the southern uni-modal rainfall areas (former Katanga Province) of the **Democratic Republic of the Congo**, planting of maize crops, for harvest in May and June 2020, is underway and will be completed in January.

In **Cameroon** and the **Central African Republic**, weather conditions were generally favourable since the onset of the rainy season, benefiting crop development and boosting yield prospects. However, significant rainfall in the Central African

Republic during September and October resulted in localized flooding in the prefectures of Bangui, Ombella-Mpoko, Ouham, Ouaka and Basse-Kotto that damaged standing crops and resulted in losses of already harvested grains. In addition, in areas where armed groups remained active, including in Basse-Kotto, Mbomou, Haut-Kotto and Ouaka, less than 50 percent of households were able to access their fields and crop production is therefore estimated to be below the average. Notwithstanding the localized crop losses and the effects of conflict, cereal production in 2019 is still estimated to be above the previous five-year average, reflecting an overall improved security conditions and the mostly conducive weather. Protracted civil unrest in **Cameroon** continues to affect livelihoods and agricultural practices and, as a result, the national 2019 cereal output is forecast to be below the five-year average. However, production of cereals in the Far-North Region is forecast to be slightly above average due to overall favourable weather conditions and a slight increase in the planted area.

In the **Democratic Republic of the Congo**, near-average precipitation amounts in October and November favoured planting activities of the 2020 main season maize crop in the uni-modal south (former Katanga Province) and of the secondary season maize crop in the bi-modal central provinces. According to the latest weather forecasts, favourable weather conditions are likely to persist until the harvest period in the first quarter of 2020. However, infestations of Fall Armyworm on maize crops were reported in 22 of the 26 provinces of the country, a factor that is curtailing production

prospects, while Cassava Brown Streak virus Disease (CBSD) is also adversely affecting cassava production in eastern provinces. Furthermore, ongoing conflicts in Kasai, North Kivu, South Kivu, Ituri and Tanganyika provinces continued to disrupt agricultural activities. As a result, and despite generally favourable weather conditions, the 2019 cereal output is estimated at an average to slightly below-average level.

In the **Republic of the Congo** and **Gabon**, domestic production of cereals, mainly maize, accounts for a small proportion of the national supplies, while the main food crop grown is cassava. Harvesting of the 2019 main season maize crop, planted in September and October, is expected to begin in late December. According to remote sensing data, a timely onset of seasonal rains in September favoured land preparation and planting activities and, as of early November, vegetation conditions were near average in most cropping areas, inferring favourable yield prospects.

Prices of maize at high levels

In the **Central African Republic**, prices of maize, rice and cassava in October were reported to be well above (up to 50 percent) the corresponding month a year earlier, amid supply shortages. In the **Democratic Republic of the Congo**, the annual inflation rate decelerated during the last three years and, in 2019, it is forecast to decline further to about 5.5 percent. Despite the slowdown in price increases, the cost of key cereal products still remains high. In central and southeastern parts of the country, prices of maize flour increased steeply between July and September 2019, due to reduced domestic supplies as well as to high import costs and reduced imports from Zambia,

Table 8. Central Africa cereal production
(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals ¹			
	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	Change: 2019/2018 (%)
Central Africa	4.3	4.1	4.2	0.6	0.7	0.7	5.0	4.8	4.9	2.4
Cameroon	2.9	2.7	2.8	0.3	0.4	0.4	3.2	3.1	3.2	3.5
Central African Republic	0.1	0.1	0.1	0.0	0.0	0.0	0.1	0.1	0.2	1.1
Democratic Republic of the Congo	1.2	1.2	1.2	0.3	0.3	0.3	1.6	1.5	1.6	0.5

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2014-2018 period.

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

which harvested a well below-average output in 2019. In **Cameroon**, in the Northwest and Southwest regions, insecurity continues to limit trade, and this, coupled with reduced harvests, kept food prices at higher-than-average levels in urban centres, as of October 2019. By contrast, in the Far-North Region, favourable cereal production prospects kept prices of sorghum and maize about 25 percent lower than the average levels reached in October over the last five years.

Food security still affected by civil unrest

In **the Democratic Republic of the Congo**, the security situation remains precarious, especially in the eastern provinces of the country, where conflicts continue to cause large population displacements. This has caused widespread disruption of agricultural and marketing activities, severely constraining the availability of and access to food. About 4 million people are estimated to be displaced in the country. Of these, according to UNHCR, over 1.5 million are located in North Kivu Province as of October 2019, straining the already limited resources of the host communities. According to the latest Integrated Food Security Phase Classification (IPC), valid for the period from July to December 2019, the provinces of Ituri, Kasai, Kasai Central, North Kivu, South Kivu and Tanganika host the majority of the severely food insecure people (IPC Phase 3: "Crisis" and IPC Phase 4: "Emergency"), estimated at 15.6 million, about 26 percent of the analyzed population. In these areas, most households face serious food access constraints and the dietary diversity has drastically diminished. Since late 2014, animal protein in-take has also fallen sharply

and cassava has substituted the more nutritious cereal and vegetable staples.

The country also faces a series of epidemics, severely affecting the population's health, such as Ebola, measles and cholera. As of late November 2019, WHO reported that over 3 300 people have been affected by Ebola, of which nearly 2 200 have died. In addition, there has been an increase in cholera cases in 21 out of the 26 provinces of the country, due to lack of access to safe drinking water and poor sanitary conditions.

In **the Central African Republic**, the conflict that began in December 2012 is still ongoing. However, following the signing of a peace agreement between the Government and several armed groups in February 2019, the security situation has improved significantly, allowing some IDPs to return to their places of origin. Despite a consistent decrease in the number of severely food insecure people since September 2018, the country continues to experience a precarious humanitarian situation. The latest IPC analysis, valid for the period from September 2019 to April 2020, estimated that 1.6 million people (35 percent of the analyzed population) are still severely food insecure (IPC Phase 3: "Crisis" and IPC Phase 4: "Emergency"). The worst food security conditions are reported in the areas with high concentrations of IDPs, including the eastern and southeastern prefectures of Haute-Kotto, Nana-Gribizi, Haut-Mbomou and Mbomou.

In **Cameroon**, the ten-year-long Boko Haram insurgency in the Far North Region and the crisis erupted in October 2016 in the Northwest and Southwest regions

are still ongoing. In the Far North Region, between January and November 2019, incursions of Boko Haram increased by about 45 percent compared to the same period in 2018 and triggered new population displacements. The number of IDPs in the region rose over the last ten months and, in October 2019, 271 000 people were internally displaced according to IOM. In the Northwest and Southwest regions, the security situation remains a serious concern as fighting continues between the security forces and the separatist armed groups and despite the National Dialogue held in early October 2019, according to UN-OCHA, 542 000 people were still internally displaced. In these areas, the lean season is expected to extend into May 2020, beyond the normal February to April period. In the country, 1.1 million people are estimated to be severely food insecure ("Cadre Harmonisé" Phase 3 or higher).

As of July 2019, about 20 000 refugees from **the Democratic Republic of the Congo** were hosted in the Republic of the Congo, mainly in the Plateaux Region, following the clashes that erupted in December 2018 in Yumbi and Mai-Ndombe regions in western Democratic Republic of the Congo. According to the UNHCR, as of September, also about 22 000 refugees from the Central African Republic were hosted in the country, mainly located in Likouala and Brazzaville provinces. Host communities, mainly in the northern and eastern areas of the country, face food shortages and limited livelihood opportunities, and the refugees' food security is essentially guaranteed by continued humanitarian assistance.

EAST AFRICA



Crop production in 2019 affected by erratic rainfall

FAO's preliminary estimate of the subregion's 2019 aggregate cereal output, including a forecast for the second season harvests to be gathered early next year, stands at 54.6 million tonnes, 5 percent below last year's output, but 3 percent above the average of the previous five years. The foreseen year-on-year decline is mainly due to reduced first season harvests in Uganda, Kenya and United Republic of Tanzania on account to severe early season dryness that caused widespread germination failures and crop wilting.

Harvesting of the 2019 main season cereal crops is well underway in central and northern parts of the subregion. In **Ethiopia**, production prospects for the main "Meher" season crops are mostly favourable in key growing areas of western Amhara, western Oromia and Benishangul Gumuz regions following conducive June-September "Kiremt" rains. However, infestations of desert locusts are a downside risk to the production outlook for the "Meher" crop, with field reports indicating localized crop damage and early harvesting by some households to minimize losses. Similarly, in **Eritrea**, the June-September

"Kiremti" rainy season was characterized by well-distributed and above-average rainfall over most key cropping areas in central and western Anseba, Debub, Maekel and Gash Barka regions that had a positive impact on vegetation conditions and yield prospects. In **the Sudan**, precipitation has been consistently well above average throughout the rainy season, benefiting crops but also triggering floods and waterlogging in parts of Khartoum, Kassala, El Gezira, Red Sea and River Nile states as well as in the Greater Darfur and Greater Kordofan regions. Although about 964 000 hectares, approximately 4 percent of the cultivated area, have been affected by the floods, an above-average cereal output is still expected. An ongoing nationwide Government-led crop assessment, supported by FAO, will provide detailed production estimates in early 2020. More substantial crop losses are expected in **South Sudan**, where exceptionally abundant late season rains in September and October, especially in northern and eastern areas, resulted in widespread floods that affected about 900 000 people and prompted the Government to declare a state of emergency. The floods have significantly reduced the harvested area, offsetting the positive impact of an increase in plantings due to an improved security situation, and are expected to result in an overall lower harvest. According to preliminary estimates, about 74 000 hectares of cultivated land was lost in former Northern Bahr el Ghazal, Upper Nile, Unity, Jonglei, Lakes, Warrap, Eastern and Central Equatoria states. National 2019 crop production estimates will be provided by a joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM), which will be fielded in the country in December. In key growing uni-modal rainfall areas of the Rift

Valley and Western provinces of **Kenya**, improved rains from May offset the earlier rainfall deficits and resulted in a substantial recovery of water stressed and late planted crops. Consequently, "long-rains" maize production is expected at average levels in these areas. By contrast, in agro-pastoral and marginal agricultural areas of central, southeastern and coastal Kenya, agricultural drought caused a sharp decline in the "long-rains" maize production, with the harvest, completed in August, estimated to be about 50-60 percent below the average.

In southern parts of the subregion, harvesting of the 2019 second season cereal crops has recently started in southern bi-modal rainfall areas of **South Sudan** and **Uganda**, while in **the United Republic of Tanzania** ("Vuli), **Somalia** ("Deyr") and agro-pastoral and marginal agricultural areas of central and southeastern **Kenya** ("short-rains"), crops will be gathered in early 2020. The October-December rainy season has been mostly characterized by exceptionally heavy precipitation, with parts of Kenya and southern Somalia receiving the highest rainfall volumes on record since 1981, up to three times the long-term average. The abundant rains had a positive impact on crop establishment and development, leading to favourable production prospects for the 2019 second season crops. However, the significant rainfall also triggered widespread floods, mainly in central and southern **Somalia**, southeastern **Ethiopia**, northern and eastern **Kenya** and across **South Sudan**, causing damage to farmland, livestock deaths and localized crop losses. In **Somalia**, damage to about 80 000 hectares of cropland in high potential riverine irrigated areas along the Shabelle River is expected to result in a substantial shortfall

Table 9. East Africa cereal production

(million tonnes)

	Wheat			Coarse grains			Total cereals ¹			
	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	Change: 2019/2018 (%)
East Africa	5.6	6.0	5.8	43.8	47.5	45.0	53.0	57.4	54.6	-4.8
Ethiopia	4.6	4.8	4.8	21.1	22.8	22.6	25.8	27.8	27.6	-0.7
Kenya	0.2	0.4	0.3	3.9	4.4	3.6	4.3	4.9	4.0	-19.3
Sudan	0.6	0.6	0.6	6.2	7.6	6.5	6.9	8.3	7.1	-13.9
Uganda	0.0	0.0	0.0	3.3	3.5	3.2	3.6	3.7	3.4	-7.9
United Republic of Tanzania	0.1	0.1	0.1	7.3	7.3	7.2	10.3	10.4	10.3	-1.0

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2014-2018 period.

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

in “Deyr” crop production. However, as already occurred in previous rainy seasons characterized by similar abundant precipitation, ample areas are expected to be available for recession agriculture and the increased water availability for irrigation due to high river levels, will likely lead to increased off-season plantings in December. As a result, an above-average off-season harvest is expected in March in these areas, compensating for the anticipated cereal production decline of the main “Deyr” crop. In **Rwanda** and **Burundi**, harvesting of the “2020A” season crops has recently started and production prospects are favourable owing to beneficial seasonal rains received throughout the cropping period.

