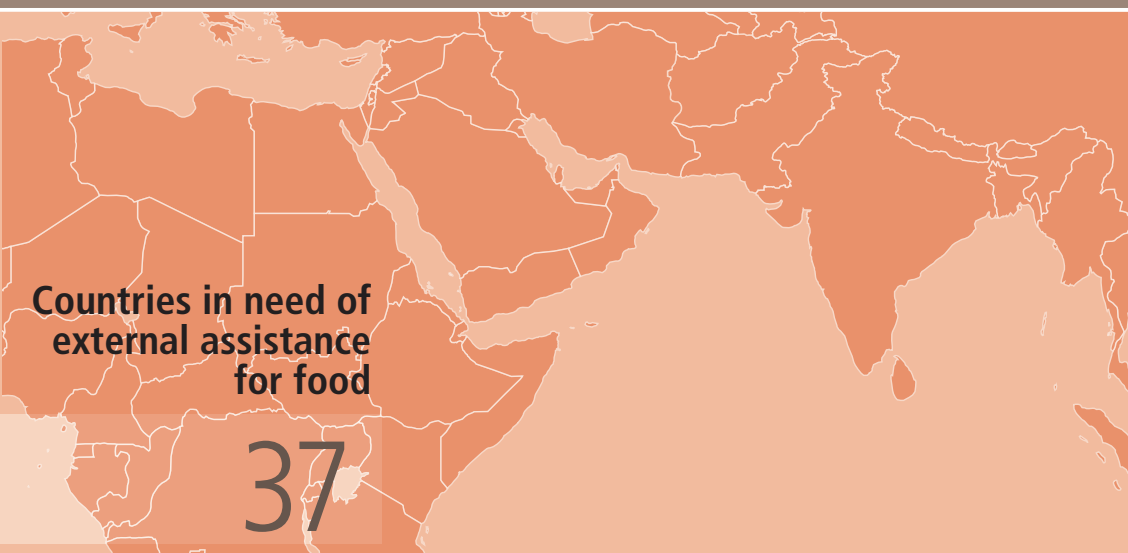




CROP PROSPECTS and FOOD SITUATION

Quarterly Global Report



COUNTRIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD

FAO assesses that globally 37 countries are in need of external assistance for food. Conflicts continue to be the main factor driving the high levels of severe food insecurity. Weather shocks have also adversely impacted food availability and access, notably in East Africa.

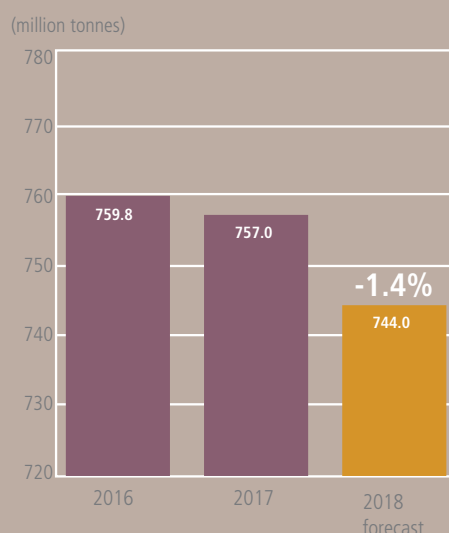
Asia	+1.0
Africa	+10.8
Central America and the Caribbean	+1.1
South America	+25.4
North America	-7.1
Europe	+2.5
Oceania	-35.2
World	+1.2

WORLD Cereal production 2017 over 2016

+1.2%

GLOBAL Wheat production 2018 over 2017

-1.4%



REGIONAL HIGHLIGHTS

AFRICA Drought conditions in parts of East Africa curbed cereal production in 2017, intensifying food insecurity in several areas, while the persisting conflict in South Sudan contributed to the drop in the 2017 national cereal harvest to its lowest level since 2013. For 2018, countries in North and Southern Africa are likely to gather reduced harvests due to dry weather conditions. In the remaining subregions, planting of the 2018 cereal crops will start from April.

ASIA Conflicts continue to acutely debilitate food security in Yemen and the Syrian Arab Republic, where large numbers of people require urgent humanitarian assistance. The 2018 main wheat production outlook in the Far East is overall favourable, while dryness has lowered expectations in the Near East and CIS countries.

LATIN AMERICA AND THE CARIBBEAN Following record cereal outputs in Argentina and Brazil in the previous year, production in 2018 is expected to fall, but to remain above average, in South America mostly owing to reduced plantings after consecutive years of record crops.

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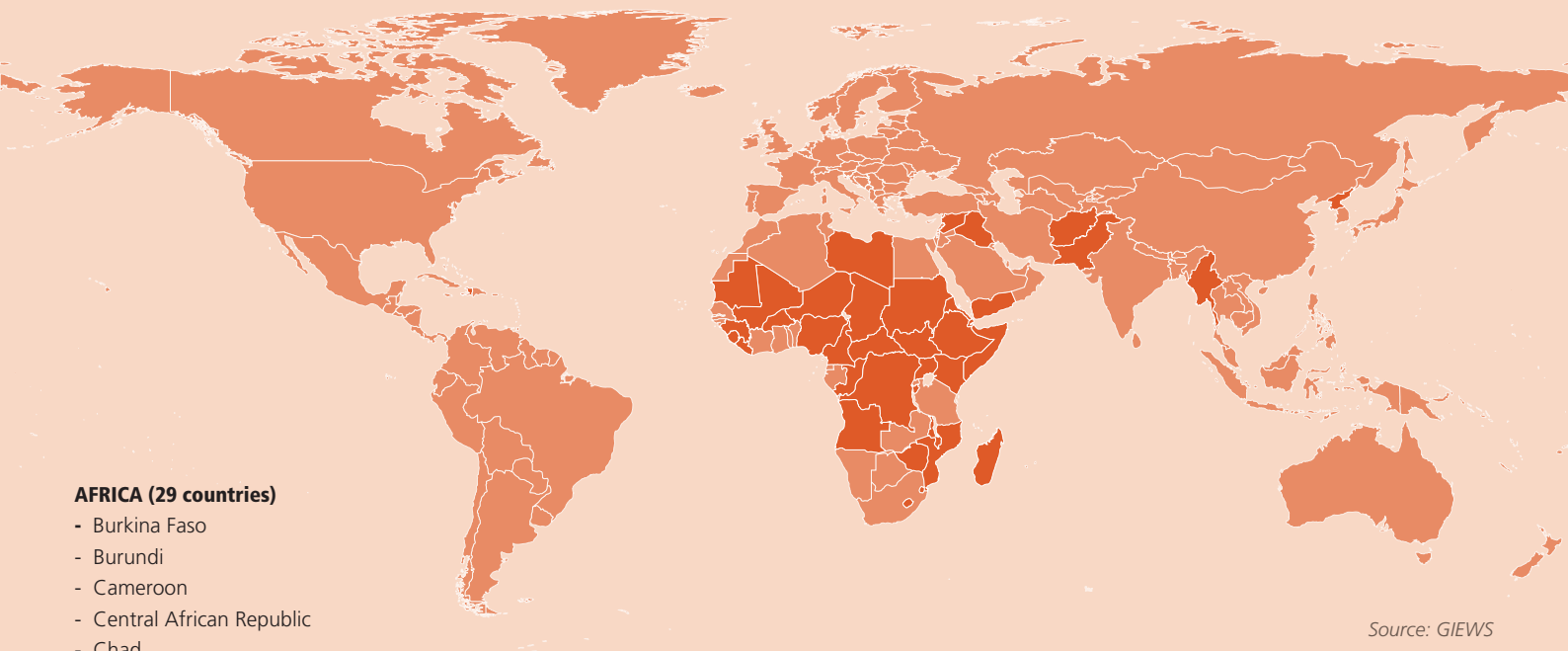
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CONTENTS

COUNTRIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD	2
GLOBAL CEREAL OVERVIEW	6
LOW-INCOME FOOD-DEFICIT COUNTRIES' FOOD SITUATION OVERVIEW	8
REGIONAL REVIEWS	
AFRICA - Overview	10
NORTH AFRICA	11
WEST AFRICA	11
CENTRAL AFRICA	12
EAST AFRICA	14
SOUTHERN AFRICA	16
ASIA - Overview	19
FAR EAST	21
NEAR EAST	22
CIS IN ASIA	23
LATIN AMERICA AND THE CARIBBEAN - Overview	25
CENTRAL AMERICA AND THE CARIBBEAN	26
SOUTH AMERICA	27
NORTH AMERICA, EUROPE AND OCEANIA - Overview	29
NORTH AMERICA	30
EUROPE	30
OCEANIA	31
STATISTICAL APPENDIX	
Table A1. Global cereal supply and demand indicators	32
Table A2. World cereal stocks	33
Table A3. Selected international prices of wheat and coarse grains	34
Table A4a. Estimated cereal import requirements of Low-Income Food-Deficit Countries in 2016/17 or 2017	35
Table A4b. Estimated cereal import requirements of Low-Income Food-Deficit Countries in 2016/17 or 2017	36
Table A5. Estimated cereal import requirements of Low-Income Food-Deficit Countries in 2017/18	37

COUNTRIES REQUIRING EXTERNAL ASSISTANCE FOR FOOD



Source: GIEWS

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 People (IDPs) caseload in January 2018 was estimated at about 688 000, a 14 percent increase since October 2017 and more than 70 percent higher than in January 2017. About 1.1 million people (30 percent of the total population) are estimated to be in need of urgent assistance for food.
- Violent clashes and inter-communal tensions have continuously increased in the Central African Republic since 2017 exacerbating the massive displacements, with a severe negative impact on the food security situation.

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 the Imbo Plain in the west and the northern lowlands (Kirundo Province).

- About 2.6 million people are estimated to be severely food insecure.

Chad

Population displacements and civil insecurity

- Approximately 409 000 refugees, 174 000 IDPs, as well as an estimated 20 000 Chadian returnees, continue to add pressure on local food supplies, negatively affecting food security.
- Between October and December 2017, about 318 000 people were estimated to be in need of food assistance.

Democratic Republic of the Congo

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

- About 7.7 million people are estimated to be in acute food insecurity and livelihood crisis. The country hosts 182 000 refugees from the Central African Republic, 87 000 from South Sudan and 44 000 from Burundi, and as of February 2018, the IDP caseload was estimated at 4.5 million.
- Reduced plantings were reported in conflict-affected areas of Kasai and Tanganyika.

Djibouti

Impact of consecutive unfavourable rainy seasons on pastoral livelihoods

- About 197 000 people are severely food insecure, 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.
- In late February 2018, 7.88 million people were estimated to be food insecure, mainly in southeastern agro-pastoral areas.

Niger

Population displacements and civil insecurity

- More than 301 000 people are estimated to be severely food insecure.
- As of end-October 2017, approximately 108 000 Nigerian and 57 000 Malian refugees are estimated to be living in the country.

Nigeria

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

- About 3.16 million people are estimated to be facing acute food insecurity and require urgent life-saving response and livelihood protection, including about 2 000 people in CH Phase 5: "Famine" (i.e. IPC "Catastrophe").
- Despite the above-average cereal harvest gathered in 2017, the weak currency, coupled with persisting civil conflict in northeastern states, has disrupted market activities and kept food prices at elevated levels.
- Approximately 1.7 million people remain internally displaced due to the insurgency northeastern states of the country.

South Sudan

Conflict, civil insecurity and severe economic downturn

- Despite sustained humanitarian assistance, food insecurity still affects large segments of the population. The number of severely food insecure people is estimated at 6.33 million, due to

persisting insecurity, trade disruptions and high food prices.

SEVERE LOCALIZED FOOD INSECURITY

Burkina Faso

Refugees putting strain on host communities

- As estimated 24 000 Malian refugees are living in the country as of January 2018.
- About 133 000 people are estimated to be in need of food assistance.

Cameroon

Influx of refugees putting strain on host communities and displacements

- The number of refugees from the Central African Republic was estimated at 249 000 at the end of January 2018. Insecurity along the borders with Nigeria also led to the internal displacement of 236 000 individuals.

Congo

Influx of refugees straining the already limited resources of host communities

- As of end-November 2017, about 32 000 refugees from the Central African Republic are sheltering in the country.

Guinea

Localized production shortfalls

- About 34 000 people are estimated to be in need of food assistance.

Kenya

Consecutive unfavourable rainy seasons affect crop and livestock production

- About 3.4 million people are severely food insecure, mainly located in eastern, southeastern and coastal areas, following the negative impact of the poor 2016 "short-rains" and below-average 2017 "long-rains" on agricultural production and pastoral livelihoods.

Lesotho

Localized production shortfalls

- About 225 000 people are estimated to be in need of food assistance until the start of the main harvest in late March 2018, mostly located in southwestern areas, where dry spells adversely affected 2017 production.

- Food security conditions are expected worsen in 2018 compared to the previous year, reflecting expectations of a reduced cereal harvest.

Liberia

Localized production shortfalls and influx of refugees

- About 29 000 people are estimated to be in need of food assistance.

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 and impact of cyclones

- In southeastern areas, the food security situation worsened compared to the previous year, reflecting a lower agricultural output in 2017 due to the impact of prolonged dry-weather conditions and a cyclone. Historically high prices of rice (the main food staple) are also constraining food access.
- Unfavourable seasonal rains in southwestern areas are expected to result in a production decline in 2018, which is likely to further stress food security conditions.

Malawi

Localized impact of weather shocks

- An estimated 0.84 million people require humanitarian assistance until the main harvest period from late March; this figure is down from the 6.7 million in the previous year, reflecting an improved agricultural output in 2017.
- Food security conditions are expected to intensify in 2018 compared to the previous year, reflecting an anticipated decline in the 2018 cereal output.

Mali

Population displacements and civil insecurity in northern areas

- An estimated 58 600 people have been internally displaced in the country mostly residing in Timbuktu, the most affected region.

Mauritania

Refugee caseload continues to put additional pressure on local food supplies

- As of end-January 2018, about 52 000 Malian refugees remain in the Mbera camp in Hodh Ech Chargui, a southeastern region of Mauritania.
- Over 378 000 people are estimated to be severely food insecure.

Mozambique

Localized impact of floods and dry spells

- About 314 000 people are estimated to be food insecure and require humanitarian assistance in the first quarter of 2018, mostly concentrated in central provinces.
- Food security conditions are expected to worsen in 2018 in southern and some central provinces, due to the unfavourable weather conditions that are anticipated to cause a reduction in the 2018 cereal harvest.

Sierra Leone

Floods and localized production shortfalls

- About 12 000 people are estimated to be severely food insecure.

Somalia

Conflict, civil insecurity and widespread drought conditions

- About 2.7 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 4.8 million people are in need of humanitarian assistance, mainly IDPs and host communities in conflict-affected areas.

Swaziland

Localized dry spells in southeastern parts

- About 159 000 people require food assistance, mostly located in Lumombo Province, on account of production shortfalls in 2017; the number of food insecure is, however, down 75 percent on an annual basis, reflecting the larger national cereal harvest in 2017.

- Food insecurity is anticipated to intensify in 2018 compared to the previous year, which would mostly reflect the expected fall in cereal production this year.

Uganda

Below-average crop production

- About 0.44 million people are estimated to be severely food insecure due to the lingering effects of two consecutive seasons of reduced agricultural outputs in 2016.
- More than 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 estimated to be food insecure in the first quarter of 2018, mostly concentrated in southern and western regions. This number is, however, significantly below the elevated levels of the previous year.
- An expected fall in cereal production is anticipated to stress food security conditions in the second half of 2018.

ASIA (7 COUNTRIES)**EXCEPTIONAL SHORTFALL
IN AGGREGATE FOOD
PRODUCTION/SUPPLIES****Syrian Arab Republic**

Civil conflict

- About 6.5 million people are food insecure and 4 million 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**

Reduced agricultural output and economic downturn

- The 2017 main season is estimated to have decreased compared to last year's near-average level, due to water deficits.
- As a result, 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 previous IPC analysis of June 2016.

