



Crop Prospects and Food Situation

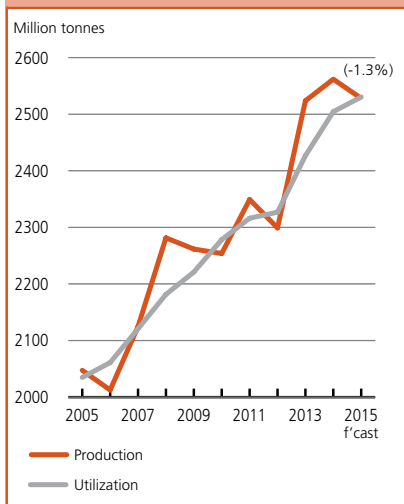
HIGHLIGHTS

- **FAO's latest forecasts for global supply and demand of cereals continue to point to a generally comfortable 2015/16 marketing season, with world inventories by the close of seasons in 2016 expected to fall only slightly below their record opening levels.**
- **AFRICA:** Cereal production in 2015 is forecast to fall, mainly reflecting the impact of adverse weather on Southern Africa's output and the ongoing harvest in East Africa. Harvests in West and Central Africa are forecast to remain close to the levels of 2014, while a production recovery in North Africa is anticipated to prevent a steeper regional decline. Conflicts in several countries continued to severely affect food security and the agriculture sector, while drought conditions in East Africa have severely impacted the livelihood of pastoralists.
- **ASIA:** A record 2015 cereal crop in China boosted aggregate regional production to levels above the previous year, while a recovery in Turkey's output also contributed. However, dry weather in some areas of the Far East lowered production in several countries, with a significant decline estimated in India. The persistent conflicts in Iraq, the Syrian Arab Republic and Yemen continue to severely impact on agricultural production and aggravate the humanitarian crisis.
- **LATIN AMERICA AND THE CARIBBEAN:** Despite improved prospects for second season crops, El Niño-associated dry weather reduced overall 2015 crop production in Central America and the Caribbean, excluding Mexico, where a bumper crop was gathered. Large 2015 maize harvests are also estimated in South America, where plantings for the 2016 crops are expected to decline, mainly reflecting ample regional supplies and lower commodity prices.
- **El Niño continues to impact on global agriculture:** Following El Niño-related dry weather that adversely affected 2015 crop production in parts of Asia, Central America and the Caribbean, and Oceania, developing dryness in Southern Africa has raised concern over the impact on 2016 production prospects.
- **FAO estimates that, globally, 33 countries, including 26 in Africa, are in need of external assistance for food.**

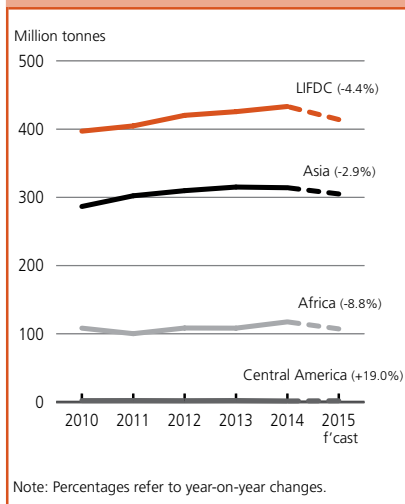
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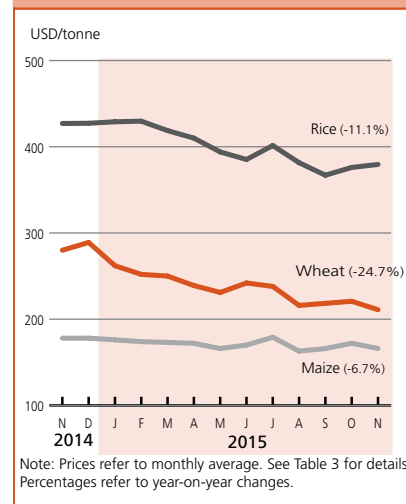
Despite a lower 2015 global cereal output, supply and demand situation is comfortable