In pastoral areas, abundant October-December rains prompted a substantial regeneration of rangeland resources. In northern and eastern **Kenya**, southeastern **Ethiopia**, central and northern **Somalia**, which experienced severe rainfall deficits during the past two rainy seasons, the heavy “Deyr/short-rains” resulted in marked improvements of vegetation conditions, which are currently above average in most areas. Rainfall surpluses have also resulted in the complete recharge of most water sources with a consequent decrease of livestock trekking distances from grazing fields to watering points. Livestock body conditions, which had declined to very low levels after two consecutive poor rainy seasons, markedly improved in October and November, and they are currently at near-average to average levels. However, widespread floods resulted in an increase in the prevalence of water-borne animal diseases and caused a significant number of livestock deaths in southeastern **Ethiopia** and **South Sudan**. In particular, in flood-affected areas of eastern and northern **South Sudan**, widespread livestock mortality is reported, with pastoralist households having lost up to 80 percent of their herds. In addition, locust outbreaks in pastoral and agro-pastoral areas of eastern Ethiopia and northern Somalia resulted in significant damage to pastures and crops.

Prices of cereals at very high levels

Domestic prices of cereals are at high levels, supported by tight supplies following reduced first season harvests in several countries and further underpinned by difficult macroeconomic situations. In **Ethiopia**, prices of maize increased by

between 20 and 65 percent between January and September 2019 in several markets, including the capital, Addis Ababa, as seasonal upward trends were amplified by the reduced supplies from the secondary “Belg” harvest. In **Uganda**, prices of maize increased by 20-40 percent in October as seasonal patterns were exacerbated by above-average exports to Kenya and South Sudan in the third quarter of 2019. Prices of maize were more than twice their values in October last year, also due to reduced domestic availabilities following a below-average 2019 first season harvest. In **Somalia**, prices of sorghum and maize began to seasonally increase in October, and were up to twice their year-earlier values due to a tight supply situation following a poor 2019 “Gu” main harvest.

In **South Sudan**, prices of maize and sorghum increased in the capital, Juba, by 35 percent and 50 percent, respectively, between July and September, largely due to a depreciation of the local currency. Subsequently, prices levelled off in October, as the country’s currency remained steady. As of October, prices of coarse grains were 60 percent higher year on year and more than 15 times above their levels in July 2015, when they started to surge as a result of the rapidly depreciating currency. The high price levels are due to sustained exports to Kenya, Rwanda and some Southern African countries, particularly Zimbabwe, while a reduced output of the first season “Masika” harvest provided further support. In **the United Republic of Tanzania**, prices of maize remained firm in September and October, but were up to twice their year-earlier values reflecting abrupt spikes that occurred in mid-2019. The high price levels are due to sustained exports to Kenya, Rwanda and some Southern African countries, particularly Zimbabwe, while a reduced output of the first season “Masika” harvest provided further support. In **the Sudan**, prices of sorghum and millet began to decline seasonally in October with the start of the 2019 harvest, decreasing by about 5-10 percent on a monthly basis. Despite the decline, prices of coarse grains in October were still at

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



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

near-record levels, driven by a significant loss of value of the local currency, fuel shortages and soaring prices of agricultural inputs, which raised production and transportation costs. In **Kenya**, prices of maize decreased by 10-30 percent between August and October, predominantly as a result of sustained imports from Uganda and the United Republic of Tanzania. However, prices remained up to twice their year-earlier levels on account of tighter domestic availabilities following a poor “long-rains” harvest in central and southeastern agro-pastoral and marginal agricultural areas and a below-average 2018/19 “short-rains” harvest.

In South Sudan widespread floods exacerbate already alarming levels of food insecurity

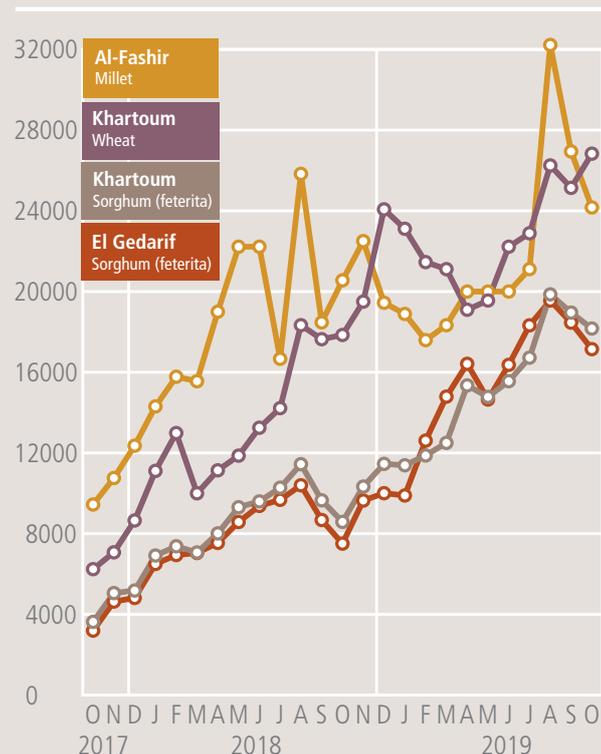
The aggregate number of people in need of humanitarian assistance is estimated at about 24.6 million, mostly located in **Ethiopia, South Sudan and the Sudan**. In **South Sudan**, the number of severely food insecure people was projected to decline from 6.35 million to 4.54 million between September and December, reflecting increased food availability from the 2019 harvests. However, the current number of food insecure is likely to be substantially higher than the projection,

as recent floods affected about 900 000 people, of whom about 420 000 have been displaced, and resulted in significant crop and livestock losses. The areas affected by the floods (former Northern Bahr El Ghazal, Warrap, Jonglei and Eastern Equatoria states and parts of Unity, Lakes and Upper Nile states) were already facing dire levels of food insecurity, with more than 3 million people in need of assistance before the torrential rains. In **Kenya** and **Somalia**, the food security situation has steadily deteriorated and reached alarming levels since early 2019 due to the cumulative impact of two consecutive poor rainy seasons on livelihoods in pastoral, agro-pastoral and marginal agricultural areas. In **Somalia**, 2.1 million people are estimated to be severely food insecure between October and December, about 35 percent more than in early 2019. The areas with the highest levels of food insecurity are southern Bay and Bakool regions, and northern Awdal and Woqooyi Galbeed regions, where IPC Phase 4: "Emergency" levels are also reported. In **Kenya**, about 3.1 million people are estimated to be food insecure between October and December, nearly four times the number reported at the beginning of 2019. IPC Phase 3: "Crisis" levels of food insecurity prevail in northern and eastern pastoral areas of Turkana, Marsabit, Samburu, Mandera, Wajir, Garissa and

Isiolo plus Kitui County, located in the southeastern marginal agriculture livelihood zone. In both Kenya and Somalia, the food security situation is expected to improve in early 2020 as the conducive weather during the "Deyr/short-rains" seasons had a favourable impact on crop and livestock production. However, limited improvements are expected in the areas where floods resulted in reduced harvests, outbreaks of water-borne livestock diseases and animal losses. In **Ethiopia**, the estimated number of food insecure people declined from 8 million between July and September to 6.7 million between October 2019 and January 2020, as the "Meher" harvest improved food availability. Limited improvements are reported in Oromia Region as below-average February-June "Belg" rains resulted in substantial shortfalls in crop production, while the number of food insecure people increased by almost 30 percent in Afar Region, as the seasonal deterioration due to the

ongoing dry season was exacerbated by a faster than normal than normal depletion of rangeland resources in northern areas, following poor July-September 2019 "Karan/Karma" rains

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



Source: Food Security information for Action (SIFISA).

SOUTHERN AFRICA



Unfavourable rainfall outlook diminishes 2020 production prospects

Planting of the main 2020 cereal crops, to be harvested from next April, is underway. Rainfall amounts were near normal to above average in November, helping to partly compensate the effects of minimal rainfall received in October, the month that normally marks the start of the rainy season. Despite the mostly beneficial rains so far, soil moisture levels at the end of November still remained below average, reflecting the lingering impact of the previous season's extreme rainfall deficits and resulting in suboptimal conditions for crop establishment. For the December 2019-March 2020 period, weather forecasts point to a higher probability of below-average rains throughout most of the subregion, a period that coincides with the critical reproductive phase of the maize crop, a key food staple. As a result, the overall outlook for maize yields in 2020 is for a continuation of below-average levels. Nonetheless, it should be noted that although seasonal rainfall is forecast to be below normal, crop water requirements may still be

satisfied, particularly in northern parts of the subregion, where average seasonal cumulative rainfall exceed the water requirements of maize crops.

Although planting estimates for the 2020 crop are not yet available for most countries, the prevailing higher year on year grain prices could encourage farmers to expand the area sown. This factor has already underpinned expectations of an expansion in maize sowings in **South Africa**, the main cereal-producing country in the subregion. Preliminary indications point to an area of 2.52 million hectares to maize, which, if it materializes, would place the 2020 planted area 6 percent above the previous five-year average.

The effects of the prolonged and harsh dry weather conditions in the previous agricultural season have also delayed a full regeneration of pastures, illustrated by below-average vegetation conditions, particularly in southern and western areas. As a result, livestock body conditions are reported to be poor in several areas.

Weather shocks sharply reduced 2019 harvests, amplifying import needs

The aggregate 2019 cereal output is estimated at 30.2 million tonnes, about 2.1 million tonnes below the previous five-year average. The reduction was primarily due to the impact of extreme weather events that resulted in extensive crop losses, and caused a reduction in yields production and the area harvested. The largest yearly decreases were estimated in **Mozambique, South Africa, Zambia** and **Zimbabwe**, with outputs in the latter three countries declining to well below-average

levels. Production of maize in the subregion is estimated at 22.3 million tonnes, 10 percent below the previous five-year average. By contrast, the second most produced cereal crop, paddy, increased to an above-average level of 4.5 million tonnes in 2019, largely owing to a production rebound in Madagascar, which produces more than 80 percent of the subregion's output.

The lower harvests have led to steep upturns in cereal import requirements for most countries, particularly in consideration of the lower-than-average national stocks that curbed countries' capacities to compensate for the production shortfalls. Total cereal import requirements in the 2019/20 marketing year (generally April/March) are estimated at 9.4 million tonnes, more than 1.5 million tonnes above the previous year and about 0.3 million tonnes higher than the average. Larger import needs for maize, estimated at 2.4 million tonnes in 2019/20 for the subregion as a whole, account for the bulk of the this year's increase and nearly one-third of this volume is expected to be imported by Zimbabwe on account of the country's substantially reduced harvest.

Subregional cereal exports almost entirely consist of maize and mostly originate from South Africa. In 2019/20, South Africa is forecast to export a below-average quantity of between 1.2 and 1.5 million tonnes of maize, largely due to the lower harvest in 2019. Exports from Zambia, which in recent years was an important source of supplies for neighbouring countries, are expected to be minimal, reflecting tight domestic supplies following two years of below-average harvests.

Table 10. Southern Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	Change: 2019/2018 (%)
Southern Africa	2.0	2.1	2.0	26.2	27.0	23.7	4.2	4.1	4.5	32.3	33.2	30.2	-8.9
- excl. South Africa	0.3	0.3	0.2	12.7	13.3	11.5	4.2	4.1	4.5	17.2	17.6	16.2	-7.8
Madagascar	0.0	0.0	0.0	0.3	0.2	0.2	3.6	3.3	3.9	3.9	3.5	4.1	16.8
Malawi	0.0	0.0	0.0	3.2	2.9	3.6	0.1	0.1	0.1	3.3	3.0	3.7	22.6
Mozambique	0.0	0.0	0.0	2.1	2.8	2.5	0.4	0.5	0.3	2.5	3.4	2.8	-15.8
South Africa	1.7	1.9	1.8	13.4	13.7	12.2	0.0	0.0	0.0	15.1	15.6	14.0	-10.1
Zambia	0.2	0.1	0.2	3.0	2.5	2.1	0.0	0.0	0.0	3.3	2.7	2.3	-14.5
Zimbabwe	0.0	0.1	0.1	1.5	1.9	0.9	0.0	0.0	0.0	1.6	2.0	0.9	-52.7

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2014-2018 period.