**SEVERE LOCALIZED FOOD
INSECURITY****Afghanistan**

Continuing conflict and population displacement

- Almost 1.9 million people are severely food insecure and 5.7 million moderately food insecure.
- Between January and November 2017, over 360 000 individuals have been forced from their homes, adding to over 600 000 displaced in 2016.

Iraq

Civil conflict

- As of January 2018, about 2.6 million people were internally displaced.
- About 800 000 people were in need of food security assistance in December 2017.

Myanmar

Conflict in parts of Kachin, Shan and resurgence of violence in Rakhine

- Since the resurgence of violence in August 2017 in the Rakhine State, an estimated 688 000 people have sought refuge in Bangladesh and 129 000 people were internally displaced within the State. As of February 2018, an estimated 107 000 people remain also displaced in Kahine and Shan states due to ongoing conflict. These populations rely mainly on humanitarian assistance to cover their basic needs.

Pakistan

Population displacement and localized cereal production shortfalls

- 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 food insecurity and caused acute malnutrition.
- Recurrent insecurity in northwestern parts of the country along the border with Afghanistan triggered large-scale internal displacement. As of January 2018, over 42 000 families were displaced in the Federally-Administered Tribal Areas (FATA) and Khyber Pakhtunkhwa Province. The country hosts close to 1.4 million registered and

unregistered Afghan refugees. Most of these people are in need of humanitarian assistance.

LATIN AMERICA AND THE CARIBBEAN (1 COUNTRY)

SEVERE LOCALIZED FOOD INSECURITY

Haiti

Recurrent droughts and hurricane damage

- As a result of the impact of recurring droughts in 2014 and 2016, coupled with the effects of hurricanes Matthew and Irma in 2016 and 2017, respectively, an estimated 1.32 million people are in need of food assistance.

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* [page 10](#)).

GLOBAL CEREAL OVERVIEW

Cereal Supply and Demand Overview¹

Cereal production at record level in 2017

Harvesting of the 2017 cereal crops is mostly complete and FAO estimates global cereal production at 2 642 million tonnes, 30.1 million tonnes higher than the previous year, following a 2-million-tonne (less than 1 percent) upward revision made in March 2018 from the previous month's estimate. The bulk of the monthly change concerns coarse grains, with upward revisions made to production estimates in Australia, as well as several countries in East and West Africa. As for rice, improved crop prospects for Cambodia and upward revisions to historical estimates for Cameroon and the Islamic Republic of Iran were partly outweighed by a reduction made to Venezuela's output estimate. For the year, global rice production is seen in the order of 502.2 million

tonnes, implying a marginal (0.3 percent) expansion from the 2016 all-time high.

First forecast for 2018 wheat production points to a decline

FAO's first forecast for world wheat production in 2018 is pegged at 744 million tonnes, indicating a second successive decline, but the global output is still expected to remain above average. Most of the projected decline stems from forecast reductions in the European Union and the Russian Federation, reflecting anticipated falls in yields from the highs of 2017. A likely recovery in Australia's output is foreseen to prevent a larger production decrease at the global level. The production outlook for the 2018 coarse grain crops in the Southern Hemisphere also points to a likely decrease, mostly on account of a contraction in plantings and unfavourable weather in South America and Southern Africa.

Table 1. World cereal production¹
(million tonnes)

	2015	2016	2017 estimate	Change: 2017 over 2016 (%)
Asia	1 120.2	1 133.0	1 144.3	1.0
Far East	1 016.6	1 029.6	1 040.0	1.0
Near East	69.3	66.6	69.4	4.2
CIS in Asia	34.4	36.9	34.9	-5.3
Africa	173.8	169.2	187.4	10.8
North Africa	39.4	30.8	36.2	17.7
West Africa	54.0	56.1	59.1	5.4
Central Africa	5.0	5.0	5.0	0.0
East Africa	48.6	52.6	48.8	-7.2
Southern Africa	26.8	24.7	38.2	54.7
Central America and the Caribbean	39.2	42.9	43.4	1.1
South America	186.3	173.5	217.6	25.4
North America	482.9	531.7	493.9	-7.1
Europe	500.7	508.5	521.1	2.5
European Union	314.1	299.5	308.5	3.0
CIS in Europe	172.8	192.9	201.0	4.2
Oceania	36.9	53.2	34.5	-35.2
World	2 540.0	2 612.1	2 642.3	1.2
Developing countries	1 463.4	1 462.2	1 529.3	4.6
Developed countries	1 076.6	1 149.9	1 112.9	-3.2
- wheat	734.2	759.8	757.0	-0.4
- coarse grains	1 315.1	1 351.4	1 383.1	2.3
- rice (milled)	490.8	500.9	502.2	0.3

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 1 February 2018.

Faster feed use boosts global cereal utilization

FAO's forecast of global cereal utilization in 2017/18 has been increased by 5 million tonnes (0.2 percent) in March to 2 608 million tonnes, making it 38 million tonnes (1.5 percent) higher than in 2016/17. The month-on-month upward adjustment largely reflects faster growth in the use of maize for feed in Asian countries, which more than offsets a small decrease in wheat consumption.

World rice utilization is still expected to expand by 1 percent in 2017/18, to 503.6 million tonnes compared to the previous year. A 6.1-million-tonne increase in food use would account for all of this growth, being sufficient to keep global per capita intake largely steady at 54 kg per person.

World trade to contract slightly in 2017/18

International trade in all cereals in 2017/18 is forecast to approach 405 million tonnes, almost 1 million tonnes (0.2 percent) below the 2016/17 level, despite a slight upward revision in March. The month-on-month adjustment is mostly due to an increase in global maize trade, more than offsetting lower wheat shipments to India, Japan and Viet Nam.

World trade in rice is forecast at 46.0 million tonnes in 2018, down 3 percent year-on-year,

but still the second highest volume on record. The forecast annual contraction primarily mirrors expectations that smaller purchases by Bangladesh, Senegal and Sri Lanka would more than offset larger deliveries to Indonesia, Nigeria and the Philippines.

FAO's forecast for world wheat inventories raised further

FAO's forecast for world cereal stocks by the close of seasons in 2018 has been increased on a monthly basis in March by 14 million tonnes (1.9 percent), and now stands at 753 million tonnes. The revised forecast makes total cereals' ending stocks 4.6 percent (33 million tonnes) higher than their opening levels. Global wheat stocks are forecast to hit a new peak, at 272.7 million tonnes, 9.2 percent above the previous season, while world inventories of coarse grains are also forecast to climb to a record, at 309.8 million tonnes, up nearly 4 percent from their opening levels.

Global rice inventories at the close of 2017/18 seasons are forecast at 170.4 million tonnes, up 1.7 million tonnes from 2016/17. China (Mainland) is anticipated to account for much of this annual expansion, although inventories are also seen up in Bangladesh and Brazil, more than compensating for the cuts expected in the Republic of Korea, Thailand and the United States of America.

Table 2. Wheat production: leading producers ¹
(million tonnes)

	Average 2015-2017	2016	2017 estimate	2018 forecast	Change: 2018 over 2017 (%)
European Union	152.3	144.5	152.0	145.3	-4.4
China (Mainland)	129.6	128.8	129.8	129.0	-0.6
India	92.4	92.3	98.4	97.0	-1.4
Russian Federation	73.6	73.3	85.8	77.0	-10.3
United States of America	55.4	62.8	47.4	47.0	-0.8
Canada	29.9	32.1	30.0	30.0	0.1
Ukraine	26.2	26.1	26.1	26.5	1.5
Australia	26.0	34.4	21.2	26.0	22.4
Pakistan	25.4	25.5	25.8	26.0	1.0
Turkey	21.6	20.6	21.5	21.0	-2.3
Argentina	16.1	18.4	18.5	16.5	-10.8
Kazakhstan	14.2	15.0	13.9	13.8	-0.4
Iran Islamic Rep. of	12.0	11.1	13.5	12.0	-11.1
Egypt	9.1	9.0	8.8	9.0	2.3
Uzbekistan	6.9	6.9	6.9	6.9	0.0
Other countries	59.4	58.9	57.5	61.0	6.1
World	750.3	759.8	757.0	744.0	-1.7

¹ Countries ranked according to average production in 2015-2017.

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	457.4	478.2	486.1	1.7
excluding India	225.3	233.4	234.6	0.5
Utilization	501.1	523.6	529.3	1.1
Food use	405.4	410.1	421.7	2.8
excluding India	210.4	216.3	224.1	3.6
Per caput cereal food use (kg per year)	147.1	146.3	147.8	1.0
excluding India	145.5	146.2	148.1	1.3
Feed	40.6	41.8	42.5	1.6
excluding India	25.8	26.3	26.2	-0.2
End of season stocks²	93.4	89.5	88.8	-0.8
excluding India	52.9	54.7	53.2	-2.7

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	2017 estimate	Change: 2017 over 2016 (%)
Africa (37 countries)	116.5	122.0	124.5	2.0
East Africa	48.6	52.6	48.8	-7.2
Southern Africa	9.1	8.3	11.5	38.1
West Africa	54.0	56.1	59.1	5.4
Central Africa	4.8	5.0	5.0	0.0
Asia (11 countries)	340.1	355.1	360.4	1.5
CIS in Asia	11.2	11.3	11.0	-2.9
Far East	319.7	333.8	341.0	2.1
- India	232.2	244.8	251.5	2.7
Near East	9.2	10.0	8.5	-14.7
Central America and the Caribbean (2 countries)	0.8	1.2	1.2	5.6
Oceania (2 countries)	0.0	0.0	0.0	0.0
LIFDC (52 countries)	457.4	478.2	486.1	1.7

Note: Totals and percentage change computed from unrounded data.

¹ Includes rice in milled terms.

Production prospects in 2018 mixed for LIFDCs

In Low-Income Food-Deficit Countries (LIFDCs), harvesting of the 2018 cereal crops will begin in March/April and production prospects vary considerably across the regions, mostly reflecting weather conditions.

In Southern Africa, erratic rains and an intense dry period at the start of the year are expected to trigger a production decrease in 2018; however, beneficial precipitation since late January is expected to partly recuperate crop conditions, preventing a larger decrease. In East, Central and West Africa, plantings of the main 2018 crop will commence in March/April. East Africa is forecast to receive average to above-average rainfall benefiting crops during their growing stage in most areas until May, while in Central Africa, the persistent insecurity in parts of the subregion continue to erode agricultural capacities, dampening the production outlook.

In Asia, production expectations in the Far East subregion are mostly favourable. The 2018 winter wheat harvest is expected to commence in the next few months and prospects are overall positive, mainly reflecting good weather conditions and adequate water for irrigation in the main producing countries of India and Pakistan, where 2018 wheat outputs are foreseen at above-average levels. In the Near East, the ongoing conflict and lack of inputs in the Syrian Arab Republic and Yemen continued to severely debilitate the capacity of the agriculture sector, thus maintaining weak production prospects this year.

² The inclusion of a country in the Low-Income Food-Deficit Countries (LIFDCs) group is based on three criteria: 1) the level of the annual per capita Gross National Income (GNI); 2) the net food trade position; and 3) self exclusion (when countries that meet the first two criteria request to be excluded from the category). The current (2016) list of the LIFDCs includes 52 countries, two less than in the 2015 list but with some changes. For full details see: www.fao.org/countryprofiles/lifdc

LIFDC cereal production grows strongly in 2017

With most of the 2017 cereal crops harvested, FAO's forecast for the aggregate cereal production of LIFDCs stands at 486.1 million tonnes, nearly 7.9 million tonnes (1.7 percent) higher than 2016's already good level. The bulk of the yearly increase is mainly associated with significant production upturns in Far East Asia (India and Pakistan) and Southern Africa (Malawi and Zimbabwe), mainly resulting from beneficial weather conditions that boosted yields. These year-on-year production gains more than offset the relatively large production declines in Bangladesh, Madagascar and the Sudan due to weather shocks.

Imports forecast to fall moderately in 2017/18

FAO's forecast for cereal imports by LIFDCs in the marketing years of 2017/18 is pegged at 65.6 million tonnes, slightly below the previous year's volume.

The small decrease largely reflects lower year-on-year imports in India and Southern African countries, where production recovered strongly in 2017 from the lows of 2016. Conversely, imports are forecast to rise in the Near East subregion, as well as East and West Africa, while a significant 3.7-million-tonne increase in cereal imports is forecast in Bangladesh, on account of the flood-reduced paddy output in 2017.

Table 5. Cereal imports of LIFDCs
(thousand tonnes)

	2015/16 or 2016	2016/17 or 2017		2017/18 or 2018	
	Actual imports	Import forecast	of which food aid	Import requirement ¹	of which food aid
Africa (37 countries)	33 169	35 429	987	34 893	1 039
East Africa	10 871	11 129	599	11 488	733
Southern Africa	3 146	3 803	93	2 894	15
West Africa	17 319	18 230	137	18 252	134
Central Africa	1 833	2 267	157	2 260	157
Asia (11 countries)	22 626	28 575	679	29 035	703
CIS in Asia	4 560	4 496	1	4 441	1
Far East	8 064	13 927	68	13 922	92
Near East	10 002	10 152	610	10 672	610
Central America and the Caribbean (2 countries)	1 268	1 389	10	1 234	10
Oceania (2 countries)	481	470	0	484	0
LIFDC (52 countries)	57 545	65 863	1 676	65 646	1 752

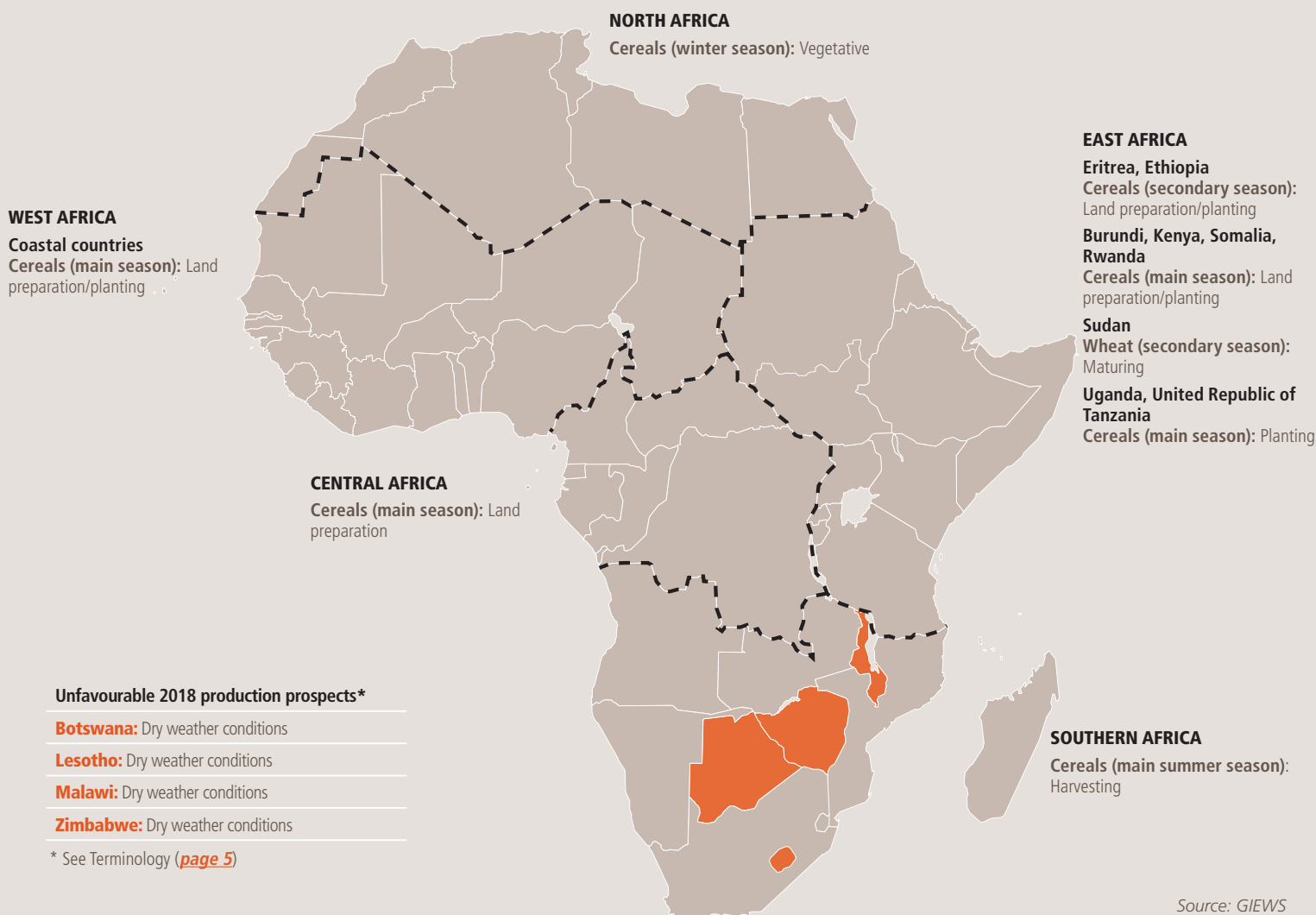
Note: Totals computed from unrounded data.

