

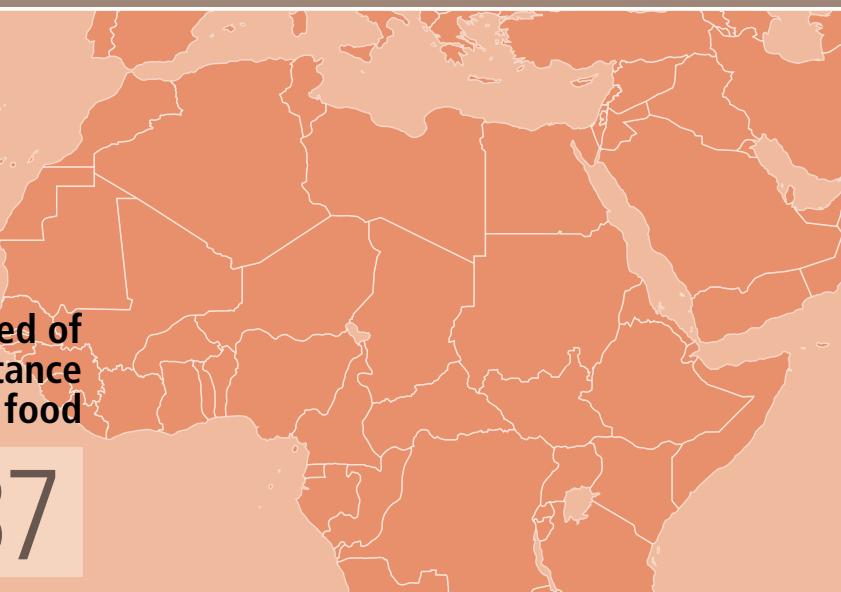


CROP PROSPECTS and FOOD SITUATION

Quarterly Global Report

**Countries in need of
external assistance
for food**

37



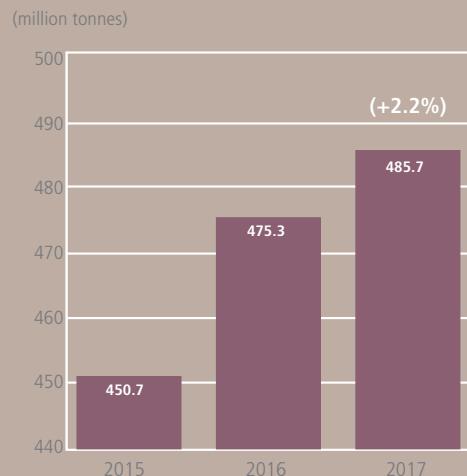
COUNTRIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD

FAO estimates that 37 countries are in need of external assistance for food in the world. Persisting conflicts have continued to acutely affect agricultural production and food security conditions. Weather shocks, including floods, hurricanes and droughts, have compounded the fragile conditions in some of the conflict-affected countries and also resulted in production shortfalls, adversely impacting food availability and access in other countries.

Asia	+0.4
Africa	+10.9
Central America and the Caribbean	-4.0
South America	+24.6
North America	-9.8
Europe	+1.1
Oceania	-31.9
World	+0.1

WORLD
**Cereal production
2017 over 2016 (%)**

+0.1



REGIONAL HIGHLIGHTS

AFRICA Northern Nigeria, Somalia and South Sudan continue to be affected by severe food insecurity, while drought in parts of East Africa has curbed agricultural outputs and sustained high food prices. Wetter conditions in Southern Africa resulted in production recoveries, leading to significantly reduced food insecure numbers, while severe localized floods in West Africa have affected larger numbers of people.

ASIA Despite severe localized floods and droughts in some countries, production in the Far East is forecast to increase in 2017. Conflicts continue to intensely impact agriculture and food security in Iraq, Syrian Arab Republic and Yemen. Elsewhere in the Near East, generally good weather boosted production.

LATIN AMERICA AND THE CARIBBEAN

In the Caribbean, the impact of hurricanes is expected to depress agricultural production for second season crops in the affected areas and adversely impact food security conditions. In South America, record cereal outputs are forecast in Argentina and Brazil in 2017.

LOW-INCOME FOOD-DEFICIT COUNTRIES

Cereal production forecast to increase in 2017 (%)

+2.2

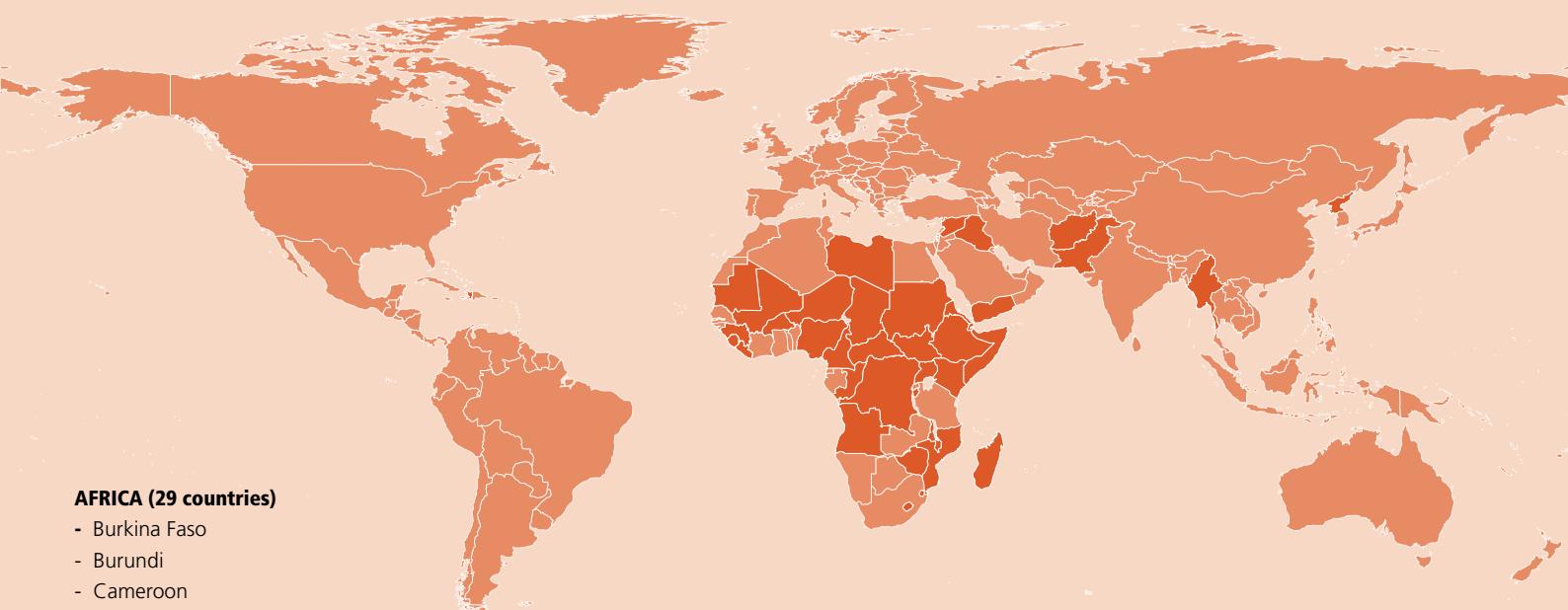
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COUNTRIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD



AFRICA (29 countries)

- Burkina Faso
- Burundi
- Cameroon
- Central African Republic
- Chad
- Congo
- Democratic Republic of Congo
- Djibouti
- Eritrea
- Ethiopia
- Guinea
- Kenya
- Lesotho
- Liberia
- Libya
- Madagascar
- Malawi
- Mali
- Mauritania
- Mozambique
- Niger
- Nigeria
- Sierra Leone
- Somalia
- South Sudan
- Sudan
- Swaziland
- Uganda
- Zimbabwe

ASIA (7 countries)

- Afghanistan
- Democratic People's Republic of Korea
- Iraq
- Myanmar
- Pakistan
- Syrian Arab Republic
- Yemen

LATIN AMERICA AND THE CARIBBEAN (1 country)

- Haiti

AFRICA (29 COUNTRIES)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/ SUPPLIES

Central African Republic

Conflict, displacements and food supply constraints

- The Internally Displaced Person (IDP) caseload continued to increase and as of end-July it was estimated at about 600 000. In addition, about 1.1 million people (30 percent of the total population) are estimated to be in need of urgent assistance for food (IPC Phase 3: "Crisis" and IPC Phase 4: "Emergency").

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. The areas most affected by food insecurity are northeastern Kirundo, Muyinga Karuzi and Cankuzo provinces, where these factors are compounded by consecutive crop production shortfalls.
- About 1.5 million people are estimated to be severely food insecure.

Chad

Population displacements and civil insecurity

- Approximately 402 000 refugees, 104 000 IDPs, as well as an estimated 97 000 Chadian returnees, continue to add pressure on local food supplies, negatively affecting food security.
- About 897 000 people are estimated to be in need of food assistance according to the latest "Cadre Harmonisé" analysis (June 2017).

Democratic Republic of the Congo

Conflict and displacements in eastern provinces, as well as influx of refugees putting strain on host communities

- As of July 2017, the IDP caseload was estimated at 3.8 million. About 7.7 million people are estimated to be in acute food insecurity and livelihood crisis (IPC Phase 3: "Crisis" and IPC Phase 4: "Emergency"). The country hosts 102 400 refugees from the Central African Republic, 81 000 from South Sudan and 40 000 from Burundi.

Djibouti

Impact of consecutive unfavourable rainy seasons on pastoral livelihoods

- About 197 000 people are severely food insecure, down from the previous estimate, mainly concentrated in pastoral areas north of Obock city and in southeastern border areas, which were affected by consecutive unfavourable rainy seasons.

Eritrea

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

Ethiopia

Impact of drought on local livelihood systems

- Drought-affected second season crops and pastures in south and southeastern areas.
- Overall, an estimated 8.5 million people are food insecure.

Niger

Population displacements and civil insecurity

- More than 1.3 million people are estimated to be in Phase 3: "Crisis" and above according to the last "Cadre Harmonisé" analysis.
- As of end-July, approximately 56 000 Malian refugees are estimated to be living in the country.
- Almost 121 000 people, mostly in the southeast Diffa Region, have been displaced due to fear of attacks.

Nigeria

Economic downturn, weakened currency, population displacements and severe civil insecurity in northern areas

- About 8.9 million people are estimated to be facing acute food insecurity and require urgent life-saving response and livelihood protection, including about 50 000 people in CH Phase 5: "Famine" (i.e. IPC "Catastrophe"), according to the latest "Cadre Harmonisé" analysis.
- Despite the above-average cereal harvest gathered in 2016, the weak currency, coupled with persisting civil conflict in northern states has continued to disrupt market activities and keep food prices at high levels.
- Approximately 1.9 million people have been internally displaced in the northeastern region of the country.

South Sudan

Conflict, civil insecurity and severe economic downturn

- Although famine conditions have been phased out following sustained humanitarian assistance, the number of severely food insecure people has reached record high of 6 million, due to persisting insecurity, trade disruptions and high food prices.

SEVERE LOCALIZED FOOD INSECURITY**Burkina Faso**

Refugees putting strain on host communities

- Over 33 500 Malian refugees are estimated to be living in the country.
- About 257 000 people are estimated to be in need of food assistance according to the last "Cadre Harmonisé" analysis, despite the bumper 2016 cereal harvest.

Cameroon

Influx of refugees putting strain on host communities and displacements

- The number of refugees from the Central African Republic was estimated, in June 2017, at 276 000. Insecurity along the borders with Nigeria also led to the internal displacement of 228 000 individuals.

Congo

Influx of refugees straining the already limited resources of host communities

- As of end-July 2017, about 31 000 refugees from the Central African Republic are sheltering in the country.

Guinea

Localized production shortfalls

- About 286 000 people are estimated to be in need of food assistance according to the last "Cadre Harmonisé" analysis.

Kenya

Crop production and livestock affected by consecutive unfavourable rainy seasons

- About 2.6 million people are severely food insecure, mainly located in eastern, southeastern and coastal areas, following the negative impact of poor 2016 "short-rains" and below-average 2017 "long-rains" on agricultural production and pastoral livelihoods.

Lesotho

Localized production shortfalls

- The number of food insecure is estimated to have fallen sharply by 68 percent to 224 664 people in 2017/18, mainly reflecting an improved national cereal output and lower food prices. However, conditions are expected to be stressed in late 2017 in southwestern areas, where dry spells adversely affected production, as households exhaust stocks and increase coping mechanisms.

Liberia

Localized production shortfalls and influx of refugees

- The country is hosting approximately 12 400 refugees as of end-July 2017, most of them from Côte d'Ivoire.
- About 15 000 people are estimated to be in need of food assistance according to the latest "Cadre Harmonisé" analysis.

Libya

Civil insecurity

- The number of people in need of food assistance is estimated at 0.4 million, with refugees, asylum seekers and internally-displaced among the most vulnerable.
- Food shortages are reported mostly in the south and east where basic food items are in short supply. Access to subsidized food among the affected population is limited.

Madagascar

Dry spells in main rice-producing regions and impact of cyclones

- Rice production is estimated to have decreased to a well below-average level in 2017 due to dryness and the impact of cyclones, negatively impacting food availability.
- Improved weather conditions in the previously drought-affected southern regions are estimated to have resulted in a small upturn in the agricultural output, easing food security conditions, which still remain stressed due to consecutive years of poor harvests.

Malawi

Localized impact of weather shocks

- The number of food insecure decreased steeply to 0.86 million people, from 6.7 million in the previous year, reflecting an overall improved agricultural output in 2017. However, increased food assistance will be required in late 2017 and early 2018 for those households affected by localized weather shocks.

Mali

Population displacements and civil insecurity in northern areas

- An estimated 55 000 people have been internally displaced in the country mostly residing in Timbuktu, the most affected region by civil insecurity.
- About 601 000 people, located mostly in Timbuktu, Mopti and Bamako regions, are estimated to be in Phase 3:

"Crisis" and above, according to the last "Cadre Harmonisé" analysis.

Mauritania

Refugee caseload continues to put additional pressure on local food supplies

- As of end-June 2017, about 52 000 Malian refugees remain in southeastern Mauritania in the Mbeera camp.
- Over 281 000 people are estimated to be in Phase 3: "Crisis" and above, according to the last "Cadre Harmonisé" analysis.

Mozambique

Localized impact of floods and dry spells

- An estimated 313 481 people are food insecure and require humanitarian assistance in 2017/18, down significantly from the year before reflecting the overall improved national agricultural output.
- Households facing stressed food security conditions are concentrated in the central provinces of Manica and Sofala, and the northern province of Nampula, mainly on account of weather shocks that adversely affected production.

Sierra Leone

Floods and localized production shortfalls

- About 92 000 people are estimated to be in need of food assistance, according to the latest "Cadre Harmonisé" analysis.
- Over 500 people died and thousands were displaced in mid-August following heavy rains and a massive landslide in and around the capital, Freetown.

Somalia

Conflict, civil insecurity and widespread drought conditions

- About 3.1 million people are estimated to be in need of emergency assistance, mainly IDPs and drought-affected agro-pastoral communities across the country.

Sudan

Conflict and civil insecurity

- An estimated 3.4 million people are in need of humanitarian assistance, mainly IDPs and host communities in conflict-affected areas.

Swaziland

Localized dry spells in southeastern parts

- Dry spells in southern Lubombo Plateau dampened agricultural production in these areas, stressing food security conditions.
- An estimated 159 080 people require food assistance, mostly concentrated in Lumombo Province. This figure is down 75 percent on an annual basis, reflecting a larger cereal harvest in 2017.

Uganda

Below-average crop production

- About 1.6 million people are estimated to be severely food insecure following two consecutive seasons of reduced agricultural outputs.
- About 1 million refugees from South Sudan are hosted in camps in the northwestern parts of the country and depend on humanitarian assistance.

Zimbabwe

Food access constraints

- An estimated 1.05 million rural people are expected to be food insecure during the peak of the lean season between January and March 2018, down 74 percent compared to the estimate for the same period in 2017 on account of significant improvements in the 2017 cereal production.
- The highest prevalence of food insecurity is concentrated in southern and western regions. Households in these areas are expected to exhaust their stocks by the end of the year and will consequently adopt an increasing number of coping mechanisms to meet their food needs.

ASIA (7 COUNTRIES)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/SUPPLIES

Syrian Arab Republic

Civil conflict

- About 6.9 people million are food insecure in terms of current consumption and 5.6 million would likely be worse-off without the food assistance provided. An

additional 3.1 million people are at risk of food insecurity.

- Although some international food assistance is being provided, Syrian refugees are also putting a strain on host communities in neighbouring countries.