Staple food prices reach new peaks

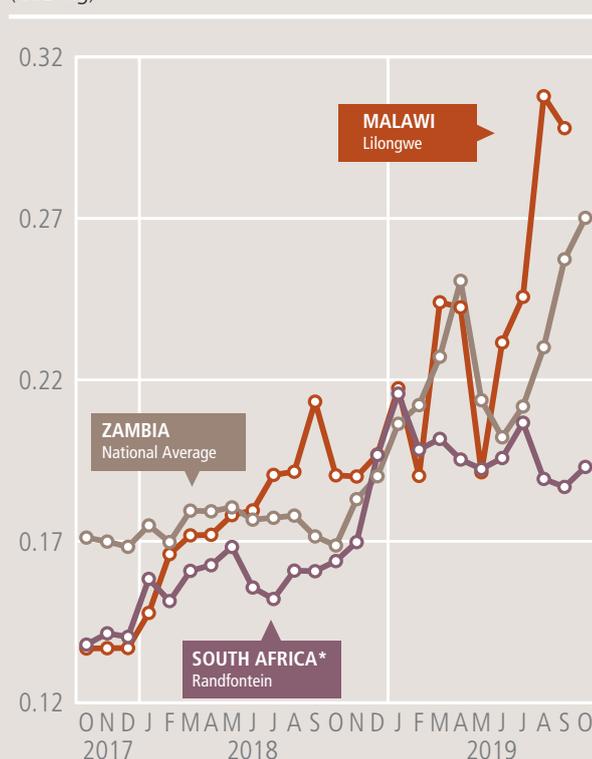
Tight domestic supply situations and currency weaknesses have underpinned sharp increases in the price of maize in 2019. The steepest increases were recorded in **Zimbabwe**, where prices of maize meal have increased by up to 50 percent on a monthly basis between July and September, pushing them seven times above their year-earlier levels as of September. Prices of other cereal products also increased, although to a lesser extent, and were well above their levels in September last year. The sharp price gains were driven by the country's currency depreciation, foreign exchange deficits that curtailed import, and the overall impact of the reduced domestic cereal availabilities. A tight domestic supply situation was also the main driver of the increase in prices in **Zambia**, where prices of maize meal products in October were close to double their year-earlier levels. In efforts to temper inflationary pressure, the Government of Zambia imposed price controls in August. In **Mozambique**, reduced domestic supplies triggered price hikes earlier in the year and have sustained higher year-on-year levels as of September, while in **Malawi**, reflecting improved supplies from this year's production upturn, prices of maize remained mostly firm but were still at high levels. In **South Africa**, prices of maize grain in October were nearly 20 percent higher year on year, on account of the lower cereal output. In **Madagascar**, prices of domestic rice varieties continued to rise seasonally in recent months, however, the monthly price gains were more subdued this year compared to 2018, reflecting the larger harvest in 2019.

Food insecurity worsens significantly

During the peak of the lean season (January-March 2020), the number of food insecure people is projected to reach 12.5 million, 15 percent above the figure estimated in the corresponding period in 2019.³ The projected level is also the second highest on record and is principally triggered by the impact of the reduced harvests that sharply cut households' food supplies and diminished income-generating opportunities, through a decrease in crop sales. The higher food prices are also exacerbating food insecurity conditions, particularly in **Zimbabwe**, where households' access to food has been severely constrained by the continual rise in prices across all food products, which negates the ability to effectively substitute to cheaper food alternatives, a key coping strategy.

The largest food insecure populations are located in **Zambia** and **Zimbabwe**, where an estimated 2.3 million and 5.5 million people, respectively, will be in need of urgent assistance. Food insecurity also deteriorated significantly in **Mozambique**, where the number of people assessed to need assistance until March 2020 increased by 85 percent on a yearly basis to

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



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

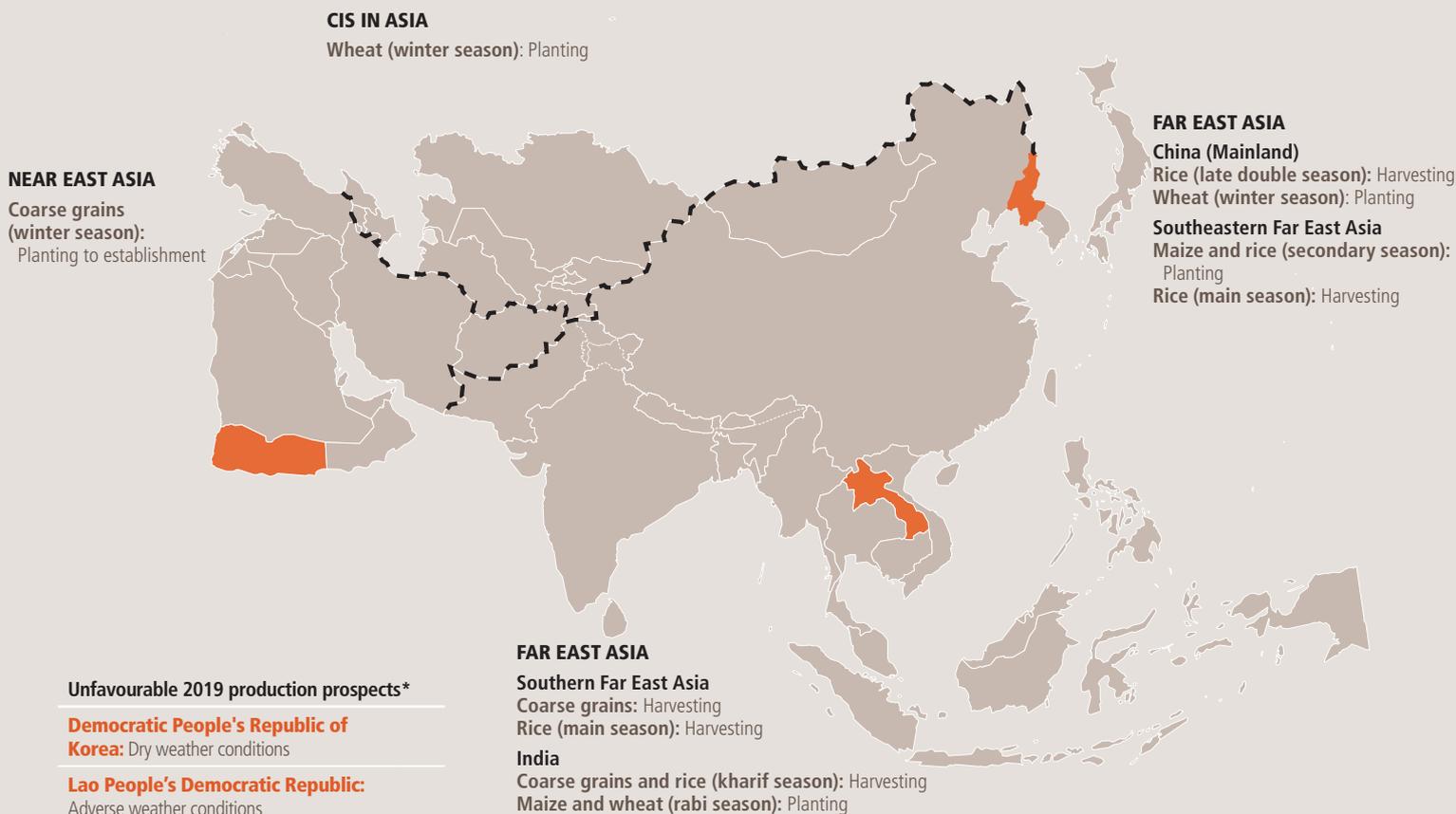
1.65 million people, driven by the impact of the two major cyclones that struck the country earlier in the year. The prevalence of food insecurity also increased in **Eswatini**, **Lesotho** and **Namibia**, similarly caused by a decrease in agricultural production. On account of the larger harvests, the number of people assessed to be food insecure has decreased in **Madagascar** and **Malawi**.

³ Excluding Angola, Mauritius and South Africa.

REGIONAL REVIEWS

ASIA

Note: Situation as of November
 ■ ■ ■ Subregional borders
 - - - Territories/boundaries**



Unfavourable 2019 production prospects*

Democratic People's Republic of Korea: Dry weather conditions

Lao People's Democratic Republic: Adverse weather conditions

Yemen: Conflict

*/** See Terminology (page 6)

Source: GIEWS (disputed territories and boundaries in conformity with UN maps)**

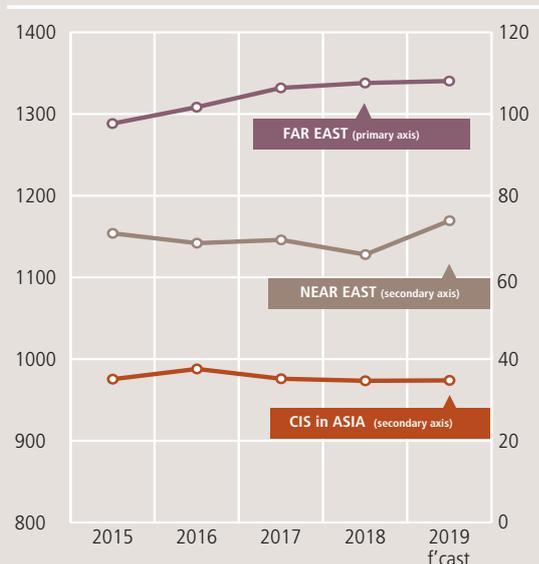
Asia Production Overview

Planting of the 2020 wheat crop is underway in the Far East and Near East countries, under mostly favourable conditions.

The forecast for the 2019 aggregate cereal output in Asia, with some crops still to be harvested, is estimated at 1 449 million tonnes in 2019, close to the previous year's level and higher than the average. In the Far East, cereal production is estimated well above the five-year average, supported by good outputs of wheat and coarse grains in the subregion's main producers, China (Mainland) and India.

In CIS Asia, cereal production is estimated close to the average, as a decrease in wheat production was offset by an upturn in barley production. In the Near East, favourable weather boosted yields, while improved security conditions led to an expansion in plantings in conflict-affected countries, resulting in an overall increase in the subregional production in 2019, estimated to be 7 percent above the average.

Cereal production
(million tonnes)



FAR EAST



Planting prospects for the 2020 wheat crop are mostly favourable

Planting of the mostly irrigated 2020 winter wheat crop, for harvest next year, is progressing at a normal pace in most countries, supported by adequate irrigation supplies and near-average rains in most producing areas. In **India**, the early official production forecast for the 2020 wheat crop is set at 100.4 million tonnes, slightly below 2019's all-time high, but if it materializes it would be the second highest output on record. In **Pakistan**, underpinned by adequate water availability for irrigation that is expected to support a high level of plantings and yields, the Government is targeting a record wheat output of 27 million tonnes in 2020. In **China (Mainland)**, according to field assessment reports, growing conditions of the germinating winter wheat crop are generally normal as weather conditions have been adequate since early September.

Aggregate cereal production in 2019 estimated slightly above the high level of 2018

In most Northern Hemisphere countries, harvesting of the 2019 main crops, mostly rice and maize, is well advanced and is expected to conclude early next year. Immediately after the main season harvest, plantings of the 2019 secondary season crops are expected to take place. In Southern Hemisphere countries and those located on the Equator, harvesting of the 2019 secondary crops has almost finalized, while the main season crops were harvested earlier in the year.

The subregional cereal output in 2019 is forecast at 1340.4 million tonnes (rice in paddy equivalent), slightly higher than the previous year's above-average level.