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 February
 ■ Subregional borders



Source: GIEWS

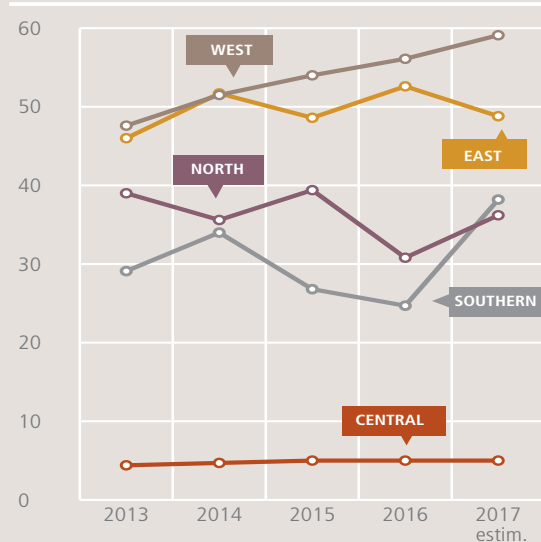
Africa Production Overview

With the 2017 cereal harvest almost complete, aggregate production is forecast at 187.4 million tonnes in 2017, 18 million tonnes higher than the average output of 2016. The yearly increase is mainly associated with larger harvest in North, Southern and West Africa that more than offset a decrease in drought-affected East Africa.

For 2018, harvesting of the main season cereal crops will begin in the next months in North and Southern Africa. Prospects in Southern Africa point to a likely decline on account of erratic seasonal rains and an intense dry period in January; however, the aggregate output is expected to remain close to the average. In North Africa, the production outlook is mixed, although prospects improved since the end of 2017 owing to beneficial rains in January.

In Central, East and West Africa plantings of the 2018 cereal crop are expected to commence in March/April. Following persisting dry conditions in preceding seasons, East Africa is forecast to receive average to above-average rainfall in most areas, while in parts of Central Africa prospects are uncertain, mainly resting on the continued effect of insecurity on the agriculture sector.

Cereal production
(million tonnes)



NORTH AFRICA



Mixed prospects for 2018 winter crops

Planting of 2018 winter wheat crop, for harvest from May, was completed in January. In **Algeria** and **Morocco**, dry weather conditions affected the start of the season in late 2017, delaying plantings in some areas. Beneficial rains in January improved soil moisture in both countries, although dry weather conditions still prevail in the southern part of **Morocco**. Weather conditions in **Tunisia** remain relatively favourable with the exception of the eastern part of the country, which was affected by early season dryness. In **Egypt**, reports indicate average conditions of the mostly irrigated wheat crop, resulting in a preliminary wheat production forecast of 9 million tonnes, similar to last year's average level.

For 2017, the subregion's aggregate wheat output was estimated at 19.5 million tonnes, about 30 percent more than previous year's weather-reduced production and slightly above the previous five-year average. The subregional barley production was estimated at 4.1 million tonnes, almost double the output of the previous year and slightly above average.

Food inflation remained high in Egypt and Libya

The inflation rate in **Egypt**, down from its peak of 44 percent in April 2017,

remained high at 25 percent, mostly driven by the impacts of currency liberalization in November 2016, higher domestic fuel prices that have pushed up transportation costs and supply bottlenecks. In **Libya**, food inflation increased to a record level of 50 percent in December 2017 (up from over 30 percent earlier in 2017), supported by insecurity-induced supply chain disruptions and shortages of foreign currencies. A moderate food price inflation rate of 4 percent was reported in **Algeria** (a decrease from 9 percent in October 2017) and 8 percent in **Tunisia** (about the same in October 2017).

WEST AFRICA



Land preparation of 2018 crops underway in coastal countries

Seasonal dry conditions prevailed in the Sahel, while in the coastal countries along the Gulf of Guinea land preparation for the first maize crop is underway. Planting of the 2018 crops in the Sahelian countries is expected to begin in April with the onset of the rainy season.

Record 2017 cereal crop harvested in most countries

Harvesting of the 2017 coarse grain crop was completed in December in the Sahel, while in the coastal countries along the Gulf of Guinea harvesting of the second season cereal crops was completed in early January. The subregion's aggregate

cereal output in 2017 is estimated at about 65.2 million tonnes, 5.6 percent higher than the previous year's bumper output and 14 percent above average. The yearly increase mostly reflects larger outputs in the Gulf of Guinea countries that more than offset declines in **Burkina Faso**, **Gambia**, **Guinea-Bissau**, **Liberia** and **Mauritania**.

Abundant rains during the cropping season also benefited pastoral areas. Natural pasture and watering conditions are currently favourable, but are likely to deteriorate seasonally until the onset of the next rainy season in April. An early start of the pastoralists' lean season is expected in areas where rains ceased earlier than normal. Already pasture conditions are quickly deteriorating fuelled by high livestock density in small areas and limited possibility to supplement natural grazing resources with other sources of feed.

Despite the good harvests, prices of coarse grains are at relatively high levels

Cereal prices started to decline at the end of last year, on account of the above-average 2017 output. However, in the Sahel belt, despite adequate supplies from the 2017 harvests, prices of domestically-produced millet and sorghum followed unseasonal trends for the second consecutive month in January, increasing or remaining relatively stable. Prices were, in addition, generally higher than a year earlier, mainly due to large volumes that were stored by traders and producers and withheld from the markets to meet the strong demand from governmental and commercial institutions that were replenishing their low carryover stocks. Insecurity in central and northern parts of **Mali** as well as northern **Burkina Faso**

Table 6. North Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2015	2016	2017 estim.	2015	2016	2017 estim.	2015	2016	2017 estim.	2015	2016	2017 estim.	Change: 2017/2016 (%)
North Africa	21.5	15.3	19.5	13.9	11.1	12.2	6.0	6.3	6.4	41.3	32.7	38.2	16.7
Algeria	2.7	2.4	2.4	1.1	1.0	1.0	0.0	0.0	0.0	3.8	3.4	3.4	-1.4
Egypt	9.6	9.0	8.8	8.7	8.9	8.0	5.9	6.3	6.4	24.2	24.2	23.2	-4.4
Morocco	8.1	2.7	7.1	3.6	0.8	2.7	0.1	0.0	0.1	11.7	3.6	9.8	177.0
Tunisia	0.9	0.9	1.1	0.4	0.4	0.5	0.0	0.0	0.0	1.3	1.3	1.6	24.6

Note: Totals and percentage change computed from unrounded data.

has disrupted traditional supply routes, and coupled with localized production shortfalls added further upward pressure on prices. In **Niger**, reduced imports from Nigeria contributed to keep prices at levels above those a year earlier. In **Chad**, prices of coarse grains also increased in most markets due to reduced localized harvests and the ongoing conflict in the Lake Chad Basin. In **Senegal**, prices of maize and millet remained stable in December, reflecting adequate market supplies, while those of sorghum declined.

In coastal countries, prices of maize in **Ghana** remained relatively stable or

seasonally increased in January, while in **Togo** institutional purchases provided some support to maize prices. In **Nigeria**, prices of food crops continued to decline significantly in December with new supplies from the 2017 harvests. Prices, however, remained at relatively high levels due to the low value of the national currency, coupled with strong domestic demand and persistent insecurity.

Food security affected by civil insecurity

In spite of three consecutive years of bumper harvests, the humanitarian situation remains critical in many countries of the

subregion, mainly due to the continuing civil conflict in northern **Nigeria**, which has resulted in large population displacements, both internally and in the neighbouring countries of **Cameroon**, **Chad** and **Niger**. As of November 2017, over 2.3 million people remained internally displaced people in the Lake Chad Basin region. The conflict has also caused widespread disruption to agricultural and marketing activities in the Lake Chad area, further deteriorating the food security situation.

Across the 17 countries of Sahel and West Africa, between October and December 2017, an estimated 5.2 million individuals were severely food insecure, including about 2 000 people in CH Phase 5: "Famine" (i.e. IPC "Catastrophe") in **Nigeria**.

CENTRAL AFRICA



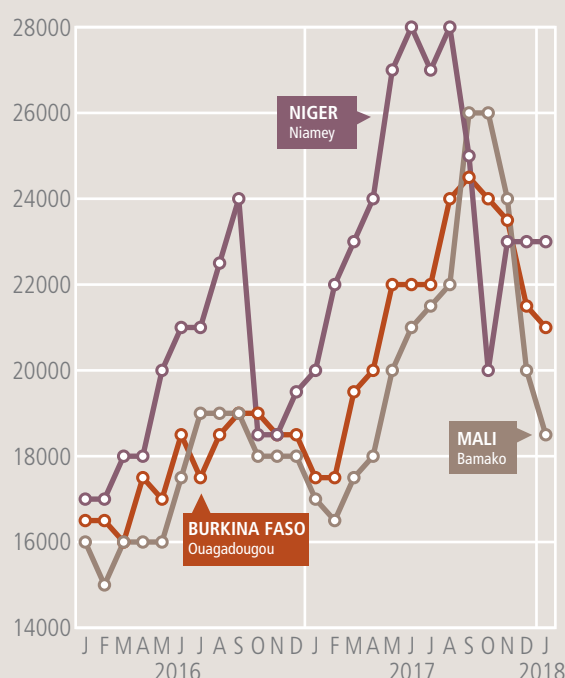
The main cropping season in 2018 is about to start; uncertain prospects in the conflict-affected countries

Planting of the 2018 main season maize crops will begin in March and are expected to be harvested from July. In **the Central African Republic**, the conflict has increased in terms of severity and spatial diffusion since 2017 resulting in increasing population displacements and consequent disruption of agricultural activities. As a result, production prospects remain uncertain for the 2018 maize crop. Similarly, in **Cameroon**, production prospects in the far north are uncertain due to continuing civil unrest, which spread from neighbouring Nigeria in late 2014. In southernmost uni-modal rainfall areas of **the Democratic Republic of the Congo**, planting of the secondary season maize crop, to be harvested from May, started in January under generally favourable weather conditions.

Near-average 2017 cereal harvests estimated in most countries

In **Cameroon**, harvesting of the second season crops was completed in January in the Centre and South regions and total cereal production for 2017 is

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



Source: Afrique Verte.

Table 7. West Africa cereal production
(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals ¹			
	2015	2016	2017 estim.	2015	2016	2017 estim.	2015	2016	2017 estim.	Change: 2017/2016 (%)
West Africa	44.8	46.1	48.5	14.4	15.5	16.6	59.3	61.7	65.2	5.6
Burkina Faso	3.9	4.4	4.2	0.3	0.4	0.4	4.2	4.8	4.6	-4.7
Chad	2.2	2.6	3.1	0.2	0.3	0.3	2.5	2.9	3.4	18.4
Ghana	2.1	2.1	2.4	0.6	0.7	0.7	2.8	2.8	3.1	11.5
Mali	5.7	6.0	6.5	2.3	2.8	2.9	8.0	8.8	9.5	7.3
Niger	5.4	5.7	5.7	0.1	0.1	0.1	5.5	5.9	5.9	-0.6
Nigeria	19.1	18.9	19.0	4.8	5.0	5.4	23.9	23.9	24.4	2.0

Note: Totals and percentage change computed from unrounded data.

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

estimated to be slightly higher than the above-average 2016 output. According to satellite-based analysis, rainfall was adequate for normal crop development and well-distributed during the main cropping season, partially offsetting the impact of reduced plantings, due to the civil insecurity in the Far North Region that has continued to severely disrupt agricultural activities. FAO provided crop production support to more than 100 000 crisis-hit farmers through the distribution of seeds, fertilizers and bio-pesticides. In addition, FAO supported livestock production, which included enhancing livestock infrastructure and construction of water points and vaccination parks.

In **the Central African Republic**, harvesting of the 2017 main season cereal crops was completed in December 2017. According to preliminary estimates, the 2017 aggregate production of food crops was similar to the reduced 2016 output, and 17 percent below the previous five-year average. Despite generally favourable vegetation conditions during the cropping season, persisting civil insecurity continued to impede agricultural activities and limited the availability and access to crop-growing areas. FAO provided crop production support to more than 150 000 vulnerable households across the country, distributing seeds and tools.

In **the Democratic Republic of the Congo**, harvesting of the main 2017 maize crop was completed in November in the north and was recently concluded in central parts of the country. Overall, seasonal cumulative rainfall amounts were average, with the exception of some eastern parts of the country, where seasonal rains were below average. In **the Congo** and **Gabon**, where the main season harvests were concluded at the end of January 2018,

the 2017 cereal production is estimated to be near average as crops benefited from the timely onset of seasonal rains in October, followed by adequate rainfall in most regions. Overall, the 2017 cereal output for the subregion is estimated at 350 000 tonnes, similar to previous year and at a near-average level.

High inflation rates persist in the Democratic Republic of Congo

In **the Democratic Republic of the Congo**, inflation surged to about 42 percent in 2017 from an estimated 18 percent in 2016, as a result of high Government spending, combined with declining export revenues owing to low international prices of the mining sector's exported commodities. In **the Central African Republic**, food prices are relatively high in most conflict-affected areas due to low market supplies. Nevertheless, the average annual inflation rate fell from 4.6 percent in 2016 to about 3.7 percent in 2017. In **Gabon**, the average inflation rate increased only slightly to 2.5 percent in 2017, with prices kept at generally low levels on account of the introduction of Government subsidies on many basic goods, including food staples, and by the relatively strong local currency which exerted downward pressure on prices of imported goods.

Acute food insecurity persists due to conflict and increased displacements

Continued civil insecurity in **the Central African Republic**, the Kasai and the Tanganyika regions of **the Democratic Republic of the Congo** as well as the Far North Region of **Cameroon** has resulted in massive population displacements and hindered access to food for the affected population. Violent clashes and

inter-communal tensions have increased in **the Central African Republic** since the first quarter of 2017 causing massive displacements, with a severe negative impact on the food security situation. The IDP caseload as of January 2018 is estimated at about 688 000 people, a 14 percent increase since October 2017 and more than 70 percent higher than January 2017. Five consecutive years of reduced harvests, compounded by access constraints to markets and declining purchasing power, have resulted in a critical food security situation across the country. In **the Democratic Republic of the Congo**, the humanitarian crisis in the Kasai Region and the extension of inter-communal conflicts in the Tanganyika Region, as well as in the eastern parts of the country, continue to be the main driver of a worsening food security situation. Since September 2016, the Kasai Region has been facing a major humanitarian crisis, where about 2.4 million people are displaced. As of February 2018, the total IDP caseload in the entire country was estimated at 4.5 million. Most IDPs have lost their productive assets and face extremely limited access to livelihoods, putting added strain on the limited resources of hosting communities. Moreover, the country hosts more than 500 000 refugees from neighbouring countries. According to the latest IPC, which is valid for the period from June to December 2017, about 7.7 million people (11 percent of the total population) were in need of urgent humanitarian assistance (IPC Phase 3: "Crisis" and IPC Phase 4: "Emergency"). In **Cameroon**, the food insecurity situation in the Far North Region is dire, due mostly to the impact of the Boko Haram armed forces on civil insecurity. The conflict has resulted

Table 8. Central Africa cereal production
(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals ¹			
	2015	2016	2017 estim.	2015	2016	2017 estim.	2015	2016	2017 estim.	Change: 2017/2016 (%)
Central Africa	4.6	4.6	4.6	0.6	0.7	0.7	5.2	5.3	5.3	0.1
Cameroon	3.0	3.1	3.2	0.3	0.4	0.4	3.3	3.5	3.5	0.3
Central African Republic	0.1	0.1	0.1	0.0	0.0	0.0	0.1	0.1	0.1	0.1
Democratic Republic of the Congo	1.2	1.2	1.2	0.3	0.3	0.3	1.6	1.6	1.5	-0.5

Note: Totals and percentage change computed from unrounded data.