Reduced outputs in Asia and Africa lower LIFDC 2015 cereal production

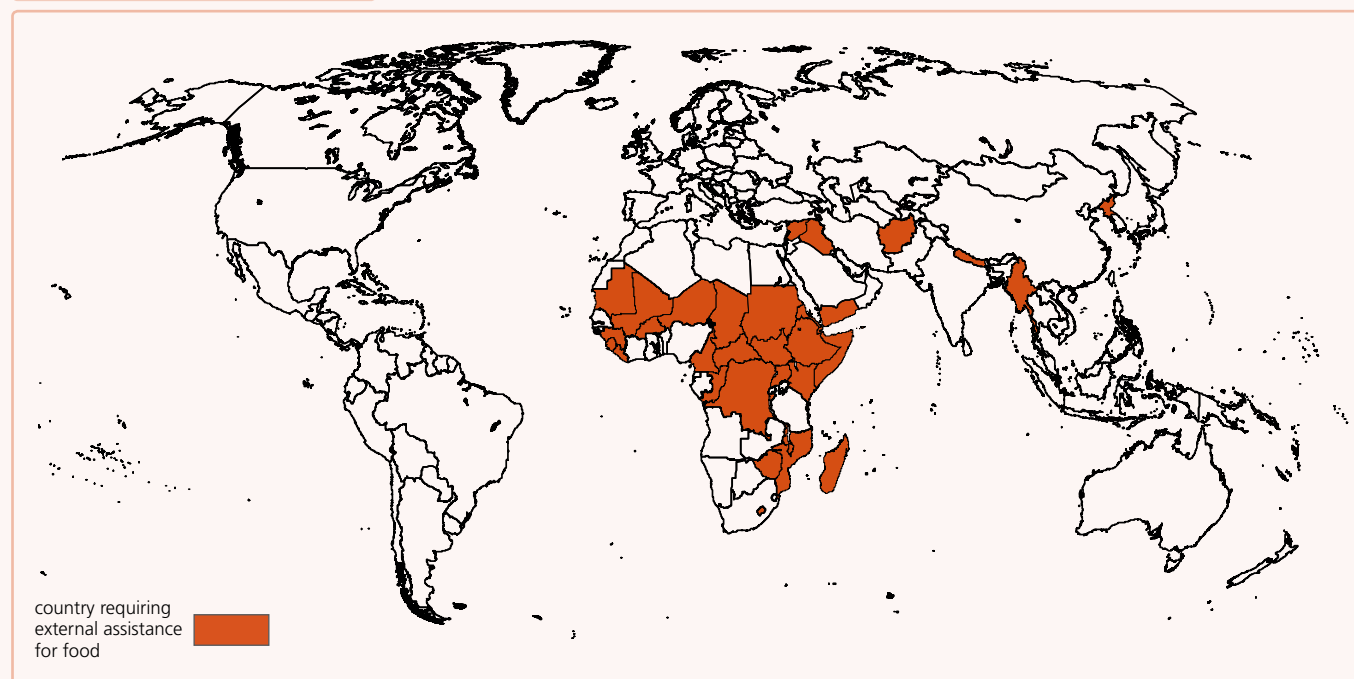


International cereal prices linger below their year-earlier levels



Countries requiring external assistance for food¹

World: 33 countries



AFRICA (26 countries)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/SUPPLIES

Central African Republic ▼

Conflict, displacements and constraints in available supplies

- The Internally Displaced Person (IDP) caseload increased from 378 000 in late August to 400 000 in mid-October due to the resurgence of inter-communal violence. In September 2015, about 1.8 million people were estimated to be in need of food assistance. The significant tightening of food supplies has driven up prices.

Zimbabwe ■

Sharply-reduced 2015 maize production

- Maize production in 2015 decreased by 49 percent, to 742 000 tonnes, compared to the previous five-year average.
- As a result, an estimated 1.49 million people require assistance, well above the level of 2014 (564 599 people) but below the 2.2 million estimated in 2013.
- Cereal production outlook for the 2016 crops is uncertain on account of unfavourable weather forecasts.

WIDESPREAD LACK OF ACCESS

Burkina Faso ▲

Massive influx of refugees from Mali puts additional pressure on local food supplies

- Over 32 000 Malian refugees are estimated to be living in the country.
- About 126 000 people are estimated to be in need of food assistance according to the last "Cadre Harmonisé" analysis.

Chad ■

Large influx of refugees puts additional pressure on local food supplies

- Over 460 000 people from the Sudan's Darfur Region, the Central African Republic and northern Nigeria, as well as the return of an estimated 340 000 Chadians, have put added pressure on local food supplies, negatively affecting food security.
- Over 461 000 people are estimated to be in need of food assistance according to the last "Cadre Harmonisé" analysis.

Djibouti ■

Inadequate pasture availability due to consecutive unfavourable rainy seasons

- About 120 000 people are severely food insecure, mainly in pastoral southeastern areas and in the Obock Region.

Eritrea ▼

Vulnerability to food insecurity due to El Niño-related drought and economic constraints

Guinea ■

Impact of the Ebola Virus Disease (EVD) outbreak

- EVD has had a serious negative impact on economic activities and livelihoods, gravely affecting the food security situation of large numbers of people.
- About 40 500 people are estimated to be in need of food assistance according to the last "Cadre Harmonisé" analysis.

Liberia*Impact of the EVD outbreak*

- EVD has had a serious negative impact on economic activities and livelihoods, gravely affecting the food security situation of large numbers of people.
- About 17 000 people are estimated to be in need of food assistance according to the last "Cadre Harmonisé" analysis.

Malawi*Reduced crop production and flooding*

- Maize production in 2015 declined by 30 percent due to dry spells and floods.
- The number of people requiring assistance in 2015 is estimated at 2.8 million, up from 1.3 million in 2014.
- Strong maize price gains are also constraining food access and further aggravating food security conditions.
- Cereal production outlook for the 2016 crops is uncertain on account of unfavourable weather forecasts.

Mali*Population displacements and insecurity in northern areas*

- About 116 000 people are estimated to be in Phase 3: "Crisis" and above according to the last "Cadre Harmonisé" analysis.

Mauritania*Influx of refugees puts additional pressure on local food supplies and high food prices constrain access*

- More than 52 000 Malian refugees remain in southeastern Mauritania.
- Over 149 000 people are estimated to be in Phase 3: "Crisis" and above according to the last "Cadre Harmonisé" analysis.

Niger*Recurrent severe food crisis*

- About 657 000 people are estimated to be in Phase 3: "Crisis" and above according to the last "Cadre Harmonisé" analysis.
- Over 49 000 Malian refugees and 105 000 Nigerian refugees are estimated to be living in the country.
- Severe depletion of household assets and high levels of indebtedness.

Sierra Leone*Impact of the EVD outbreak*

- EVD has had a serious negative impact on economic activities and livelihoods, gravely affecting the food security situation of large numbers of people.
- About 421 000 people are estimated to be in need of food assistance according to the last "Cadre Harmonisé" analysis.

SEVERE LOCALIZED FOOD INSECURITY**Burundi***Unrest and civil insecurity*

- Disruption to markets, farming activities and livelihoods, seriously affect food security conditions of households in Kirundo, Muyinga and Makamba provinces.

Cameroon*Influx of refugees exacerbating food insecurity of the host communities*

- The number of refugees from the Central African Republic (CAR), which mainly entered East, Adamaoua and North regions, was estimated at 253 000 in late September 2015. About 63 000 refugees from Nigeria mainly entered the Far North Region since May 2013.