Production of rice, the major food staple in the subregion, is forecast at 695.9 million tonnes (paddy terms), more than 2 percent above the five-year average. In **China (Mainland)**, the world's largest rice producer, the 2019 paddy crops were harvested in the second half of the year and production is estimated at a below-average level of 209.3 million tonnes, 2.8 million tonnes lower than the near-average outturn in 2018. The decrease mainly reflects reduced sowings of the "early" and "late" paddy crops. In **India**, paddy production in 2019, including the minor "Rabi" crop to be harvested early next year, is forecast at 173.6 million tonnes, above the five-year average but slightly below the bumper level

in 2018, due to a year-on-year contraction in plantings of the main "Kharif" crop. Above-average outputs are forecast in other paddy-producing countries in the subregion, including **Bangladesh, Cambodia, Indonesia, Myanmar, Pakistan and Sri Lanka**. The bumper outputs in these countries mainly reflect average to above-average yields, on account of favourable weather conditions during the main cropping season, and/or increases in the planted area. In **Viet Nam and the Philippines** production of paddy in 2019 is forecast at average levels, as high yields are anticipated to compensate for contractions in the planted area. In **Thailand**, production of paddy in 2019 is forecast to decrease on a yearly basis, but still to remain close to the five-year average level. This mainly reflects reduced plantings and lower yields, due to dry weather conditions during the sowing of the main paddy season and damage caused to standing crops in August and September by flash floods. Reduced outputs are anticipated in **Japan**, as well as in **the Republic of Korea**, where the area under paddy has contracted steadily since 2002, in part reflecting a decrease in domestic rice consumption. Similarly, a below-average output is estimated in **the Democratic People's Republic of Korea**, where planting operations were affected by dry weather conditions and subsequently heavy rains in August and early September caused localized damage to maturing standing crops. In **Lao People's Democratic Republic**, unfavourable weather conditions, in the form of dry weather and floods,

Table 11. Far East cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	Change: 2019/2018 (%)
Far East	257.0	260.8	266.3	371.6	378.0	378.3	681.2	699.1	695.9	1 309.9	1 338.0	1 340.4	0.2
Bangladesh	1.3	1.1	1.3	2.6	3.3	3.4	52.5	54.2	54.9	56.4	58.6	59.6	1.8
Cambodia	0.0	0.0	0.0	0.8	1.2	1.2	10.0	10.9	10.8	10.8	12.1	12.0	-0.6
China (Mainland)	132.1	131.4	134.0	268.6	267.1	267.7	211.5	212.1	209.3	612.2	610.7	611.0	0.0
India	94.6	99.9	102.2	43.6	45.5	44.1	164.6	174.6	173.6	302.9	319.9	319.9	0.0
Japan	0.9	0.8	0.8	0.2	0.2	0.2	10.9	10.6	10.6	12.0	11.6	11.6	0.2
Myanmar	0.1	0.1	0.1	2.5	2.8	2.9	28.9	30.4	30.5	31.5	33.3	33.5	0.6
Nepal	1.9	2.0	2.2	2.7	3.0	3.0	5.0	5.3	5.4	9.6	10.3	10.6	2.5
Pakistan	25.7	25.1	25.2	6.2	6.8	6.8	10.6	10.8	11.2	42.5	42.7	43.3	1.3
Philippines	0.0	0.0	0.0	7.6	7.8	7.7	18.6	18.6	18.8	26.2	26.4	26.5	0.5
Republic of Korea	0.0	0.0	0.0	0.2	0.2	0.2	5.5	5.2	5.2	5.7	5.4	5.4	0.1
Sri Lanka	0.0	0.0	0.0	0.3	0.3	0.3	3.8	3.9	4.6	4.0	4.2	4.9	14.9
Thailand	0.0	0.0	0.0	4.9	5.2	5.3	31.3	32.7	31.6	36.2	38.0	36.9	-2.9
Viet Nam	0.0	0.0	0.0	5.2	4.9	4.9	44.0	44.0	43.5	49.1	48.9	48.4	-1.1

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2014-2018 period.

affected the 2019 main season paddy crops to be harvested by the end of the year. A FAO/WFP Crop and Food Security Assessment Mission (CFSAM) visited the country to evaluate the agricultural production in 2019 and its final report is expected to be released in early 2020.

Aggregate production of maize in 2019 is forecast at an above-average level of 350.2 million tonnes, placing it 2.4 million tonnes above the output in 2018. The aggregate production increase mainly reflects expected above-average harvests in **India**, forecast at 28.4 million tonnes, and in **Indonesia**, where production is estimated at 26.3 million tonnes, 21 percent above the average, on account of large plantings and near-record yields. In **Bangladesh, Cambodia, Myanmar, Nepal, Pakistan, Sri Lanka** and **Thailand**, above-average outputs are also anticipated in 2019, due to high levels of plantings driven by strong demand by the feed industry, and the increased use of high-yielding crop varieties. In **China (Mainland)**, the main producer in the subregion, the 2019 maize production is estimated at an average level of 257.6 million tonnes, as record yields offset a reduction in the planted area. Production in **the Democratic People's Republic of Korea** is estimated to be below average, due to reduced plantings and low yields as a result of unfavourable weather conditions, and in **Viet Nam**, where the area planted decreased for the second consecutive year as farmers shifted to more profitable crops.

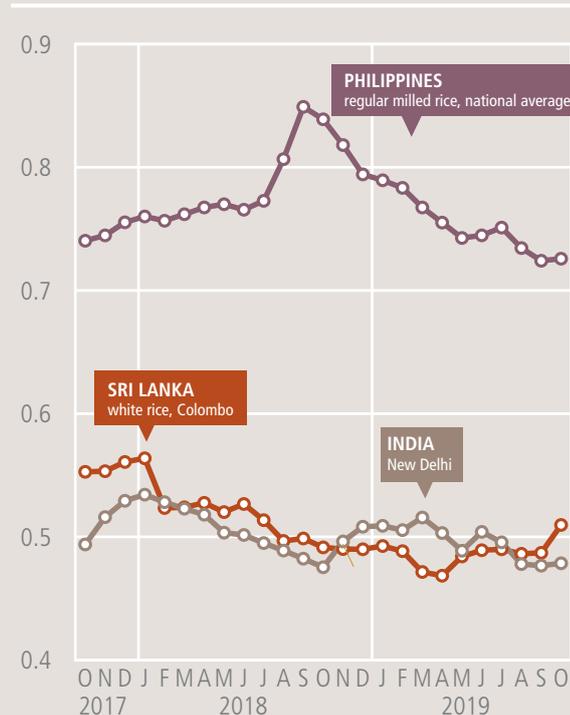
The aggregate 2019 wheat output, with the harvest concluded in the first part of the year, is estimated at a record high of 266.3 million tonnes. Most countries, including the subregion's biggest producers **China (Mainland)** and **India**, harvested bumper crops, supported by favourable weather conditions and adequate supplies of agricultural inputs and water availability for irrigation.

Aggregate cereal imports in 2019/20 forecast slightly above average

In the 2019/20 marketing year, aggregate wheat import requirements are forecast at a high level of 51 million tonnes, reflecting strong demand from most wheat-importing countries in the subregion, including **Bangladesh, Indonesia, Thailand, Viet Nam** and **the Republic of Korea**. Import requirements for coarse grains, mostly maize and barley for feed use, are forecast at below-average levels. The lower quantity is the result of a decline in demand for coarse grains from **China (Mainland)**, following the implementation of a government programme that aims to cut maize stocks through an increase in sales from the state reserves. Import forecasts of rice in 2020,

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.

which account for a small share of the total imports, are forecast at a below-average level, on expectations of subdued purchases by **Bangladesh, China (Mainland)** and **Indonesia**.

Exports of rice, accounting for the bulk of subregional exports, are forecast at 39.2 million tonnes in 2020, on higher expected exports by **Cambodia, India, Myanmar, Pakistan** and **Viet Nam**.

Table 12. Far East cereal production and anticipated trade in 2019/20¹

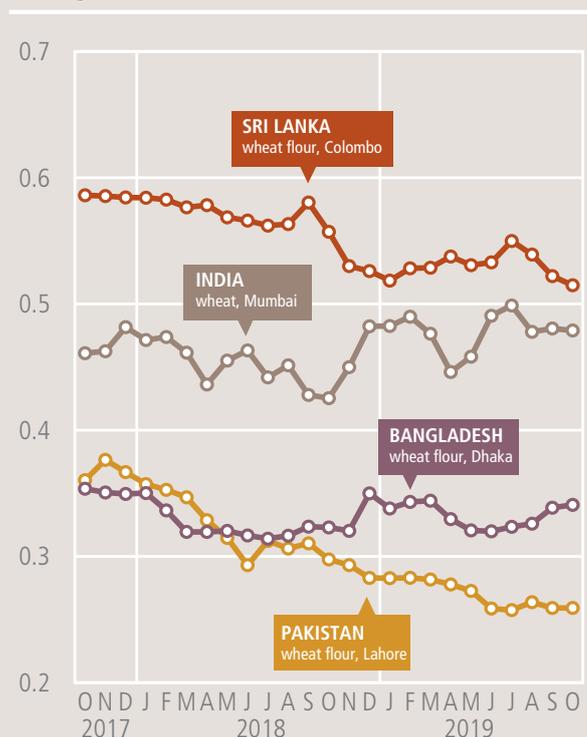
(thousand tonnes)

	Avg 5-ys (2014/15 to 2018/19)	2018/19	2019/20	2019/20 over 2018/19 (%)	2019/20 over 5-yr avg (%)
Coarse grains					
Exports	3 597	3 962	3 595	-9.3	0.0
Imports	66 076	62 182	62 915	1.2	-4.8
Production	371 650	378 049	378 280	0.1	1.8
Rice (milled)					
Exports	37 866	38 002	39 223	3.2	3.6
Imports	14 375	12 108	11 845	-2.2	-17.6
Production	452 012	463 650	461 474	-0.5	2.1
Wheat					
Exports	3 043	2 623	2 393	-8.8	-21.4
Imports	48 820	48 340	50 685	4.9	3.8
Production	257 033	260 848	266 280	2.1	3.6

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

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.

Prices of cereals followed mixed trends

Domestic prices of rice followed mixed trends between August and October in most countries, but were generally below their year-earlier levels. In **Viet Nam**, after a decline in August and September, prices increased in October, following the completion of the summer-autumn harvest. By contrast, in **Thailand**, prices have decreased in September and October with the start of the 2019/20 main season harvest and declining exports. Price declines during the August-October period were also recorded in key producing areas of **China (Mainland)**, triggered by ample supplies from the 2019 harvests. In **India**, prices remained stable or strengthened ahead of the arrival into the markets of the main “Kharif” harvest. In recent months, prices were generally stable and lower than

a year earlier in **Cambodia** reflecting adequate domestic supplies, while in **Myanmar**, wholesale prices of rice were well below their year-earlier levels, after steady falls between February and September 2019. To protect farmers from excessively low prices, the Government of Myanmar announced, in mid-October, a minimum purchasing price for 2019/20 main and secondary crops. Prices continued to decrease in October in **Bangladesh**, on account of abundant domestic supplies from the 2019 harvests, and in **the Philippines**, where the main season harvest has started in September. By contrast, in **Sri Lanka**, prices of white rice increased in September and October, with seasonal pressure compounded by the dry weather-reduced 2019 secondary season harvest, while in **Indonesia**, prices remained virtually unchanged and close to their year-earlier levels.

Prices of wheat and wheat flour remained generally stable, with the exception of **India**, where seasonal increases took place, and **Pakistan**, where prices were above their year-earlier levels underpinned by tighter availabilities from the below average 2019 output and strong export demand prior to the introduction of a ban on wheat exports in July 2019. In **China (Mainland)**, prices of wheat were stable or weakened amid good market availabilities from the near-average 2019 output. Prices of wheat flour levelled off in October in **Bangladesh** after some increases in August and September, reflecting improved supplies from a pick-up in imports. In **Indonesia** and **Sri Lanka**, where wheat is not produced, steady imports contributed to keep prices stable in the August-October period.

Food security conditions generally stable, but concerns remain in some countries

Overall, food security conditions are stable in the subregion, but pockets of severe food insecurity persist in some countries. In the **Democratic People’s Republic of Korea**, according to the FAO/WFP rapid Food Security Assessment Mission, conducted in April 2019, about 10.1 million people (about 40 percent of the total population) were estimated to be food insecure. Given the expectations of a below-average output, the overall food security situation in 2019/20 is not expected to improve. In **Myanmar**, protracted conflicts in Rakhine, Chin, Kachin and northern Shan states have triggered large-scale internal population displacements, particularly since 2017. Most IDPs are affected by high levels of food insecurity as conflicts are hampering their movement and engagement in livelihood activities. A large number of refugees are putting strain on local resources in both **Pakistan**, where about 1.4 million Afghan refugees found shelter, and **Bangladesh**, where, as of October, about 915 000 refugees from Myanmar remained displaced in temporary settlements in the Cox’s Bazar District. Reflecting the negative impact on the host communities, about 336 000 Bangladeshis are estimated to be in need of humanitarian assistance to meet their basic needs.

Extensive outbreaks of African Swine Fever (ASF), across several countries of the subregion, have affected the livelihoods and food security of a large number of people, particularly hog farmers, who are predominantly small-scale producers and rely on the production of pig meat for income generation and to meet their daily protein needs. As of mid-November, ASF had been reported in ten Asian countries, including China (Mainland), Cambodia, the Democratic People’s Republic of Korea, Viet Nam, Mongolia, Myanmar, Lao People’s Democratic Republic, the Philippines, the Republic of Korea, and Timor-Leste, with official estimates indicating that a large number of animals have perished.

NEAR EAST



Mixed planting conditions for 2020 winter crops

Planting of the 2020 winter wheat and coarse grains crops is currently underway and, depending on location and soil conditions, will continue until the end of the year or January next year. As of mid-November, conditions for crop establishment and development in southeastern **Iraq** and northeastern **Iran (Islamic Republic of)** were favourable with sufficient soil moisture. Elsewhere in the subregion, including in **Turkey**, the main regional producer, dryness remained a concern and hampered crop establishment before the arrival of the cold season.