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

in the displacement of about 236 000 Cameroonians and an influx of about 89 000 refugees from Nigeria. Moreover, the increasing civil insecurity in **the Central African Republic** has led to an influx of refugees into the country during recent months. Almost all new arrivals have settled into host communities in East and Adamaoua regions.

EAST AFRICA



Erratic rains affect secondary season crops in Somalia, Kenya and northeastern United Republic of Tanzania

Harvesting of 2017 secondary season cereal crops was recently concluded and outputs are forecast to be below average in several countries. The expected production declines would primarily result from lower-than-average precipitation amounts, as well as an erratic temporal distribution of rainfall, during the October-December 2017 rainy season, particularly over eastern parts of the subregion (southeastern **Kenya**, northeastern **United Republic of Tanzania** and southern **Somalia**). In **Somalia**, the “deyr” rainy season in the main maize producing area in the Lower

Shabelle Region was characterized by severe dryness in October 2017, heavy precipitations in November (with more than 60 percent of the cumulative seasonal rainfall was received during the first dekad) and by an early cessation of the rains in late November, which caused a significant reduction in yields. Although better growing conditions prevailed in the “sorghum belt” in the Bay Region and in agro-pastoral areas of Bakool and Middle Shabelle regions, the aggregate “deyr” cereal production is estimated to be 20 percent below average. A similar rainfall pattern was observed in southeastern and coastal areas of **Kenya** where the “short-rains” harvest is estimated at a well below-average level. In particular, substantial cereal production shortfalls are expected in Kitui and Makueni counties, reflecting both lower yields, due to unfavourable rains, and a decline in plantings, instigated by expectations of unfavourable rains at the start of the season. In northeastern bi-modal rainfall areas of **the United Republic of Tanzania**, the “vuli” harvest is estimated at a lower-than-average level in Arusha, Kilimanjaro, Manyara and Tanga regions, where insufficient rains affected crop development. In bi-modal rainfall areas of central and southern **Uganda**, the secondary season cereal harvest, completed in January, is estimated to be average to above-average, reflecting generally favourable rains. In **South Sudan**, harvesting of the 2017 crops was also completed in January. According to the preliminary findings of the 2017 FAO/WFP Crop and Food Security Assessment Mission, the 2017 aggregate cereal production is estimated at about 764 000 tonnes, the smallest output since the start of the conflict in 2013. The

dismal performance of the 2017 cropping season, despite overall favourable weather conditions, is mainly due to severe production declines in key-producing areas of the Greater Equatoria Region and the former Western Bahr El Ghazal State following an increase in the scale and intensity of the conflict, which caused large-scale displacements and disruption to farming activities.

The 2017 aggregate cereal output for the subregion is estimated at about 50 million tonnes, 7 percent down from last year, but 2 percent higher than the previous five-year average. The decline in the 2017 aggregate cereal production compared to the previous year is essentially due to a significant cereal production decline in **the Sudan**.

Land preparation is underway for 2018 main season crops

Land preparation for the 2018 main season cereal crops has started in the major-growing areas of Central, Rift Valley and Western provinces in **Kenya** (“long-rains” season), in southern and central **Somalia** (“gu” season) and in southern bi-modal rainfall areas of **South Sudan** and **Uganda**. In central and southern uni-modal rainfall areas of **the United Republic of Tanzania**, planting of the 2018 long-rains “msimu” season crops, to be harvested in May/June, was completed in December 2017, except in central regions of Singida and Dodoma, and southern regions of Iringa and Ruvuma, where a dry spell in mid-November delayed planting operations and resulted in some farmers replanting crops. Above-average rains from December until early February benefited crop development, especially in key-growing areas of the southern

Table 9. East Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Total cereals ¹			
	2015	2016	2017 estim.	2015	2016	2017 estim.	2015	2016	2017 estim.	Change: 2017/2016 (%)
East Africa	5.9	5.5	5.5	40.3	44.4	40.9	49.9	54.0	50.2	-7.2
Ethiopia	4.7	4.5	4.5	20.7	20.7	20.5	25.5	25.4	25.1	-1.2
Kenya	0.2	0.2	0.3	4.2	3.6	3.4	4.5	3.9	3.7	-3.9
Sudan	0.8	0.5	0.5	3.3	8.0	4.7	4.1	8.5	5.2	-38.8
Uganda	0.0	0.0	0.0	3.2	3.2	3.4	3.4	3.4	3.6	5.2
United Republic of Tanzania	0.1	0.1	0.1	6.9	7.0	7.1	10.0	10.5	10.3	-1.8

Note: Totals and percentage change computed from unrounded data.

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

highlands. Land preparation for the 2018B season crops is underway in **Rwanda** and **Burundi**, while the harvest of the 2018A season crops, recently concluded, is estimated at average levels. However, reduced outputs are expected in some low-land areas in Bubanza, Cibitoke, and Kirundo provinces of Burundi and in Rwamagana, Kayanza and Kirehe districts of Eastern Province in Rwanda, due to below-average seasonal rains.

According to the latest weather forecast by the Greater Horn of Africa Climate Outlook Forum (GHACOF), the March-to-May rainy season is expected to be characterized by average to above-average rainfall over most of the subregion, except over eastern Kenya, southeastern Ethiopia and in-land Somalia.

Rangeland conditions improving in Somalia and southeastern Ethiopia, while drought conditions prevail in parts of eastern Kenya

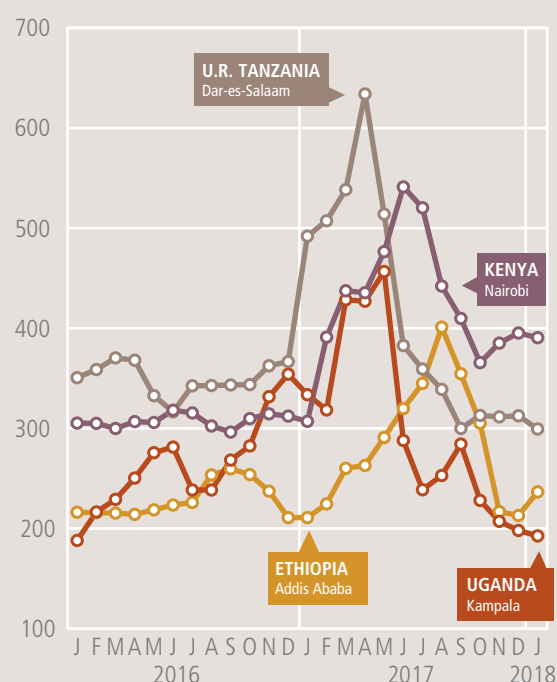
Seasonal October-December 2017 rains over southeastern **Ethiopia** and central **Somalia** were near average, easing drought conditions, and boosting pasture conditions and water availability that helped to improve livestock body conditions. These pastoral and agro-pastoral areas have been severely affected by drought conditions since late 2016, which resulted in extremely poor livestock body conditions, high animal

mortality rates and a decline in milk production to record low levels. Although the recent rains brought some relief, they were not sufficient to fully offset moisture deficits, and vegetation conditions in February were still below average. In addition, the availability of livestock products and animal reproduction remained at low levels due to massive livestock losses incurred in previous months. In several pastoral areas of eastern **Kenya**, the October-December 2017 rains were extremely poor, with seasonal cumulative precipitation volumes up to 80 percent below the average. With weather forecasts pointing to below-average rainfall amounts over these areas during March-May 2018 rainy season, a close monitoring of weather conditions and their impact on rangeland resources is warranted.

Prices of cereals surge to record levels in the Sudan

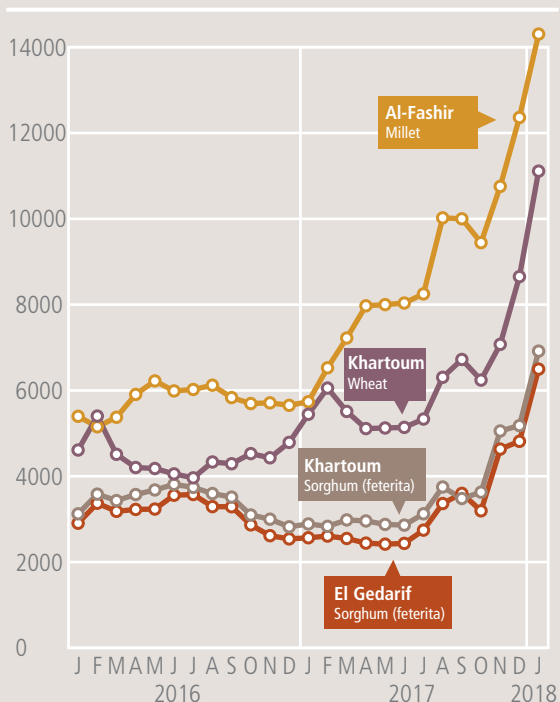
In most countries of the subregion, prices of cereals levelled off in January around their year-earlier levels, after having declined in the previous months as newly-harvested 2017 crops increased supplies. By contrast, in **the Sudan** and **Ethiopia**, prices began or continued to increase in January and were generally at high levels. In **the Sudan**, prices of sorghum, millet and wheat surged to record levels in recent months, doubling in the majority of markets between October 2017 and January 2018. The price spikes were mainly driven by the removal of wheat subsidies in the 2018 budget, which increased demand for millet and sorghum as substitute foods, and by a strong depreciation of the local currency in the parallel market that triggered a significant rise in the general inflation rate. The removal of electricity subsidies, high fuel prices and localized, but substantial, production shortfalls for the 2017 harvest, also provided support to the elevated prices. In **Ethiopia**, prices of maize increased by 8-35 percent in January, after having declined

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



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

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



Source: Food Security information for Action (SIFISA).

by 30-45 percent between September and December 2017 when newly-harvested crops from the main "meher" harvest became available for consumption. Prices of maize in January were 30-55 percent higher than 12 months earlier due to the poor performance of the secondary "belg" harvest, large institutional purchases and sustained exports to Kenya. In **South Sudan**, prices of maize and sorghum declined by 15-25 percent between June 2017 and January 2018, following the 2017 harvests and the establishment of a trading company by the Government that began selling basic food commodities at subsidized prices. Coarse grain prices in January, however, remained up 70 percent above the high levels recorded one year earlier, driven by widespread insecurity, a tight supply situation and the significant depreciation of the local currency. In **Somalia**, prices of locally-produced coarse grains unseasonably increased in January in some markets, including the capital, Mogadishu, as the recently concluded "deyr" harvest is estimated at below-average levels. Despite the recent increases, prices remained 20-40 percent below their levels a year earlier, mainly as a result of large-scale humanitarian assistance. In **Kenya**, **Uganda** and **the United Republic of Tanzania**, maize prices declined by about 50 percent in the second semester of 2017 as newly-harvested crops increased supplies. In **Kenya**, additional

downward pressure on prices was exerted by sustained imports and the introduction of a new price subsidy programme for maize grain imports and domestic maize flour. In **the United Republic of Tanzania**, reduced exports following a maize export ban introduced in June 2017 further contributed to the price declines. In all these countries, prices of maize levelled off in January, at 15-40 percent below the high levels of 12 months earlier, when drought conditions seriously affected crop production, and around their levels in early 2016. In **Burundi**, prices of maize declined by about 30 percent between September and January, and were 43 percent below their year-earlier levels, while in **Rwanda** they were mostly stable in recent months around their values of 12 months earlier.

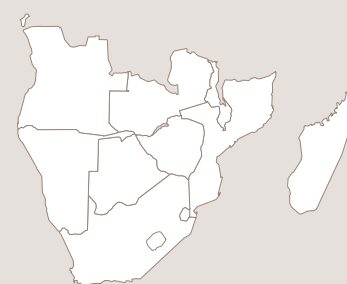
Despite some seasonal improvements, food insecurity is still critical in southeastern Ethiopia, Somalia and South Sudan

Food security conditions improved in late 2017 and early 2018 as the newly-harvested main season crops became available for consumption. However, improvements in **South Sudan** and **Somalia** have been limited and short-lived, reflecting the reduced harvests that did not allow an adequate replenishment of household stocks, resulting in an earlier-than-normal onset of the lean season. Currently, the number of people in need of humanitarian assistance in the subregion is estimated at 28.2 million, about 20 percent above the high levels of one year earlier. In **Ethiopia**,

after a sharp deterioration of the food security situation in 2017 due to prolonged drought conditions in southeastern areas, the food insecure caseload, estimated at 8.5 million in August 2017, declined to 7.88 million in February 2018 as the main "meher" harvest replenished household stocks and "deyr" rains brought some relief to the drought-affected households. However, humanitarian needs still remain substantial as the cumulative impact of consecutive poor rainy seasons heavily damaged the agro-pastoral livelihoods and resulted in massive livestock losses. In **Somalia**, the risk of famine declined and the food security situation improved due to the delivery of large-scale humanitarian assistance and seasonal improvements in food availability with the harvest of "deyr" crops. According to the latest multi-agency assessment, about 2.7 million people (more than one-fifth of the total population) are currently estimated to be severely food insecure (IPC Phases 3: "Crisis" and 4: "Emergency"), 16 percent less than the estimated caseload in late 2017 and 7 percent less than the estimate of one year earlier. However, the current caseload is still almost three times the estimate of mid-2016, reflecting the dramatic impact on local livelihoods of consecutive poor rainy seasons. The areas of major concern are the central regions of Bay, Hiraan, Mudug and Galgadud and the northern regions of Sanag and Sool, where 30-45 percent of the population are severely food insecure. In **South Sudan**, an earlier-than-normal start of the lean season, due to a reduced 2017 crop production, resulted in an increase of

the food insecure caseload from 4.8 million people at the end of 2017 to 6.33 million for the February-April 2018 period, with about 50 000 people estimated to face IPC Phase 5: "Catastrophe" food insecurity conditions in the former Western Bahr El Ghazal State. At the peak of the lean season, from May to July 2018, a further deterioration in the food security situation is anticipated, with close to 7.1 million people projected to be severely food insecure.

SOUTHERN AFRICA



Erratic rains lower production prospects for 2018 cereal crops

Harvesting of the 2018 cereal crops is expected to begin in late March/early April and production prospects indicate a year-on-year reduction. However, the aggregate cereal output is still expected to remain close to the previous five-year average. The current outlook mainly reflects a period of well below-average rains and higher-than-average temperatures in January 2018, following generally erratic rainfall since the beginning of the season

Table 10. Southern Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2015	2016	2017 estim.	2015	2016	2017 estim.	2015	2016	2017 estim.	2015	2016	2017 estim.	Change: 2017/2016 (%)
Southern Africa	1.7	2.2	1.8	22.2	19.6	33.9	4.3	4.3	3.7	28.2	26.1	39.4	50.9
- excl. South Africa	0.3	0.3	0.3	11.1	10.9	15.8	4.3	4.3	3.7	15.6	15.5	19.9	28.3
Madagascar	0.0	0.0	0.0	0.3	0.3	0.3	3.7	3.8	3.1	4.1	4.1	3.4	-18.1
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	1.5	11.1	8.7	18.1	0.0	0.0	0.0	12.6	10.6	19.5	83.9
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.

in October 2017, which have caused water stress and adversely affected crop development. In addition, the impact of the invasive Fall Armyworm (FAW), which is present in all countries except Lesotho and Mauritius, poses a further risk to yield potential in the affected areas as dry weather conditions exacerbate the yield impact of the pest. Most of the year-on-year decline is expected to result from a fall in yields, while the contraction in planted area, notably in the commercial sector on account of lower grain prices and poor rains at planting time in 2017, has also negatively impacted the overall production outlook. Following abundant precipitations since the end of January and with favourable weather forecasts until the harvest period from late March/April, crop conditions are expected to partly recover. Nevertheless, cereal production is forecast to still remain well below 2017's levels. Moreover, some parts of the subregion received excessive precipitation in February that triggered flooding and will likely result in localized crop losses.