- In September 2015, the number of food insecure was estimated at 1.27 million. The most affected areas are the North and Far North regions.

Displacement

- Insecurity along the borders with Nigeria has led to the internal displacement of 81 700 individuals.

Congo*Influx of refugees straining the already limited resources of host communities*

- As of late September 2015, about 30 000 refugees from the CAR are sheltering in the country.

Democratic Republic of the Congo*Conflict and displacements in eastern provinces*

- As of September 2015, the total number of IDPs was estimated at 1.6 million.
- In the third quarter of 2015 (June to September), 260 000 people were newly displaced.
- An estimated 4.5 million people are in need of urgent humanitarian assistance in Eastern and Southern conflict affected provinces (September 2015).

Influx of refugees straining on already limited resources of host communities

- As of late August, refugees from the CAR, mainly hosted in the northern Equateur Province, were estimated at about 97 000.

Ethiopia*Impact of severe drought on livestock and crop production*

- The estimated number of food insecure people has sharply increased from 2.9 million in January 2015 to 8.2 million in October, as severe rainfall deficits led to the rapid deterioration of food security conditions in several agro pastoral and pastoral areas.
- Locally, thousands of livestock deaths are severely limiting availability of nutritious livestock products and household income.

Kenya*Reduced second season crop production during the first quarter of 2015 and worsening pasture conditions*

- About 1.1 million people are severely food insecure, mainly located in coastal and northeastern counties.

Lesotho*Reduced crop production in 2015*

- Reflecting the slightly reduced 2015 maize output, an estimated 463 936 people require assistance, up 3 percent from last year.
- Cereal production outlook for the 2016 crops is uncertain on account of unfavourable weather forecasts.

Madagascar*Flooding and reduced crop production in 2015*

- Cyclones and flood damage in early 2015 negatively impacted on livelihoods and crop production, particularly affecting southern regions where the rate of food insecurity is acute.
- An estimated 1.89 million people are food insecure, including 400 000 people who require immediate assistance.

Mozambique*Flooding in central provinces and reduced localized crop production in 2015*

- The number of food insecure persons in 2015 is estimated at about 138 000.
- Cereal production outlook for the 2016 crops is uncertain on account of unfavourable weather forecasts.

Somalia

Conflict, civil insecurity and reduced localized crop production

- About 1 million people are estimated to be in need of emergency assistance, mainly IDPs and poor households in southern and central regions.

South Sudan

Conflict, civil insecurity and reduced crop production in conflict-affected areas

- Over 2.3 million people have fled their homes since the conflict erupted at the end of 2013.
- About 2.4 million people, including 40 000 people in the Integrated Food Security Phase Classification (IPC) Household Phase 5: "Catastrophe", are severely food insecure, mainly in conflict-affected states of Jonglei, Unity and Upper Nile.

Sudan

Conflict and civil insecurity

- An estimated 3.9 million people are in need of humanitarian assistance, mainly IDPs in conflict affected areas.

Uganda

Below-average crop production

- About 295 000 people in Karamoja region are estimated to be severely food insecure following consecutive unfavourable rainy seasons.

ASIA (7 countries)

EXCEPTIONAL SHORTFALL IN AGGREGATE FOOD PRODUCTION/SUPPLIES

Iraq

Escalation of the conflict and large internal displacement

- Over 2 million people have been displaced since January 2014.
- Some 1.8 million beneficiaries (IDPs, non-displaced food insecure in conflict areas and food insecure host families) are receiving food assistance.
- Internal trade restrictions and reduced access to stocks held in the areas under ISIL control.

Syrian Arab Republic

Worsening civil conflict

- Agricultural production significantly affected by conflict.
- About 13.5 million people are in need of humanitarian assistance, with caseloads increasing.
- Although some international food assistance is being provided, Syrian refugees are also putting strain on other host communities in neighbouring countries.
- WFP plans to reach 2 million people with food assistance in neighbouring countries and 4.5 million within the country.

WIDESPREAD LACK OF ACCESS

Democratic People's Republic of Korea

Impact of drought and floods

- Poor rains between mid-April and mid-July, coupled with short supplies of irrigation water, sharply reduced the 2015 early season crops and negatively impacted the main food crops. Heavy rains from mid-July to early August reportedly caused some localized floods across North Hamgyong and Rason provinces, located in the northeastern part of the country, causing severe damage to housing and infrastructure (including schools, roads and bridges).



- With drought conditions and floods this season, the food security situation is likely to deteriorate compared to the situation of the previous years, when most households were already estimated to have borderline or poor food consumption rates.

Yemen

Conflict, poverty, and high food and fuel prices

- Around 21.2 million people, 82 percent of the population, require some kind of humanitarian assistance to meet their basic needs or protect their fundamental rights
- According to the IPC indicative analysis of June 2015, out of the 12.9 million food insecure people across the country, about 6.1 million were in Phase: 4 "Emergency", while 6.8 million were in Phase: 3 "Crisis".
- The level of food insecurity increased by 21 percent compared to the previous year.



SEVERE LOCALIZED FOOD INSECURITY

Afghanistan

Continuing conflict and population displacement

- Some 2.1 million people are classified as very severely food insecure.
- Over 700 000 people are internally displaced, mostly in Helmand Province.
- About 1.7 million people targeted with food assistance.



Myanmar

Impact of July-August floods

- Nearly 1.7 million people have been affected by heavy rainfall and the passing of Cyclone Komen in July.
- The floods caused severe damage to productive assets and resulted in a reduction of the 2015 main season paddy production in the flood affected areas.