Above-average cereal output gathered in 2019

At the subregional level, total cereal production in 2019 is estimated at 73.8 million tonnes, about 13 percent above the 2018 harvest and 8 percent higher than the five-year average. The 2019 wheat production is estimated at 46.2 million tonnes, 8 percent above the five-year average and about 12 percent above the 2018 weather-stricken output.

A near-average cereal production was registered in **Turkey**, the subregion's main cereal producer, while year-on-year

production gains were estimated in **Afghanistan, Iraq, Iran (Islamic Republic of), and the Syrian Arab Republic**. In **Iran (Islamic Republic of)**, which was the most affected by heavy rains and flash flooding from mid-March to April 2019, production losses in the flooded areas were more than offset by production gains in areas where increased precipitation was conducive for crop development. As a result, the cereal output was officially estimated at 21.6 million tonnes, about 15 percent above the five-year average and 7 percent higher than last year. Cereal production also increased in the countries suffering from conflict or the aftermath of conflicts, namely **Afghanistan, Iraq, and the Syrian Arab Republic**, mostly on account of favourable weather conditions. In **Afghanistan**, about 6 million tonnes of cereals were harvested in 2019, over one-third above the output in 2018 and 7 percent above the five-year average. In Iraq, cereal production was estimated at 5.6 million tonnes, more than 80 percent above the 2018 harvest and 30 percent above the five-year average. In **the Syrian Arab Republic**, abundant and well-distributed rainfall, coupled with improved security conditions, which facilitated the return of internally displaced people, resulted in a significant expansion of the area sown with cereals. Consequently, the 2019 wheat production was estimated at 2.2 million tonnes, up from 1.2 million tonnes in 2018, but still below the pre-crisis level of 4.1 million tonnes (2002-2011). At 2 million tonnes, the 2019 barley production was also more than five times that of 2018 and over 150 percent higher than the pre-crisis levels. Severe challenges persist in **Yemen**, where the conflict continues to debilitate agricultural livelihoods.

At subregional level, wheat imports in the 2019/20 (July/June) marketing year are

forecast at an average level of 27.6 million tonnes. Total cereal imports are forecast at a level close to the average of 72 million tonnes.

Food insecurity of large numbers of people continued to worsen due to persisting conflicts and reduced livelihood opportunities

In **Yemen**, after four years of escalating conflict, the food security situation remains dire. In December 2018, over 1.5 million people were estimated to be severely food insecure in 29 out of the 45 most food insecure districts. This included 658 000 people in IPC Phase 4: "Emergency", 44 000 in IPC Phase 5: "Catastrophe" and the remaining falling under IPC Phase 3: "Crisis". An updated analysis carried out in April 2019, reported no cases of IPC Phase 5, but still about 1.25 million people are severely food insecure (IPC Phases 3 and 4 combined).

In **the Syrian Arab Republic**, about 6.5 million people are estimated to be food insecure and in need of food and livelihood support. An additional 2.5 million people are at risk of food insecurity and need livelihood support to strengthen their resilience.

In **Afghanistan**, between August and October 2019, it was estimated that a total of 10.23 million people (one-third of the total population) were in severe acute food insecurity and required urgent humanitarian assistance. These included around 7.79 million people in IPC Phase 3: "Crisis" situation and 2.44 million people in IPC Phase 4: "Emergency" situation. Around 10.37 million people were also in IPC Phase 2: "Stressed" situation and required livelihood support.

Table 13. Near East cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	Change: 2019/2018 (%)
Near East	43.0	41.2	46.2	21.2	19.6	22.9	4.4	4.6	4.8	68.6	65.5	73.8	12.8
Afghanistan	4.5	3.6	5.1	0.6	0.4	0.4	0.6	0.5	0.6	5.7	4.5	6.1	35.9
Iran (Islamic Republic of)	11.8	13.4	14.5	4.2	3.7	4.1	2.7	3.0	3.0	18.8	20.1	21.6	7.5
Iraq	3.2	2.2	4.3	0.9	0.7	1.1	0.2	0.1	0.2	4.3	3.0	5.6	83.4
Turkey	20.7	20.0	19.0	13.8	13.4	14.3	0.9	0.9	1.0	35.4	34.4	34.3	-0.2

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2014-2018 period.

CIS IN ASIA⁴



Plantings of 2020 winter cereals estimated slightly above average

Planting of the 2020 winter cereal crops (mainly wheat), to be harvested from May 2020, took place between September and November 2019 under slightly drier-than-average weather conditions. However, as of mid-November, according to satellite-based vegetation indicators, conditions of crops were generally favourable, inferring proper crop establishment and germination.

At the subregional level, early estimates point to an area planted with 2020 winter wheat that slightly exceeds the five-year average. This is mainly due to a significant increase in the area sown in

Azerbaijan, reflecting the Government's strategy to reduce import dependency through production growth, which more than outweighed area contractions in **Armenia, Kyrgyzstan** and **Kazakhstan**. In **Kazakhstan**, the area planted with wheat is expected to continue its declining trend, in line with Government policies that seek to progressively reduce the total area planted with wheat from 12.4 million hectares in 2016 to 10.1 million hectares in 2021, in favour of more profitable oil crops.

Near-average cereal production obtained in 2019

Harvesting of the 2019 cereal crops was completed in October and the aggregate production is estimated at a near-average level of 34.7 million tonnes. The 2019 wheat output, accounting for about 70 percent of the subregion's cereal production, is estimated at 23.8 million tonnes, 7 percent below the average level as large outputs obtained in **Azerbaijan** and **Turkmenistan** were more than offset by reduced harvests in **Kazakhstan, Armenia** and **Kyrgyzstan**. In **Tajikistan** and **Uzbekistan**, wheat outputs are estimated at near-average levels. In **Kazakhstan**, wheat production is estimated at 11.5 million tonnes, about 18 percent below the five-year average, due

to warmer and drier-than-average weather conditions between June and August 2019, which negatively affected yields in the key wheat-producing northern province of Kostanay. In addition, abundant rainfall in September slowed harvesting operations and resulted a deterioration of grain quality. The aggregate production of barley is estimated at a bumper level of 6.5 million tonnes on account of well above-average outputs obtained in **Kazakhstan** and **Azerbaijan**.

Reduced wheat production in Kazakhstan boosts import requirements in 2019/20

The subregion's aggregate cereal import requirement is forecast at 8.8 million tonnes in the 2019/20 marketing year, 15 percent above average. The increased needs stem from an expected record-high wheat import volume by **Kazakhstan**, estimated at 1.5 million tonnes, nearly five times higher than the average. Supplies from the Russian Federation are expected to meet the heightened needs for high-quality wheat in Kazakhstan, which would enable the country to export additional supplies of wheat flour to neighbouring states. Wheat imports are also forecast at an above-average level in **Kyrgyzstan** and

Table 14. CIS in Asia cereal production

(million tonnes)

	Wheat			Coarse grains			Total cereals ¹			
	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	Change: 2019/2018 (%)
CIS in Asia	25.6	24.6	23.8	8.2	9.0	9.7	34.8	34.6	34.7	0.3
Armenia	0.3	0.2	0.3	0.2	0.1	0.1	0.5	0.3	0.4	17.1
Azerbaijan	1.8	2.0	2.2	1.1	1.2	1.3	2.9	3.3	3.5	5.7
Georgia	0.1	0.1	0.1	0.3	0.3	0.2	0.4	0.4	0.3	-14.2
Kazakhstan	14.1	13.9	11.5	4.3	5.3	5.9	18.9	19.7	17.9	-9.4
Kyrgyzstan	0.6	0.6	0.6	1.0	1.1	1.2	1.7	1.8	1.8	1.9
Tajikistan	0.9	0.7	0.8	0.3	0.3	0.3	1.3	1.1	1.3	15.0
Turkmenistan	1.2	1.0	1.6	0.1	0.1	0.1	1.4	1.2	1.8	50.4
Uzbekistan	6.6	6.0	6.8	0.8	0.5	0.6	7.8	6.8	7.8	14.6

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2014-2018 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.

Tajikistan, while below-average import volumes are foreseen in **Azerbaijan** and **Turkmenistan**, amid large domestic outputs obtained in 2019.

In the 2019/20 marketing years, the forecast for subregional cereal exports (mainly wheat) stands at 8.8 million tonnes, about 8 percent below the average volume. Wheat shipments are forecast at a below-average level of 7.3 million tonnes on account of an expected decline in exports from **Kazakhstan**, the main exporting country of the subregion, reflecting the lower harvest.

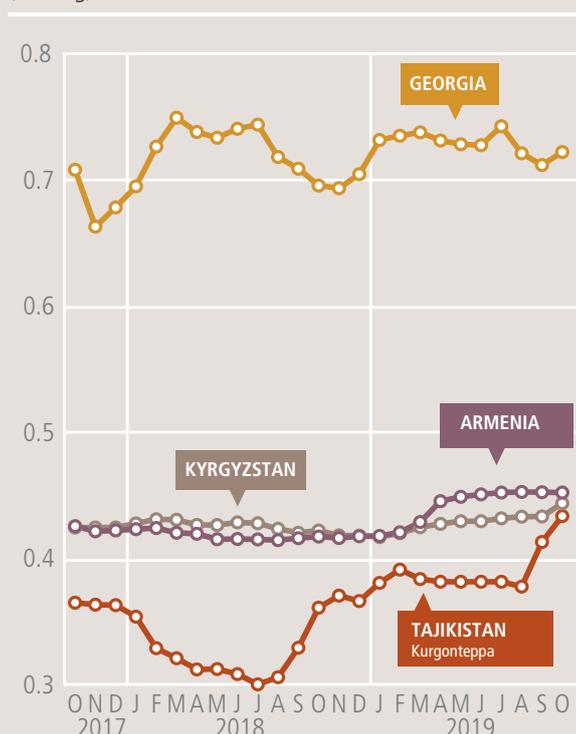
Export and domestic prices of wheat flour increased

In **Kazakhstan**, export prices of milling wheat increased in the previous 3 months and in November where about 25 percent higher on a yearly basis. A weaker currency and a below-average 2019 output triggered

the price gains. For similar reasons domestic retail prices of wheat flour increased over the last months and were about 30 percent higher than their values in November 2018.

In the subregion's importing countries, retail prices of wheat flour remained mostly stable in **Tajikistan** and **Kyrgyzstan** between March and August 2019. However, in September and October, prices rose sharply to significantly higher year-on-year levels. The abrupt price spurts were triggered by increasing prices in **Kazakhstan**, the countries' key supplier of wheat. Prices were firm in **Armenia** and **Georgia** in the last three months up to October.

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



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

REGIONAL REVIEWS

LATIN AMERICA AND THE CARIBBEAN



Unfavourable 2019 production prospects*

Honduras: Dry weather conditions

*/** See Terminology ([page 6](#))

Source: GIEWS (disputed territories and boundaries in conformity with UN maps)**

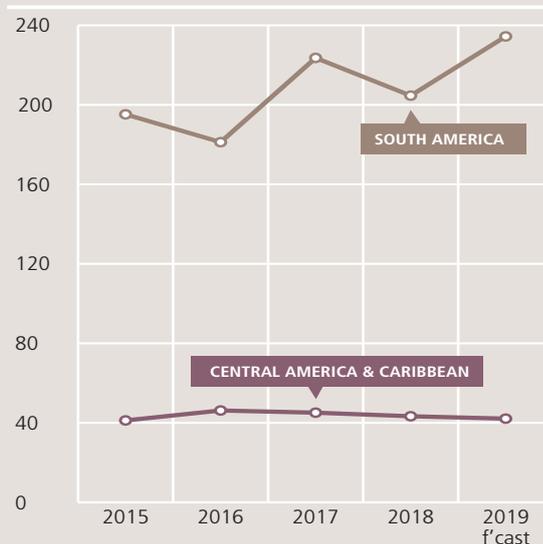
Latin America and the Caribbean Production Overview

Planting of the 2020 coarse grain crops is ongoing in South America and total area sown is anticipated at an above-average level, mostly spurred by higher year-on-year grain prices, despite some rainfall shortages impeding plantings in Argentina.

The aggregate cereal production in Latin America and the Caribbean in 2019 is forecast at 276.5 million tonnes, 14 percent above the five-year average. In South America, cereal production is forecast well above the average, reflecting large maize harvests in Argentina and Brazil and a near-record wheat output, driven mostly by area expansions.

In Central America and the Caribbean, aggregate cereal production is estimated below the five-year average, primarily resulting from rainfall deficits that negatively affected maize crops in most countries.