WIDESPREAD LACK OF ACCESS

Democratic People's Republic of Korea

Low agricultural output and economic downturn

- Poor rains between April and June, coupled with low supplies of irrigation water, sharply reduced the 2017 early season crops and negatively impacted the 2017 main season crops, currently being harvested.
- With a reduced cereal production in 2017, most households are anticipated to continue to experience borderline or poor food consumption rates.

Yemen

Conflict, poverty and high food and fuel prices

- According to the latest IPC (March 2017), 17 million people are food insecure and require urgent humanitarian assistance, with an increase of 3 million from the last IPC analysis of June 2016.

SEVERE LOCALIZED FOOD INSECURITY

Afghanistan

Continuing conflict and population displacement

- Almost 1.6 million people are severely food insecure and 9.7 million moderately food insecure.
- Over 630 000 people were displaced by the conflict in 2016, mostly in the hard-to-access areas.
- Since 1 January 2017, almost 84 000 Afghans returned from Pakistan and 230 000 from Iran (Islamic Republic of), adding to 700 000 undocumented Afghans who returned to the country in 2016.

Iraq*Civil conflict*

- In the first half of 2017, some 922 000 people were internally displaced, mostly due to the operations in Mosul, in addition to the 3 million people already displaced by November 2016.
- About 2.4 million people are estimated to be food insecure, of which 1.5 million severely food insecure.

Myanmar

Impact of floods for the third consecutive year in 2017, and conflict in parts of Kachin, Shan and resurgence of violence in Rakhine

- Three years of flooding negatively impacted on the food security conditions of a large number of people.
- Since the resurgence of violence in August 2017 in the Rakhine State, an estimated 370 000 people have sought refuge in Bangladesh.
- According to OCHA, as of August, 525 000 people are estimated to be in need of food assistance, mostly in Kachin, Shan, Rakhine states and displaced people in southeastern Bangladesh.

Pakistan

Population displacement and localized cereal production shortfalls

- As of September, approximately 43 000 families remain displaced in northern Pakistan due to recurrent insecurity.
- In Tharparkar District and the surrounding areas of Sindh Province, the drought-affected cereal production and the loss of livestock for the third consecutive year have aggravated the food insecurity and caused acute malnutrition.

LATIN AMERICA AND THE CARIBBEAN (1 COUNTRY)**SEVERE LOCALIZED FOOD INSECURITY****Haiti**

Recurrent droughts and hurricane damage

- As a result of the reduced availability and access to food in the affected areas due to recurring droughts in 2014 and 2016, coupled with the effects of Hurricane Matthew in 2016, an estimated 1.5 million people are food insecure, of which 1.3 million will be assisted in 2017. The recent impact of Hurricane Irma is expected to further weigh negatively on food security conditions.

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 13, 22, 28).

2017

GLOBAL CEREAL OVERVIEW

Cereal Supply and Demand Overview¹

FAO cereal production forecast for 2017 raised further

The forecast for world cereal production in 2017 has been raised by 18.4 million tonnes since the previous forecast of July to 2 611 million tonnes, slightly above the 2016 record. The bulk of the revision follows improved production prospects for wheat and coarse grains. Global wheat production in 2017 is now pegged at 748.8 million tonnes, up 8.9 million tonnes (1.2 percent) from July's forecast. The upturn is mainly on account of improved production prospects in the Russian Federation, as beneficial rains have boosted yield expectations even further. This increase more than offsets downward

revisions made for the United States of America and Canada, where dry weather continued to negatively affect yield prospects. Confirming expectations of another expansion, world coarse grains output is forecast at 1 359 million tonnes, 9 million tonnes (0.7 percent) more than foreseen in July. The upward adjustment reflects higher forecasts for maize and barley outputs, particularly in Brazil and the Russian Federation. Global rice production in 2017 is now forecast at an all-time high of 503 million tonnes, up 0.5 percent from the revised estimate for 2016 and 0.5 million tonnes above July expectations. The revision is primarily the result of small upward adjustments to production forecasts for India, the Philippines and Thailand, more than compensating for downward revisions made for China and the Democratic People's Republic of Korea.

Table 1. World cereal production¹

(million tonnes)

	2015	2016 estimate	2017 forecast	Change: 2017 over 2016 (%)
Asia	1 119.8	1 135.1	1 140.0	0.4
Far East	1 014.4	1 031.1	1 035.5	0.4
Near East	70.8	67.4	69.2	2.6
CIS in Asia	34.6	36.6	35.3	-3.5
Africa	167.6	164.2	183.3	11.6
North Africa	38.3	29.6	36.6	23.8
West Africa	51.8	56.9	56.9	-0.1
Central Africa	4.5	4.1	4.2	1.9
East Africa	46.2	49.7	48.7	-2.0
Southern Africa	26.8	23.9	36.9	54.5
Central America and the Caribbean	39.2	42.9	41.2	-4.1
South America	186.6	173.7	217.6	25.3
North America	482.9	530.4	478.5	-9.8
Europe	499.6	507.7	513.6	1.2
European Union	314.1	299.5	301.3	0.6
CIS in Europe	172.8	195.4	199.6	2.1
Oceania	36.5	54.2	36.7	-32.2
World	2 532.2	2 608.3	2 610.9	0.1
Developing countries	1 457.0	1 459.9	1 518.6	4.0
Developed countries	1 075.2	1 148.4	1 092.3	-4.9
- wheat	733.7	760.3	748.8	-1.5
- coarse grains	1 307.6	1 347.0	1 358.7	0.9
- rice (milled)	490.9	501.0	503.4	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 7 September 2017.

Global cereal utilization in 2017/18 to expand faster than projected in July

World cereal utilization is currently forecast to reach 2 591 million tonnes, 23 million tonnes (0.9 percent) higher than in 2016/17. This level represents an increase of 7.5 million tonnes from the forecast made in July, reflecting upward adjustments to overall consumption of wheat and maize. Wheat utilization in 2017/18 is now expected to approach the 2016/17 record level, as large global supplies stimulate food consumption, compensating for a forecast decline in the use of wheat for animal feed. Total utilization of coarse grains in 2017/18 is projected to expand by 17.6 million tonnes (1.3 percent) year-on-year, mainly driven by a 15 million tonnes (2.6 percent) growth in the feed use of maize to an all-time high of 592 million tonnes. FAO has also raised its forecast of world rice consumption in 2017/18 to 506 million tonnes. This level would imply a 1.3 percent year-on-year increase, sustained by a 5-million-tonne expansion in food use of the commodity to 406 million tonnes.

World cereal inventories to hit a new record

As a result of this month's large upward adjustments to wheat and coarse grain production forecasts, world cereal stocks (end of season), are now seen hitting a new high of 719 million tonnes, up 13.8 million tonnes (2 percent) from their

already high opening levels and 15 million tonnes (2.1 percent) above the July forecast. This level would keep the stocks-to-use ratio of cereals above the 20-percent mark for the fourth consecutive season.

Global wheat stocks (ending in 2018) are forecast to hit an all-time high of 262 million tonnes. The new forecast stands 6 million tonnes above the July figure on expectations of buildup of inventories in the Russian Federation following a bumper 2017 harvest. The forecast of coarse grain inventories (ending in 2018) has also been raised by 8.7 million tonnes, mostly on higher-than-earlier anticipated build-ups of maize stocks in Brazil. At 233 million tonnes, the forecast for world maize inventories is up 7.6 million tonnes from July. Global rice inventories (ending in 2018) are forecast to exceed their opening levels by a small margin of 0.3 percent, reaching 171.2 million tonnes. Although improved crop prospects have led to upward adjustments for Brazil and India, these were mostly offset by downscaled forecasts for China, Egypt and the United States of America.

Cereal trade prospects for 2017/18 improved

FAO's forecast of world cereal trade in 2017/18 has been lifted by 8 million tonnes since July to a record 403 million tonnes, implying an 8.7 million tonne (2.2 percent) expansion from 2016/17. FAO's forecast of international trade in wheat in

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

	2015/16	2016/17 estimate	2017/18 forecast	Change: 2017/18 over 2016/17 (%)
Production¹	2 532.2	2 608.3	2 610.9	0.1
Developing countries	1 457.0	1 459.9	1 518.6	4.0
Developed countries	1 075.2	1 148.4	1 092.3	-4.9
Trade²	393.1	394.4	403.1	2.2
Developing countries	129.9	115.4	131.6	14.0
Developed countries	263.2	279.0	271.5	-2.7
Utilization	2 513.1	2 568.2	2 591.4	0.9
Developing countries	1 627.4	1 662.4	1 688.6	1.6
Developed countries	885.7	905.8	902.7	-0.3
Per caput cereal food use (kg per year)	148.2	148.5	148.7	0.1
Stocks³	664.6	705.4	719.1	1.9
Developing countries	496.2	501.7	522.2	4.1
Developed countries	168.4	203.7	196.9	-3.3
World stock-to-use ratio (%)	25.9	27.2	26.9	-1.0

Note: Totals and percentage change computed from unrounded data.

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

2017/18 (July/June) has been raised since July by almost 3 million tonnes on stronger import demand, particularly by Brazil and India. At around 175 million tonnes, global wheat trade would virtually be unchanged from the previous season's record level. Global trade in coarse grains in 2017/18 (July/June) is heading towards a 5.4 percent annual expansion, with trade in maize likely reaching an

all-time high of 144 million tonnes. This latest forecast of maize trade stands 4 million tonnes above July's projection, reflecting higher expected imports by China, the EU, the Islamic Republic of Iran and Mexico. World trade in rice in 2018 is anticipated to reach 44.8 million tonnes, marginally above the current forecast for 2017, supported by firm demand in the Near East and West Africa.

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)

	2015/16	2016/17 estimate	2017/18 forecast	Change: 2017/18 over 2016/17 (%)
Cereal production¹	450.7	475.3	485.7	2.2
<i>excluding India</i>	221.1	229.0	232.5	1.5
Utilization	493.8	520.4	524.1	0.7
Food use	401.9	410.7	418.8	2.0
<i>excluding India</i>	208.6	214.6	219.9	2.4
Per caput cereal food use (kg per year)	146.0	146.6	146.9	0.2
<i>excluding India</i>	144.7	145.5	145.7	0.1
Feed	38.5	39.8	39.4	-0.9
<i>excluding India</i>	24.0	24.4	23.7	-2.9
End of season stocks²	84.3	79.3	81.4	2.5
<i>excluding India</i>	44.0	43.8	44.6	1.7

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)

	2015	2016 estimate	2017 forecast	Change: 2017 over 2016 (%)
Africa (37 countries)	111.6	119.0	121.5	2.1
East Africa	46.2	49.7	48.7	-2.0
Southern Africa	9.1	8.3	11.8	41.8
West Africa	51.8	56.9	56.9	-0.1
Central Africa	4.4	4.0	4.1	1.9
Asia (11 countries)	338.3	355.1	363.0	2.2
CIS in Asia	10.9	10.9	10.8	-0.6
Far East	317.5	335.6	343.6	2.4
- India	229.6	246.3	253.2	2.8
Near East	9.9	8.6	8.6	0.8
Central America and the Caribbean (2 countries)	0.8	1.2	1.2	-1.5
Oceania (2 countries)	0.0	0.0	0.0	0.0
LIFDC (52 countries)	450.7	475.3	485.7	2.2

Note: Totals and percentage change computed from unrounded data.

¹ Includes rice in milled terms.

Larger outputs in Asia and Southern Africa lift the 2017 aggregate cereal production of LIFDCs

Since the previous issue of this publication in June, FAO has raised the 2017 cereal production forecast for Low-Income Food-Deficit Countries (LIFDCs) by nearly 6 million tonnes to 485.7 million tonnes, reflecting upward revisions in India, as well as in Southern and West Africa. At this level, aggregate production is 10 million tonnes (2 percent) higher year-on-year, with most of this year's growth pertaining to increases in India and Southern Africa.

In Asia, **India** is expected to register a near-3 percent increase in cereal production in 2017, forecast at 253.2 million tonnes. Although floods and insufficient rains affected parts of the country, an increase in wheat production, resting on larger plantings, boosted the overall cereal harvest this year. Overall beneficial weather in **Bangladesh**, **Nepal** and **Pakistan** supported small production upturns and is anticipated to help maintain above-average outputs in 2017, while insufficient rains at the start of the season in **the Democratic People's Republic of Korea** are expected to curb this year's output. In the Near East, the agriculture sectors in **the Syrian Arab Republic** and **Yemen** continue to suffer significantly due to the ongoing conflicts, sustaining well below-average cereal outputs in 2017. However, improved weather conditions in **the Syrian Arab Republic** helped foster a slight year-on-year increase. In the CIS countries of Asia, production is foreseen to retreat slightly from the high levels of 2016.

In sub-Saharan Africa, wetter conditions in 2017 in Southern African countries resulted in production recoveries to above-average levels, after the previous year's drought-reduced outputs. However, in

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 new (2016) list of the LIFDCs stands at 52 countries, two less than in 2015 list but with some changes. For full details see: www.fao.org/countryprofiles/lifdc

Madagascar, prolonged dryness and cyclone damage is forecast to result in a steep cut to the 2017 paddy output, forecast at a below-average level. In East Africa, with the bulk of the main season cereal crops being harvested or reaching full maturity, aggregate production in 2017 is forecast to decline moderately. The expected decrease reflects the impact of erratic rains early in the season and pest infestations, while civil insecurity in **Somalia** and more notably in **South Sudan** continues to restrain agricultural productive capacities. The biggest year-on-year production decreases in the subregion are forecast in **the Sudan** and **United Republic of Tanzania**, which however are still expected to gather above-average harvests, as well as **Kenya**, where the 2017 harvest is anticipated at a below-average level. In Central Africa, a minor production increase is expected in **Cameroon**, but the 2017 harvest is still forecast at a below-average level as insecurity adversely affected agricultural activities in northern areas bordering Nigeria. Persisting insecurity also continues to weigh negatively on the production capacities in the **Central African Republic**, containing production in 2017 at a below-average level.

In Central America and the Caribbean, cereal production in **Haiti** was anticipated to rise in 2017, however prospects are now uncertain due to the impact of Hurricane Irma, which struck the country at the planting time for the autumn season crops. No official data on losses are yet available but the excess humidity and rains may impact the 2017 maize output.

Production increases curb import requirements

The forecast for aggregate cereal imports by LIFDCs in the 2017/18 marketing year stands at 64.2 million tonnes, almost unchanged compared with the previous year.

In Asia, the steep upturn in **India's** output resulted in a sizeable cut to the import forecast, while in **Bangladesh** imports are expected to increase by nearly 2 million tonnes, mostly related to rice. In the Near East, the continuing conflict has pushed-up import requirements in **the Syrian Arab Republic**, while a small rise is forecast for CIS countries of Asia as they seek to bolster supplies following slightly reduced outputs.

Lower import needs are forecast in Southern African countries due to this year's production increases, notably in **Zimbabwe**, where imports are expected to fall by 1 million tonnes on a yearly basis. In East Africa, cereal imports are anticipated to rise in **Kenya** and **South Sudan** to compensate for smaller outputs in 2017, with Kenya also drawing on stocks to offset the lower harvest and help curb imports. Aggregate import needs in West Africa are forecast to increase, mostly on account of larger requirements in **Nigeria** where production is forecast to contract moderately in 2017, while unchanged import volumes are projected for Central African countries.

Table 5. Cereal imports of LIFDCs
(thousand tonnes)

	2015/16 or 2016 Actual imports	Import forecast	of which food aid	Import requirement ¹	of which food aid
Africa (37 countries)	32 678	34 000	982	33 648	935
East Africa	10 738	10 834	600	11 117	623
Southern Africa	3 218	4 130	96	2 631	26
West Africa	16 982	17 017	129	17 814	129
Central Africa	1 740	2 019	157	2 086	157
Asia (11 countries)	22 516	28 230	713	28 834	623
CIS in Asia	4 480	4 241	1	4 401	1
Far East	8 034	13 866	102	13 801	102
Near East	10 002	10 122	610	10 632	520
Central America and the Caribbean (2 countries)	1 287	1 273	10	1 189	10
Oceania (2 countries)	481	470	0	484	0
LIFDC (52 countries)	56 963	63 973	1 705	64 155	1 569

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

Note: Situation as of August/September
 Subregional borders



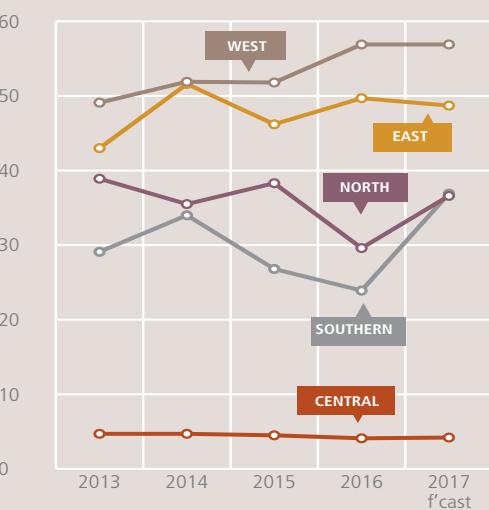
Africa Production Overview

Cereal production in Africa in 2017 is forecast to increase by 12 percent on an annual basis to 183.3 million tonnes, reflecting significant production recoveries in North and Southern Africa. The year-on-year growth in these subregions mainly results from beneficial weather conditions, while in East Africa erratic and insufficient rains have impaired prospects and aggregate production is forecast to fall although remaining above average.