Nepal

Impact of the April earthquake

- The earthquake that struck in April, mostly impacting central and western parts, resulted in the loss of nearly 9 000 lives. In addition, the consequent damage to the agricultural sector contributed to a reduction in 2015 cereal output, mainly for rice and maize crops



Countries with unfavourable prospects for current crops² (total: 21 countries)

AFRICA (16 countries)

Southern Africa subregion

(Angola, Botswana, Lesotho, Madagascar, Malawi, Mozambique, Namibia, South Africa, Swaziland, Zambia and Zimbabwe)

Dry conditions at the start of the 2015/16 cropping season (October-June) have negatively impacted on planting activities and establishment of early-planted crops. Weather forecasts for the season, influenced by the current strong El Niño episode that is predicted to continue until early 2016, point to a higher probability of below-normal rains until March 2016 across large portions of the subregion. As a result, 2016 production prospects are muted



Central African Republic

The widespread conflict, which caused large-scale displacements, the loss and the depletion of the households' productive assets and input shortages, is expected to severely affect the outcome of the current cropping season

Eritrea

Poor and erratically-distributed rains have affected main season crops in central highlands

Ethiopia

Poor and erratically-distributed rains have severely affected 2015 main "meher" season crops in eastern parts of the country

Sudan

Late and erratically-distributed rains have severely affected 2015 sorghum crops in key producing areas

Uganda

Late and erratic rains affected crops in uni-modal rainfall areas of Karamoja region

LATIN AMERICA AND THE CARIBBEAN (5 countries)**El Salvador**

Prolonged and severe dry weather related to El Niño significantly reduced cereal outputs during the main 2015 first season which ended in September. Despite improved rains for the current second season, production prospects are uncertain. The Government and the international community are directly assisting the most affected populations, including the provision of food assistance

Guatemala

Prolonged and severe dry weather related to El Niño significantly reduced cereal outputs during the main 2015 first season which ended in September. Rains have improved for the current second season, particularly in main producing regions which were not as affected by earlier dry weather. The Government and the international community are directly assisting the most affected populations, including the provision of food assistance particularly in the "dry corridor" of the country

Haiti

Prolonged and severe dry weather related to El Niño significantly reduced cereal outputs during the main 2015 first season which ended in September. Despite improved rains for the current second season, production prospects are uncertain. The Government and the international community are directly assisting the most affected populations, including the provision of food assistance

Honduras

Prolonged and severe dry weather related to El Niño significantly reduced cereal outputs during the main 2015 first season which ended in September. Despite improved rains for the current second season, production prospects are uncertain. The Government and the international community are directly assisting the most affected populations, including the provision of food assistance

Nicaragua

Prolonged and severe dry weather related to El Niño significantly reduced cereal outputs during the main 2015 first season which ended in September. Despite improved rains for the current second season, production prospects are uncertain. The Government and the international community are directly assisting the most affected populations, including the provision of food assistance

Key - Changes since last report (October 2015)

No change ■ Improving ▲ Deteriorating ▼ New Entry +

Terminology

¹ **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.

² **Countries facing unfavourable prospects for current crops** are countries where prospects point to a shortfall in production of current crops as a result of a reduction of the area planted and/or yields due to adverse weather conditions, plant pests, diseases and other calamities.

Global overview

CEREALS 2015

In spite of a reduced forecast, world cereal production in 2015 is expected to be almost sufficient to cover global utilization, requiring only a small drawdown from the large existing reserves¹

World cereal production in 2015 is now forecast at 2 527 million tonnes, 2.6 million tonnes lower than last foreseen and 33.9 million tonnes (1.3 percent) below the 2014 record. Most of this month's downward revision reflects a lowering of maize and wheat forecasts, as that of barley was raised and that of rice kept unchanged. At 1 301 million tonnes, the current forecast for world coarse grains production in 2015 is about 1 million tonnes less than expected last month and 32.3 million tonnes (2.4 percent) below 2014. This month's revision was very much the result of a 5-million tonne, weather

induced, lowering of maize production in **China**, which is nonetheless anticipated to harvest a record crop. On the other hand, maize production prospects improved for **Brazil, Mexico** and **the United States of America**. World barley production was also lifted by 1.4 million tonnes since November, almost entirely on account of the **European Union (EU)**. As for wheat, with most crops already harvested, global production is now estimated at 735 million tonnes, marginally down from the November figure, but still slightly above 2014. This month's lowering mainly reflects adverse weather in **Pakistan, Brazil**

and **Argentina**. At 491.4 million tonnes, FAO's forecast for global rice production (milled rice basis) in 2015 has remained virtually unchanged since last month, still suggesting a year-on-year contraction of almost 3 million tonnes, or 0.6 percent.

WHEAT 2016

Wheat plantings for harvest in 2016 are virtually complete in Northern Hemisphere countries. In **the United States of America**, early indications show that the area sown to winter wheat, which accounts for over 80 percent of the

Table 1. World cereal production¹

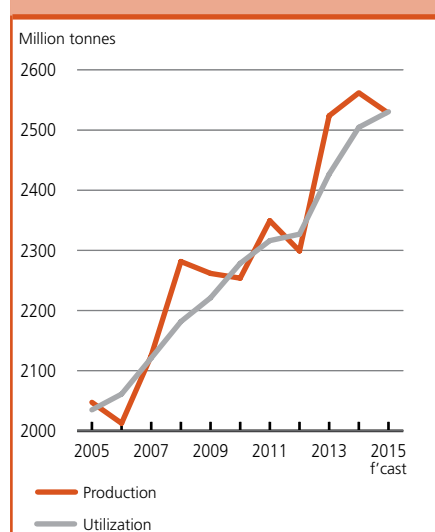
(million tonnes)