Cereal production (million tonnes)



CENTRAL AMERICA AND THE CARIBBEAN



Below-average wheat production expected in 2019 due to reduced plantings

Wheat production in the subregion, which almost exclusively concentrate in Mexico, is estimated at a below-average level of 3.3 million tonnes. In **Mexico**, the 2019 minor wheat crop, which accounts for about 5 percent of the national production, is at the vegetative stage, and the aggregate 2019 output, including the main crop harvested in July, is expected to be 7 percent below the five-year average. The reduced level is a result of a fall in the area planted, reflecting a continuous shift to the more remunerative maize crop.

Maize production anticipated to be below average due to prolonged dry spells

The aggregate subregional maize output is forecast at 29.8 million tonnes in 2019, slightly below the five-year average, mainly due to dry weather conditions that affected crops in several countries. In **Mexico**, which accounts for more than 85 percent of the subregion's maize output, the main season harvest is underway and production is expected at a below-average level due to limited rainfall

during the planting and flowering stages. According to official estimates and contrary to the initial planting expectations, the area sown during the current season was about 8 percent lower than the five-year average, largely on account of soil moisture deficits. In addition, crop losses due to drought conditions were reported in about 6 percent of the area planted, mainly in the states of San Luis Potosí, Veracruz, Guerrero, Oaxaca and Queretaro. With the inclusion of the minor season output gathered in July, Mexico's 2019 overall cereal output is anticipated at 34.8 million tonnes, slightly below the average.

Elsewhere in the subregion, prolonged dry spells in the June-August period, coupled with elevated temperatures that increased evapotranspiration rates, adversely affected the main maize crops, in northern and central **Guatemala**, **Honduras** and northeastern **Nicaragua**. In particular, the dry weather conditions in Honduras caused significant crop losses in the main maize producing areas, including Olancho, El Paraíso and Francisco Morazán departments. Only in **El Salvador**, production is expected at an average level, mainly reflecting beneficial rains. The minor season crop, to be harvested from December, is developing under generally favourable weather conditions. In aggregate, but excluding Mexico, the subregion's maize output is forecast at a below-average level of 4.3 million tonnes in 2019.

In **Haiti**, increased rainfall since September has benefited the second season maize crop, which is currently being harvested. However, the availability of cereals on

markets is estimated to be generally low, mainly due to a below-average main season output, with the harvest having concluded earlier in the year. In addition, the limited availability of fuel and social unrest has also impeded the internal distribution of food, further contributing to the reduced market supplies. As well as constrained availability, access to food for most households has worsened on account of sharp increases in food prices, following a 35 percent depreciation of the national currency against the US dollar during the year up to October 2019.

Cereal import requirements set at all-time highs in 2019/20

Cereal import requirements, with maize accounting for about 65 percent of the total, are forecast at a record high of 37.2 million tonnes in the 2019/20 marketing years. The high level mainly reflects growing demand for yellow maize by the feed industry and the need to compensate for the reduced harvests in 2019. Imports of wheat are also expected at an above-average level as the demand for wheat-based products for human consumption continues to rise, mostly driven by an expanding population.

Prices of maize declined seasonally in the August-October period

Prices of white maize generally declined between August and October, as newly harvested crops from the main season improved market availabilities. Prices were generally lower year on year in **El Salvador**, mainly due to a significant increase in imports from the United States of America that boosted domestic supplies.

Table 15. Latin America and the Caribbean cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	Change: 2019/2018 (%)
Central America & Caribbean	3.5	2.9	3.3	37.6	37.3	35.8	2.9	3.0	3.1	44.0	43.3	42.1	-2.7
El Salvador	0.0	0.0	0.0	0.9	0.9	0.9	0.0	0.0	0.0	1.0	0.9	1.0	7.3
Guatemala	0.0	0.0	0.0	1.9	1.9	1.9	0.0	0.0	0.0	1.9	2.0	1.9	-3.8
Honduras	0.0	0.0	0.0	0.6	0.6	0.5	0.1	0.1	0.1	0.6	0.6	0.6	-12.4
Mexico	3.5	2.9	3.3	32.8	32.6	31.2	0.3	0.3	0.3	36.6	35.8	34.8	-2.9
Nicaragua	0.0	0.0	0.0	0.5	0.5	0.4	0.3	0.4	0.4	0.8	0.8	0.8	-5.2
South America	25.9	28.9	28.2	147.9	150.8	183.3	24.7	25.0	22.9	198.5	204.6	234.4	14.5
Argentina	16.3	19.5	19.0	47.3	50.8	64.3	1.4	1.4	1.2	65.1	71.6	84.5	18.0
Brazil	5.7	5.4	5.3	84.3	84.1	103.5	11.9	12.1	10.4	101.9	101.5	119.3	17.5

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2014-2018 period.

Also in **Guatemala**, in addition to domestic production, imports from Mexico boosted local supplies and contributed to maintaining prices below the level of the previous year. In **Nicaragua**, prices in October were well below the near-record highs of a year earlier, when increased input costs and social turmoil caused an upsurge in prices. In **Mexico**, prices of white maize held steady in October after declining in the previous two months with the above-average minor season harvest. Prices of black and red beans, key food staples, increased between June and October, and were higher year on year reflecting a production decline from the minor season. With regard to rice, prices were generally stable in the August-October period due to the adequate flows of imports that usually needed to cover a considerable share of the domestic needs. However, in **Haiti**, prices of imported rice were higher year on year, despite the Government's decision to suspend the value added tax on imported rice in response to the sharp weakening of the national currency. The depreciated currency and consequently higher import costs of grain, also kept prices of maize well above their values a year earlier.

SOUTH AMERICA



Plantings of the 2020 maize crop anticipated to be well above average

In *South America*, planting of the 2020 maize crop in **Argentina** is proceeding at a slow pace due to soil moisture deficits in the main producing Buenos Aires and Córdoba departments. While in **Brazil**, increased rainfall from late October abated initial concerns over the impact of dryness on plantings of first season maize and soybean crops, after which planting of the second and main season maize crop will follow.

Overall, the areas sown to maize in both countries is officially forecast at well above-average levels, reflecting higher year on year grain prices.

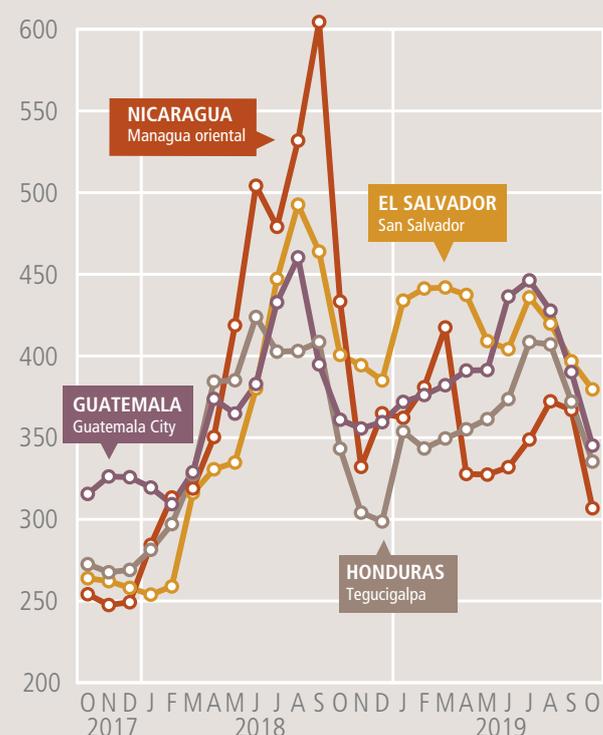
in the last decade. In **Colombia**, production is also anticipated to be below the five-year average on account of unfavourable weather conditions. In **Bolivia (Plurinational State of)** and **Paraguay**, where the 2019 season is nearing completion, maize production is expected to decline year on year, but remain at close to average levels. In **Venezuela (Bolivarian Republic of)**, harvesting of the main season maize crop is ongoing and the aggregate production in 2019, including the minor crop harvested in May, is expected to be well below average. The anticipated decline mostly stems from a significant contraction in the area sown, reflecting the prohibitively high production costs and a general lack of agricultural inputs on the domestic markets, caused by a significant depreciation of the currency, which constrained farmers' productive capacities.

Harvesting of the 2019 wheat crop is ongoing or is expected to start soon in the subregion and production is anticipated at 28.2 million tonnes, similar to last year's record level. In **Argentina**, the major producer of the subregion, the harvest started in early November in the north. The total area sown is officially estimated to have reached a new peak of 6.6 million hectares, a 5 percent increase from last year's record high, driven by high domestic prices, as the significant depreciation of the country's currency boosted demand for exports. Production is forecast to exceed the average due to the larger sowings that are expected more than offset lower yields owing to dry weather conditions in the main producing departments of Buenos Aires and Córdoba. Similarly, in **Paraguay**, production is expected to be above average, resting on favourable yields. In **Brazil, Chile and Uruguay**, despite a year-on-year rebound in the area sown, plantings were still estimated to be below average, and consequently the wheat harvests in 2019 are foreseen to be slightly lower than the average levels.

Rice harvests have concluded in most countries and the aggregate 2019 paddy production is forecast at a below-average level of 22.9 million tonnes, mainly due to a significant contraction in plantings in **Brazil and Uruguay**. In these countries, the low level of sowings were a result of farmers' decision to plant more profitable crops, such as soybeans and maize, reflecting the higher costs associated with paddy production. Elsewhere in the subregion,

Wholesale white maize prices in selected countries in Central America

(USD/tonne)



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

Maize and wheat production estimated at a record high in 2019

The 2019 subregional maize output is estimated at a record-high of 169.5 million tonnes, 26 percent above the five-year average, driven by an increase in the area sown and good weather conditions that raised yields. In **Brazil and Argentina**, where the harvests were completed in August, the 2019 outputs are officially estimated at record highs of 100 million and 57 million tonnes, respectively. Similarly, in **Uruguay**, the 2019 outturn reached a record level of 816 000. By contrast, maize production in **Chile** declined by 20 percent compared to the five-year average to 973 000 tonnes and is the lowest outturn

where harvesting of the 2019 minor season crop is ongoing under generally favourable conditions, the area sown is estimated to have contracted in **Ecuador** and **Peru**, while larger plantings were estimated in **Colombia**.

Record maize exports from Argentina and Brazil boost trade forecasts in 2019/20

Aggregate cereal exports in the 2019/20 marketing years are forecast at a record high of 95.8 million tonnes, more than 40 percent above the average, with maize grain accounting for nearly 80 percent of this quantity. The buoyant export forecast mainly rests on the record domestic outputs and the weak local currencies in **Argentina** and **Brazil**, which strengthened the countries' competitiveness in the international markets. Subregional wheat exports are forecast at 14.3 million tonnes, 15 percent higher than the average, mostly reflecting larger availabilities of exportable supplies in Argentina.

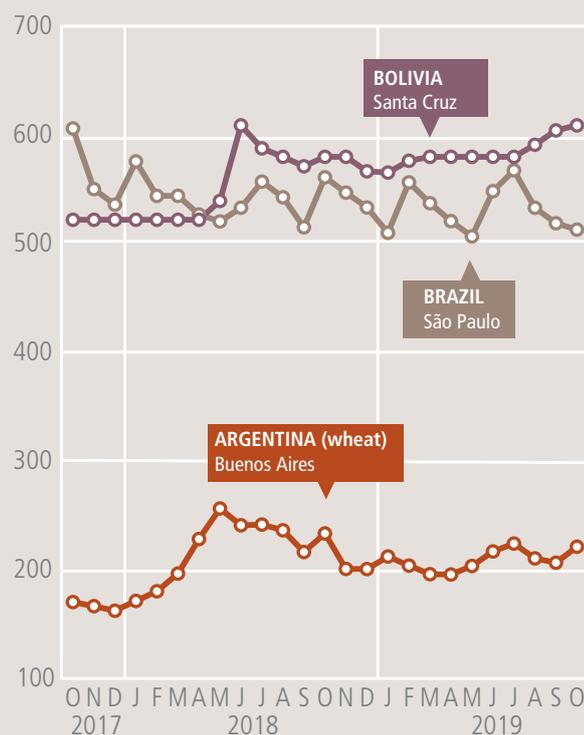
Prices of yellow maize strengthened seasonally

In **Argentina**, wholesale prices of yellow maize have increased consistently in nominal terms since early 2018, despite the record high output in 2019. The elevated price levels result from strong demand for exports, underpinned by the weakness of the national currency, and compounded by concerns over the impact of dryness on planting of the 2020 crops.