The overall production outlook in West Africa is also favourable, despite flooding that lowered harvest prospects in localized areas.

In Central Africa, production prospects continue to be curbed by civil insecurity in some parts, although generally good weather is forecast to foster a slight increase in the aggregate output.

Cereal production
(million tonnes)



NORTH AFRICA



Slightly above-average cereal output expected in 2017

The 2017 wheat and barley harvest was completed by mid-August. Maize and rice crops in **Egypt** will be harvested from early October. Overall, improved weather conditions resulted in an increased 2017 cereal output compared to the previous year's weather-reduced level.

With the exception of **Egypt**, which produces the bulk of the subregional cereal output mostly on irrigated lands, and **Libya** (where production is negligible), crop production in the rest of the subregion varies markedly from year to year because of significant rainfall variations. In **Morocco**, the 2017 wheat production is estimated at 5.8 million tonnes, a significant rebound on last year's drought-affected output of only 2.7 million tonnes and 9 percent above the previous five-year average. In **Tunisia**, at 1.7 million tonnes, the 2017 wheat production was over 80 percent higher than the previous year's drought-affected output and over 40 percent above the previous five-year average. By contrast, cereal production in **Algeria** recovered only slightly compared to 2016's level due to prevailing hot and dry weather conditions, and the national output still remains about 7 percent below average. In **Egypt**,

where the cereal harvest will continue until October 2017 cereal production is expected to be on par with last year and the five-year average.

FAO's preliminary forecast puts the subregion's aggregate wheat output at 18.9 million tonnes, about 26 percent up on last year's weather-reduced production and at a similar level to the previous five-year average. The subregional barley production is estimated at about 5 million tonnes, more than double the output of the previous year and one-third above the average. At 7.3 million tonnes, the maize crop, produced primarily in **Egypt**, is virtually unchanged on a yearly basis and about 10 percent below the last five-year average.

All North African countries rely heavily on wheat imports from the international markets to cover their consumption needs, especially **Egypt**, the world's largest importer. With a slightly above-average 2017 harvest, the subregion's aggregate cereal import requirement (of which wheat accounts for about 60 percent) for the 2017/18 marketing year (July/June) is estimated at approximately 51 million tonnes, 14 percent above the previous five-year average.

High levels of food inflation persist in Egypt and Libya, but rates remain relatively stable elsewhere

Annual food price inflation rates during the 2017 summer (June to August, depending on data availability) ranged from -2 percent in **Morocco** (July 2017) to 40 percent in **Egypt** (June 2017). A moderate food price inflation rate of 4.7 percent (in June 2017)

was reported in **Algeria** and 5.2 percent in **Tunisia** (August 2017). The inflation rate in **Egypt**, although down from its peak of 44 percent in April 2017, remains high and is mostly driven by the impacts of currency liberalization in November 2016, higher domestic fuel prices pushing up distribution costs and supply bottlenecks. In **Libya**, food inflation increased from over 22 percent in January 2017 to 26 percent in March 2017, but remained below the record levels of 39 percent in July 2017. The high inflation levels are supported by insecurity-induced supply chain disruptions and shortages of foreign currencies.

WEST AFRICA



Overall 2017 production prospects remain favourable despite substantial flooding and Fall Armyworm infestations

In the Sahel, despite significant localized flooding, rains have been generally favourable since the beginning of the growing season in June, allowing for the satisfactory development of the 2017 crops. Similarly, in the coastal countries along the Gulf of Guinea, in spite of some localized floods and rainfall deficits, precipitation has been generally widespread since the onset of

Table 6. North Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2015	2016 estim.	2017 f'cast	2015	2016 estim.	2017 f'cast	2015	2016 estim.	2017 f'cast	2015	2016 estim.	2017 f'cast	Change: 2017/2016 (%)
North Africa	20.9	15.0	18.9	13.3	10.2	13.2	6.0	6.3	6.4	40.2	31.5	38.6	22.4
Algeria	2.8	2.2	2.5	1.3	1.1	1.4	0.0	0.0	0.0	4.1	3.3	3.9	17.7
Egypt	9.0	9.0	8.8	7.8	7.8	8.0	5.9	6.3	6.4	22.7	23.1	23.1	0.1
Morocco	8.0	2.7	5.8	3.7	0.8	3.0	0.1	0.0	0.1	11.8	3.6	8.9	149.7
Tunisia	0.9	0.9	1.7	0.4	0.4	0.8	0.0	0.0	0.0	1.3	1.3	2.5	90.0

Note: Totals and percentage change computed from unrounded data.

the major season in April in the south, where harvesting of the first maize crop is underway. In the north, millet and sorghum crops are developing satisfactorily and production prospects are positive, provided that favourable weather conditions continue through October.

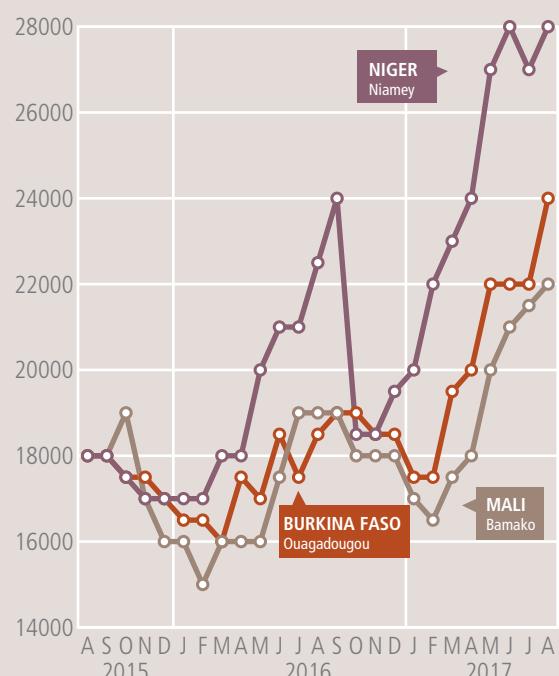
Localized flooding has been reported across the subregion in the past months, affecting a large number of people, causing considerable human casualties and damage to crops and livestock. In **Sierra Leone**, the most affected country, three days of heavy rains caused flash floods and a massive landslide in and around the capital, Freetown, in mid-August that killed over 500 people. In **Niger**, over 82 000 people are estimated to have been affected by the floods and over 11 000 animals killed, notably in Maradi, Dosso and Niamey regions. In **Mali**, Timbuktu Region in the northern part of the country was the hardest hit with over 26 000 livestock reported to have been lost. In **Ghana**, Greater Accra, Central Region, Western Region and Eastern Region were declared as flood emergencies in July following torrential rains that caused damage to infrastructure and people's livelihoods. Similarly, thousands of people have been affected by floods in **Guinea**, **Guinea Bissau**, **Liberia**, **Nigeria** and **Senegal**. In addition, Fall Armyworm (FAW) infestations were reported in several countries, which is likely to have caused localized crop losses. In West Africa, the FAW infestations were first detected in **Benin**, **Nigeria** and **Togo** in early 2016 and spread to **Cabo Verde**, **Ghana** and **Niger** afterwards. The infestation has a high potential of continuing to spread to other countries.

Despite the damage caused by the floods, and the impact of FAW infestation in the affected countries, overall crops prospects remain favourable and an above-average cereal output is forecast for most countries and at regional level in 2017.

Coarse grain prices strengthened seasonally in most countries

In the Sahel, prices of coarse grains strengthened significantly over the past few months following seasonal patterns and were generally above their year-earlier levels. In **Mali**, prices of millet and sorghum continue to rise, although some declines were reported in the north of the country with the free distribution of grains from the Commissary for Food Security. In **Burkina Faso**, prices of coarse grains have also been on the rise, reaching levels above those of a year earlier. In these countries, strong demand from neighbouring countries contributed to the upward pressure on prices. In **Niger**, coarse grain prices followed similar patterns but were relatively higher and at record or near-record levels mainly due to reduced imports from Nigeria following the restrictions imposed by the Government. By contrast, in **Chad**, prices of coarse grains declined sharply in most markets and in July were generally lower than their year-earlier levels as a result of adequate domestic supplies from the above-average 2016 harvest, drawdown in large institutional stocks and the early 2017 harvests in some areas. Similarly, in

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



Source: Afrique Verte.

Senegal, prices of sorghum and maize remained relatively stable in recent months and around their year-earlier levels mainly reflecting the significant volume of imports, while those of millet generally increased and were higher than last year's levels, due to the reduced output in 2016 and lower imports. In coastal countries, in **Ghana**, prices of maize strengthened in most markets in August due to the impact of widespread crop pest attacks. In **Togo**, maize prices increased seasonally in recent months in several markets but remained generally below their year-earlier levels, reflecting the above average crop in 2016 as well as favourable prospects for the

Table 7. West Africa cereal production (million tonnes)

	Coarse grains			Rice (paddy)			Total cereals ¹			
	2015	2016 estim.	2017 f'cast	2015	2016 estim.	2017 f'cast	2015	2016 estim.	2017 f'cast	Change: 2017/2016 (%)
West Africa	42.6	47.0	46.6	14.3	15.4	16.0	57.1	62.6	62.7	0.2
Burkina Faso	3.9	4.2	4.2	0.3	0.4	0.4	4.2	4.6	4.6	1.3
Chad	2.2	2.6	2.6	0.2	0.3	0.3	2.5	2.9	2.9	-1.1
Ghana	2.1	2.2	2.2	0.6	0.8	0.8	2.8	3.0	3.0	1.3
Mali	5.7	6.0	5.9	2.3	2.8	2.9	8.1	8.8	8.8	-0.4
Niger	5.2	5.7	5.7	0.1	0.1	0.1	5.4	5.9	5.8	-0.2
Nigeria	16.8	19.4	19.0	4.8	5.0	5.3	21.6	24.4	24.3	-0.4

Note: Totals and percentage change computed from unrounded data.

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

2017 harvest. In **Nigeria**, prices of cereals remained relatively stable or declined recently, reflecting favourable prospects for the new cropping season and a more stable macroeconomic situation. Prices, however, remained well above their year-earlier levels due to the lingering effects of a weak currency and civil insecurity.

Continuing food emergency in the Lake Chad Basin Region

In spite of two consecutive years of above-average cereal harvests and the overall favourable prospects for the 2017 output, the humanitarian situation remains critical in the Lake Chad Basin Region, including northern **Nigeria**, northern **Cameroon**, **Niger** and **Chad** mainly due to the continuing civil conflict in Nigeria which has resulted in large population displacements in the subregion. New waves of displacements have been recorded recently reflecting the volatility of the security situation. According to the United Nations Office for the Coordination of Humanitarian Affairs (OCHA), about 2.6 million people have been internally displaced in the Lake Chad Basin Region, including 1.8 million people in northern **Nigeria**. The conflict has also caused widespread disruption to agricultural and marketing activities, with the impact of the steep depreciation of the Nigerian naira further negatively impacting on food access. The results from the last Cadre Harmonisé (CH) analysis and WFP's Emergency Food Security Assessment indicate that about 6.9 million people in conflict-affected areas are in CH phases 3, 4 and 5 and require urgent food, nutrition and livelihoods assistance. This includes over 5 million people in Nigeria's Yobe, Adamawa and Borno states. In addition to the impact of the Boko Haram conflict, **Chad** has also been affected by the civil conflict in the Sudan, the Central African

Republic and Libya, which has led to an increase in the number of refugees and returnees in the country. Moreover, a combination of falling oil production volumes and a continued decline in international prices led to a reduction in the Chadian Government's social protection schemes, negatively affecting vulnerable households' access to food. In addition, a number of countries in the subregion were affected by localized flooding and dry spells that caused crop losses adversely affecting food availability.

As a result of the various shocks mentioned above, the aggregate subregional number of people in Phase 3: "Crisis" and above is estimated to be close to 14 million, including nearly 9 million in **Nigeria** according to the latest "Cadre Harmonisé" analysis. However, recent floods have restricted physical access to several localities across the subregion, including in the Lake Chad Basin, complicating relief assistance to the affected populations.

areas is well underway in Cameroon and the Central African Republic, while in northern uni-modal rainfall areas of the Central African Republic, harvesting of the millet and sorghum crops has just started. In **Cameroon**, crop growing conditions in most central and southern areas were generally favourable due to average to above-average rainfall. By contrast, in the uni-modal north, the production outlook for sorghum and millet crops, expected to be harvested from October, is uncertain as agricultural operations continue to be affected by civil unrest which spread from neighbouring Nigeria since late 2014. The widespread insecurity resulted in displacement of people, shortage of inputs and the depletion of households' productive assets. As a result, a reduced agricultural output for the third consecutive year is likely in 2017. In **the Central African Republic**, despite generally favourable weather conditions, conflict, renewed violence and population movements continue to have a negative impact on crop production, contributing to sustaining a below average harvest in 2017. In **the Democratic Republic of the Congo**, the main season 2017 maize crop was sown in July/August in northern Equateur and Oriental provinces and will be harvested from October. Despite favourable rainfall levels during the cropping season, cereal production is expected at a below average level. Agricultural activities continue to be affected by the protracted insecurity in central Kasai, restricting access to fields, causing large-scale displacement of people, disrupting basic social services and limiting the flow of supplies to markets. Moreover, in Haut-Katanga, Lualaba and Lomami provinces in the southeastern part of the country, maize crop production has been affected by

CENTRAL AFRICA



Despite favourable weather conditions, agricultural production continues to be affected by conflict and Fall Armyworms

Harvesting of the 2017 main maize crop in central and southern bi-modal rainfall

Table 8. Central Africa cereal production (million tonnes)

	Coarse grains			Rice (paddy)			Total cereals ¹			
	2015 estim.	2016 f'cast	2017 f'cast	2015 estim.	2016 f'cast	2017 f'cast	2015 estim.	2016 f'cast	2017 f'cast	Change: 2017/2016 (%)
Central Africa	4.1	3.7	3.8	0.5	0.5	0.5	4.7	4.3	4.4	1.9
Cameroon	2.7	2.4	2.4	0.2	0.2	0.2	2.9	2.6	2.6	0.3
Central African Republic	0.1	0.1	0.1	0.0	0.0	0.0	0.1	0.1	0.1	0.0
Democratic Republic of the Congo	1.3	1.2	1.2	0.3	0.3	0.3	1.6	1.5	1.6	4.9

Note: Totals and percentage change computed from unrounded data.

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

Fall Armyworm infestations. In **the Congo** and **Gabon**, the second season maize crop was harvested in June-July. Both countries received adequate and well-distributed rainfall during the cropping season and as a result preliminary estimates point to an above-average aggregate 2017 cereal output.

Inflation rates generally on the decline in 2017 except in the Democratic Republic of the Congo

In **the Central African Republic**, the average inflation rate has been on the decline in recent years and is expected to continue this downward trend in 2017. The average inflation rate is forecast to fall to 3.5 percent in 2017 compared to 4 percent in 2016. In **the Democratic Republic of the Congo**, the rates of inflation are forecast to increase slightly to 2.7 percent in 2017 for a second consecutive year due to the loosening fiscal policy that is expected to boost domestic demand. In **the Congo**, inflation rates are forecast to fall to 3.7 percent in 2017 following the increase in 2016 due to the general decline in global food prices, as the regional central bank pursues a less accommodative monetary policy. In **Gabon**, consumer prices in 2017 are forecast to remain unchanged from their 2016 levels. Prices of imported wheat, the most important food staple, increased slightly in the capital, Libreville, by about 4 percent in the first semester of 2017. In June, however, they were still similar to their levels of 12 months earlier. By contrast, prices of imported rice have remained mostly stable over the last few years, but increased by 17 percent between January and June 2017, and were about 21 percent above their year earlier levels. Similarly, in **Cameroon**, the inflation rate in 2017 is forecast to remain at 2.2 percent, similar to the level in 2016.