	2013	2014 estimate	2015 forecast	Change: 2015 over 2014 (%)
Asia	1 123.3	1 118.2	1 124.1	0.5
Far East	1 014.7	1 018.1	1 015.8	-0.2
Near East	75.3	68.6	74.8	8.9
CIS in Asia	33.3	31.4	33.5	6.6
Africa	163.4	173.3	161.8	-6.6
North Africa	36.0	32.7	37.1	13.5
West Africa	49.9	52.5	51.4	-2.1
Central Africa	4.7	4.7	4.4	-6.4
East Africa	43.8	48.9	42.4	-13.2
Southern Africa	28.9	34.6	26.5	-23.4
Central America and Caribbean	41.3	42.0	44.6	6.3
South America	176.9	179.2	183.9	2.6
North America	498.0	491.2	480.1	-2.3
Europe	480.4	521.8	495.0	-5.1
EU	304.3	330.8	311.6	-5.8
CIS in Europe	162.2	176.9	170.3	-3.7
Oceania	40.3	36.2	38.4	6.3
World	2 523.7	2 561.9	2 527.9	-1.3
Developing countries	1 447.7	1 455.0	1 459.2	0.3
Developed countries	1 075.9	1 106.9	1 068.7	-3.5
- wheat	715.6	733.3	734.5	0.2
- coarse grains	1 313.6	1 334.4	1 302.0	-2.4
- rice (milled)	494.5	494.2	491.4	-0.6

Note: Totals and percentage change computed from unrounded data.

¹ Includes rice in milled terms.

Figure 1. World cereal production and utilization



¹ For more detailed global analysis see the [Food Outlook](#) issue released on 8 October 2015.

country's total wheat area, is likely to be close to the previous year's level. Crop conditions are generally rated as fair to good, apart from some drier conditions in the southern Plains. In the **EU**, under generally favourable weather, plantings are nearly complete and preliminary expectations also point to a similar area compared to 2015. Early-season dryness in parts of **the Russian Federation** and **Ukraine** delayed planting activities and impaired crop emergence; however, beneficial rains were received in late October improving conditions before winter dormancy. An estimated 16 million hectares had been planted in the Russian Federation by late November, similar to last year's area, while a small expansion is expected in the **Ukraine**. In the *Near East*, land preparation and planting of the 2016 winter cereal crops are proceeding under favourable conditions: a wet October boosted soil moisture, ensuring good winter grain emergence and establishment. In the *Far East*, weather conditions so far have been favourable in the main producing areas of **China**, benefitting establishment of the earliest planted crops. In **India**, the production target is 6 percent higher than the reduced 2015 crop. However, lower irrigation supplies in the main reservoirs has significantly delayed planting activities. In **Pakistan**, preliminary expectations point to a 3 percent increase in the 2016 wheat output under the assumptions of good water availability in the main reservoirs and adequate supply of quality inputs.

WHEAT 2015

With most of the 2015 wheat crops already harvested, the global output in 2015 is now estimated at 735 million tonnes, marginally down from expectations earlier this year, but still slightly above 2014. The year-on-year increase mainly reflects improved harvests in **China**, **Morocco**, **Turkey** and **Ukraine** that more than offset reductions in **Argentina** and **Canada**.

In *Europe*, following several consecutive upward revisions during the year, the **EU's** 2015 wheat output is now estimated at 158.5 million tonnes, 1 percent higher than the previous year, reflecting improved yields that more than offset lower plantings. Elsewhere in *Europe*, a larger harvested area in the **Ukraine** resulted in a 10 percent production increase, while the **Russian Federation's** output increased marginally on last year's high level. In *North America*, the 2015 wheat output in **Canada** is estimated at 26 million tonnes, down about 11 percent from last year. The reduction mostly reflects dry weather that caused a sharp reduction in yields more than nullifying the impact of an expansion in the harvested area. At 55.8 million tonnes, **the United States of America's** 2015 wheat production is estimated to be 1.3 percent up on last year, on account of a larger area harvested that offset marginally lower yields.

In *Asia*, aggregate 2015 wheat production is up slightly, mainly resting on production gains in **China** and **Turkey**, which compensated for a decline in **India** where irregular monsoon rains lowered yields. At 129.9 million tonnes, China's harvest is put at a record level, while in Turkey production rebounded by 19 percent to 22.6 million tonnes owing to weather-improved yields.

The aggregate output in *Africa* is forecast to increase by about 2.2 million tonnes, almost entirely on account of a near-3 million tonne production gain in **Morocco**. This increase more than offset lower outputs estimated in **Tunisia** and forecast in **Ethiopia** following adverse weather, while outputs in other countries of the region are expected to remain close to the previous year's levels.

In *South America*, **Argentina's** output is forecast at 10.5 million tonnes, nearly one quarter below last year's high level. The decrease is largely a result of a lower harvested area. In **Brazil**, the second main producer in the subregion, production is put at 6.2 million tonnes, with recently

lowered forecasts for yield accounting for a marginal year-on-year contraction. In the other main wheat-producing Southern Hemisphere country, **Australia**, persistent dry conditions and high temperatures linked to the current El Niño, lowered production expectations from previous forecasts to 24.3 million tonnes. However, at this level, the output is still anticipated to be about 3 percent up on 2014.

COARSE GRAINS 2015

FAO's forecast for coarse grains stands at 1 302 million tonnes, 32.4 million tonnes (2.4 percent) below 2014. The bulk of the year-on-year decrease is mainly on account of reduced maize outputs in *Africa*, *Europe* and *North America*, with the global 2015 maize production now standing at 1 001 million tonnes, 30.9 million (3 percent) down on 2014.

In **the United States of America**, despite improved prospects from earlier expectations, the maize output is forecast at 346.8 million tonnes, 4 percent down from the previous year, mostly reflecting a price-induced contraction in plantings. **Canada's** maize output is set to expand by 6 percent to 12.2 million tonnes mostly resulting from an expansion in plantings. In *Asia*, the aggregate 2015 maize output is set to rise by nearly 2 percent. This year's production gain is mostly on account of a 5.3 million-tonne increase in **China** to a record level of 221 million tonnes, despite adverse weather in the key-producing northeastern provinces causing a recent downward revision to production expectations.