Prices of yellow maize rose in **Brazil** and **Bolivia (Plurinational State of)** following seasonal trends. In the maize net-importing countries, such as **Chile** and **Colombia**, prices also strengthened and were higher year on year as of October 2019 as the depreciation of the local currencies raised imports costs. By contrast, in **Ecuador** and **Peru**, good supplies from the ongoing harvests helped push prices below the year-earlier levels as of October 2019.

In October, favourable harvest expectations for the 2019 wheat crop pressured prices downwards in **Uruguay** and **Chile**. By contrast, in **Argentina**, wholesale prices of wheat grain continued to increase due to concerns over the impact of dry weather on yields and further supported by the robust demand for exports. In importing countries such as **Ecuador**, **Peru** and **Bolivia (Plurinational State of)**, prices of wheat flour were stable, reflecting adequate imports. In **Colombia**, the sustained depreciation of the country's currency contributed to maintain an upward pressure on prices, which remained at levels above those a year earlier.

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



Sources: Servicio Informativo de Mercados Agropecuarios, Bolivia; Instituto de Economía Agrícola, Brazil; Bolsa de Cereales, Argentina.

Prices of rice increased seasonally in **Brazil** and **Uruguay** and were higher year on year, underpinned by the reduced outputs in 2019. Similarly, in **Colombia** and **Peru**, prices were above their year-earlier values, following high production costs and a yearly contraction in output, respectively.

REGIONAL REVIEWS

NORTH AMERICA, EUROPE AND OCEANIA

Note: Situation as of November

— Territories/boundaries**



NORTH AMERICA

Canada, United States of America
Cereals (winter season): Dormant

EUROPE

Northern Europe
Cereals (winter season): Dormant
Centre-southern Europe
Cereals (winter season): Establishment
CIS in Europe:
Cereals (winter season): Establishment to dormant

OCEANIA

Australia
Cereals (winter season): Harvesting

North America, Europe and Oceania Production Overview

In North America, cereal production is forecast at 483 million tonnes in 2019, well below the five-year average and the outturn in 2018, primarily driven by a reduced maize production in the United States of America.

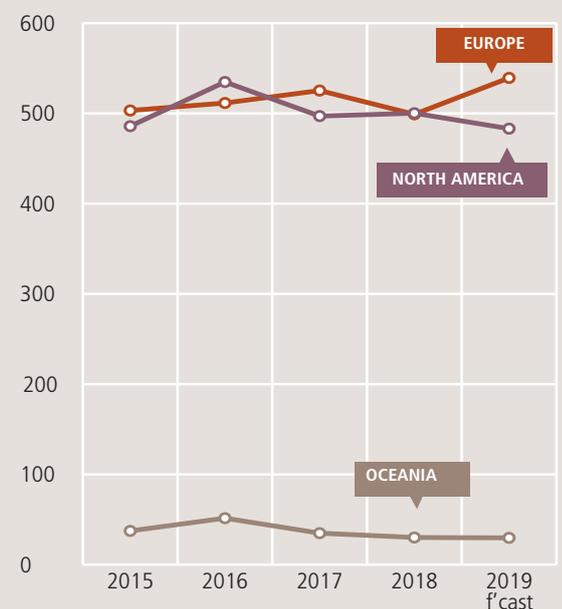
In Europe, larger wheat outputs in the European Union and CIS countries, underpinned by generally favourable weather and area expansions, led to an overall increase in cereal production to 539 million tonnes in 2019.

In Oceania, a second consecutive year of extreme rainfall deficits in Australia is foreseen to result in a well below-average wheat harvest, which would put the total cereal production at 28.6 million tonnes.

Source: GIEWS
(disputed territories and boundaries in conformity with UN maps)**

** See Terminology ([page 6](#))

Cereal production (million tonnes)



NORTH AMERICA



Wheat production edges higher in 2019, as planting of the 2020 crop is underway

For the 2019 wheat crop, the estimate for total production was trimmed recently, based on the latest field-survey data that revealed a larger unharvested area. Production is estimated at 52.3 million tonnes in 2019, slightly higher year-on-year due to an upturn in yields, but almost 2 million tonnes lower than the five-year average. In the **United States of America**, planting of the 2020 winter wheat crop, for harvest next year, was nearly complete by the end of November, a faster pace than the previous year but in line with the average timing. Early indications suggest that the area sown may contract on weaker price prospects, while early crop conditions were reported to be slightly inferior to normal levels.

Regarding maize, the 2019 harvest is almost complete and production is estimated at 347 million tonnes. At this level, the output is 5 percent below the average outturn of 2018, primarily driven by a contraction in the area sown, while a recent downgrading of yield estimates further curbed harvest expectations.

In **Canada**, the total 2019 wheat output is estimated at 32.5 million tonnes, a comparable level to the above-average outturn in 2018. The stable year-on-year production is attributed to an area-driven increase in spring wheat production that more than compensated for a decline in the minor winter wheat harvest.

of 156 million tonnes. Production of maize in 2019 is also estimated at an average level of 67 million tonnes, a comparable level to the previous year's outturn. In total, cereal production in the *European Union* is forecast to rebound to 321.2 million tonnes, exceeding the five-year average by almost 10 million tonnes.

EUROPE



EUROPEAN UNION

Mixed conditions for 2020 winter crops in the European Union, following an above-average cereal output in 2019

In the *European Union*, following early-seasonal rainfall deficits, improved precipitation in November helped to recuperate soil moisture levels, benefiting the establishment of the 2020 winter wheat crop. However, dry weather conditions persisted in far eastern and western parts of the European Union, resulting in suboptimal planting condition that may also impede early crop development.

The 2019 wheat crop, harvested earlier in the year, stood at an above-average level

CIS IN EUROPE

Area planted with 2020 winter cereals is estimated at a record high in the Russian Federation

Planting of the 2020 winter cereal crops is virtually complete and the total area sown at subregional level is estimated to be slightly above average.

In the **Russian Federation**, winter cereal plantings are officially estimated at a record high of 18.2 million hectares, spurred by favourable weather conditions and Government policies that seek to boost exports. As of late November, soil moisture levels were reported to be adequate in the main winter cereal growing areas of North Caucasian, Southern, Volga and Central districts and, consequently, conditions of winter crops were generally favourable. In **Ukraine**, below-average precipitation and warmer-than-average temperatures between September and October, hampered planting operations of the winter wheat crop in the key producing southeastern areas of the country. As a result, winter wheat plantings are estimated below the average level. The

Table 16. North America, Europe and Oceania cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	5-yr Avg.	2018 estim	2019 f'cast	Change: 2019/2018 (%)
North America	84.9	83.5	84.8	408.1	406.6	389.8	9.5	10.2	8.5	502.5	500.2	483.1	-3.4
Canada	30.4	32.2	32.5	25.5	26.3	28.7	0.0	0.0	0.0	55.9	58.5	61.2	4.6
United States of America	54.6	51.3	52.3	382.6	380.3	361.2	9.5	10.2	8.5	446.6	441.7	422.0	-4.5
Europe	254.6	242.5	268.6	254.7	252.5	266.6	4.0	3.9	4.0	513.4	499.0	539.3	8.1
Belarus	2.5	1.8	2.8	5.0	4.0	5.4	0.0	0.0	0.0	7.5	5.8	8.2	41.0
European Union	150.6	138.3	156.0	158.5	154.4	162.3	2.9	2.8	2.8	312.0	295.5	321.2	8.7
Russian Federation	70.6	72.1	75.5	41.2	36.6	41.1	1.1	1.0	1.2	112.9	109.8	117.7	7.2
Serbia	2.6	2.9	2.5	6.8	7.6	7.3	0.0	0.0	0.0	9.4	10.5	9.8	-6.8
Ukraine	25.5	24.6	28.8	38.3	44.6	45.6	0.1	0.1	0.1	63.9	69.3	74.5	7.5
Oceania	23.6	17.7	17.9	14.0	11.7	11.7	0.7	0.6	0.1	38.3	30.1	29.7	-1.4
Australia	23.2	17.3	17.5	13.3	11.1	11.1	0.6	0.6	0.1	37.2	29.0	28.6	-1.4

Note: Totals and percentage change computed from unrounded data. The five-year average refers to the 2014-2018 period.

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



Source: International Grains Council.

Record maize output obtained in 2019

Harvesting of the 2019 winter cereals was finalized in August, while the spring cereal harvest was concluded in November. The aggregate 2019 subregional cereal production is estimated at a record high of 204 million tonnes, about 9 percent above the five-year average. This mostly results from an all-time high maize output, estimated at 51 million tonnes and a large production of wheat, estimated at 108.4 million tonnes, 9 percent above the average. Similarly, barley production is estimated at an above-average level of 31 million tonnes. Maize production benefited from overall favourable weather conditions that boosted plantings and raised yields in all countries of the subregion.

In **Belarus**, recently released official information indicated a larger-than-previously estimated area planted with maize and accordingly the 2019 production was revised upwards to an above-average level of 1.2 million tonnes.

Above-average cereal exports forecast in 2019/20

Total subregional cereal exports in the 2019/20 marketing years are forecast at about 96 million tonnes, 17 percent above the average reflecting an expected increase in the shipments of wheat and maize, forecast at about 53 and 33 million tonnes, respectively. In **the Russian Federation**, wheat shipments (accounting for almost 70 percent of the subregion's total wheat exports) are expected to reach 33.5 million tonnes, 10 percent above the average volume due to large supplies from the above-average domestic output, overall competitive prices and government policies that seek to boost export growth. In **Ukraine**, wheat exports are forecast at

a well above-average level of 18.5 million tonnes and maize shipments are forecast at 29 million tonnes. Combined, exports of cereals in 2019/20 are forecast to be the second highest on record following the all-time high registered in 2018/19.

Wheat export prices increasing since October

In **the Russian Federation and Ukraine**, export prices of milling quality wheat increased notably in October and November, following declines between March and September 2019. The increase mainly reflects the stronger demand by importers and the prevailing trends in the international market. Prices, however, remained almost 9 percent below their levels of November 2018, reflecting the good outputs obtained in 2019. Domestic prices of wheat in **the Russian Federation and Ukraine** also rose slightly in October and November, after seven months of consecutive declines, but still remained below the corresponding period last year.

total area sown with the 2020 winter cereals is, nonetheless, expected to reach a near-average level of 7.2 million hectares, resting on larger winter barley plantings prompted by favourable weather conditions in the main producing southwestern provinces of Odessa and Nikolayev. Widespread rains from late October supported crop establishment and as of mid-November conditions of winter crops were reported to be favourable, but final yields will largely depend on weather conditions during the December-March period. In **Belarus and the Republic of Moldova**, the areas sown with winter cereals are estimated at near-average levels and, despite generally warm temperatures and slightly below-average rains since September, soil moisture conditions are reported to be overall favourable for crop emergence and establishment.

OCEANIA



Ongoing drought conditions diminish 2019 wheat production prospects in Australia

In **Australia**, harvesting of the 2019 wheat crop is expected to conclude early next year. A persisting agricultural drought has resulted in several downward revisions to the wheat production forecast and, at its current level, production is expected to reach 17.5 million tonnes, which would be 5.7 million tonnes below the average, and the second consecutive year of a drought-reduced output.

STATISTICAL APPENDIX

Table A1. Global cereal supply and demand indicators

	Average 2014/15 - 2018/19	2015/16	2016/17	2017/18	2018/19	2019/20
Ratio of world stocks to utilization (%)						
Wheat	34.9	33.0	35.8	38.0	35.6	36.1
Coarse grains	28.5	27.8	28.7	29.6	28.7	26.8
Rice	34.3	33.7	33.6	34.1	35.4	34.7
Total cereals	31.4	30.4	31.6	32.8	31.9	30.8
Ratio of major grain exporters' supplies to market requirements (%) ¹						
	122.5	124.7	123.6	122.8	116.9	118.2
Ratio of major exporters' stocks to their total disappearance (%) ²						
Wheat	19.0	18.0	19.8	21.0	17.5	17.7
Coarse grains	14.8	13.4	14.7	15.8	15.5	15.5
Rice	20.8	19.7	18.8	18.2	22.6	23.2
Total cereals	18.2	17.0	17.8	18.3	18.5	18.8
	Annual trend growth rate 2009-2018	2015	Change from previous year		2018	2019
			2016	2017		
Changes in world cereal production (%)						
	1.8	-0.9	2.9	1.4	-1.7	2.1
Changes in cereal production in the LIFDCs (%)						
	2.7	-3.4	4.0	3.1	2.3	0.4
Changes in cereal production in the LIFDCs excluding India (%)						
	2.6	-1.6	2.9	-0.1	3.4	0.7
		2016	2017	2018	2019*	Change 2019* over 2018*
Selected cereal price indices³						
Wheat		125.2	133.4	148.5	143.9	-2.7%
Maize		151.0	146.3	155.9	161.5	3.8%
Rice		193.5	206.4	224.4	223.8	-0.6%

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 2002-2004=100; for maize, the U.S. maize No.2 Yellow (delivered U.S. Gulf ports) with base 2002-2004=100; for rice, the FAO Rice Price Index, 2002-2004=100, is based on 16 rice export quotations.