Forced displacements due to the escalation of the conflict have negatively impacted food security in the region and raised assistance needs significantly

As the conflict continues in the Central African Republic and in the Kasai Region in the Democratic Republic of the Congo, the number of IDPs and refugees has significantly increased. Immediate food assistance is needed to prevent a further worsening of the humanitarian

situation for the affected population as well as the hosting communities. In **the Democratic Republic of the Congo**, the massive movement of people fleeing the violence has caused the estimated number of people in need of urgent assistance for food (IPC Phase 3: "Crisis" and IPC Phase 4: "Emergency") to increase by 1.8 million in June 2017 compared to the previous estimate in June 2016, bringing the total number to 7.7 million. The conflict in the Kasai Region, which started in August 2016, as well as the inter-communal conflicts in the Tanganyika Region remain tense. During the past 12 months, violence has spread from the Dibaya territory of the Kasai Central Province to five provinces in the Kasai Region, forcing more than 1.4 million people to be displaced. In total, the IDP caseload is estimated at 3.8 million. Similarly, in **the Central African Republic**, food insecurity remains worrying as a result of the civil unrest. The latest Integrated Food Security Phase Classification (IPC) in the country, valid for the period February-May 2017, estimated 1.1 million people to be in need of urgent assistance (IPC Phase 3: "Crisis" and IPC Phase 4: "Emergency"). Since April 2016, more than 100 000 people have been newly displaced in northwest, southwest, southeast and central areas (Ouham Pende, Nana Mambéré, Lower Kotto, Mbomou, Haut Mbomou and Haute Kotto). According to OCHA, at the end of July 2017, the number of IDPs had increased to 600 000. The IDP's face difficulty in accessing agricultural fields and work due to ongoing violence and the presence of armed groups is significantly affecting their food security situation. In **Cameroon**, civil insecurity in the Extreme North Region, on account of the impact of the Boko Haram armed forces, remains volatile and unpredictable. Furthermore, the impact of the Boko Haram violence in the Lake Chad Basin and the instability and resurgence of violence in the Central African Republic has led to an increased flow of refugees in recent months. Almost all of these new arrivals have settled into host communities, increasing the need for humanitarian assistance. The number of food insecure people was estimated at 2.6 million in March 2017 with the majority of the vulnerable groups located in Makari, Fotokol and Kousseri in the Logone and Chari Department.

EAST AFRICA



Crop production in 2017 affected by erratic rainfall and pest infestations

Harvesting of the 2017 first season cereal crops has recently been completed in southern parts of the subregion. Crop outputs are estimated at below-average levels in several countries as the March-May rains were generally erratic and insufficient, resulting in reduced planted areas and yields. In **Somalia**, production of the main 2017 "gu" season coarse grain crops in central and southern cropping areas of Hiraan, Bakool, Gedo, Lower and Middle Shabelle was severely affected by poor rains, while in the "sorghum belt" in Bay Region, although cumulative rainfall levels were near-average the temporal distribution was erratic. Overall, the aggregate "gu" output is estimated to be about 40 percent below average. Similarly, erratic rains affected maize production in southeastern and coastal marginal agricultural areas of **Kenya**, with very low yields estimated in southeastern Tharaka Nithi, Meru North, Kitui, Makueni and Embu counties. In bi-modal rainfall areas of **Uganda**, the output of the 2017 first season harvest is estimated at below-average levels as seasonal rainfall was poor and erratic in several southwestern and northern districts. In **the United Republic of Tanzania**, production of main "msimu" crops in uni-modal areas was above average in most key-growing areas of southern highlands, including the main producing regions of Mbeya and Iringa, while a reduced output was gathered in central Tabora, Singida and Dodoma regions due to below average rains. Similarly, the output of the minor "masika" crops in northeastern bi-modal areas was compromised by poor rains in northern Arusha, Mwanza and Shinyanga regions. In southern bi-modal rainfall areas of **South Sudan**, harvesting of first season

crops has just been completed. Seasonal rains were above average in the "green belt", including the former Central and Western Equatoria states, while in the former Eastern Equatoria State they started in late April with about a one-month delay. Crop production is expected to be lower than the already poor 2016 output as the conflict, which escalated in July 2016, caused further massive displacements outside the former Central and Eastern Equatoria states. In both **Rwanda** and **Burundi**, after a delayed onset of seasonal rains, favourable weather conditions in April and May benefited crops and the "2017B season" output is estimated at average to above-average levels.

In central and northern parts of the subregion, the main season cereal crops are at vegetative or maturing stages and production prospects are mixed.

In **Ethiopia**, crops are progressing well as seasonal "kiremt" rains have been abundant and well-distributed over most cropping areas. In **the Sudan**, cumulative seasonal rainfall has been generally above average so far. However, in North Darfur, northern Gadaref and southern Kassala states, an erratic temporal distribution, with a prolonged dry spell in July, had a negative impact on vegetation conditions and resulted in crop-wilting. Widespread heavy rains in August reduced moisture deficits in the areas affected by dry spells, but triggered floods that may result in crop losses. In northern and central uni-modal rainfall areas of **South Sudan**, weather conditions have been generally favourable. However, agricultural activities continue to be disrupted by protracted and widespread insecurity, which is constraining access to fields and continues

to cause large-scale displacement of people and damage to households' productive assets. In key-growing areas of Rift Valley and Western provinces of **Kenya**, the "long-rains" were characterized by a late onset and a prolonged dry spell in June which caused moisture stress and crop wilting. Improved rainfall in July and August partly offset the moisture deficits, but some crop damage was irreversible and the maize output is forecast at about 18 percent below average. In **Eritrea**, seasonal rains have been generally above average, but had an erratic temporal distribution, with a negative impact on crop establishment and development in some eastern and northern areas. In agro-pastoral areas of the Karamoja Region of **Uganda**, the cereal harvest, currently underway, was delayed by a month and crop production is estimated at below-average levels on account of unfavourable rains.

Fall Armyworm infestations in parts of western and southeastern **Kenya**, southern and western **Ethiopia**, **South Sudan**, **Uganda**, **Rwanda**, **Burundi** and **the United Republic of Tanzania** are likely to further constrain yields in the affected areas.

Prolonged drought conditions have severely affected pasture, browse and water availability in most pastoral and agro-pastoral areas of the subregion. A harsh dry season in early 2017, characterized by higher-than-normal temperatures, and the late and erratic start of the 2017 "gu/genna/long-rains" compounded the effects of the failed "short-rains" season in late 2016, causing a further deterioration of rangeland conditions to extremely poor levels.

Although late season rains in the last dekad of April and in the first dekad of May had some positive effects on forage and water resources, improvements were short-lived as grazing resources entered the ongoing dry season with already very poor conditions. The most severe forage and water deficits are recorded in southeastern **Ethiopia**, in central and southern **Somalia** and in northern and eastern **Kenya**, resulting in extremely poor livestock body conditions, high animal mortality rates and a decline of milk production to record low levels.

According to the latest Greater Horn of Africa Climate Outlook Forum (GHACOF) weather forecast, the October-December rains are likely to be above average over cropping areas of **the United Republic of Tanzania**, southwestern **Kenya**, **Uganda**, southwestern **South Sudan** and southeastern **Somalia**, thus benefiting the second season harvests in 2017. By contrast, seasonal rainfall is likely to be below average over pastoral areas of **Somalia**, southern **Ethiopia**, northern and eastern **Kenya** and in the Karamoja Region of **Uganda**, potentially resulting in a further deterioration of the already critical rangeland conditions.

Prices of coarse grains declining but still at high levels

After reaching record levels in mid-2017, prices of coarse grains decreased in several markets of the subregion in recent months as newly-harvested crops increased market supplies. However, despite the recent declines, prices remain generally well above their year-earlier levels due to the overall reduced availabilities from the drought-affected outputs of the 2016 second season and the 2017 first

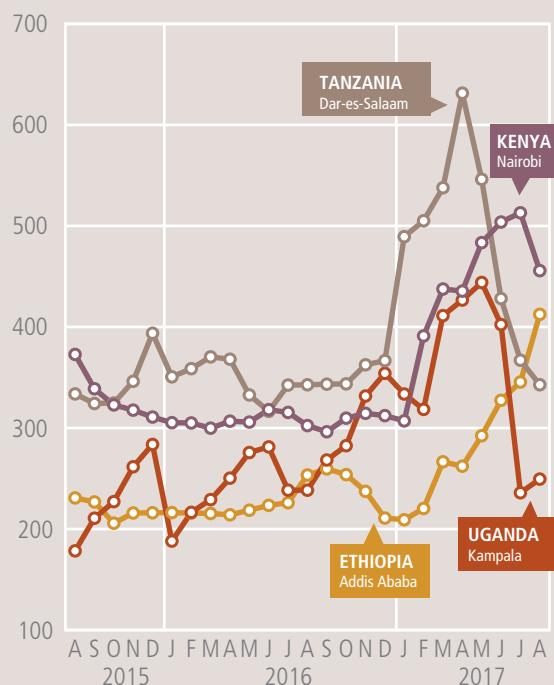
Table 9. East Africa cereal production
(million tonnes)

	Wheat		Coarse grains		Total cereals ¹				Change: 2017/2016 (%)	
	2015	2016 estim.	2017 f'cast	2015	2016 estim.	2017 f'cast	2015	2016 estim.	2017 f'cast	
East Africa	5.3	5.3	5.4	38.4	41.7	40.8	47.5	51.1	50.0	-2.2
Ethiopia	4.2	4.3	4.3	18.8	19.0	18.9	23.1	23.4	23.3	-0.4
Kenya	0.4	0.4	0.5	4.1	3.6	3.3	4.6	4.0	3.8	-5.7
Sudan	0.5	0.5	0.5	2.9	7.4	7.0	3.4	7.9	7.5	-6.0
Uganda	0.0	0.0	0.0	3.2	2.9	2.9	3.4	3.2	3.2	0.6
United Republic of Tanzania	0.1	0.1	0.1	7.2	6.6	6.7	10.3	10.2	9.9	-3.0

Note: Totals and percentage change computed from unrounded data.

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

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



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

season. In **Uganda** and the **United Republic of Tanzania**, prices of maize decreased between May and August by 35-50 percent from their record highs as the recently-harvested crops increased supplies. However, prices remained up to 20 percent higher than 12 months earlier. Similarly, in **Kenya**, maize prices declined by 20-40 percent between May and August, following increased imports from neighbouring Uganda and the harvest in southeastern and coastal areas. However, prices of maize remained up to 60 percent higher than one year earlier. In **South Sudan**, prices of maize and sorghum declined by about 13 percent between June and August, following the first season harvest in southern bi-modal rainfall areas and the establishment, by the Government, of a trading company selling basic food commodities at subsidized prices. Prices of maize and sorghum in August, however, were about two times the high levels in August last year and about 12 times higher than in the corresponding period two years earlier, driven by widespread insecurity, a tight supply situation, hyperinflation and a significant depreciation of the local currency. In **Somalia**, prices of sorghum and maize declined between June and August by 15-25 percent in markets of the "sorghum belt" in Bay and Bakool regions as the 2017 "gu" harvest increased

supplies. By contrast, prices unseasonally increased in Marka, the main maize-producing area of the Lower Shabelle Region, where poor rains resulted in significant cereal production shortfalls. Overall, prices of coarse grains were up to twice their levels of August 2016, underpinned by the low supplies from the drought-affected 2016 cereal output and by the reduced main 2017 "gu" season harvest. In **Ethiopia**, prices of maize surged in all monitored markets, almost doubling between January and August, as seasonal increases were exacerbated by the poor performance of the "belg" harvest and by concerns over the impact of the Fall Armyworm infestation on the main "meher" crop. In August, prices were up to 70 percent higher than a year earlier and at record levels in all monitored markets. In **the Sudan**, prices

of sorghum seasonally increased between May and August on average by 30 percent, but remained around their year-earlier levels due to adequate availabilities from the above-average 2016 harvest.

Dire food in security situation persists in southeastern Ethiopia, Somalia and South Sudan

The lean season is peaking in **Ethiopia**, **Eritrea**, **the Sudan**, western **Kenya**, northern uni-modal areas of **South Sudan** and in the Karamoja Region in **Uganda**. Food security conditions are generally improving in **Somalia**, southern **Kenya**, **Uganda**, **Rwanda**, **Burundi** and the **United Republic of Tanzania**, where recently-harvested crops have become available for consumption. However, these improvements are limited and are likely to be short-lived as the below-average harvests gathered in most of these countries did not allow household stocks to be adequately replenished and an earlier-than-usual onset of the lean season is anticipated. Driven by ongoing conflicts and the cumulative impact of the failed October-December 2016 rains and the poor March-May 2017 rainy season, the aggregate number of people in need of humanitarian assistance in the subregion is estimated at a record high of 28 million. The current caseload is more than 4 million

people higher than the already elevated estimate of the same period in 2016 which was driven by the lingering effects of the 2015 El Niño-induced drought. The food security situation in **Ethiopia** has sharply deteriorated in recent months, with the estimated number of food insecure people increasing from 5.6 million in December 2016 to 8.5 million in early August 2017, due to prolonged drought conditions severely affecting pastoral and agro-pastoral livelihoods in southeastern areas. The area of major concern is the Somali Region, where 1.7 million individuals (31 percent of the regional population) require emergency livelihood and food assistance, reflecting the critically-reduced availability of food, pasture and water and massive livestock losses, particularly in southern districts. In these areas, vulnerable households heavily rely on humanitarian assistance and continued food aid distributions are essential to avert the extreme levels of food insecurity. In **Somalia**, the risk of famine continues in several areas and it has been prevented so far essentially due to the delivery of large-scale humanitarian assistance. According to the latest multi-agency assessment, about 3.1 million people (one-quarter of the total population) are currently estimated to be severely food insecure (IPC Phases 3 and 4). The food insecure caseload declined by just 1 million from the estimate in May, conducted during the lean season, as the poor "gu" rains resulted in reduced crop production and is over three times the caseload estimated one year earlier. The areas of major concern are central Bay, Bakool, Hiran and Galgadud regions and northern Sanag and Sool regions, where 40-50 percent of the population is severely food insecure. In **South Sudan**, famine was declared in February 2017 and subsequently it has been phased out in June as the number of people facing IPC Level 5: "Catastrophe" food security conditions declined from over 100 000 to about 45 000, due to sustained humanitarian assistance operations. However, the food insecure caseload (IPC Phases 3, 4 and 5) increased by 1 million from February to a record high of 6 million people in June, as food access continues to be severely constrained by widespread insecurity, large scale displacements, high food prices, market disruptions and limited income-earning opportunities. The areas of major concern are Greater Jonglei and Unity states, where over 60 percent of the population faces "Crisis", "Emergency"

and "Catastrophe" levels of food insecurity. In particular, people facing catastrophic conditions are located in Ayod County in Greater Jonglei State and in Leer, Koch and Mayendit counties in Unity State.

SOUTHERN AFRICA



Cereal production rebounds strongly in 2017

With the bulk of the 2017 cereal crop harvested by July, the subregional output is forecast at 38.3 million tonnes, well above the previous five-year average and 13 million tonnes (51 percent) higher than the drought-reduced 2016 output. The main driver behind the production upturn is favourable weather conditions, reflecting generally well distributed rains. Although weather shocks were limited, **Madagascar** experienced a prolonged dry spell and a cyclone in early 2017, which combined to cause a sharp cut to the national cereal output. The impact of the Fall Armyworm (FAW) outbreak that affected almost all countries of the subregion, was limited by heavy rains and control operations, which helped curb its effect on the 2017 cereal outputs. Continued pest-management interventions

are required to suppress its impact in the following seasons.

The subregional 2017 maize output, which accounts for the bulk of Southern Africa's cereal production, is estimated at 30.6 million tonnes, about one-third above the five-year average and two-thirds up on 2016's harvest. In absolute terms, **South Africa's** maize production, which is estimated at a record high of 17.1 million tonnes, represents the biggest year-on-year gain. Significant increases were also estimated in **Malawi** and **Zimbabwe**, where the maize harvest increased by more than 1 million tonnes each, while robust gains in relative terms were estimated in **Botswana, Lesotho and Swaziland**. In addition to the beneficial weather, continued support by governments and humanitarian agencies in the form of subsidized input programmes also helped sustain agricultural productive capacities, assisting farmers to respond positively to the higher grain prices in 2016 and expand plantings, which, in addition to higher yields, supported the production increases this year.