The most dry-weather-affected areas of the subregion include key growing regions in **Lesotho**, southern and central areas of **Mozambique**, western **South Africa**, southern parts of **Zambia** and **Malawi**, eastern **Zimbabwe** and southwestern **Madagascar**. Given that some of these areas represent the main cereal-growing regions of their respective countries, the expected lower outputs could have a magnified impact on national maize production, the principal food staple.

For most countries, crop assessments will be conducted in the next months to provide more details on cereal production in 2018. For **South Africa**, however, the preliminary official production forecast puts the 2018 commercial maize crop at 12.2 million tonnes, 27 percent below the historical high of 2017, but still slightly above the five-year average. The bulk of the yearly reduction reflects a contraction in plantings.

Favourable supply conditions reduced import requirements

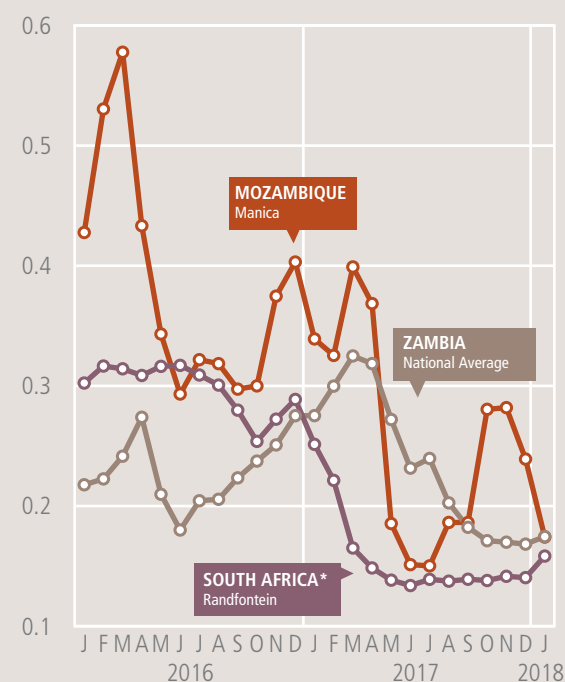
Following the record subregional 2017 cereal output, estimated at 39.4 million tonnes, over 50 percent higher than the

drought-reduced 2016 output, current supply conditions are favourable. Most of the subregional cereal production increase is reflective of a larger maize harvest, estimated at 32.3 million tonnes, with a smaller production increase estimated for sorghum. The main driver behind the upturn in maize production was favourable weather conditions, with the largest year-on-year gains estimated in **South Africa** and **Zimbabwe**. Conversely, wheat production fell and rice production is also down, mostly on account of dry weather conditions. In **Madagascar**, which produces on average about 85 percent of the total subregional rice output, 2017 production fell by 20 percent on a yearly basis to a well below-average level.

The good maize supply levels enabled countries to build-up inventories and opening stocks for the forthcoming 2018/19 marketing year (generally April/March) are forecast to be above average. Higher stock levels should partly cushion the impact of the expected maize production decreases, averting a larger decline in domestic availabilities. An opening maize stock of over 4 million tonnes in 2018/19 is forecast in **South Africa** and, therefore, despite the anticipated production decrease, the country is still expected to have adequate supplies to fulfill the import demand by neighbouring countries.

The larger domestic supplies also sharply cut maize import requirements for the 2017/18 marketing year, which are estimated to be less than 1 million tonnes compared to an average level of 2.4 million tonnes and 4.8 million tonnes imported in 2016/17. Most of the yearly decline reflects negligible imports for **South Africa**, compared to the 2.2 million tonnes imported in 2016/17. Significantly smaller import requirements were also estimated in **Malawi** and **Zimbabwe**. In the 2018/19 marketing year, imports are forecast to rise on a yearly basis due to the anticipated declines in national cereal outputs.

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



* Wholesale prices, all others retail prices

Sources: Central Statistical Office, Zambia; Sistema De Informação De Mercados Agrícolas De Moçambique, Mozambique; SAFEX Agricultural Products Division, South Africa.

Subregional maize exports are forecast at just over 3 million tonnes in 2017/18, above the previous five-year average level of 2.2 million tonnes. The bulk of the increase, compared to the average, is accounted for by **South Africa**, which is expected to ship over 2 million tonnes, supported by low grain prices. Larger export volumes are also expected in **Zambia**, while a trade ban on maize, due to concerns over this year's output, has been recently introduced in **Malawi**.

Prices of maize remained low and stable

Prices of maize were quite stable since the start of the year, reflecting adequate supplies that have contained seasonal rises. In **South Africa**, prices of maize remained overall stable and well below their year-earlier levels. So far, the upward pressure from the reduced production expectations for the 2018 crop has been eased by the impact of the large national supplies. In addition, the recent beneficial rains and favourable weather forecasts, curtailed price increases. South African

wheat prices declined sharply since the end of 2017, despite a drop in the 2017 wheat output. The decrease mainly reflects significant imports in 2017, supported by a stronger South African rand that lowered import costs. In **Mozambique** and **Zambia**, prices of maize grain showed signs of seasonal increases, but large national supplies from the bumper 2017 harvests generally prevented stronger gains and kept prices lower on a yearly basis as of January. In **Malawi** and **Swaziland**, prices of maize declined slightly at the end of 2017 and were below their year-earlier values, mostly on account of good national stocks, while Swaziland also benefited from the comparatively lower import prices from South Africa. In **Zimbabwe**, prices of maize

grain began to rise seasonally towards the end of 2017, although they remained lower compared to their year-earlier levels as of January 2018, mostly on account of the bumper harvest and good supplies. In contrast to the subregional trend, prices of rice in **Madagascar** reached historical highs in January, mostly due to the drop in the 2017 national rice output that tightened domestic availabilities.

Food insecurity conditions expected to intensify

Based on the 2017 national Vulnerability Assessments Committees' evaluations, the estimated number of food insecure (valid up to March 2018) are significantly below the caseload estimated in 2016. In the

current lean season (January-March 2018), the number of people who require food assistance was projected to have fallen by 76 percent to 4.3 million³, mostly resulting from the increased national agricultural outputs and prevailing lower food prices.

However, the anticipated reduction in agricultural outputs in 2018 is expected to stress food security conditions, notably in the countries and areas where the dry period was most intense, with the total number of food insecure in the subregion foreseen to rise on a yearly basis. However, the situation is still expected to be better than in 2016 when the El Niño-induced drought pushed about 17.7 million people into food insecurity⁴.

³ Based on the 2017 Vulnerability Assessment Committees' evaluation. This figure excludes Angola (official estimates are not available) and South Africa (figures are not directly comparable with data from other countries).

⁴ This figure excludes the Democratic Republic of the Congo, South Africa and the United Republic of Tanzania.

REGIONAL REVIEWS

ASIA

Note: Situation as of February

■ ■ Subregional borders



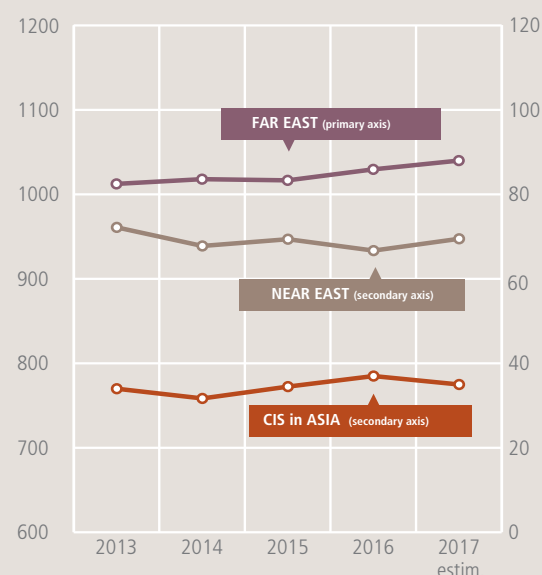
Source: GIEWS

Asia Production Overview

The forecast for total cereal production in Asia in 2017 stands at 1 144 million tonnes, an 11-million-tonne (1 percent) increase compared to the above-average output in 2016. The bulk of the yearly growth is associated with larger wheat outputs in the Far East and, to a lesser degree, in the Near East.

For 2018, the winter wheat crop is expected to be harvested from April and planting of the paddy crop would mostly start from June. In the Far East, the wheat production outlook is favourable, reflecting beneficial rains and an unchanged planted area. By contrast, rainfall deficits were observed in several regions of the Near East and CIS countries and, as a result, wheat production is expected to decline from last year's levels, but still remain close to the average.

Cereal production
(million tonnes)



FAR EAST



Favourable prospects for the 2018 wheat crop

The subregion's 2018 winter wheat crop is at maturing stage in most countries, with harvesting due to start from April. Average to above-average and well-distributed rains since the start of the season, coupled with adequate water levels in major reservoirs, benefited planting operations and crop development. In **China (Mainland)**, the area planted to wheat is estimated at 24.1 million hectares, close to last year's near-average level, reflecting the still attractive margins earned by wheat producers despite a 2.5 percent reduction in the minimum State purchase price for the 2018 wheat crop. Assuming normal weather conditions for the remainder of

the season, the 2018 wheat production is projected by FAO at 129 million tonnes, close to the five-year average. In **India**, despite some delays in planting operations due to smog and lack of sunlight, the area planted to the 2018 wheat crop is expected to remain close to last year's high level, supported by attractive minimum support prices. Assuming average yields, FAO forecasts the 2018 wheat output at 97 million tonnes, close to last year's high level. Similarly, in **Pakistan**, prospects for the 2018 wheat output are favourable, reflecting

near-normal rains and adequate supplies of irrigation water and fertilizers.

Aggregate cereal production in 2017 estimated at a record level

In the Northern Hemisphere countries, harvesting of the 2017 main paddy and coarse grain crops was completed at the end of last year, while harvesting of the 2017 secondary crops is expected to start in March-April. The subregional aggregate cereal output in 2017 is forecast at a record high of 1 268.3 million tonnes (rice in paddy terms). With paddy and coarse grains production almost unchanged year-on-year, most of the growth is on account of an increase in the subregion's wheat production, estimated at 258.5 million

tonnes, 3 percent above last year's bumper level. The highest year-on-year gain was registered in **India**, where the 2017 wheat output is officially estimated at 98.4 million tonnes, 6.1 million tonnes (or 7 percent) more than 2017's high level. Similarly, bumper wheat crops were gathered in most countries of the subregion, except in **Mongolia**, where a severe drought during the summer months severely affected the 2017 wheat output.

The aggregate production of paddy rice, the major staple in the subregion, is forecast at 678.9 million tonnes in 2017, close to the record level of 2016. Overall, the season's performance was mixed. Paddy production increased to record levels in **Cambodia, China (Mainland), Indonesia, Pakistan** and **the Philippines** supported by both larger plantings and higher yields. In **Thailand**, notwithstanding some flood damage, the 2017 paddy output is forecast to expand to 33.7 million tonnes. By contrast, the 2017 paddy production is expected to decrease compared to last year's level in several countries, with the largest absolute reductions concerning **Bangladesh**, following recurrent severe episodes of floods during 2017, and **Sri Lanka** due to drought. Similarly, the 2017 paddy output is estimated to have decreased in **the Democratic People's Republic of Korea**, as a result of prolonged dry conditions at the start of the cropping season, and in **India, Viet Nam** and **Nepal** mostly due to erratic rains and floods.

Table 11. Far East cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2015	2016	2017 estim.	2015	2016	2017 estim.	2015	2016	2017 estim.	2015	2016	2017 estim.	Change: 2017/2016 (%)
Far East	246.7	251.3	258.6	329.3	328.7	330.9	663.5	677.3	678.9	1 239.5	1 257.2	1 268.3	0.9
Bangladesh	1.3	1.3	1.4	2.3	2.5	2.8	52.5	52.1	50.8	56.1	55.9	55.1	-1.5
Cambodia	0.0	0.0	0.0	0.4	0.7	0.8	9.3	10.0	10.4	9.7	10.6	11.1	4.6
China (Mainland)	130.2	128.8	129.8	234.1	229.3	226.0	209.8	208.7	210.3	574.1	566.8	566.1	-0.1
India	86.5	92.3	98.4	41.3	42.4	43.7	156.6	165.2	164.2	284.4	299.9	306.2	2.1
Japan	1.0	0.8	0.9	0.2	0.2	0.2	10.5	10.7	10.4	11.7	11.6	11.5	-1.2
Myanmar	0.2	0.2	0.2	1.8	1.9	2.1	27.7	28.6	29.5	29.7	30.7	31.7	3.2
Nepal	2.0	1.7	1.8	2.6	2.6	2.6	4.3	5.2	4.8	8.8	9.6	9.3	-2.9
Pakistan	25.1	25.5	25.8	5.6	6.1	6.4	10.2	10.3	11.1	40.9	41.9	43.3	3.4
Philippines	0.0	0.0	0.0	7.0	8.0	7.6	17.5	18.5	19.4	24.4	26.6	27.0	1.6
Republic of Korea	0.0	0.0	0.0	0.2	0.2	0.2	5.8	5.6	5.3	6.0	5.9	5.5	-5.8
Thailand	0.0	0.0	0.0	4.8	4.7	4.7	27.4	32.6	33.7	32.2	37.3	38.3	2.6
Viet Nam	0.0	0.0	0.0	5.3	5.2	5.1	45.1	43.2	42.8	50.4	48.4	48.0	-0.9

Note: Totals and percentage change computed from unrounded data.

The subregion's 2017 aggregate maize production is estimated to remain close to last year's record level at 301.1 million tonnes. A strong increase in 2017 maize output in **Indonesia**, mostly reflecting an expansion in plantings in response to higher demand for feed, more than compensated a 3.7-million-tonne decrease in **China (Mainland)**, where the output is estimated at a near-average level of 215.9 million tonnes, but marking a second consecutive yearly decline. The decreases in China (Mainland) are mainly driven by area contractions as farmers prefer to plant more profitable crops, in particular soybeans, in response to the Government's decision to lower the maize procurement price. Favourable weather conditions boosted maize outputs in **Cambodia**, **Myanmar**, **Lao People's Democratic Republic** and **Pakistan**.

Subregional cereal imports in 2017/18 to remain high, while exports are forecast close to last year's below-average level

Aggregate cereal imports in the 2017/18 marketing year are forecast to remain well above the previous five-year average at 132.8 million tonnes, but down from last year's record quantity. The bulk of the year-on-year decrease reflects lower wheat demand on international markets from **China (Mainland)**, due to high domestic stocks obtained from successive bumper harvests, and from **Thailand** on account of the Government's decision to restrict imports of feed wheat. By contrast,

subregional imports of rice in calendar year 2018 are forecast at 14.6 million tonnes, marginally below last year's above-average level. Imports of maize are forecast to remain close to last year's average level.

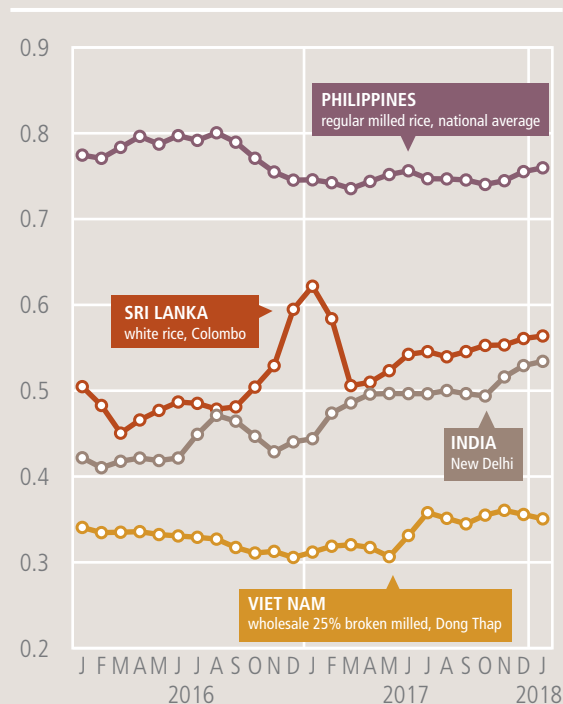
Exports of cereals consist mostly of rice. In 2018 calendar year, aggregate rice exports are forecast at 38.3 million tonnes, close to the previous year's above-average level.