* January-November average.

Table A2. World cereal stocks¹
(million tonnes)

	2015	2016	2017	2018	2019 estimate	2020 forecast
TOTAL CEREALS	770.0	797.2	839.7	881.6	864.7	863.1
Wheat	228.6	243.0	264.0	284.4	270.1	278.2
held by:						
- main exporters ²	70.7	70.4	79.9	84.3	69.1	71.0
- others	157.9	172.6	184.1	200.1	201.0	207.2
Coarse grains	369.2	384.7	405.2	422.9	411.6	403.3
held by:						
- main exporters ²	115.3	106.1	119.0	130.5	127.8	130.8
- others	253.9	278.6	286.2	292.4	283.8	272.5
Rice (milled basis)	172.2	169.6	170.5	174.3	183.0	181.6
held by:						
- main exporters ²	43.6	34.5	33.1	32.3	39.7	41.4
- others	128.6	135.1	137.4	142.0	143.3	140.2
Developed countries	172.8	170.4	196.0	198.6	184.9	190.5
Australia	7.9	6.9	9.1	7.9	6.8	5.8
Canada	10.6	10.0	12.5	11.1	9.3	10.4
European Union	43.5	40.8	35.2	45.3	44.7	52.8
Japan	7.1	7.3	6.6	6.7	6.5	6.5
Russian Federation	13.3	11.9	20.2	22.9	13.5	13.0
South Africa	3.2	3.7	1.8	5.1	3.6	2.3
Ukraine	13.1	9.7	8.0	7.6	6.8	9.0
United States of America	69.0	76.1	95.8	88.8	88.6	81.1
Developing countries	597.2	626.8	643.6	683.0	679.8	672.6
Asia	493.4	526.3	543.5	562.7	563.4	561.4
China (Mainland)	332.9	379.4	411.1	426.8	425.9	420.5
India	48.7	42.3	34.6	42.1	50.3	52.6
Indonesia	9.9	9.6	8.9	10.0	10.4	9.6
Iran (Islamic Republic of)	9.3	9.9	8.4	6.2	4.9	4.7
Korea, Republic of	4.0	4.4	4.0	3.8	3.1	3.2
Pakistan	7.2	6.0	6.0	5.4	3.8	2.4
Philippines	4.2	4.0	3.7	4.1	4.9	4.8
Syrian Arab Republic	2.0	1.5	2.0	1.9	1.4	2.0
Turkey	7.4	7.4	6.0	7.1	6.7	5.7
Africa	54.3	56.3	54.1	60.2	60.5	55.7
Algeria	5.0	5.7	5.6	5.3	6.4	5.9
Egypt	6.8	7.7	7.4	6.7	5.4	5.8
Ethiopia	3.1	4.2	4.8	5.6	6.3	6.5
Morocco	5.4	8.4	5.9	6.6	7.2	6.0
Nigeria	4.3	2.9	2.5	2.9	3.8	3.6
Tunisia	1.2	1.0	1.0	1.1	1.0	1.3
Central America	7.8	9.3	11.2	11.8	11.2	10.4
Mexico	3.6	4.6	6.5	7.6	7.5	6.9
South America	41.3	34.6	34.5	47.9	44.2	44.8
Argentina	11.6	7.7	7.4	12.4	12.1	12.0
Brazil	17.5	14.2	12.7	19.9	16.8	18.7

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.

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)						
2006/07	212	176	188	150	145	155
2007/08	361	311	318	200	192	206
2008/09	270	201	234	188	180	170
2009/10	209	185	224	160	168	165
2010/11	316	289	311	254	260	248
2011/12	300	256	264	281	269	264
2012/13	348	310	336	311	278	281
2013/14	318	265	335	217	219	218
2014/15	266	221	246	173	177	210
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
Monthly						
2017 - November	220	176	179	148	150	167
2017 - December	219	171	178	149	158	174
2018 - January	229	178	178	156	164	178
2018 - February	240	191	189	164	177	188
2018 - March	245	198	211	171	188	181
2018 - April	240	198	229	175	189	180
2018 - May	250	211	261	179	192	165
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

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 Countries¹ in 2018/19 or 2019*(thousand tonnes)*

	Marketing year	2017/18 or 2018			2018/19 or 2019
		Commercial purchases	Food aid	Total imports (commercial and aid)	Total import requirements (excl. re-exports)
AFRICA		28 274.0	1 044.7	29 318.7	27 536.0
East Africa		11 474.2	733.0	12 207.2	11 162.4
Burundi	Jan/Dec	170.1	16.0	186.1	180.1
Comoros	Jan/Dec	61.0	0.0	61.0	66.0
Djibouti	Jan/Dec	81.0	4.0	85.0	86.0
Eritrea	Jan/Dec	447.7	0.0	447.7	448.3
Ethiopia	Jan/Dec	1 892.9	54.0	1 946.9	1 830.0
Kenya	Oct/Sept	3 590.0	85.0	3 675.0	3 009.0
Rwanda	Jan/Dec	325.0	0.0	325.0	310.0
Somalia	Aug/Jul	760.0	190.0	950.0	835.0
South Sudan	Nov/Oct	575.0	90.0	665.0	680.0
Sudan	Nov/Oct	2 090.0	260.0	2 350.0	2 235.0
Uganda	Jan/Dec	537.5	23.0	560.5	518.0
United Republic of Tanzania	Jun/May	944.0	11.0	955.0	965.0
Southern Africa		2 912.5	14.8	2 927.3	2 570.7
Lesotho	Apr/Mar	188.5	0.6	189.1	176.9
Madagascar	Apr/Mar	881.1	8.0	889.1	555.0
Malawi	Apr/Mar	150.0	2.0	152.0	197.0
Mozambique	Apr/Mar	1 356.0	1.0	1 357.0	1 368.7
Zimbabwe	Apr/Mar	336.9	3.2	340.1	273.1
West Africa		11 483.0	133.9	11 616.9	11 141.9
Coastal Countries		6 535.6	44.5	6 580.1	6 377.5
Benin	Jan/Dec	606.0	6.0	612.0	517.0
Côte d'Ivoire	Jan/Dec	2 250.0	5.5	2 255.5	2 275.5
Ghana	Jan/Dec	1 447.6	5.0	1 452.6	1 450.0
Guinea	Jan/Dec	1 112.0	5.5	1 117.5	937.5
Liberia	Jan/Dec	475.0	12.0	487.0	507.0
Sierra Leone	Jan/Dec	346.0	10.0	356.0	400.0
Togo	Jan/Dec	299.0	0.5	299.5	290.5
Sahelian Countries		4 947.4	89.4	5 036.8	4 764.4
Burkina Faso	Nov/Oct	668.0	10.0	678.0	724.0
Chad	Nov/Oct	131.0	38.6	169.6	189.6
Gambia	Nov/Oct	262.4	1.5	263.9	198.5
Guinea-Bissau	Nov/Oct	138.0	6.3	144.3	134.3
Mali	Nov/Oct	451.2	0.0	451.2	461.2
Mauritania	Nov/Oct	531.8	13.0	544.8	558.8
Niger	Nov/Oct	520.0	18.0	538.0	618.0
Senegal	Nov/Oct	2 245.0	2.0	2 247.0	1 880.0
Central Africa		2 404.3	163.0	2 567.3	2 661.0
Cameroon	Jan/Dec	1 130.0	10.0	1 140.0	1 340.0
Congo	Jan/Dec	432.0	2.0	434.0	336.0
Central African Republic	Jan/Dec	67.0	23.0	90.0	96.0
Democratic Republic of the Congo	Jan/Dec	760.0	125.0	885.0	870.0
Sao Tome and Principe	Jan/Dec	15.3	3.0	18.3	19.0

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>

Table A4b. Estimated cereal import requirements of Low-Income Food-Deficit Countries¹ in 2018/19 or 2019
(thousand tonnes)

	Marketing year	2017/18 or 2018			2018/19 or 2019
		Commercial purchases	Food aid	Total imports (commercial and aid)	Total import requirements (excl. re-exports)
ASIA		43 963.9	853.6	44 817.5	40 978.8
Cis in Asia		4 856.8	0.1	4 856.9	4 919.3
Kyrgyzstan	Jul/Jun	617.4	0.1	617.5	612.0
Tajikistan	Jul/Jun	1 032.5	0.0	1 032.5	1 232.0
Uzbekistan	Jul/Jun	3 206.9	0.0	3 206.9	3 075.3
Far East		29 232.1	226.5	29 458.6	24 692.5
Bangladesh	Jul/Jun	10 771.9	101.5	10 873.4	7 666.0
Democratic People's Republic of Korea	Nov/Oct	518.0	123.0	641.0	1 585.0
India	Apr/Mar	1 893.8	0.0	1 893.8	342.4
Nepal	Jul/Jun	1 317.7	2.0	1 319.7	1 285.8
Viet Nam	Jul/Jun	14 730.7	0.0	14 730.7	13 813.3
Near East		9 875.0	627.0	10 502.0	11 367.0
Afghanistan	Jul/Jun	2 782.0	100.0	2 882.0	3 312.0
Syrian Arab Republic	Jul/Jun	3 020.0	290.0	3 310.0	3 705.0
Yemen	Jan/Dec	4 073.0	237.0	4 310.0	4 350.0
CENTRAL AMERICA AND THE CARIBBEAN		1 391.7	9.1	1 400.8	1 355.0
Haiti	Jul/Jun	766.0	9.1	775.1	795.0
Nicaragua	Jul/Jun	625.7	0.0	625.7	560.0
OCEANIA		63.8	0.0	63.8	64.0
Solomon Islands	Jan/Dec	63.8	0.0	63.8	64.0
TOTAL		73 693.4	1 907.4	75 600.8	69 933.8

Source: FAO

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

Table A5. Estimated cereal import requirements of Low-Income Food-Deficit Countries¹ in 2019/20**(thousand tonnes)*

Marketing year	2018/19			2019/20	
	Commercial purchases	Food aid	Total imports (commercial and aid)	Total import requirements (excl. re-exports)	
AFRICA	4 155.0	215.7	4 370.7	5 258.2	
Eastern Africa	1 599.0	201.0	1 800.0	1 850.0	
Somalia	Aug/Jul	645.0	190.0	835.0	865.0
United Republic of Tanzania	Jun/May	954.0	11.0	965.0	985.0
Southern Africa	2 556.0	14.7	2 570.7	3 408.2	
Lesotho	Apr/Mar	176.3	0.6	176.9	272.1
Madagascar	Apr/Mar	547.0	8.0	555.0	601.0
Malawi	Apr/Mar	195.0	2.0	197.0	177.0
Mozambique	Apr/Mar	1 367.7	1.0	1 368.7	1 400.0
Zimbabwe	Apr/Mar	270.0	3.1	273.1	958.1
ASIA	34 559.0	484.8	35 043.8	34 222.4	
CIS in Asia	4 919.2	0.1	4 919.3	4 809.6	
Kyrgyzstan	Jul/Jun	611.9	0.1	612.0	637.6
Tajikistan	Jul/Jun	1 232.0	0.0	1 232.0	1 235.0
Uzbekistan	Jul/Jun	3 075.3	0.0	3 075.3	2 937.0
Far East	23 012.8	94.7	23 107.5	24 310.8	
Bangladesh	Jul/Jun	7 573.3	92.7	7 666.0	7 574.0
India	Apr/Mar	342.4	0.0	342.4	326.0
Nepal	Jul/Jun	1 283.8	2.0	1 285.8	1 260.8
Viet Nam	Jul/Jun	13 813.3	0.0	13 813.3	15 150.0
Near East	6 627.0	390.0	7 017.0	5 102.0	
Afghanistan	Jul/Jun	3 212.0	100.0	3 312.0	2 332.0
Syrian Arab Republic	Jul/Jun	3 415.0	290.0	3 705.0	2 770.0
CENTRAL AMERICA AND THE CARIBBEAN	1 344.9	10.1	1 355.0	1 465.1	
Haiti	Jul/Jun	784.9	10.1	795.0	850.1
Nicaragua	Jul/Jun	560.0	0.0	560.0	615.0
TOTAL	40 058.9	710.6	40 769.5	40 945.7	

Source: FAO

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

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

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