In contrast to the general trend of the subregion, rice production in **Madagascar**, the country's main food staple, is forecast to decline in 2017. The decrease is mainly reflective of a delayed start of seasonal rains, an extended dry period during a critical crop development phase in early 2017 and the impact of Cyclone Ewano in February. These weather shocks mostly affected the main-producing regions in the north, centre and east of the country, while more beneficial weather conditions in the south supported a small production increase. The recently-fielded Crop

and Food Security Assessment Mission, conducted jointly by FAO and WFP, will provide more detailed results on the agricultural and food security situation, with the report expected to be released in October. Rice production in the rest of the subregion, mainly concentrated in **Malawi, Mozambique** and **Zambia**, is estimated to increase. However, the subregional output is estimated to be down on a yearly basis as the decline in Madagascar more than outweighed production gains elsewhere.

Harvesting of the 2017 winter wheat crop, which is mainly grown in **South Africa** and **Zambia**, will commence in October. Prospects in **South Africa**, which produces about 85 percent of the subregional wheat output, are mixed as drought conditions in the main producing southwest province of Western Cape, where the crop is mostly grown under rainfed conditions, have lowered production expectations. As a result, early forecasts in South Africa point to a 16 percent drop in wheat production to about 1.6 million tonnes, while in **Zambia** the wheat output is anticipated to be just below average.

Supply situation improved significantly, increasing export availabilities in 2017/18

The bumper cereal output this year has reversed the unfavourable supply situation of 2016/17. This is expected to facilitate stock replenishments, while import requirements are forecast to fall. In the 2016/17 marketing year (generally May/April), maize imports rose drastically to a well above-average level estimated at 4.8 million tonnes, as countries compensated for sharp production decreases. In the current 2017/18 marketing

Table 10. Southern Africa cereal production (million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2015	2016 estim.	2017 f'cast	2015	2016 estim.	2017 f'cast	2015	2016 estim.	2017 f'cast	2015	2016 estim.	2017 f'cast	Change: 2017/2016 (%)
Southern Africa	1.7	2.2	1.9	22.2	18.8	32.2	4.3	4.3	4.1	28.2	25.3	38.3	51.2
- excl. South Africa	0.3	0.3	0.3	11.1	10.1	14.5	4.3	4.3	4.1	15.6	14.7	19.0	29.2
Madagascar	0.0	0.0	0.0	0.3	0.3	0.3	3.7	3.8	3.5	4.1	4.1	3.8	-7.5
Malawi	0.0	0.0	0.0	2.9	2.4	3.6	0.1	0.1	0.1	3.0	2.5	3.7	46.8
Mozambique	0.0	0.0	0.0	2.1	2.1	2.4	0.4	0.3	0.4	2.5	2.4	2.9	18.2
South Africa	1.4	1.9	1.6	11.1	8.7	17.7	0.0	0.0	0.0	12.6	10.6	19.3	81.6
Zambia	0.2	0.3	0.2	2.7	2.9	3.7	0.0	0.0	0.0	2.9	3.2	4.0	23.6
Zimbabwe	0.0	0.0	0.1	0.8	0.6	2.5	0.0	0.0	0.0	0.9	0.6	2.5	298.9

Note: Totals and percentage change computed from unrounded data.

year, aggregate maize imports are expected to fall below 1 million tonnes. Most of this cut stems from South Africa where imports are expected to fall to a negligible level compared to the 2.2 million tonnes imported in 2016/17, while significantly smaller import volumes are forecast in **Malawi** and **Zimbabwe**, due to larger domestic harvests in 2017. In **Madagascar**, imports of rice are forecast to increase to compensate for this year's lower output, with imports mainly sourced from India and Pakistan.

Subregional maize exports are forecast to increase in 2017/18. However, the market for imports within Southern Africa will be more limited this year on account of the

higher domestic outputs that will restrain demand for external supplies. **South Africa** is forecast to export 2.6 million tonnes of maize in 2017/18. Between May and August, about 1.1 million tonnes have already been exported, mostly to Kenya and East Asia, while more moderate quantities continue to be shipped to neighbouring countries. South African maize prices are currently trading below or close to export parity levels creating conducive export conditions. **Zambia** is forecast to export an above-average volume this year, mostly trading with Malawi, the Democratic Republic of Congo, the United Republic of Tanzania and Zimbabwe.

Prices of maize remained stable in recent months and down on a yearly basis

Following strong seasonal declines that began in the first quarter of 2017, maize price decreases eased from May/June and in July/August they were down on an annual basis, reflecting the significantly-improved supply situation. In **South Africa**, despite several upward revisions to the maize production estimate in recent months, prices have remained generally stable between May and August, as domestic markets had already factored in the impact of the bumper output. Although an appreciation of the local currency and lower international quotations put downward pressure on prices in preceding months, this was mostly offset by strong export demand, notably from Asia and East Africa. Similarly, in **Malawi**, **Mozambique** and **Zambia**, prices of maize grain were well down on a yearly basis, on account of the larger domestic supplies. In the net-importing country of **Swaziland**, maize meal prices

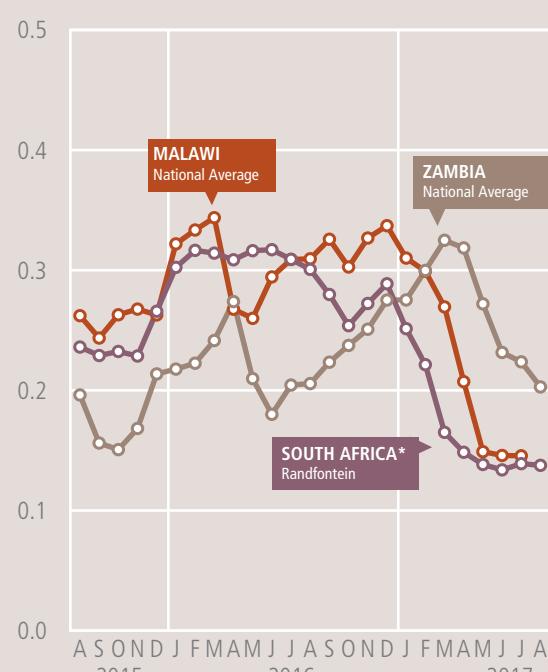
remained below their year-earlier levels, due to the larger domestic harvest and reduced prices in South Africa, the main source of the imported grain, while in **Namibia** prices were closer to their levels of 2016. In **Zimbabwe**, prices of maize meal generally remained unchanged and were lower than a year earlier. In **Madagascar**, rice prices increased early in the year, reflecting sharply curtailed production expectations due to weather shocks, but have since stabilized between May and June, as large import volumes and the arrival of the 2017 harvest augmented market supplies. As of June, rice prices in the main urban centres were moderately above their year-earlier levels.

Food security improves significantly in 2017/18

There has been a significant decrease in the number of food insecure people across the subregion, as the larger 2017 harvests increased households' food availability and lower prices have improved food access. At the aggregate level, excluding Angola³ and South Africa⁴, results from the Vulnerability Assessment Committees' (VACs) evaluations indicate that the number of food insecure has fallen by 75 percent to 4.3 million people in 2017/18. Most of this decrease reflects sharply reduced numbers in **Malawi** (down 5.8 million), **Mozambique** (down 1.7 million) and **Zimbabwe** (down 3 million). In **Madagascar**, the impact of Cyclone Ewano and a below-average rice harvest at the national level will negatively weigh on the food security situation. However, some improvements are foreseen in the previously drought-stricken southern regions that mainly rest on a recovery in the agricultural output this year. More information on the food insecure numbers will be provided in the soon-to-be released CFSAM report. Although food assistance needs have decreased this year, chronic malnutrition indicators still remain high in the subregion, with several countries reporting stunting prevalence of over 20 percent.

White maize prices in selected Southern African markets

(USD/kg)



REGIONAL REVIEWS

ASIA

Note: Situation as of August/September

— Subregional borders

CIS IN ASIA

Crops (winter): Land preparation to planting
Maize: Harvesting
Wheat: Mostly harvested



NEAR EAST ASIA

Grains (winter): Land preparation



Unfavourable 2017 production prospects*

Democratic People's Republic of Korea:

Insufficient rains

Mongolia:

Drought

Sri Lanka:

Drought

Syrian Arab Republic:

Conflict

* See terminology (page 7)

FAR EAST ASIA

Southern Far East Asia:
Coarse grains: Harvesting
Rice (main): Maturing to harvesting

India

Maize and millet (kharif): Reproductive to maturing
Rice (kharif): Harvesting begins
Rice and wheat (rabi): Land preparation to planting



Asia Production Overview

Cereal production in Asia is forecast at 1 140 million tonnes, slightly higher than the previous year. Most of the increase would rest on gains in the Far East, mainly reflecting larger wheat and, to a lesser extent, paddy outputs following beneficial weather.

In the Near East, generally favourable weather is anticipated to result in a small increase in the aggregate cereal output, however, persisting conflicts continue to depress agricultural productive capacities in Iraq, the Syrian Arab Republic and Yemen.

In the CIS countries of Asia, production is forecast to remain above average but down from the bumper levels of last year as yields are expected to return to average.

Cereal production

(million tonnes)



FAR EAST



Aggregate cereal production in 2017 is forecast marginally above the high level of 2016

Far Eastern countries in the Northern Hemisphere are currently harvesting the 2017 main season cereal crops, mostly rice and maize, while countries along or south of equator are currently gathering the 2017 secondary season crops. In general, the early arrival and abundant southwest monsoon rains have boosted 2017 crop prospects in most countries. However, the above-average rains have also resulted in severe localized floods in several countries of the subregion, including **Bangladesh**, **Cambodia**, **China (Mainland)**, **India**, **Myanmar**, **Nepal** and **Thailand**. Although the floods resulted in severe localized crop losses in several countries, rains benefitted crops in surrounding areas. Improved water

availability for irrigation is also expected to benefit the 2017 secondary crops, where these are grown. Overall, FAO has maintained its positive outlook for the 2017 subregional cereal production, forecasting an output of 1 264 million tonnes (rice in paddy terms), marginally above the previous year's level and a new record high.

Production of paddy rice, the major staple crop in the subregion, is forecast to reach 680 million tonnes, slightly above the 2016 record output. Most

of the projected increase in production is expected to come from **Indonesia**, **the Philippines** and **Thailand**, where both the planted area and yields increased slightly. In India, although the floods have affected northern parts of the country and insufficient rains impeded seasonal progress in southern and central regions, FAO has maintained a positive outlook for the 2017 season in the country, pointing to a marginal increase from the 2016 record outcome to 165.9 million tonnes. Paddy output is forecast to partially recover from last year's weather-affected level in **Viet Nam**, **Malaysia** and **Timor-Leste**. Production increases are also forecast in **Lao People's Democratic Republic** and **Myanmar**, reflecting the overall favourable growing conditions that boosted paddy yields, and in **Cambodia** and **Pakistan**,

resting on an expansion in plantings. By contrast, 2017 paddy output is forecast to fall in some countries. In **the Republic of Korea**, paddy output is expected to decline slightly due to a reduction in plantings resulting from weak prices and the Government's efforts to avoid oversupply problems due to successive bumper harvests and a decline in domestic rice consumption. In **the Democratic People's Republic of Korea**, severe rainfall deficits between April and June, coupled with a shortage of water supplies for irrigation, resulted in an area reduction of the 2017 paddy crop and lower yields. However, the largest reduction in 2017 paddy output is estimated in **Sri Lanka**, where a severe drought in 2016 and early 2017 is expected to result in a near 40 percent decrease in the 2017 aggregate paddy output to 2.7 million tonnes. Paddy production is foreseen to remain stable in **Bhutan**, **Japan** and **China**.

FAO's latest forecast for the 2017 maize output in the subregion stands at 294.5 million tonnes, 2 percent below last year's record output. The year-on-year decrease reflects an 8-million-tonne reduction in **China**, driven by area cuts, as farmers are gradually shifting land from maize to more profitable crops, in particular soybeans, in response to the Government's decision to remove the Minimum Support Price (MSP) for maize. In **Pakistan**, **the Philippines** and **Cambodia**, maize outputs are forecast to increase reflecting favourable weather conditions, while maize production is forecast to fall considerably in **Sri Lanka**,

Table 11. Far East cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2015	2016 estim.	2017 f'cast	2015	2016 estim.	2017 f'cast	2015	2016 estim.	2017 f'cast	2015	2016 estim.	2017 f'cast	Change: 2017/2016 (%)
Far East	246.6	251.3	259.2	327.2	330.0	324.7	663.6	677.5	680.4	1 237.3	1 258.8	1 264.3	0.4
Bangladesh	1.3	1.4	1.4	2.7	2.9	3.0	52.5	52.1	52.2	56.4	56.3	56.6	0.5
Cambodia	0.0	0.0	0.0	0.4	0.7	0.8	9.3	10.0	10.0	9.7	10.6	10.8	2.0
China (Mainland)	130.2	128.9	130.2	234.1	229.3	221.6	209.8	208.5	208.4	574.1	566.6	560.3	-1.1
India	86.5	92.3	98.4	38.7	43.9	44.2	156.6	165.2	165.9	281.8	301.4	308.5	2.4
Japan	1.0	0.8	0.8	0.2	0.2	0.2	10.5	10.7	10.7	11.7	11.6	11.7	0.3
Myanmar	0.2	0.2	0.2	1.8	1.9	2.0	27.5	28.5	28.9	29.4	30.6	31.1	1.5
Nepal	2.0	1.7	1.8	2.6	2.6	2.6	4.3	5.2	5.4	8.8	9.6	9.8	2.8
Pakistan	25.1	25.5	26.0	5.6	5.9	6.1	10.2	10.3	10.4	40.9	41.7	42.5	2.1
Philippines	0.0	0.0	0.0	7.0	8.1	8.3	17.5	18.5	19.3	24.4	26.6	27.6	3.6
Republic of Korea	0.0	0.0	0.0	0.2	0.2	0.2	5.8	5.6	5.5	6.0	5.9	5.7	-3.0
Thailand	0.0	0.0	0.0	4.8	4.8	4.5	27.4	32.6	33.7	32.2	37.4	38.1	2.0
Viet Nam	0.0	0.0	0.0	5.3	5.2	5.2	45.2	43.6	43.8	50.5	48.8	49.0	0.3

Note: Totals and percentage change computed from unrounded data.

due to the prolonged drought in 2016 and early 2017.

Based on the latest official estimates for most countries, the subregion's 2017 aggregate wheat production, with crops harvested earlier this year, is estimated at about 259 million tonnes. Most countries recorded bumper wheat crops in 2017, with the exception of **Mongolia**, where the wheat output is estimated to drop by almost 50 percent from last year's near-average level to 259 000 tonnes, due to a prolonged drought during the summer months.

Cereal imports in 2017/18 forecast to decrease from last year's record level

Aggregate cereal imports in the 2017/18 marketing year are forecast to decrease from last year's record level, but remain well above the previous five-year average. Most of this year's decline reflects expectations of reduced demand from **India**, **China** and **Thailand**.

Wheat imports in 2017/18 are expected to fall by 8 percent from last year's record level to 52.6 million tonnes but remain well above the five-year average. Most of this decline is projected to come from **India**, where imports in 2017/18 are forecast at 3.5 million tonnes, almost half the high level of the previous year as result of a 6-million-tonne recovery in the 2017 output. Demand for wheat and wheat flour is also foreseen to decline in **China** due to high stock levels obtained from successive bumper harvests, and in **Thailand** following

the Government's decision to restrict imports of feed wheat. Imports of coarse grains in 2017/18, mostly maize, are forecast at 61.9 million tonnes at the aggregate, close to last year's high level, reflecting strong demand for feed cereals from **Viet Nam**, **Japan** and **the Republic of Korea**. By contrast, imports of coarse grains are likely to decline in **China**, reflecting the Government's directive to diminish the large national maize inventories through increased sales from State reserves.

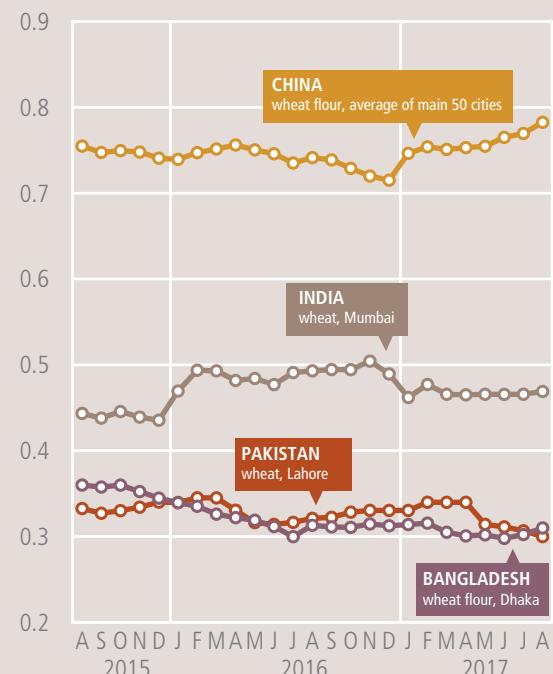
Exports of cereals in the subregion consist mostly of rice and, to a lesser extent, wheat. Aggregate rice exports in the 2017 calendar year are forecast at 36.4 million tonnes, implying a 9 percent recovery from last year's level. Most of this increase comes from the subregion's main exporters **India**, **Thailand** and **Vietnam**.