Domestic prices of rice were generally above their year-earlier levels, those of wheat were mainly stable

In most countries of the subregion, domestic prices of rice, in local currencies, were stable or strengthened in recent months and were above their year-earlier levels. In the main cereal-exporting countries, prices have increased supported by strong demand. In **Thailand**, after two months of stability, prices strengthened in January, underpinned by the strong demand that more than offset the downward pressure from the recently-concluded 2017 main harvest, estimated at a good level. Similarly, despite ample availabilities from the 2017 main harvest, in **India**, export sales and large Government procurements underpinned the higher prices in recent

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.

months. Prices continued to increase also in **Viet Nam** and, in January, were well above their year earlier levels, due to strong demand coupled with a second consecutive year of output declines in 2017. By contrast, abundant supplies from the 2017 main harvests kept prices stable in **Myanmar** and **Cambodia**.

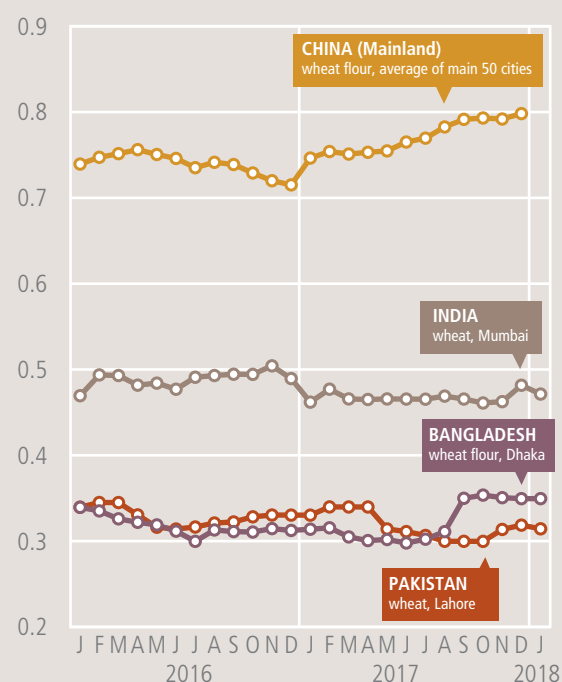
In rice importing countries, prices strengthened, particularly in **Indonesia**

Table 12. Far East cereal production and anticipated trade in 2017/18 ¹
(thousand tonnes)

	Avg 5-yrs (2012/13 to 2016/17)	2016/17	2017/18	2017/18 over 2016/17 (%)	2017/18 over 5-yr avg (%)
Coarse grains					
Exports	4 755	3 307	2 899	-12.4	-39.0
Imports	60 399	62 925	64 103	1.9	6.1
Production	322 110	328 675	330 858	0.7	2.7
Rice (milled)					
Exports	35 995	39 482	38 252	-3.1	6.3
Imports	14 024	14 873	14 570	-2.0	3.9
Production	443 600	449 620	450 521	0.2	1.6
Wheat					
Exports	5 306	2 178	2 060	-5.4	-61.2
Imports	43 563	56 682	52 298	-7.7	20.1
Production	247 710	251 259	258 591	2.9	4.4

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

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



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

and **Bangladesh**. In the latter, production losses, caused by floods in 2017, kept prices more than 20 percent above those a year earlier. Similarly, prices of rice increased in **Sri Lanka** amid seasonal tightness. In **China (Mainland)** and **the Philippines**, prices were generally stable and only slightly above their year-earlier values at the start of 2018.

Prices of wheat grain and wheat flour remained generally unchanged throughout the subregion in recent months, except in **Bangladesh**, where they increased slightly and were higher than a year earlier mostly supported by increased domestic

consumption as a substitute for rice and expectations of a reduced 2018 wheat harvest. In the subregion's main wheat-producing countries of **India, Pakistan** and **China (Mainland)** favourable prospects for the 2018 wheat crop, to be harvested from April, kept prices stable. A similar price trend was also observed in **Indonesia** and **Sri Lanka**, where adequate imports contributed to keep quotations stable.

NEAR EAST



in southern **Iraq**, and in central and northwestern **Iran (Islamic Republic of)**. Crop performance will depend on the quantity and quality of rains in the coming months.

In **Turkey**, the subregion's main cereal producer, despite some eastern cropping areas suffering from localized autumn dryness up to mid-November 2017, current vegetation conditions indicate adequate to abundant moisture reserves across the main growing areas for dormant winter grains. If normal weather conditions prevail for the remainder of the season, the preliminary forecasts of wheat production in Turkey point to a slightly above-average output of 21 million tonnes in 2018.

In **Afghanistan**, a late onset of rains hampered planting of winter crops across the country. As of late January, below-average cumulative precipitation resulted in significant soil moisture deficits especially in northern provinces. Reduced snowpack is expected to limit available irrigation water for spring crops.

The ongoing conflict and lack of inputs continue to hamper agricultural activities in **the Syrian Arab Republic, Yemen** and **Iraq**, with serious consequences in terms of planted area and yields.

Mixed production outlook for the 2018 winter cereal crops in major producing countries

Across the subregion, planting of winter wheat and barley crops, for harvest from June 2018, was completed in early January.

Late and poor rains in parts of **Iran (Islamic Republic of), Iraq** and **the Syrian Arab Republic** had a negative impact on still dormant or semi-dormant cereals. Beneficial precipitations in January improved soil moisture in western and northern **Syrian Arab Republic**, northern **Iraq** and western **Iran (Islamic Republic of)**, while soil moisture deficits are still significant

Total cereal production in 2017 was estimated at a slightly above-average level of 71.1 million tonnes. At the subregional level, cereal imports in the 2017/18 marketing year (July/June) are estimated at 67.5 million tonnes, about 4.3 million tonnes more than in the previous year and 7 percent above the last five-year average.

Table 13. Near East cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2015	2016	2017 estim.	2015	2016	2017 estim.	2015	2016	2017 estim.	2015	2016	2017 estim.	Change: 2017/2016 (%)
Near East	44.3	42.8	45.1	22.4	20.9	21.3	4.0	4.6	4.7	70.7	68.2	71.1	4.2
Afghanistan	4.7	4.6	4.3	0.7	0.6	0.7	0.6	0.5	0.5	6.0	5.7	5.5	-3.8
Iran (Islamic Republic of)	11.5	11.1	13.5	4.4	3.8	4.0	2.3	2.9	3.1	18.3	17.8	20.6	15.3
Iraq	2.6	3.1	3.5	0.7	0.8	1.1	0.1	0.2	0.3	3.5	4.0	4.9	20.7
Syrian Arab Republic	2.4	2.9	1.8	0.5	0.7	0.9	0.0	0.0	0.0	2.9	3.6	2.7	-25.3
Turkey	22.6	20.6	21.5	15.1	13.8	13.7	0.9	0.9	0.9	38.6	35.3	36.1	2.4

Note: Totals and percentage change computed from unrounded data.

Persisting conflicts continue to severely debilitate food security of large numbers of people

In **Yemen**, according to the latest IPC, 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 2018 Humanitarian Needs Overview, released in December 2017, estimated that approximately 17.8 million Yemenis were food insecure. Any disruption of trade flows threatens the continuity of market supplies and consequently the food security of large numbers of people. Large price differences persist among markets, and prices across the country are generally well above their pre-crisis (February 2015) levels, in some cases have doubled.

In the **Syrian Arab Republic**, as of September 2017, some 6.5 million people faced large food consumption gaps or accelerated depletion of livelihood assets. An additional 4 million people are at risk of food insecurity.

In **Afghanistan**, almost 1.9 million people were considered to be severely food insecure (IPC Phase 4: "Emergency") and 5.7 million moderately food insecure (IPC Phase 3: "Crisis") between August and November 2017, a significant increase from the 4.3 million people who were in IPC Phases 3 and 4 between July and December 2016.

CIS IN ASIA⁵



Mixed production prospects for the 2018 winter cereal crops

The 2018 winter cereal crops, mainly wheat and barley, are at the dormant stage. In **Uzbekistan** and **Turkmenistan**, remote sensing data indicated below-average precipitation between November 2017 and February 2018, which negatively impacted soil moisture levels. Additionally, in **Tajikistan**, reports indicate reduced snow coverage, which is a source of water for the Amu Darya River that in turn supplies irrigated fields in Tajikistan, Uzbekistan and Turkmenistan. The lack of snow therefore raises concerns over potential water shortages for cereal crops during the summer period (June–August). In southern and southeastern **Kazakhstan**, where winter wheat is cultivated, planting operations were hampered by excessive precipitations in September–October 2017. However, by mid-February, crops were reported to be in good conditions with only a small percentage of winterkill area. The total area planted with winter cereals

in the subregion is forecast to be close to average.

Above-average cereal production in 2017

The 2017 aggregate cereal production is estimated at an above-average level of 35 million tonnes, 1.9 million tonnes below the record high of the previous year. Production of wheat, which accounts for more than 70 percent of the subregion's total cereal output, is estimated at 26 million tonnes, about 1 million tonnes below the previous year's level, but still above the five-year average. The bulk of the decrease is account for by a production decline in **Kazakhstan**, reflecting a reduction in the area planted, as farmers switched to more profitable oil crops. However, the share of milling quality wheat in 2017 is reported to be higher than in the previous year. In the remaining countries of the subregion, the 2017 wheat outputs are estimated to be similar to last year. The aggregate 2017 coarse grain production is also estimated to have fallen compared to the bumper crop of the previous year, but still remained higher than the previous five-year average.

Exports expected to fall moderately in 2017/18

Aggregate subregional cereal exports in the 2017/18 marketing year (July/June) are forecast at 9.1 million tonnes, slightly below the high level of 2016/17. The decrease is mainly due to lower wheat shipments from **Kazakhstan**, which are forecast to decline by 200 000 tonnes to 7.3 million tonnes,

Table 14. CIS in Asia cereal production

(million tonnes)

	Wheat			Coarse grains			Total cereals ¹			
	2015	2016	2017 estim.	2015	2016	2017 estim.	2015	2016	2017 estim.	Change: 2017/2016 (%)
CIS in Asia	25.8	27.4	26.1	8.0	8.9	8.2	34.7	37.2	35.3	-5.2
Armenia	0.4	0.4	0.3	0.2	0.2	0.2	0.6	0.6	0.6	-3.2
Azerbaijan	1.6	1.8	1.8	1.3	1.2	1.2	2.9	3.0	3.0	-1.2
Georgia	0.1	0.1	0.1	0.2	0.3	0.3	0.4	0.4	0.4	-1.0
Kazakhstan	13.7	15.0	13.9	3.8	4.5	4.1	17.9	20.0	18.4	-7.7
Kyrgyzstan	0.7	0.7	0.7	1.0	1.1	1.1	1.8	1.8	1.7	-0.6
Tajikistan	0.9	0.9	0.9	0.3	0.4	0.3	1.3	1.4	1.3	-6.3
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	1.0	1.1	0.9	8.2	8.3	8.1	-2.8

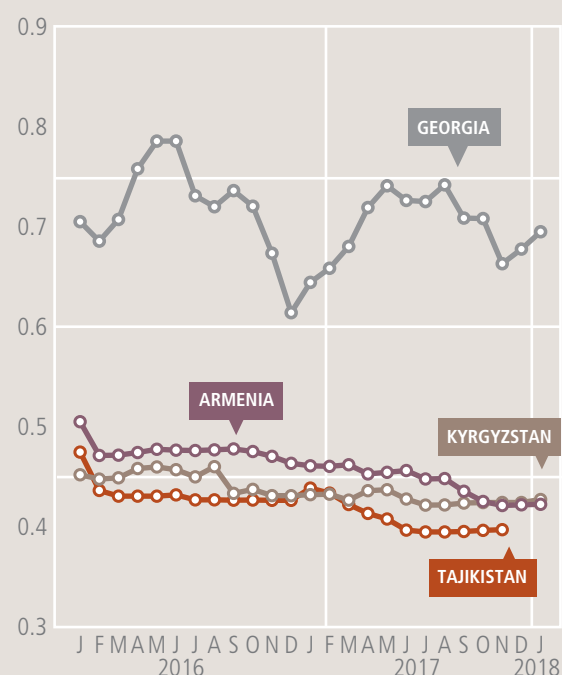
Note: Totals and percentage change computed from unrounded data.

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.

given the reduction in 2017 production and the increased competition with the Russian Federation for wheat markets.

Total subregional imports are forecast at 7.8 million tonnes in 2017/18, slightly above the previous year, but still below average, reflecting adequate domestic supplies.

Domestic prices of wheat flour mainly weakened

In **Kazakhstan**, export wheat prices increased over the last six months, underpinned by trends in the international markets. Domestic wholesale prices remained unchanged since September 2017 and slightly above their values of a year earlier reflecting a small reduction in domestic production.

In the importing countries of the subregion, domestic prices

of wheat flour showed mixed trends. Prices of wheat flour declined moderately in **Armenia** the preceding six months to January 2018, and were below their values of a year earlier reflecting adequate domestic supplies. Prices of locally-produced wheat flour also declined in **Azerbaijan** since September 2017, but were higher than a year earlier due to increased milling costs. Similarly, in **Belarus** and **Tajikistan**, prices were generally higher than the previous year's levels on account of high processing costs and a weakened currency. In **Uzbekistan**, prices of wheat flour were about 7 percent higher on a yearly basis following a depreciation of the national currency in September 2017, triggered by the switch to a free floating exchange rate mechanism.

Prices of potatoes, another basic staple in the subregion, seasonally increased over the past few months and were, in general, higher than a year earlier due to the reduced subregional output in 2017. In **Belarus**, the key exporter of the subregion, prices of potatoes in January 2018 were around 30 percent above their values of a year earlier.

REGIONAL REVIEWS

LATIN AMERICA AND THE CARIBBEAN



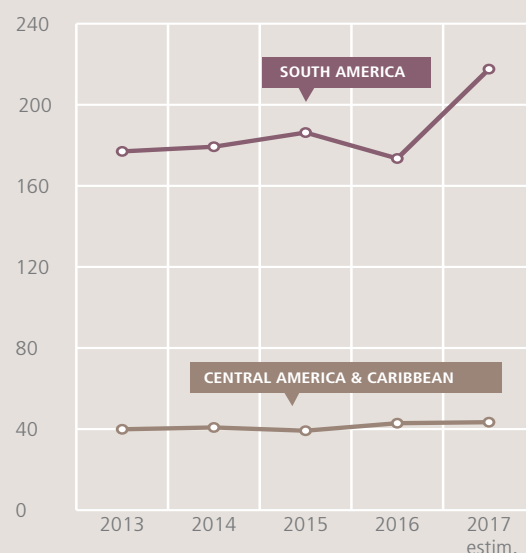
Source: GIEWS

Latin America and the Caribbean Production Overview

Cereal production in Latin America and the Caribbean in 2017 is forecast at 270.2 million tonnes, a significant 45-million-tonne (21 percent) increase compared to the average output in 2016. The sharp upturn is almost entirely associated with a record maize output in South America, while cereal production in Central America recovered to contributing to the high output.

Planting of the 2018 maize crop in South America is almost complete and in the two main producers, Argentina and Brazil, the area sown is forecast to be above average but slightly down compared to the previous year, mostly reflecting lower prices and ample subregional availabilities.

Cereal production
(million tonnes)



CENTRAL AMERICA AND THE CARIBBEAN



Plantings of the 2018 autumn/winter season cereal crop remain high in Mexico

In **Mexico**, plantings of the 2018 autumn/winter maize and wheat crops have concluded. Plantings for the 2018 wheat crop, to be harvested from May, are estimated at 590 000 hectares, less than 2 percent below last year's level. By contrast, plantings of the autumn/winter maize crop are anticipated at 1.26 million hectares, some 5 percent above the same season last year.