In *Europe*, aggregate 2015 maize production is forecast to decline by 18 percent, with steep falls forecast in the **EU** and **Ukraine**. Hot and dry weather in the EU resulted in reduced yields that largely caused an expected 23 percent decline in production from last year's bumper output to 59.6 million tonnes, while in Ukraine a fall in plantings is largely attributed to the 20 percent production

decrease to 22.9 million tonnes. By contrast, the **Russian Federation** is expected to gather a crop of 13 million tonnes, up 15 percent, stemming from weather-improved yields.

In *South America*, the maize output is up 6 percent to 132 million tonnes, reflecting larger harvests in the main producing countries of **Argentina** and **Brazil** on account of an expansion in plantings and higher yields. In *Central America and the Caribbean*, the aggregate 2015 maize production is put at 30.8 million tonnes, almost 10 percent higher than last year's output. This mainly reflects a record crop of about 27 million tonnes in Mexico, which more than offset dry-weather reduced outputs, associated with the current El Niño episode, in the remaining countries of the subregion.

In *Africa*, maize production decreased steeply in *Southern African* countries also

due to severe dry weather, while adverse weather has dampened overall prospects in *East and West Africa*. The aggregate 2015 regional output is forecast to fall by 12 percent to 66.7 million tonnes.

The forecast for 2015 world barley production stands at 146.2 million tonnes, about 2 percent higher than the previous year. This year's increase is on account of production gains in **Turkey** and **Argentina** more than compensating for a decline in the **Russian Federation**, while a recent raising of the **EU's** estimated production also added to the improved global output.

World sorghum production in 2015 is forecast at about 66 million tonnes, nearly unchanged from the previous year's high level. A larger expected output in North America (**the United States of America**) was almost entirely offset by a reduction in the aggregate output in *Africa*.

RICE 2015

At 491.4 million tonnes, FAO's forecast for global rice production (milled rice basis) in 2015 has remained virtually unchanged since last month, still suggesting a year-to-year contraction of almost 3 million tonnes, or 0.6 percent. The 2015 decline looks relatively small, especially taking into account the concern that has surrounded the El Niño weather anomaly since the season onset. Yet, the drop clearly represents a departure from the upward trend that characterized the rice economy in the past decades and which has seen global production growing by an average of 7 million tonnes per year since 2006. The 2015 expected decline also succeeds to a 2014 season of stagnating output, thus arising as the second successive year of below trend results.

While negligible at the aggregated world level, revisions to the production forecasts were more accentuated for *Asia*, where 444.7 million tonnes are expected to be harvested, about 2 million tonnes, or 0.4 percent, below the current 2014 estimate. The deterioration of 2015 crop prospects in the region was mainly on account of **Laos**, **the Philippines** and **Thailand**, where they reflected the predicted persistence of severe drought problems in the coming months. The Government of **Pakistan** also lowered the country's production forecast, amid low prices and rising costs. On the other hand, expectations improved for **Bangladesh**, following the excellent "boro" crop harvested early this year and the favourable growing conditions that supported the "aman" crop, now at the harvest stage. Better-than-previously anticipated yields in **the Republic of Korea** have also underpinned the country's recently improved production estimate. Compared to 2014, the nations likely to see the sharpest drops in output in the region are **Thailand**, **India** and **the Philippines**.

Table 2. Basic facts of world cereal situation

(million tonnes)

	2013/14	2014/15 estimate	2015/16 forecast	Change: 2015/16 over 2014/15 (%)
PRODUCTION¹				
World	2 523.7	2 561.9	2 527.9	-1.3
Developing countries	1 447.7	1 455.0	1 459.2	0.3
Developed countries	1 075.9	1 106.9	1 068.7	-3.5
TRADE²				
World	362.2	375.3	364.5	-2.9
Developing countries	114.0	113.6	119.7	5.4
Developed countries	248.2	261.7	244.8	-6.5
UTILIZATION				
World	2 426.7	2 504.5	2 530.4	1.0
Developing countries	1 558.6	1 615.6	1 636.4	1.3
Developed countries	868.2	888.9	894.0	0.6
Per caput cereal food use (kg per year)	149.0	149.4	149.3	-0.1
STOCKS³				
World	596.3	646.5	643.5	-0.5
Developing countries	454.4	477.1	467.8	-2.0
Developed countries	141.9	169.4	175.7	3.7
WORLD STOCK-TO-USE RATIO (%)	23.8	25.6	25.0	-2.1

Note: Totals and percentage change computed from unrounded data.

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

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

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

The overall outlook for *Africa's* production in 2015 improved somewhat, sustained by better expectations for **Burkina Faso, Mali and Senegal**. The region is now forecast to harvest 18.3 million tonnes, still representing a 2.5 percent contraction from the favourable 2014 season, with much of the shortfall concentrated in **Madagascar, Nigeria and the United Republic of Tanzania**. In *North America*, higher yields than previously reported were behind an upgrade of crop results in **the United States of America**, which, nonetheless, are estimated to drop by 14 percent compared to 2014. The 2015 season also ended negatively in *Oceania*, where **Australia** incurred a 12 percent drop in production, as a result of insufficient irrigation water, following drought. In *Latin America and the Caribbean*, 19.2 million tonnes are

anticipated to be harvested in 2015, about 500 000 tonnes, or 2.7 percent more than in 2014. This outcome would be in spite of a 5 percent expected contraction in *Central America and the Caribbean*, where the season has been marred by a scarcity of rainfall, and relies instead on a 3.5 percent increase in *South America*, particularly underpinned by large gains in **Brazil, Colombia and Peru**. The outlook in *Europe*, which was recently upgraded on account of **the Russian Federation**, remains very positive, with production in the region forecast to rebound by 5.2 percent, sustained by gains in the **EU** and in **the Russian Federation**.