Prices of rice and wheat followed mixed trends in recent months

Prices of domestic rice, in local currencies, followed mixed trends in the past few months. In **Thailand**, prices decreased sharply for the second consecutive month in August, reflecting the favourable outlook for the 2017 main season crop and a lapse in fresh sales. A slowdown in

Wheat and wheat flour retail prices in selected Far East countries

(USD/kg)



Sources: Pakistan Bureau of Statistics; Ministry of Consumer Affairs, India; Management Information System and Monitoring, Bangladesh; National Bureau of Statistics of China.

sales was also behind a slight decrease in prices in **Viet Nam**, although they remained higher than a year earlier after the sustained increases of the past months due to tight availabilities from the reduced 2017 main season output, harvested earlier in the year, and strong demand. In **India**, prices were relatively stable in recent months, although seasonal tightness ahead of the 2017 main season harvest, to be gathered from late September, provided

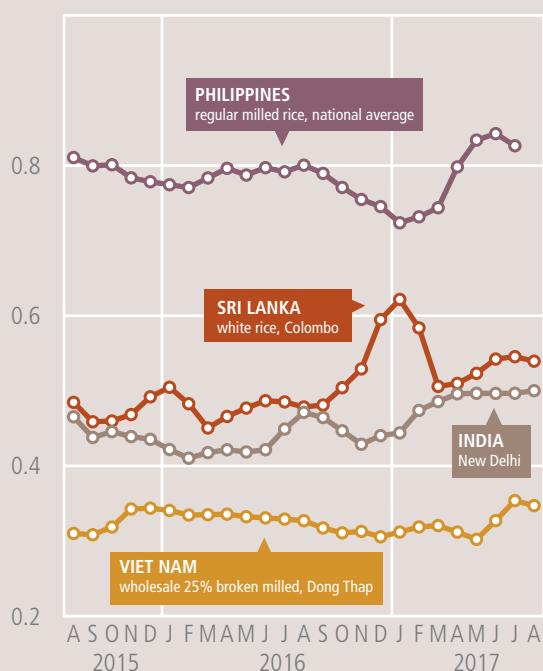
Table 12. Far East cereal production and anticipated trade in 2017/18¹
(thousand tonnes)

	Avg 5-yr (2012/13 to 2016/17)	2016/17	2017/18	2017/18 over 2016/17 (%)	2017/18 over 5-yr avg (%)
Coarse grains					
Exports	4 672	3 357	3 575	6.5	-23.5
Imports	60 284	62 349	61 899	-0.7	2.7
Production	322 484	330 007	324 695	-1.6	0.7
Rice (milled)					
Exports	35 345	36 358	36 866	1.4	4.3
Imports	13 889	14 294	13 885	-2.9	0.0
Production	443 661	449 797	451 565	0.4	1.8
Wheat					
Exports	5 341	2 335	2 258	-3.3	-57.7
Imports	43 488	57 066	52 565	-7.9	20.9
Production	247 696	251 282	259 218	3.2	4.7

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

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; Agroinfo, Viet Nam.

Prices of wheat and wheat flour also showed mixed trends. They were relatively stable in **India** and **China**, reflecting good market availabilities from the bumper 2017 outputs harvested earlier in the year. Similarly, wheat flour prices were generally unchanged in **Sri Lanka** as a result of the high level of imports during recent months. In **Bangladesh**, prices of mostly imported wheat and wheat flour increased marginally on dwindling availabilities. In **Indonesia**, after softening in the past months, wheat flour prices increased in August reaching their year-earlier levels. By contrast, prices decreased in most markets in **Pakistan**, pressured by ample market availabilities from successive bumper crops.

weather conditions across the subregion were relatively favourable, a recovery in outputs remained constrained by the continuing conflict in many small cereal-producing countries. Preliminary estimates indicate an aggregate subregional wheat production of about 44.8 million tonnes, slightly exceeding last year's output as well as the previous five-year average. Total cereal production in 2017 is forecast at a slightly above-average level of 70.8 million tonnes.

In **Turkey**, the largest producer in the subregion, preliminary estimates indicate a slightly above-average cereal output in 2017, consisting of 21.8 million tonnes of wheat and 14.2 million tonnes of coarse grains. In **Iran (Islamic Republic of)**, the second biggest wheat producer in the subregion, despite a delayed start of the season in the west and northwest, crop conditions recovered and the 2017 production is estimated at 13.5 million tonnes, on par with 2016's level and 25 percent above the five-year average. In **Afghanistan**, the spring wheat harvest will continue until the end of September. Total wheat production in the country is forecast at 4.4 million tonnes, some 12 percent below the five-year average, reflecting lower winter wheat plantings due to dry weather conditions in autumn 2016.

NEAR EAST**Slightly above-average 2017 cereal output expected in major producing countries**

Harvesting of the 2017 winter cereal crops was completed in August. Although

In **the Syrian Arab Republic**, the ongoing conflict, lack of inputs, damage to agricultural machinery, irrigation systems and storage facilities, together with disruptions to electricity supplies, continues to erode the country's agricultural productive capacity. A Crop and Food Security Assessment Mission (CFSAM), fielded jointly by FAO and WFP in May 2017, estimated the 2017 wheat production at 1.8 million tonnes, 12 percent

Table 13. Near East cereal production

(million tonnes)

	Wheat		Coarse grains		Rice (paddy)			Total cereals					
	2015	2016 estim.	2017 f'cast	2015	2016 estim.	2017 f'cast	2015	2016 estim.	2017 f'cast	2015	2016 estim.	2017 f'cast	Change: 2017/2016 (%)
Near East	45.0	43.7	44.8	23.2	21.1	21.7	4.0	4.2	4.3	72.2	69.0	70.8	2.6
Afghanistan	4.7	4.6	4.4	0.7	0.7	0.7	0.6	0.5	0.5	6.0	5.8	5.6	-3.2
Iran (Islamic Republic of)	11.5	13.5	13.5	4.4	3.9	4.0	2.3	2.5	2.6	18.3	19.9	20.1	0.9
Iraq	3.2	3.0	2.8	1.1	1.0	1.0	0.1	0.2	0.3	4.4	4.2	4.1	-2.2
Syrian Arab Republic	2.4	1.6	1.8	1.1	0.9	0.9	0.0	0.0	0.0	3.6	2.5	2.7	10.0
Turkey	22.6	20.6	21.8	15.1	13.8	14.2	0.9	0.9	1.0	38.6	35.3	37.0	4.8

Note: Totals and percentage change computed from unrounded data.

more than last year's record low harvest, but still much less than half of the pre-conflict average of 4.1 million tonnes (2002-2011). Cereal production slightly improved in 2017 compared to the previous year due to better rainfall and improved access to agricultural land in some areas.

At subregional level, wheat imports in the 2017/18 (July/ June) marketing year are estimated at 28 million tonnes, about the same as the previous year and the last five-year average. Imports of coarse grains to the subregion are estimated at 35.8 million tonnes, 20 percent above the last five-year average, supported by strong demand for animal feed in most Arab countries.

Yemen still at high risk of localized famine; civil unrest affects food security of large numbers of people

In **Yemen**, according to the latest Integrated Food Security Phase Classification carried out in March 2017, about 17 million people are estimated to be in IPC Phase 3: "Crisis" and IPC Phase 4: "Emergency" and require urgent humanitarian assistance. This corresponds to 60 percent of the total Yemeni population. The most affected governorates are Al Hodeidah and Taiz, where almost 2.2 million people are in "Crisis" and over 1.9 million in "Emergency". Here, the Global Acute Malnutrition (GAM) prevalence is estimated to be above the WHO critical threshold of 15 percent. Similar levels of GAM

prevalence are also reported in Abyan and Hadramout governorates. By mid-August 2017, the total number of suspected cholera cases in Yemen in 2017 exceeded 500 000 and nearly 2 000 people have died since the outbreak began to spread rapidly at the end of April. Yemen's cholera epidemic, currently the largest in the world, has unfolded due to deteriorating hygiene and sanitation conditions as well as disruptions to the water supply across the country.

In **Iraq**, in the first half of 2017, some 922 000 people were internally displaced, mostly due to the operations in Mosul, in addition to the 3 million people already displaced by November 2016. The changing conflict dynamics are mirrored into a volatile food security situation across the country with 2.4 million people estimated to be food insecure, of which 1.5 million are severely food insecure. In the Syrian Arab Republic, the CFSAM fielded in May 2017 estimated that 6.9 million Syrians are food insecure in terms of current consumption and 5.6 million would likely be worse off without the food assistance provided. An additional 3.1 million are at risk of food insecurity as they are using asset depletion strategies in order to meet their consumption needs and only 3.5 million can currently be considered as food secure.

In **Afghanistan**, almost 1.6 million people are considered to be severely food insecure and 9.7 million moderately food insecure. Documented and undocumented Afghans

have been returning to the country for a variety of reasons, including a deteriorating protection space in Pakistan and the Islamic Republic of Iran. So far, in 2017, almost 84 000 Afghans returned from Pakistan, and 230 000 from the Islamic Republic of Iran, adding to 700 000 undocumented Afghans who returned to the country in 2016. Most returnees need support to be socially and economically reintegrated.

CIS IN ASIA⁵



Cereal production in 2017 forecast to fall, but to remain above average

With the 2017 harvest nearing completion, the total subregional cereal output, mostly wheat, is forecast at 35 million tonnes, 4 percent below the 2016 output but still above the previous five-year average. The anticipated decline rests on expectations of a smaller wheat output in **Kazakhstan**, the largest producer and exporter of the subregion, where production is expected to fall by 7 percent to 14 million tonnes, but

Table 14. CIS in Asia cereal production

(million tonnes)

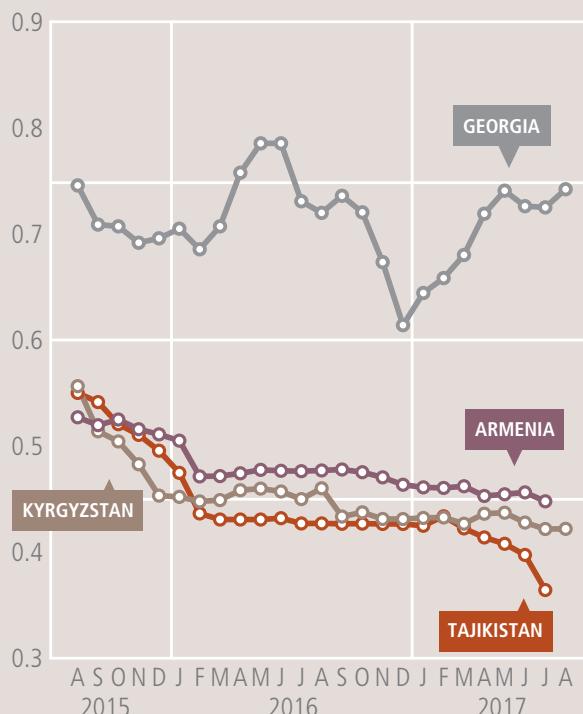
	Wheat			Coarse grains			Total cereals ¹			
	2015	2016 estim.	2017 f'cast	2015	2016 estim.	2017 f'cast	2015	2016 estim.	2017 f'cast	Change: 2017/2016 (%)
CIS in Asia	26.2	27.4	26.3	7.9	8.6	8.5	34.9	36.9	35.6	-3.4
Armenia	0.4	0.4	0.3	0.2	0.2	0.2	0.6	0.6	0.6	-3.1
Azerbaijan	2.0	1.9	1.8	1.3	1.2	1.2	3.3	3.1	2.9	-4.0
Georgia	0.1	0.2	0.1	0.3	0.3	0.3	0.4	0.5	0.4	-15.5
Kazakhstan	13.7	15.0	14.0	3.8	4.5	4.5	17.9	20.0	19.0	-4.9
Kyrgyzstan	0.7	0.7	0.6	1.0	1.1	1.0	1.8	1.8	1.7	-5.9
Tajikistan	0.9	0.8	0.9	0.2	0.3	0.2	1.1	1.1	1.2	7.3
Turkmenistan	1.4	1.6	1.6	0.1	0.1	0.1	1.6	1.8	1.8	-0.1
Uzbekistan	7.0	6.9	6.9	0.9	0.9	0.9	8.1	8.1	8.1	-0.5

Note: Totals and percentage change computed from unrounded data.

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

⁵ Georgia is no longer a member of CIS but its inclusion in this group is maintained for the time being.

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



Source: National Statistical Service of Republic of Armenia; National Statistical Committee of the Kyrgyz Republic; State Committee on Statistics, Republic of Tajikistan; National Statistics Office of Georgia

this would still be an above-average level. This year's decline reflects a reduced planted area, following farmers' decision to switch to more profitable crops. Production of barley, which is the second most important cereal crop, is forecast at 3.3 million tonnes, slightly above the already high level of 2016.

In the remaining countries of the subregion, the aggregate cereal output is expected to decrease from the good level of 2016. In Armenia, total cereal production is estimated to decline 3 percent below 2016's output but remain higher than the previous five-year average. In Azerbaijan, harvesting of the 2017 cereal crop was completed

in August and, according to the latest official figures, the cereal output is estimated at 2.9 million tonnes, well above average but 4 percent down on an annual basis. Wheat production is estimated at 1.7 million tonnes, marginally below 2016's harvest.

In **Georgia**, dry weather conditions during the winter months and a decline in wheat plantings contributed to a smaller cereal output, forecast at 419 000 tonnes in 2017. Of this total, wheat production is estimated at 113 000 tonnes, down from the 2016 record, but still above the average.

In Kyrgyzstan, total cereal production in 2017 is forecast to be near average, but 6 percent below last year's level, following a small decrease in plantings.

In **Turkmenistan**, the latest estimates point to a cereal crop of 1.8 million tonnes in 2017, virtually unchanged from the already high level of 2016. Wheat represents the bulk of the national cereal output and production of this crop is estimated at 1.6 million tonnes, following beneficial weather conditions during the growing season. In **Uzbekistan**, the aggregate cereal output in 2017 is anticipated to remain close to the previous year's high level.

In **Tajikistan**, aggregate cereal production is forecast at 1.2 million tonnes, about 7 percent higher than the below-average output of 2016. Wheat production is expected to increase by 16 percent compared to the lower-than-average output

obtained in 2016, following favourable weather conditions during the spring season.

Planting of the 2018 winter crops, which constitutes only a small fraction of the total annual cereal production, started in mid-August under generally favourable weather conditions.

Cereal imports projected to increase following smaller production in 2017

The aggregate cereal import requirement in the 2017/18 marketing year is forecast to be 5 percent up from the previous year, but below average, mostly reflecting higher import demand for wheat following the year-on-year decrease in domestic outputs in 2017.

Total cereal exports in the 2017/18 marketing year are forecast to decline by 3 percent from last year's level of 9.4 million tonnes. This small decrease mainly reflects reduced shipments of wheat and wheat flour, which are anticipated to decline by 2 percent to 8.1 million tonnes. Most of the decline is on account of a lower wheat export forecast for **Kazakhstan**, where shipments are expected to fall to 7.3 million tonnes, 3 percent below the high level of the previous year.

Domestic prices of wheat flour remain stable

In most of the importing countries of the subregion, domestic prices of wheat flour remained stable over the last three months, as harvest pressure was offset by weak national currencies and increased milling costs.

In **Kazakhstan**, the main exporter of the subregion, wheat export quotations were also stable and, as of August, the export price of wheat was 5 percent lower than a year earlier.

REGIONAL REVIEWS

LATIN AMERICA AND THE CARIBBEAN



Unfavourable 2017 production prospects*

Cuba: Hurricane

Haiti: Hurricane

* See terminology ([page 7](#))

Latin America and the Caribbean Production Overview

Aggregate cereal production in Latin America and the Caribbean in 2017 is forecast at 258.8 million tonnes, 20 percent higher compared to 2016 and the previous five-year average. The bulk of the yearly gain is associated with record maize outputs forecast in the South American countries of Argentina and Brazil, which more than compensated for reductions in the remaining countries of the subregion.

In Central America and the Caribbean, Mexico is expected to register an above-average output. Elsewhere in the subregion, the overall cereal production is expected to rise moderately in 2017, however, the impact of Hurricane Irma is expected to depress production in the affected areas, particularly in the Caribbean islands.