Cereal production reached a record level in 2017

The 2017 cereal output is estimated at record level of 44.5 million tonnes. This results mainly from a bumper maize output, which accounts for over 70 percent of cereal production, due to normal weather patterns after several seasons of drought caused by the El Niño phenomenon. The estimate for the 2017 maize output in **Mexico**, the subregion's main producer,

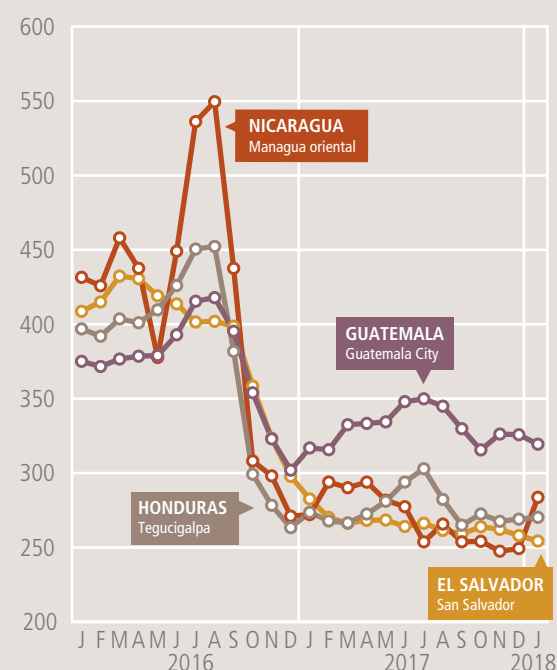
accounting for about 90 percent of the aggregate production, has been revised upwards to 28 million tonnes on account of better-than-expected yields. In addition, the 2017 wheat crop is estimated at 3.5 million tonnes, close to the five-year average. Elsewhere in the subregion, cereal production (excluding Mexico) is estimated at a record 6.8 million tonnes, including 3.8 million tonnes of maize and 2.7 million tonnes of rice. In the Caribbean countries of **Haiti** and the **Dominican Republic**, despite an intense hurricane season, the combined cereal output for 2017 is estimated at an above-average level of 1.6 million tonnes.

Prices of white maize increased seasonally with the conclusion of main harvest

Prices of white maize rose seasonally in **Honduras** and **Nicaragua** during the November-January period and were higher than a year earlier. By contrast, in **Guatemala**, prices declined slightly as recently harvested crops from the northern department of Petén and from the eastern producing area of the country continued to supply markets. In **El Salvador**, prices remained relatively stable in January and were 10 percent lower than a year earlier. In **Mexico**, prices increased

moderately in January following seasonal patterns, but were still lower than a year earlier reflecting ample supplies from the 2017 harvests. In **Haiti**, price movements of domestically-produced maize meal were mixed at the start of 2018, while in the **Dominican Republic**, they strengthened seasonally and were more than 10 percent higher than a year earlier reflecting the reduced 2017 output.

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	2017 estim.	2015	2016	2017 estim.	2015	2016	2017 estim.	2015	2016	2017 estim.	Change: 2017/2016 (%)
Central America & Caribbean	3.7	3.9	3.5	33.9	37.2	38.0	2.6	2.9	3.0	40.2	44.0	44.5	1.2
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	1.0
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	2.7
Honduras	0.0	0.0	0.0	0.2	0.3	0.6	0.1	0.1	0.1	0.3	0.4	0.7	88.8
Mexico	3.7	3.9	3.5	30.8	33.5	33.9	0.2	0.3	0.3	34.7	37.6	37.6	0.1
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	29.4	25.8	147.8	128.4	174.8	25.7	23.2	25.1	194.6	181.0	225.7	24.7
Argentina	11.3	18.4	18.5	42.5	47.0	56.3	1.6	1.4	1.3	55.3	66.8	76.1	14.0
Brazil	5.5	6.8	4.2	88.2	65.9	102.8	12.4	10.6	12.3	106.1	83.3	119.4	43.3

Note: Totals and percentage change computed from unrounded data.

SOUTH AMERICA



Planting of 2018 maize crops concluded under generally favourable weather conditions

Planting of the 2018 maize crop in Argentina and Brazil, which account for, on average, about 95 percent of subregion's output, is virtually complete. In **Argentina**, plantings of the 2018 maize crop are estimated at a well above average level of 8.7 million hectares, although approximately 100 000 hectares less than originally anticipated as planting operations were delayed by insufficient rains. In **Brazil**, plantings of the first season maize crop are estimated at 5.2 million hectares, some 5 percent below last year's area as a result of low prices and ample availabilities. Planting of the second season "de safrinha" maize crop is underway and the early forecast points to an 8 percent decline from last year, reflecting two years of record outputs. In aggregate, Brazil's maize plantings in 2018 are expected to remain above the previous five-year average.

Cereal production reached a record level in 2017, reflecting a bumper maize output

The 2017 subregional cereal output is estimated at a historical high of 225.7 million tonnes. This mainly reflects a record subregional maize output estimated at 162.5 million tonnes, mostly on account of substantial harvests in **Argentina** and **Brazil**. In addition, **Bolivia (Plurinational State of)** almost doubled maize production to 1.2 million tonnes in 2017, while there were sharp reductions in **Paraguay** and **Uruguay**, as these countries diversified away from

maize production. The 2017 wheat output is estimated at well-above average 25.8 million tonnes, but 12 percent below the 2016 output. The year-on-year decline mainly reflects adverse weather in **Brazil**, as frost damage towards the end of the season reduced the 2017 output by 38 percent to a well below-average level of 4.2 million tonnes. By contrast, **Argentina's** output in 2017 reached a record level of 18.5 million tonnes in 2017. Elsewhere in the subregion, the aggregate wheat output (excluding Argentina and Brazil) declined by 27 percent to 3 million tonnes in 2017. This mainly reflects a lower wheat output in **Paraguay** (down 46 percent) and in **Chile** (down 31 percent), as farmer in both countries diversified away from wheat, due to reduced crop prices.

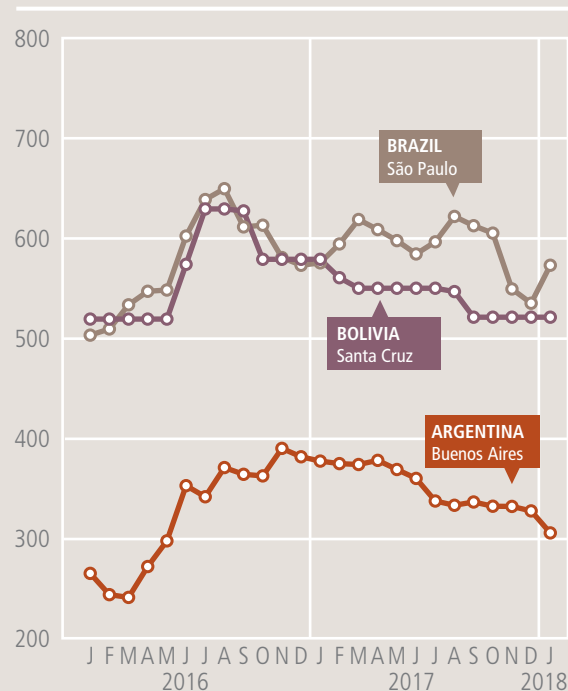
Cereal exports in 2017/18 expected at record levels

Cereal exports in the 2017/18 marketing year (March/February) are estimated at a record 77.8 million tonnes, mainly reflecting increased maize deliveries from **Argentina** and **Brazil** as a result of bumper harvests in 2017 and weak local currencies, which increased the competitiveness of local grains in the international market. Maize exports, mostly from Argentina and Brazil, are expected to reach more than 59 million tonnes. The estimate for wheat exports has been revised upwards to 13.2 million, mainly reflecting increased deliveries from Argentina.

Wheat prices remained mostly unchanged during the November-January period, maize price movements were mixed

Prices of wheat grain and flour were relatively stable in the November-to-January period and around their year-earlier levels, reflecting adequate availabilities from the 2017 harvests. In **Argentina**, however, prices of wheat grain increased significantly, with seasonal trends exacerbated by a

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.

strong pace of exports. In **Brazil**, prices of both wheat grain and wheat flour increased moderately and were around their levels of January 2017, with imports easing the upward pressure stemming from the reduced 2017 harvests. In the major importing countries, **Colombia**, **Ecuador** and **Peru**, prices of wheat flour were unchanged and around their year-earlier values at the start of 2018, mainly as a result of adequate import volumes. In **Chile**, prices of wheat grain were stable in January but higher than a year earlier, due to the reduced harvest. In **Bolivia (Plurinational State of)**, prices of imported and nationally-produced wheat flour remained unchanged or eased during the November-January period and were generally down from a year earlier, reflecting the good supplies from the 2017 harvest and adequate import quantities.

Prices of yellow maize remained stable or declined during the November-January period and were generally well below their levels from the same time last year, with the notable exception of Argentina, where prices increased sharply and were higher than a year earlier. The seasonal increase

in the past months was exacerbated by concerns about the impact of hot and dry weather on 2018 crops, while a weak currency contributed to keeping prices higher year-on-year. In **Brazil**, prices of yellow maize increased moderately in January amid tightening market supplies.

The Government released maize from the State reserves to limit price increases. In **Bolivia (Plurinational State of)** and **Colombia**, prices of yellow maize eased or remained virtually unchanged and were lower than a year earlier. In **Ecuador**, prices of maize cobs declined sharply in January

and were well below their year-earlier values. Prices also declined moderately in **Peru** with the new harvest and were nearly 20 percent lower than in January last year. In **Chile**, yellow maize prices strengthened seasonally but remained more than 10 percent lower than a year earlier.

REGIONAL REVIEWS

NORTH AMERICA, EUROPE AND OCEANIA

Note: Situation as of February

NORTH AMERICA

Canada

Cereals (winter season): Dormant to vegetative

United States of America

Cereals (winter season): Vegetative

EUROPE

Northern Europe

Cereals (winter season): Dormant to vegetative

Centresouthern Europe

Cereals (summer season): Planting

Cereals (winter season): Vegetative

CIS in Europe:

Cereals (winter season): Dormant to vegetative

OCEANIA

Australia

Cereals (summer season): Harvesting

Source: GIEWS

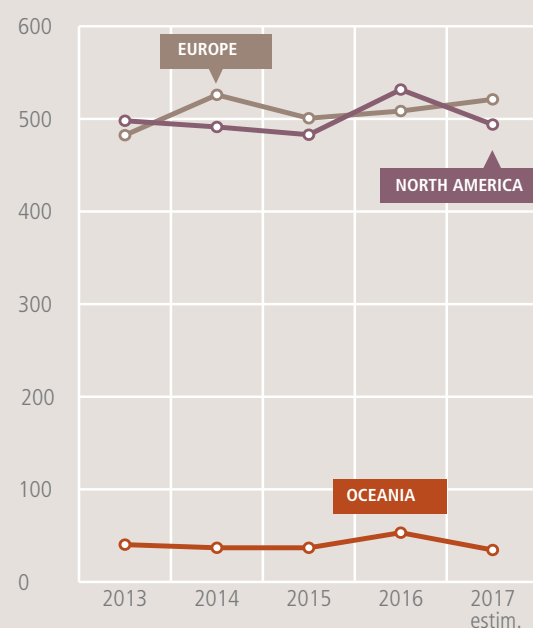
North America, Europe and Oceania Production Overview

In the United States of America, 2018 winter wheat plantings are estimated to be down slightly from the low level of the previous year, and amid dry weather conditions wheat production is set to remain well below average. Canada's main 2018 wheat crop will be sown in the spring, and preliminary forecasts indicate an enlarged area.

In Europe, production prospect for the European Union's 2018 wheat crop point to a year-on-year decrease, reflecting a contraction in winter plantings and dry spells that affected southern parts of the European Union. In the CIS countries, wheat production is likely to fall in the Russian Federation from the record high of 2017, but an expansion of sowings in Ukraine is foreseen to foster a small production upturn in 2018.

In Oceania, dryness in preceding months has lowered yield prospects for Australia's summer cereal crops.

Cereal production
(million tonnes)



NORTH AMERICA



Winter wheat plantings in the United States of America in 2018 are forecast 15 percent below average

In the United States of America, winter plantings concluded in November 2017 and the area planted is officially estimated at 13.2 million hectares, about 15 percent below the five-year average and the second lowest on record. The reduction is mainly due to lower wheat prices and expected reduced returns on wheat production. Moreover, dry weather conditions negatively affected crops in the Southern Great Plains, especially the hard red winter wheat varieties. About 42 percent of the hard winter wheat area was reported to be in poor or very poor conditions in February, 25 percent higher compared to the previous month. At this early stage, assuming average spring weather conditions, the aggregate wheat output in 2018 is tentatively forecast at 47 million tonnes, close to 2017's level, but about 20 percent below the five-year average.

In Canada, the planted area of the minor winter wheat crop is estimated at 0.6 million hectares, a decline of 11 percent compared to 2017 and the lowest level since 2005. Overall, crop conditions are favourable and

the harvest is expected to start in June. The main spring wheat crop will be sown in May and plantings are expected to increase slightly from last year to compensate for the reduction in winter sowings. The total planted wheat area in 2018 is forecast at 9 million hectares, unchanged from last year's low level and 20 percent below the five-year average. Assuming an average proportion of the planted area will be affected by winterkill, aggregate wheat production is forecast at 30 million tonnes, unchanged from the previous year.

have been generally favourable for the survival of winter crops in most countries, with the exception of **Spain** and **Italy** that were affected by dry spells during the January-February period. Assuming average yields, the 2018 wheat production is tentatively forecast at 145 million tonnes, 4 percent less than 2017, but close to five-year average.

CIS IN EUROPE

Early prospects for the 2018 winter crops are favourable

Production prospects for the 2018 winter crops, which are now mostly dormant, are generally favourable in the subregion. In the Russian Federation, planting of winter cereals (mainly wheat), for harvest from July 2018, was completed by the end of November 2017. According to official forecasts, about 17.12 million hectares were planted, close to the previous year's high level. Despite a

short cold spell in January, above-average temperatures during the December-February winter period were favourable for winter crop survival. At the beginning of February, around 95 percent of the winter crop was reported to be in fair to good condition. However, snow coverage, which is an important moisture reserve, is currently below average, raising some concerns for crop development in the next few months. Considering the current conditions of winter crops and assuming average yields, FAO's preliminary forecast for the Russian Federation's 2018 aggregate wheat

EUROPE



EUROPEAN UNION

Wheat sowings down in 2018, but growing conditions mostly favourable

In the European Union, the early estimate for wheat plantings in 2018 stands at 25.9 million hectares, 2 percent less than the previous year. Excessive precipitations hampered planting operations in northern Europe, including the Baltic states and Germany, and the total wheat planted area is estimated to have declined by 5 percent on a yearly basis. Weather conditions since

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

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2015	2016	2017 estim.	2015	2016	2017 estim.	2015	2016	2017 estim.	2015	2016	2017 estim.	Change: 2017/2016 (%)
North America	83.7	95.0	77.4	393.1	429.6	410.9	8.8	10.2	8.1	485.5	534.8	496.3	-7.2
Canada	27.6	32.1	30.0	25.7	26.7	26.3	0.0	0.0	0.0	53.3	58.9	56.3	-4.3
United States of America	56.1	62.8	47.4	367.3	402.9	384.6	8.8	10.2	8.1	432.2	475.9	440.0	-7.5
Europe	257.1	252.2	272.2	241.0	253.7	246.5	4.2	4.2	4.0	502.3	510.1	522.7	2.5
Belarus	2.9	2.3	2.8	5.7	4.7	5.0	0.0	0.0	0.0	8.6	7.1	7.8	10.4
European Union	160.5	144.5	152.0	151.8	153.2	154.7	3.0	3.1	2.9	315.3	300.7	309.6	3.0
Russian Federation	61.8	73.3	85.8	39.5	43.4	43.1	1.1	1.1	1.0	102.4	117.7	129.9	10.3
Serbia	2.6	3.0	2.5	6.4	7.9	4.4	0.0	0.0	0.0	9.0	10.9	6.9	-36.5
Ukraine	26.5	26.1	26.1	33.4	39.4	34.3	0.1	0.1	0.1	60.0	65.6	60.4	-7.8
Oceania	22.6	34.7	21.6	13.8	18.3	12.4	0.7	0.3	0.8	37.1	53.3	34.8	-34.8
Australia	22.3	34.4	21.2	13.3	17.8	11.8	0.7	0.3	0.8	36.2	52.4	33.9	-35.4

Note: Totals and percentage change computed from unrounded data.