Although the 2015 rice season has yet to close in those Northern Hemisphere countries growing more than one crop per year, countries south and along the Equator are already engaging in seeding

their **2016** crops. The early outlook is very much influenced by the prevailing El Niño, which is being associated with a late arrival of the rainfall and scant precipitation in **Indonesia, Oceania and Southern Africa**, and with excessive rains in *South America*. In *Asia*, planting delays associated with the lack of rains risk to result in falling production in Indonesia. In *South America*, early indications mostly point to a retrenchment from rice cultivation in **Brazil and Uruguay**, where plantings have been constrained by heavy precipitation. In addition, in most of the subregion, low prices and high stocks are likely to weigh negatively on next year's production. Continued water scarcity in **Australia** is also expected to foster a further cut in the rice area, even though minimum prices are being offered by private companies to entice farmers to keep on growing the crop.

UTILIZATION 2015/16

Global cereal utilization in 2015/16 is now forecast at 2 529 million tonnes, nearly unchanged from the previous month, but 1.0 percent greater than in 2014/15. This would imply a sharp slowdown from the 3.2 percent and the 4.3 percent growth registered in 2014/15 and 2013/14, respectively, due mainly to less robust demand prospects for feed and industrial uses. Total utilization of coarse grains is projected at 1 302 million tonnes, slightly higher than it was anticipated last month. Compared to 2014/15, the world coarse grain usage would be only marginally higher with feed use reaching 743 million tonnes, up 1.3 percent from the previous season. By contrast, global utilization of wheat is anticipated to expand by 1.8 percent to 728 million tonnes in 2015/16, with its food use increasing by almost 1 percent to 491 million tonnes and feed use by 3.5 percent to 145 million tonnes. The strong growth in wheat usage in animal rations is likely to be concentrated in the **EU** and **the United States of America**, compensating for

an expected sharp decline in **Canada**, which harvested a smaller wheat crop this year. World rice utilization is anticipated to grow by 1.3 percent, to 499 million tonnes, of which around 402 million tonnes is expected to be consumed as food, some 1.4 percent more than in the previous season and broadly in line with world population growth.

STOCKS 2015/16

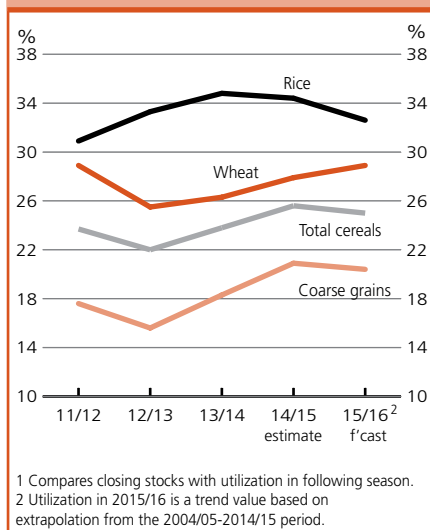
According to the latest FAO's assessment, this season's decline in world cereal stocks is likely to be less pronounced than predicted last month, following upward adjustments to coarse grains (mainly maize) and rice inventories. Total cereal stocks, by the close of seasons ending in 2016, are now forecast at 643 million tonnes, 5.8 million tonnes higher than anticipated last month and 2.9 million tonnes (only 0.4 percent) below the 2015 estimate. As a result, the global cereal stock-to-use ratio is estimated at almost 25 percent, slightly less than the 2014/15 ratio of 25.6 percent. The forecast for world coarse grains inventories has been raised by 5.3 million tonnes to 271 million tonnes, with **the United States of America** accounting for most of the revision, now standing only 0.2 percent short of last year's record. The forecast for global rice stocks was also scaled up, by 900 000 tonnes to nearly 166 million tonnes, mainly on account of higher figures for **Bangladesh, the Republic of Korea** and **Indonesia**. At this level, world rice inventories would be some 6 million tonnes (3.6 percent) lower than in 2015, with much of the drawdown concentrated in **India** and **Thailand**. By contrast, world wheat carryovers may increase to 207 million tonnes in 2016, 4 million tonnes (1.9 percent) above their already high opening level. The forecast is marginally below that of last month, on lower-than-anticipated

inventory build-ups in **Argentina** and **Brazil**. Much of the increase in world inventories next year is expected to reflect sharp rises in the **EU, China, the United States of America** and **the Russian Federation**, more than compensating for significant drawdowns in **Argentina, Canada, India** and **the Islamic Republic of Iran**.

TRADE 2015/16

At around 364.5 million tonnes, international trade (exports) in cereals in 2015/16 is currently anticipated to fall by about 11 million tonnes, or 2.9 percent, from the previous season's record. The forecast has remained broadly unchanged since last month, as small reductions in wheat and rice trade counter-weighted an increase in coarse grains. Compared to the previous season, global wheat trade in 2015/16 (July/June) is seen falling by as much as 6.3 million tonnes, or 4 percent, to 149.5 million tonnes, largely on expectation of significant reductions in imports by **Morocco, the Islamic Republic of Iran** and **Turkey**. World trade in coarse grains in 2015/16 (July/June) is forecast to decline by 5.7 million tonnes, or 3.2 percent, from the previous season's record to around 170 million tonnes. Much of the drop would rest on an 11.3 percent and 9.0 percent contraction in barley and sorghum trade volumes, respectively, following sharply reduced purchases by **China**. Global trade in maize is likely to drop by 0.9 percent from the previous season's peak to 127.5 million tonnes, on lower imports by **the Islamic Republic of Iran** and **Mexico**. By contrast, in calendar year 2016, world rice trade is anticipated to rebound by 2.6 percent, sustained by stronger import demand by **Indonesia, the Philippines, the Islamic Republic of Iran**, and **Nigeria**.