Cereal production
(million tonnes)



CENTRAL AMERICA AND THE CARIBBEAN



Wheat production estimated at a high level in 2017

In **Mexico**, virtually the only wheat producer in the subregion, FAO estimates the 2017 wheat crop at 3.6 million tonnes, well above the previous five-year average, mainly reflecting an increase in the area sown.

Maize production in 2017 anticipated at above-average levels

FAO's forecast for the subregion's aggregate 2017 maize production was recently revised downward to 29.4 million tonnes. At its current level it is below last year's record, but remains well above the previous five-year average. The downward revision mainly reflects a lower-than-anticipated output in Mexico, which accounts for approximately 90 percent of the subregion's maize output and is expected to reach approximately 26 million tonnes in 2017.

Elsewhere in the subregion, the main "de primera" maize season harvest is well

advanced and prospects are favourable, mostly on account of good weather conditions. FAO anticipates that aggregate maize production in 2017, excluding Mexico, may reach 3.4 million tonnes. Notably, following the negative impact of El Niño on agricultural outputs between 2014 and early 2016, this year's maize harvest is set to be the second consecutive output that will exceed the previous five-year average.

In **Haiti**, maize production from the main "printemp" season, which normally accounts for some 60 percent of the total output, is anticipated to be below 2016's level, as yields were adversely impacted by prolonged dry conditions between June and July. Planting of the "hiver" season is currently ongoing and will conclude in late September. Prospects are uncertain as crops may be affected by hurricane Irma, particularly in the north and centre of the country.

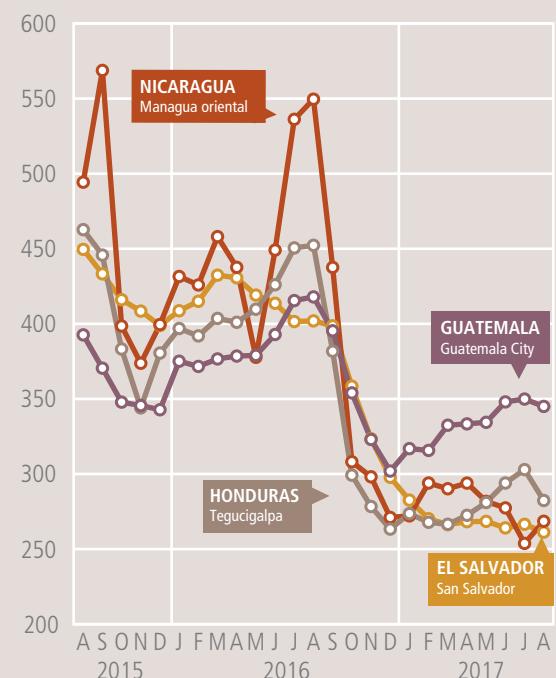
White maize prices decline due to harvest pressure

In most countries, white maize prices eased during the June-August period, underpinned by harvest pressure, and were significantly below their year-earlier levels as a result of ample supplies. In **Costa Rica**, **El Salvador** and **Nicaragua**, prices declined between 3 and 5 percent during the June-August

period. In **Honduras** and **Guatemala**, they were mostly stable during the same three-month period, but began to decline in late August. In **the Dominican Republic**, prices fell by 30 percent in the June-August period, but by contrast, in **Haiti**, prices were unchanged or declined only moderately during the same period, reflecting the anticipated reduced output of the first season. In **Mexico**, prices were relatively unchanged, but trended downward during the three-month period.

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.

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

	Wheat		Coarse grains		Rice (paddy)		Total cereals						
	2015	2016 estim.	2017 f'cast	2015	2016 estim.	2017 f'cast	2015	2016 estim.	2017 f'cast	2015	2016 estim.	2017 f'cast	Change: 2017/2016 (%)
Central America & Caribbean	3.7	3.9	3.6	33.9	37.2	35.7	2.6	2.8	2.9	40.2	44.0	42.2	-4.0
El Salvador	0.0	0.0	0.0	0.8	1.0	1.0	0.0	0.0	0.0	0.9	1.1	1.1	0.0
Guatemala	0.0	0.0	0.0	0.9	0.9	1.0	0.0	0.0	0.0	1.0	1.0	1.0	2.8
Honduras	0.0	0.0	0.0	0.2	0.3	0.3	0.0	0.1	0.1	0.3	0.4	0.4	7.5
Mexico	3.7	3.9	3.6	30.8	33.5	31.9	0.2	0.3	0.3	34.7	37.6	35.8	-5.0
Nicaragua	0.0	0.0	0.0	0.4	0.5	0.5	0.3	0.4	0.4	0.7	0.9	0.9	-4.7
South America	21.1	29.2	27.5	148.1	128.4	172.8	25.7	23.7	25.6	194.9	181.3	225.9	24.6
Argentina	11.3	18.4	19.0	42.5	47.0	55.0	1.6	1.4	1.3	55.3	66.8	75.3	12.8
Brazil	5.5	6.7	5.5	88.2	65.8	102.3	12.4	10.6	12.3	106.1	83.1	120.1	44.5

Note: Totals and percentage change computed from unrounded data.

SOUTH AMERICA



Maize 2017 harvests estimated at record levels, with record outputs in Argentina and Brazil

Harvesting of the 2017 main maize crop is virtually complete in **Argentina** and **Brazil**, which together account for 92 percent of the subregional output. FAO's earlier estimates for this year's maize outputs were recently revised upwards to 48.8 million and 99.4 million tonnes for Argentina and Brazil, respectively, mainly reflecting better-than-anticipated yields. At these levels, the 2017 maize outputs are at record highs. Elsewhere in the subregion, maize production estimates have also been raised and the aggregate output (excluding Argentina and Brazil) is now anticipated to remain relatively unchanged from last year's good level, estimated at 13.3 million tonnes. Average to slightly above-average maize outputs are estimated in **Colombia**, **Ecuador**, **Bolivia (Plurinational State of)** and **Peru**. By contrast, in **Chile**, the 2017 maize harvest is estimated to be 7 percent below last year's level as a result of lower plantings. The reduction in maize sowings, from last year's already low levels, reflects prevailing low prices as a result of ample subregional availabilities, particularly in **Argentina** and **Brazil**.

Planting of the 2017 wheat crop, to be harvested from November, is nearly

complete. In Argentina and Brazil, which account for 90 percent of subregional wheat output, early estimates point to a decline from last year's high level. In **Argentina**, the preliminary estimate of the area sown points to 5.9 million hectares being planted, about 7 percent below last year's high level. This reduction mainly reflects delays in sowing operations caused by excess rains. In **Brazil**, the 2017 area sown is expected at 1.9 million hectares, 11 percent down from last year's high level as a result of ample availabilities from the record 2016 wheat crop.

Cereal exports in 2017/18 anticipated to reach record levels

FAO's forecast for cereal exports in the 2017/18 marketing year (March/February) has been recently revised upwards to 78.2 million tonnes, a record level. This mainly reflects anticipated record maize deliveries from Argentina and Brazil as a result of their bumper 2017 crops and their weak local currencies, which have increased competitiveness of local grains in international markets. Disaggregated by crop, maize exports are forecast to reach about 60 million tonnes, with 77 percent of these deliveries coming from Argentina and Brazil. Wheat exports have also been revised upwards to 13 million, with almost 90 percent originating from Argentina.

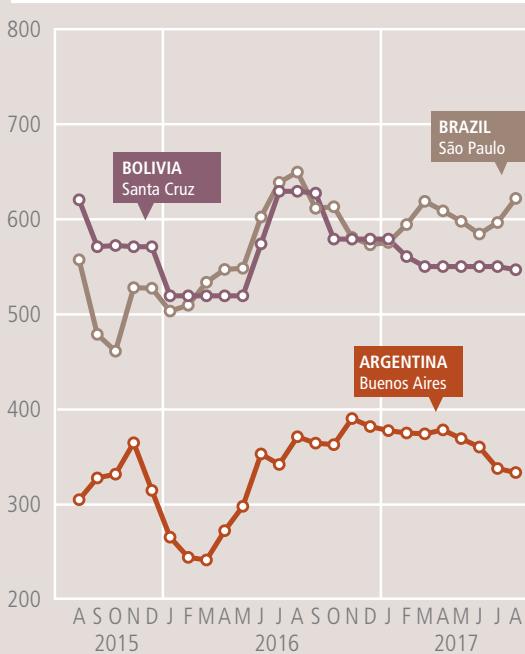
Wheat prices followed mix trends, maize prices declined on record outputs

Prices of wheat grain and wheat flour continued to follow mixed trends between June and August. However, ample supplies, due to bumper 2016 outputs and adequate levels of imports, have kept prices below last year's level in most countries. In **Argentina**, prices

increased by about 13 percent during the June-August period and were higher than a year earlier reflecting robust export demand. In **Brazil**, prices also increased during the June-August period but remained below their year-earlier levels. In the main importing countries of **Bolivia (Plurinational State of)**, **Ecuador** and **Peru**, prices were generally stable or declined during the preceding months. By contrast, in **Chile** and **Colombia**, prices increased between June and August.

With respect to yellow maize, record 2017 crops, particularly in **Brazil** and **Argentina**, continued to pressure prices downwards during the June-August period. Elsewhere in the subregion, prices for yellow maize declined and were below their year-earlier levels as of August. Prices in **Argentina**, by contrast, remained generally unchanged on a yearly basis but trended downward during the June-August period.

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.

REGIONAL REVIEWS

NORTH AMERICA, EUROPE AND OCEANIA

Note: Situation as of August/September.



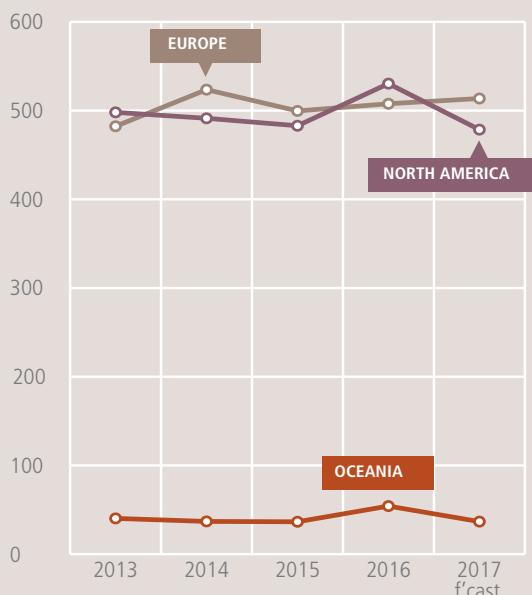
North America, Europe and Oceania Production Overview

In North America, cereal production in 2017 is expected to fall by 10 percent to 475.5 million tonnes, mostly on account of a reduced output in the United States of America predominantly reflecting a contraction in plantings. Cereal production is anticipated to also decline in Canada resting on a lower wheat output.

In Europe, larger plantings in the European Union is the main driver behind a forecasted production increase in 2017, while the cereal output in CIS countries is foreseen to surpass the high level of 2016, mainly as a result of a record high wheat output in the Russian Federation.

In Oceania, Australia is forecast to register a significant cut in the cereal output reflective of a smaller wheat harvest from the record high of 2016.

Cereal production
(million tonnes)



NORTH AMERICA



Wheat production in the United States of America forecast at a 15-year low

In the United States of America, total wheat production is forecast at 47 million tonnes, the lowest level in 15 years and 25 percent below the good output gathered in 2016. The year-on-year decline is mainly attributed to a significant reduction in the area planted following farmers' decision switch to more profitable crops. Moreover, drought conditions in the Northern Plains is expected to result in a 15 percent decline in yields compared to the record highs in 2017. Regarding coarse grains production, latest official forecasts puts the 2017 maize output at an above-average level of 359 million tonnes, but down 7 percent on an annual basis on account of reduced plantings and lower yields compared to the highs of 2016.

Plantings of the 2018 winter wheat crop started in early September. Dry weather in the Northern Plains resulted in some delays, but there still remains time for sowing as the planting windows extends until the end of October in these areas.

In Canada, the 2017 wheat harvest is underway and production is estimated at 27 million tonnes, 14 percent below the previous year's high level and 10 percent below the five-year average. This decrease is mostly on account of drought conditions that adversely affected crops in the major producing areas of the Prairie provinces. The 2017 maize output, with the harvest expected to conclude by November, is forecast to increase by 3 percent to 13.5 million tonnes.

aggregate wheat output of 149 million tonnes, 3 percent below the low level of 2016, but still above the previous five-year average.

Regarding coarse grains, production in 2017 is forecast to decline by 2 percent from the average level of the previous year, reflecting the impact of hot and dry weather in August in southern Europe that lowered yield prospects for maize and barley outputs. Maize is forecast at 60 million tonnes, down 2 percent from 2016. Barley production is expected to decline to 58.5 million tonnes, 3 percent below the previous year as lower yields more than offset a year-on-year increase in the area planted.

EUROPE



EUROPEAN UNION

Aggregate cereal production is close to average levels

In the European Union, the 2017 winter wheat crop was harvested by August, while harvesting of the spring wheat crop is nearing completion. Recent excessive rains in western and northern Europe hampered spring harvesting operations and raised concerns over grain quality in these areas. Latest estimates point to an

CIS IN EUROPE

Cereal production forecast at a record high in 2017

Harvesting of the 2017 cereal crops is underway and the aggregate cereal output is estimated at a record level of 200 million tonnes, 2 percent up from last year's already high level. The increase rests on a larger wheat output, forecast at 109 million tonnes, almost 5 million tonnes higher than 2016's output, while maize and barley

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

	Wheat			Coarse grains			Rice (paddy)			Total cereals				
	2015	2016 estim.	2017 f'cast	2015	2016 estim.	2017 f'cast	2015	2016 estim.	2017 f'cast	2015	2016 estim.	2017 f'cast	Change: 2017/2016 (%)	
North America	83.7	94.6	74.6	393.1	428.7	397.9	8.8	10.2	8.5	485.5	533.5	481.0	-9.8	
Canada	27.6	31.7	27.3	25.7	25.8	24.6	0.0	0.0	0.0	53.3	57.5	51.9	-9.8	
United States of America	56.1	62.9	47.3	367.3	402.9	373.3	8.8	10.2	8.5	432.2	475.9	429.1	-9.8	
Europe	256.8	252.1	261.9	240.2	253.0	249.2	4.2	4.2	4.1	501.2	509.3	515.1	1.1	
Belarus	2.9	2.9	2.8	5.7	6.7	5.8	0.0	0.0	0.0	8.6	9.6	8.5	-11.7	
European Union	160.5	144.5	149.0	151.8	153.2	150.5	3.0	3.0	2.9	315.3	300.7	302.5	0.6	
Russian Federation	61.8	73.3	79.0	39.5	43.4	45.1	1.1	1.1	1.0	102.4	117.7	125.1	6.3	
Serbia	2.4	2.4	2.5	5.9	5.9	5.7	0.0	0.0	0.0	8.3	8.3	8.2	-1.4	
Ukraine	26.5	26.1	26.0	33.4	39.4	37.8	0.1	0.1	0.1	60.0	65.5	63.9	-2.5	
Oceania	22.6	35.4	24.5	13.4	18.6	11.6	0.7	0.3	0.8	36.7	54.3	37.0	-31.8	
Australia	22.3	35.1	24.2	12.9	18.0	11.1	0.7	0.3	0.8	35.8	53.4	36.1	-32.3	

Note: Totals and percentage change computed from unrounded data.

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



Source: International Grains Council.

outputs, estimated at 46 and 30 million tonnes, respectively, are close to the previous year's levels.

In the **Russian Federation**, total cereal production is estimated at an all-time high of 125 million tonnes, up 7 percent from the already high level of 2016, mainly on account of favourable weather conditions during the summer months that boosted yields. Wheat production is now estimated at a record level of 79 million tonnes, up 8 percent from last year, following better-than-expected yields. The maize output is also forecast to reach a new record of 16 million tonnes as a result of larger plantings. Similarly, larger plantings resulted in an estimated 11 percent increase in barley production, estimated at 20 million tonnes in 2017.

In **Ukraine**, the aggregate cereal output is forecast at 64 million tonnes, slightly

below the 2016 level. Despite some dry spells in April-June, favourable weather conditions during the remaining months of the summer improved crop conditions. Wheat production is estimated at the level of last year, 26 million tonnes, and the share of milling quality wheat is reported to be higher than in 2016. Improved weather conditions also resulted in better production prospects for maize, which is now estimated at 28 million tonnes, virtually unchanged from the previous year.

In the **Republic of Moldova**, the 2017 cereal output is expected to be 10 percent below last year's level, estimated at 2.6 million tonnes. The hot weather and reduced rainfall delayed plantings and caused a contraction in the area planted. Wheat production, which is the country's main crop, is estimated at 1.1 million tonnes, down 14 percent from the previous year.