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

Source: International Grains Council.

production is 77 million tonnes, down 11 percent from the record level of last year, but well above the five-year average.

In **Ukraine**, the area planted with winter cereals (mainly wheat) is officially forecast at approximately 7.2 million hectares, slightly more than the above-average level of the previous year. Dry weather conditions during the planting period facilitated land preparation and led to a quickened pace of plantings. Although the dryness affected early crop development at the start of the season, the warm weather conditions during the November-February period were favourable for the survival of crops. As of February 2018, about 87 percent of the crop were officially reported to be in

good or fair conditions, 5 percent above the level of the previous year. At this early stage, FAO tentatively forecasts the 2018 aggregate wheat production at 26.5 million tonnes, an increase of about 400 000 tonnes on the above-average level of 2017.

In the **Republic of Moldova** and **Belarus**, the area planted with winter cereals is officially forecast to be close to the above-average level of 2017. Abnormally warm weather conditions and above-average precipitations during the November-February period resulted in a good survival rate for the winter crops. However, above-average precipitations have increased the risk of waterlogging and potentially lower yields.

Cereal output estimated at a record level in 2017

The subregional 2017 aggregate cereal output is estimated at a record 201 million tonnes,

4 percent above the previous year, reflecting a larger wheat output that more than offset a decline in maize production. The subregional wheat output, which accounts for more than half of the total cereal production, is estimated at 116 million tonnes, with most of the increase originating in **the Russian Federation**, mainly on account of favourable weather conditions that increased yields. Similarly, the aggregate subregional production of barley is estimated at 30.6 million tonnes in 2017, about 6 percent above the high level of last year. By contrast, the aggregate maize output declined to 38.5 million tonnes, around 15 percent below the 2016's

OCEANIA**Dry weather and high temperatures negatively affected 2018 summer crops**

In **Australia**, planting of the 2018 summer cereal crops is virtually complete and planted area is officially estimated at 1.3 million hectares, about 2 percent higher than the above-average level of 2017. The expansion was mainly driven by an increase in the area planted to sorghum, the main summer cereal crop, compared to the previous year, when farmers switched to more profitable cotton crops. Following the planting period, dry weather conditions and above average temperatures in December and January negatively affected crop development in several regions. Adequate and timely rainfall over the remainder of the season is therefore critical to ensure a favourable performance of the summer crop, to be harvested by March 2018.

The recently-completed 2017 wheat harvest is officially estimated at 21.2 million tonnes, about 40 percent below the record high of 2016 and 15 percent below the five-year average. Reduced yields, on account of dry weather conditions between May and June 2017, was the main cause of the sharp production decline. The barley output also fell significantly in 2017 to 8.9 million tonnes, almost 33 percent below the previous year.

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	27.9	26.6	29.3	31.0	34.0	36.5
Coarse grains	19.0	19.6	22.7	22.1	22.2	22.4
Rice	31.5	33.9	34.2	33.6	33.5	33.3
Total cereals	24.1	24.4	26.8	26.9	27.7	28.5
Ratio of major grain exporters' supplies to market requirements (%) ¹	118.0	122.4	124.0	123.3	122.6	121.5
Ratio of major exporters' stocks to their total disappearance (%) ²						
Wheat	17.1	14.9	16.7	16.3	19.1	20.2
Coarse grains	11.5	11.1	14.7	13.0	13.9	15.6
Rice	25.5	28.9	24.5	19.7	18.6	16.9
Total cereals	18.0	18.3	18.6	16.3	17.2	17.6
	Annual trend growth rate 2007-2016	2013	Change from previous year			
			2014	2015	2016	2017
Changes in world cereal production (%)	2.3	10.1	1.9	-1.1	2.8	1.2
Changes in cereal production in the LIFDCs (%)	2.1	2.1	3.0	-3.3	4.5	1.7
Changes in cereal production in the LIFDCs less India (%)	2.7	3.7	5.6	-1.5	3.6	0.5
	Average 2010-2014	2014	Change from previous year (%)			
			2015	2016	2017	2018*
Selected cereal price indices³						
Wheat	191.2	-6.6	-20.5	-13.0	6.6	5.2
Maize	232.8	-25.8	-11.8	-6.4	-3.1	-4.5
Rice	233.9	0.8	-10.5	-8.1	6.7	10.4

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-February average.

Table A2. World cereal stocks¹*(million tonnes)*

	2013	2014	2015	2016	2017 estimate	2018 forecast
TOTAL CEREALS	545.4	608.8	673.0	686.8	719.4	752.8
Wheat	177.2	190.3	208.0	226.5	249.7	272.7
held by:						
- main exporters ²	48.9	54.5	63.2	63.7	76.8	81.0
- others	128.3	135.8	144.8	162.8	172.9	191.7
Coarse grains	211.5	252.4	296.5	293.1	301.1	309.8
held by:						
- main exporters ²	60.4	85.2	114.3	103.1	112.9	128.4
- others	151.1	167.2	182.2	190.0	188.2	181.4
Rice (milled basis)	156.6	166.1	168.6	167.2	168.7	170.4
held by:						
- main exporters ²	46.6	49.6	43.5	34.5	32.9	30.0
- others	110.0	116.5	125.1	132.7	135.8	140.4
Developed countries	126.9	151.0	181.7	180.8	211.3	218.4
Australia	6.7	6.1	6.8	5.6	9.7	8.3
Canada	8.2	15.2	10.4	10.0	12.1	11.3
European Union	24.3	32.7	40.1	36.4	32.7	34.3
Japan	7.4	7.1	7.1	7.4	7.1	6.9
Russian Federation	7.9	8.2	10.9	9.3	18.6	29.3
South Africa	2.5	1.7	3.4	3.8	1.8	5.1
Ukraine	7.3	10.6	14.0	10.5	8.9	6.7
United States of America	44.2	51.4	69.0	76.1	95.8	90.5
Developing countries	418.5	457.8	491.4	506.0	508.2	534.4
Asia	352.4	376.4	391.9	406.4	412.3	418.5
China	214.4	235.4	248.2	277.6	297.0	305.5
India	52.2	50.0	48.9	40.5	34.9	35.6
Indonesia	11.2	10.9	9.9	9.6	8.9	10.6
Iran (Islamic Republic of)	3.6	3.6	7.1	7.3	4.9	3.5
Korea, Republic of	3.3	3.7	3.9	4.3	4.5	4.4
Pakistan	4.3	4.7	5.9	4.9	4.7	3.8
Philippines	3.1	3.1	3.9	3.6	3.8	4.8
Syrian Arab Republic	3.4	3.2	2.0	1.6	2.0	1.9
Turkey	4.6	5.7	5.1	5.0	2.7	3.0
Africa	38.7	42.2	47.5	50.7	47.3	47.3
Algeria	2.6	4.2	5.0	5.7	5.6	5.4
Egypt	5.3	6.2	6.3	7.1	6.6	6.7
Ethiopia	1.9	1.7	2.7	3.4	3.8	2.6
Morocco	3.4	5.5	5.2	8.9	5.8	7.3
Nigeria	2.8	1.3	2.9	2.9	2.7	2.1
Tunisia	1.2	1.0	1.2	1.0	0.8	0.7
Central America	6.2	7.2	8.1	9.7	12.3	13.3
Mexico	2.6	3.3	3.6	4.6	6.9	8.0
South America	20.9	31.6	43.4	38.7	35.8	54.9
Argentina	2.1	5.8	10.6	6.3	6.8	12.2
Brazil	8.6	12.5	17.5	14.2	8.1	20.0

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						
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
2017 - September	215	176	181	147	149	169
2017 - October	214	177	182	148	149	171
2017 - November	220	176	179	148	150	167
2017 - December	219	171	178	149	158	174
2018 - January	229	178	178	156	164	178
2018 - February	240	191	189	164	177	188

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
		Commercial purchases	Food aid	Total imports (commercial and aid)	Total import requirements (excl. re-exports)
AFRICA		31 958.6	1 210.5	33 169.1	35 428.8
East Africa		10 023.7	847.7	10 871.4	11 128.8
Burundi	Jan/Dec	149.7	15.2	164.9	182.0
Comoros	Jan/Dec	51.0	0.0	51.0	46.0
Djibouti	Jan/Dec	78.9	4.1	83.0	85.0
Eritrea	Jan/Dec	437.3	0.0	437.3	448.2
Ethiopia	Jan/Dec	1 566.0	104.0	1 670.0	1 600.0
Kenya	Oct/Sept	2 620.0	80.0	2 700.0	3 300.0
Rwanda	Jan/Dec	165.0	0.0	165.0	175.0
Somalia	Aug/Jul	610.0	170.0	780.0	920.0
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	482.2	23.0	505.2	518.0
United Republic of Tanzania	Jun/May	933.6	11.4	945.0	1 027.6
Southern Africa		3 102.8	43.0	3 145.8	3 802.6
Lesotho	Apr/Mar	197.0	5.0	202.0	263.0
Madagascar	Apr/Mar	400.9	19.3	420.2	448.1
Malawi	Apr/Mar	330.0	3.8	333.8	516.0
Mozambique	Apr/Mar	1 237.0	1.3	1 238.3	1 296.0
Zimbabwe	Apr/Mar	937.9	13.6	951.5	1 279.5
West Africa		17 155.1	163.4	17 318.5	18 230.1
Coastal Countries		12 810.0	43.7	12 853.7	13 168.5
Benin	Jan/Dec	391.3	5.7	397.0	467.0
Côte d'Ivoire	Jan/Dec	1 915.2	4.8	1 920.0	2 070.5
Ghana	Jan/Dec	1 437.0	5.0	1 442.0	1 310.0
Guinea	Jan/Dec	907.0	5.5	912.5	857.5
Liberia	Jan/Dec	343.0	12.2	355.2	452.0
Nigeria	Jan/Dec	7 250.0	0.0	7 250.0	7 360.0
Sierra Leone	Jan/Dec	257.9	10.0	267.9	406.0
Togo	Jan/Dec	308.6	0.5	309.1	245.5
Sahelian Countries		4 345.1	119.7	4 464.8	5 061.6
Burkina Faso	Nov/Oct	683.0	10.0	693.0	653.0
Chad	Nov/Oct	101.0	40.7	141.7	159.6
Gambia	Nov/Oct	203.3	1.5	204.8	208.5
Guinea-Bissau	Nov/Oct	109.8	4.5	114.3	134.3
Mali	Nov/Oct	479.3	0.0	479.3	451.2
Mauritania	Nov/Oct	557.8	12.9	570.7	622.0
Niger	Nov/Oct	483.3	42.7	526.0	578.0
Senegal	Nov/Oct	1 727.6	7.4	1 735.0	2 255.0
Central Africa		1 677.0	156.4	1 833.4	2 267.3
Cameroon	Jan/Dec	959.0	10.0	969.0	1 295.0
Central African Republic	Jan/Dec	63.9	22.1	86.0	84.0
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 1 985 in 2013); 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
		Commercial purchases	Food aid	Total imports (commercial and aid)	Total import requirements (excl. re-exports)
ASIA		21 824.2	802.3	22 626.5	28 575.1
Cis in Asia		4 559.2	1.0	4 560.2	4 496.2
Kyrgyzstan	Jul/Jun	514.2	1.0	515.2	572.2
Tajikistan	Jul/Jun	1 139.0	0.0	1 139.0	1 147.0
Uzbekistan	Jul/Jun	2 906.0	0.0	2 906.0	2 777.0
Far East		7 864.7	199.6	8 064.3	13 926.9
Bangladesh	Jul/Jun	5 403.6	86.0	5 489.6	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	5 807.8
Nepal	Jul/Jun	929.3	1.5	930.8	921.8
Pakistan	May/Apr	234.7	0.0	234.7	232.8
Near East		9 400.3	601.7	10 002.0	10 152.0
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	4 300.0
CENTRAL AMERICA AND THE CARIBBEAN		1 255.1	13.2	1 268.3	1 389.0
Haiti	Jul/Jun	658.2	13.1	671.3	826.0
Nicaragua	Jul/Jun	596.9	0.1	597.0	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		55 518.5	2 026.0	57 544.5	65 863.1

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 1 985 in 2013); 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		16 250.1	688.7	16 938.8	12 412.6
Eastern Africa		7 571.6	503.0	8 074.6	4 835.0
Kenya	Oct/Sep	3 220.0	80.0	3 300.0	3 570.0
Somalia	Aug/Jul	750.0	170.0	920.0	940.0
South Sudan	Nov/Oct	500.0	60.0	560.0	665.0
Sudan	Nov/Oct	2 085.0	182.0	2 267.0	2 355.0
United Republic of Tanzania	Jun/May	1 016.6	11.0	1 027.6	875.0
Southern Africa		3 709.4	93.2	3 802.6	2 894.2
Lesotho	Apr/Mar	249.0	14.0	263.0	177.1
Madagascar	Apr/Mar	431.0	17.1	448.1	821.0
Malawi	Apr/Mar	510.0	6.0	516.0	222.0
Mozambique	Apr/Mar	1 295.0	1.0	1 296.0	1 351.0
Zimbabwe	Apr/Mar	1 224.4	55.1	1 279.5	323.1
West Africa		4 969.1	92.5	5 061.6	4 683.4
Sahelian Countries		4 969.1	92.5	5 061.6	4 683.4
Burkina Faso	Nov/Oct	643.0	10.0	653.0	673.0
Chad	Nov/Oct	121.0	38.6	159.6	159.6
Gambia	Nov/Oct	207.0	1.5	208.5	228.5
Guinea-Bissau	Nov/Oct	128.0	6.3	134.3	134.3
Mali	Nov/Oct	451.2	0.0	451.2	381.2
Mauritania	Nov/Oct	605.9	16.1	622.0	588.8
Niger	Nov/Oct	560.0	18.0	578.0	608.0
Senegal	Nov/Oct	2 253.0	2.0	2 255.0	1 910.0
ASIA		23 815.6	459.0	24 274.6	24 744.8
CIS in Asia		4 495.2	1.0	4 496.2	4 441.2
Kyrgyzstan	Jul/Jun	571.2	1.0	572.2	622.2
Tajikistan	Jul/Jun	1 147.0	0.0	1 147.0	1 032.0
Uzbekistan	Jul/Jun	2 777.0	0.0	2 777.0	2 787.0
Far East		13 858.4	68.0	13 926.4	13 921.6
Bangladesh	Jul/Jun	6 506.5	0.0	6 506.5	10 200.0
Democratic People's Republic of Korea	Nov/Oct	392.0	66.0	458.0	482.0
India	Apr/Mar	5 807.3	0.0	5 807.3	2 066.0
Nepal	Jul/Jun	919.8	2.0	921.8	941.8
Pakistan	May/April	232.8	0.0	232.8	231.8
Near East		5 462.0	390.0	5 852.0	6 382.0
Afghanistan	Jul/Jun	2 882.0	100.0	2 982.0	3 012.0
Syrian Arab Republic	Jul/Jun	2 580.0	290.0	2 870.0	3 370.0
CENTRAL AMERICA AND THE CARIBBEAN		1 378.9	10.1	1 389.0	1 234.1
Haiti	Jul/Jun	815.9	10.1	826.0	725.1
Nicaragua	Jul/Jun	563.0	0.0	563.0	509.0
TOTAL		41 444.6	1 157.8	42 602.4	38 391.5

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 1 985 in 2013); for full details see <http://www.fao.org/countryprofiles/lifdc>

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