Exports in the 2017/18 marketing year are forecast at a record level

Aggregate cereal exports in the 2017/18 marketing year (July/June) are forecast at a new record level of 84 million tonnes. The anticipated increase from the **Russian Federation** is expected to offset the projected decline in shipments from Ukraine. Wheat exports from the Russian Federation are forecast to reach 31.2 million tonnes, which would confirm the country as the biggest wheat exporter in the world for the second consecutive year. By contrast, wheat exports from **Ukraine** are forecast to fall by 12 percent on an annual basis to 15.5 million tonnes in 2017/18. Regarding maize, total subregional exports are expected to rise slightly to 27.4 million tonnes, mainly on expectations of higher shipments from Ukraine and the Russian Federation.

Export prices remained stable or eased over last three months

In the main exporting countries, export prices of milling wheat and wheat flour remained stable or weakened over the past three months. In **Ukraine**, prices of wheat increased since May as a result of a heightened demand from importers. In the **Russian Federation**, export and domestic prices of wheat declined in August following the start of the harvest, but the decreases were limited by the strengthening of the local currency against the US dollar. In Ukraine, domestic prices remained stable over the last three months, despite the commercialization of the new crops. In **Belarus** and the **Republic of Moldova**, prices for wheat flour have been rising over the past years, underpinned by weak national currencies and increasing flour production costs.

OCEANIA



Wheat production in 2017 forecast to fall from the previous year's record high, but remains close to average

In **Australia**, the current production outlook for the 2017 wheat crop, which is currently being harvested, points to a 31 percent decrease to 24 million tonnes from the record high of the previous year and slightly below average. The anticipated year-on-year decline mainly reflects reduced yields compared to the exceptionally high levels achieved in 2016, as early seasonal dryness in Western Australia, central and northern New South Wales and Queensland lowered yield expectations.

STATISTICAL APPENDIX

Table A1. Global cereal supply and demand indicators

	Average 2010/11 - 2014/15	2013/14	2014/15	2015/16	2016/17	2017/18
Ratio of world stocks to utilization (%)						
Wheat	27.4	26.1	28.7	30.2	33.8	34.7
Coarse grains	18.2	18.3	21.2	20.4	21.2	20.5
Rice	32.5	35.1	35.3	34.2	33.7	33.0
Total cereals	23.7	23.8	26.1	25.9	27.2	26.9
Ratio of major grain exporters' supplies to market requirements (%)¹	117.7	121.6	123.4	122.5	121.7	119.7
Ratio of major exporters' stocks to their total disappearance (%)²						
Wheat	17.1	14.9	16.7	16.1	19.6	18.9
Coarse grains	10.9	10.5	13.5	11.7	13.7	14.3
Rice	25.5	28.9	24.3	19.1	18.4	16.8
Total cereals	17.8	18.1	18.2	15.7	17.2	16.7
Annual trend growth rate						
	2007-2016	2013	2014	2015	2016	2017
Changes in world cereal production (%)	2.3	9.9	1.8	-1.2	3.0	0.1
Changes in cereal production in the LIFDCs (%)	3.3	1.2	3.3	-4.9	5.5	2.2
Changes in cereal production in the LIFDCs less India (%)	3.3	-0.5	7.0	-4.3	3.4	22.3
Average 2010-2014						
		2013	2014	2015	2016	2017*
Selected cereal price indices³						
Wheat	191.2	-4.9	-6.6	-20.5	-13.0	4.5
Maize	232.8	-12.9	-25.8	-11.8	-6.4	-3.3
Rice	233.9	0.8	0.8	-10.5	-8.1	-1.2

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 grain 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 IGC 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-August average.

Table A2. World cereal stocks¹

(million tonnes)

	2013	2014	2015	2016	2017 estimate	2018 forecast
TOTAL CEREALS	532.7	596.9	655.1	664.6	705.4	719.1
Wheat	174.0	186.2	203.8	221.4	247.3	261.9
held by:						
- main exporters ²	49.0	54.5	63.2	63.0	78.6	75.4
- others	125.0	131.7	140.6	158.4	168.7	186.5
Coarse grains	197.5	238.3	276.9	272.4	287.4	286.0
held by:						
- main exporters ²	54.9	81.0	105.7	93.1	109.9	116.9
- others	142.6	157.3	171.2	179.3	177.5	169.1
Rice (milled basis)	161.2	172.4	174.4	170.8	170.8	171.2
held by:						
- main exporters ²	46.6	49.4	43.1	33.6	32.5	30.0
- others	114.6	123.0	131.3	137.2	138.3	141.2
Developed countries	119.0	141.9	169.9	168.4	203.7	196.9
Australia	6.6	5.9	6.4	4.7	10.9	6.4
Canada	8.2	15.1	10.4	9.9	12.1	8.9
European Union	24.4	32.6	39.9	36.4	31.2	29.8
Japan	6.2	5.6	5.2	5.0	4.9	4.7
Russian Federation	6.4	6.7	9.4	8.1	16.7	25.2
South Africa	2.5	1.7	3.4	3.8	2.0	4.3
Ukraine	5.8	8.7	10.0	6.5	5.8	6.2
United States of America	44.2	51.4	69.0	76.1	98.4	87.5
Developing countries	413.7	455.0	485.2	496.2	501.7	522.2
Asia	355.2	380.3	395.1	408.2	413.6	415.8
China	218.7	241.3	254.1	281.4	298.1	299.2
India	52.2	49.9	48.5	40.3	35.5	36.8
Indonesia	11.2	10.9	9.9	9.6	8.9	9.4
Iran (Islamic Republic of)	3.6	3.4	6.5	6.3	5.4	5.2
Korea, Republic of	3.3	3.7	3.9	4.3	4.6	4.9
Pakistan	4.3	4.7	5.9	4.9	4.7	3.7
Philippines	3.1	3.1	3.9	3.6	3.9	4.7
Syrian Arab Republic	2.6	2.2	1.4	1.5	0.7	1.0
Turkey	4.6	5.7	5.1	5.0	3.2	3.9
Africa	33.2	35.7	40.3	42.7	38.5	40.6
Algeria	2.2	3.9	4.7	5.5	5.1	5.2
Egypt	5.3	6.2	6.3	6.5	6.3	6.2
Ethiopia	1.9	1.7	2.7	2.9	2.9	2.6
Morocco	3.4	5.5	5.2	8.9	5.9	7.4
Nigeria	1.8	1.6	1.8	1.3	1.1	1.2
Tunisia	1.2	1.0	1.2	1.0	0.8	1.2
Central America	6.6	7.7	8.6	10.3	13.2	13.2
Mexico	2.6	3.3	3.6	4.6	7.2	7.6
South America	18.3	31.0	40.9	34.5	35.9	52.1
Argentina	2.1	5.8	10.6	6.4	7.9	11.8
Brazil	6.1	12.0	15.2	9.9	8.7	20.3

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 grain 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)						
2004/05	154	138	123	97	90	99
2005/06	175	138	138	104	101	108
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
Monthly						
2015 - August	216	190	227	163	160	180
2015 - September	218	195	223	166	161	177
2015 - October	221	208	223	172	164	182
2015 - November	211	201	210	166	167	173
2015 - December	212	191	193	164	166	170
2016 - January	213	192	194	161	161	165
2016 - February	205	189	194	160	167	165
2016 - March	207	189	192	159	163	161
2016 - April	201	193	199	164	170	162
2016 - May	193	189	202	169	187	153
2016 - June	198	186	210	181	197	170
2016 - July	188	168	210	161	179	147
2016 - August	188	157	215	150	177	140
2016 - September	188	158	201	148	170	141
2016 - October	193	164	184	152	174	146
2016 - November	191	167	176	152	178	143
2016 - December	187	162	168	154	181	154
2017 - January	201	173	177	159	183	155
2017 - February	210	180	186	163	179	157
2017 - March	198	176	191	159	163	150
2017 - April	191	173	189	157	164	150
2017 - May	200	175	189	158	161	158
2017 - June	226	182	190	158	155	164
2017 - July	240	206	193	159	150	173
2017 - August	201	173	190	148	149	170

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 2016/17 or 2017
(thousand tonnes)

	Marketing year	2015/16 or 2016			2016/17 or 2017 Total import requirements (excl. re-exports)
		Commercial purchases	Food aid	Total imports (commercial and aid)	
AFRICA		31 469.5	1 208.9	32 678.4	34 000.3
East Africa		9 889.1	848.7	10 737.8	10 833.7
Burundi	Jan/Dec	149.7	15.2	164.9	182.0
Comoros	Jan/Dec	56.0	0.0	56.0	46.0
Djibouti	Jan/Dec	78.9	4.1	83.0	84.0
Eritrea	Jan/Dec	437.3	0.0	437.3	448.2
Ethiopia	Jan/Dec	1 566.0	104.0	1 670.0	1 555.0
Kenya	Oct/Sept	2 542.6	80.0	2 622.6	3 207.4
Rwanda	Jan/Dec	116.0	0.0	116.0	133.1
Somalia	Aug/Jul	600.0	170.0	770.0	840.0
South Sudan	Nov/Oct	n.a.	n.a.	535.0	560.0
Sudan	Nov/Oct	2 395.0	440.0	2 835.0	2 267.0
Uganda	Jan/Dec	474.0	24.0	498.0	508.0
United Republic of Tanzania	Jun/May	938.6	11.4	950.0	1 003.0
Southern Africa		3 174.6	43.8	3 218.4	4 130.2
Lesotho	Apr/Mar	197.0	5.0	202.0	263.0
Madagascar	Apr/Mar	472.7	20.1	492.8	445.7
Malawi	Apr/Mar	330.0	3.8	333.8	866.0
Mozambique	Apr/Mar	1 237.0	1.3	1 238.3	1 276.0
Zimbabwe	Apr/Mar	937.9	13.6	951.5	1 279.5
West Africa		16 821.8	160.0	16 981.8	17 017.1
Coastal Countries		12 650.0	43.7	12 693.7	12 588.5
Benin	Jan/Dec	391.3	5.7	397.0	337.0
Côte d'Ivoire	Jan/Dec	1 915.2	4.8	1 920.0	1 990.5
Ghana	Jan/Dec	1 437.0	5.0	1 442.0	1 275.0
Guinea	Jan/Dec	907.0	5.5	912.5	857.5
Liberia	Jan/Dec	373.0	12.2	385.2	442.0
Nigeria	Jan/Dec	7 050.0	0.0	7 050.0	7 020.0
Sierra Leone	Jan/Dec	257.9	10.0	267.9	386.0
Togo	Jan/Dec	318.6	0.5	319.1	280.5
Sahelian Countries		4 171.8	116.3	4 288.1	4 428.6
Burkina Faso	Nov/Oct	613.0	10.0	623.0	638.0
Chad	Nov/Oct	101.0	40.7	141.7	159.6
Gambia	Nov/Oct	208.3	1.5	209.8	213.5
Guinea-Bissau	Nov/Oct	109.8	4.5	114.3	124.3
Mali	Nov/Oct	479.3	0.0	479.3	381.2
Mauritania	Nov/Oct	449.5	9.5	459.0	494.0
Niger	Nov/Oct	483.3	42.7	526.0	568.0
Senegal	Nov/Oct	1 727.6	7.4	1 735.0	1 850.0
Central Africa		1 584.0	156.4	1 740.4	2 019.3
Cameroon	Jan/Dec	877.0	10.0	887.0	1 055.0
Central African Republic	Jan/Dec	52.9	22.1	75.0	76.0
Democratic Republic of the Congo	Jan/Dec	640.0	120.3	760.3	870.0
Sao Tome and Principe	Jan/Dec	14.1	4.0	18.1	18.3

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 1 945 in 2011); for full details see <http://www.fao.org/countryprofiles/lifdc>

Table A4b. Estimated cereal import requirements of Low-Income Food-Deficit Countries¹ in 2016/17 or 2017
 (thousand tonnes)

	Marketing year	2015/16 or 2016			2016/17 or 2017 Total import requirements (excl. re-exports)
		Commercial purchases	Food aid	Total imports (commercial and aid)	
ASIA		21 714.2	802.3	22 516.5	28 229.6
Cis in Asia		4 479.2	1.0	4 480.2	4 241.2
Kyrgyzstan	Jul/Jun	514.2	1.0	515.2	572.2
Tajikistan	Jul/Jun	1 089.0	0.0	1 089.0	932.0
Uzbekistan	Jul/Jun	2 876.0	0.0	2 876.0	2 737.0
Far East		7 834.7	199.6	8 034.3	13 866.4
Bangladesh	Jul/Jun	5 393.6	86.0	5 479.6	6 506.5
Democratic People's Republic of Korea ²	Nov/Oct	572.9	112.1	685.0	458.0
India	Apr/Mar	724.2	0.0	724.2	5 807.3
Nepal	Jul/Jun	909.3	1.5	910.8	861.8
Pakistan	May/Apr	234.7	0.0	234.7	232.8
Near East		9 400.3	601.7	10 002.0	10 122.0
Afghanistan	Jul/Jun	2 692.0	100.0	2 792.0	2 982.0
Syrian Arab Republic	Jul/Jun	2 573.3	286.7	2 860.0	2 870.0
Yemen	Jan/Dec	4 135.0	215.0	4 350.0	4 270.0
CENTRAL AMERICA AND THE CARIBBEAN		1 253.8	33.2	1 287.0	1 273.1
Haiti	Jul/Jun	658.2	33.1	691.3	710.1
Nicaragua	Jul/Jun	595.6	0.1	595.7	563.0
OCEANIA		480.6	0.0	480.6	470.2
Papua New Guinea	Jan/Dec	420.2	0.0	420.2	420.2
Solomon Islands	Jan/Dec	60.4	0.0	60.4	50.0
TOTAL		54 918.1	2 044.4	56 962.5	63 973.2

Source: FAO

¹ The Low-Income Food-Deficit Countries (LIFDCs) group includes net food deficit countries with annual per caput income below the level used by the World Bank to determine eligibility for IDA assistance (i.e. USD 1 945 in 2011); for full details see <http://www.fao.org/countryprofiles/lifdc>

² Please see GIEWS Special Alert for further details

Table A5. Estimated cereal import requirements of Low-Income Food-Deficit Countries¹ in 2017/18*

(thousand tonnes)

	Marketing year	2016/17		2017/18	
		Commercial purchases	Food aid	Total imports (commercial and aid)	Total import requirements (excl. re-exports)
AFRICA		5 695.6	277.6	5 973.2	5 818.3
Eastern Africa		1 661.6	181.4	1 843.0	1 727.6
Somalia	Aug/Jul	670.0	170.0	840.0	720.0
United Republic of Tanzania	Jun/May	991.6	11.4	1 003.0	1 007.6
Southern Africa		4 034.0	96.2	4 130.2	4 090.7
Lesotho	Apr/Mar	249.0	14.0	263.0	283.0
Madagascar	Apr/Mar	425.6	20.1	445.7	445.7
Malawi	Apr/Mar	860.0	6.0	866.0	816.0
Mozambique	Apr/Mar	1 275.0	1.0	1 276.0	1 231.0
Zimbabwe	Apr/Mar	1 224.4	55.1	1 279.5	1 315.0
ASIA		23 108.6	393.0	23 501.6	19 647.8
CIS in Asia		4 240.2	1.0	4 241.2	4 241.2
Kyrgyzstan	Jul/Jun	571.2	1.0	572.2	572.2
Tajikistan	Jul/Jun	932.0	0.0	932.0	932.0
Uzbekistan	Jul/Jun	2 737.0	0.0	2 737.0	2 737.0
Far East		13 406.4	2.0	13 408.4	9 514.6
Bangladesh	Jul/Jun	6 506.5	0.0	6 506.5	5 475.0
India	Apr/Mar	5 807.3	0.0	5 807.3	3 056.0
Nepal	Jul/Jun	859.8	2.0	861.8	751.8
Pakistan	May/April	232.8	0.0	232.8	231.8
Near East		5 462.0	390.0	5 852.0	5 892.0
Afghanistan	Jul/Jun	2 882.0	100.0	2 982.0	2 932.0
Syrian Arab Republic	Jul/Jun	2 580.0	290.0	2 870.0	2 960.0
CENTRAL AMERICA AND THE CARIBBEAN		1 237.0	36.1	1 273.1	1 400.0
Haiti	Jul/Jun	677.0	33.1	710.1	865.0
Nicaragua	Jul/Jun	560.0	3.0	563.0	535.0
TOTAL		30 041.2	706.7	30 747.9	26 866.1

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 1 945 in 2011); for full details see <http://www.fao.org/countryprofiles/lifdc>

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