Figure 2. Ratio of world cereal stocks to utilization¹



MAIZE

Export prices of maize from the United States of America, the world's largest maize producer and exporter, declined in November after two months of consecutive increases. The international benchmark US maize (No.2, Yellow) price averaged USD 166 per tonne, 4 percent lower than in October and about 7 percent down from the corresponding period last year. The decline reflects sluggish export demand and ample global supplies, buoyed by the upward revisions of the 2015 production forecast and the closing

stocks in the United States of America. Maize export prices eased in Ukraine with the completion of the 2015 harvest, while in South America quotations were supported by strong export demand.

WHEAT

Export prices of wheat generally declined in November, with the benchmark US wheat (No.2 Hard Red Winter) price averaging USD 211 per tonne, more than 4 percent lower than in October and one-quarter down from its year-earlier value. Despite lingering concerns about

the impact of dry weather on 2016 wheat crops in Ukraine and the Russian Federation, beneficial rains improved crop conditions in the United States of America and weighed on prices. Large global supplies and weak export demand provided additional downward pressure. In Argentina, prices declined with the recently-started 2015 harvest.

RICE

The FAO Rice Price Index retreated by 1.4 percent in November, reaching its lowest level since January 2008. As in the previous month, the decline was driven by the falling prices of Aromatic and Japonica rice, while both the Lower and Higher Quality Indica rice sub-indices gained around 1 percent. The white rice benchmark quotation (Thai 100%B) firmed slightly over the month, gaining 1 percent to USD 380 per tonne. Prices in the other origins followed diverging patterns, rising in Viet Nam, where traders continued to secure supplies for delivery to the Philippines and Indonesia, and in Pakistan, on steady shipments to Eastern Africa. Prices in the Americas were stable to lower in the United States of America, with Japonica rice particularly under downward pressure. They also dropped in Argentina and Uruguay, while they showed a tendency to increase in Brazil, partly reflecting a strengthening of the Real against the US dollar.

Table 3. Cereal export prices*

(USD/tonne)

	2014			2015			
	Nov.	Jun	Jul	Aug	Sept	Oct.	Nov.
United States							
Wheat ¹	280	242	238	216	218	221	211
Maize ²	178	170	179	163	166	172	166
Sorghum ²	197	224	223	180	177	182	173
Argentina³							
Wheat	252	226	229	227	223	223	210
Maize	179	173	176	160	161	164	167
Thailand⁴							
Rice, white ⁵	427	385	401	382	367	376	379
Rice, broken ⁶	338	327	321	324	316	323	329

*Prices refer to the monthly average.

¹ No.2 Hard Red Winter (Ordinary Protein) f.o.b. Gulf.

² No.2 Yellow, Gulf.

³ Up river, f.o.b.

⁴ Indicative traded prices.

⁵ 100% second grade, f.o.b. Bangkok.

⁶ A1 super, f.o.b. Bangkok.

Low-Income Food-Deficit Countries food situation overview²

Cereal production of LIFDCs in 2015 to decline to a below-average level, reflecting reduced outputs in Africa and the Far East

FAO's latest forecast for 2015 cereal production for Low-Income Food-Deficit Countries (LIFDCs) stands at 414 million tonnes, 4.4 percent (19 million tonnes) below the 2014 bumper level. The reduction this year is mostly on account of lower harvests in **India**, the largest LIFDC producer, and in *East and Southern Africa*.

In *Asia*, with the bulk of the harvest complete, the aggregate 2015 cereal output is preliminarily estimated at 305 million tonnes, 2.9 percent down on 2014. The production decline is mostly on account of a near 10-million tonne

decrease in **India**, where mainly dry weather conditions adversely affected crops in the large producing northern and central states. Production declines are also forecast for **Nepal**, **the Democratic People's Republic of Korea** and **Mongolia**, although to a lesser extent. In **Yemen**, a second consecutive year-on-year decline has resulted in a well below-average output. In the **Syrian Arab Republic**, although still below average, a 35 percent cereal production increase was registered compared to the previous year's drought-affected crop following overall favourable weather. Given the good weather, larger gains were severely limited by the impact of the conflict on the agricultural sector. In *CIS in Asia*, the 2015 aggregate cereal crop is estimated at an above-average level.

In sub-Saharan *Africa*, harvesting of the 2015 cereal crops was completed in *Southern Africa* and is expected to be finalized in *West, Central and East Africa* by the end of the year. The 2015 aggregate cereal output has been revised downwards compared to earlier forecasts, reflecting the impact of severe rainfall deficits and currently stands at 107.2 million tonnes, 9 percent below 2014. *East Africa* accounts for most of the contraction, with the aggregate output forecast at 42.4 million tonnes, 6.5 million tonnes lower than the previous year mostly reflecting production declines in **the Sudan** and **Ethiopia**. Significant falls were also registered in *Southern Africa*, following a severe dry period in early 2015, with notable production decreases in **Malawi** and **Zimbabwe**. In *West Africa*, the 2015 aggregate production, forecast at 51.3 million tonnes, is 1.1 million tonnes lower than in 2014 but still above average. The decrease is mainly driven by lower foreseen outputs in coastal countries along the Gulf of Guinea, following irregular rains earlier in the season, while production gains in **Guinea**, **Mali** and **Senegal** averted a steeper decline at the aggregate level. In *Central Africa*, 2015 production is anticipated at an average level generally reflecting beneficial weather conditions. However, persistent insecurity in parts of the subregion continued to adversely affect the agricultural sector restraining production gains.

In *Central America and the Caribbean*, prolonged and severe dry weather associated with the current El Niño episode

Table 4. Basic facts of the Low-Income Food-Deficit Countries (LIFDCs) cereal situation (million tonnes, rice in milled basis)

	2013/14	2014/15 estimate	2015/16 forecast	Change: 2015/16 over 2014/15 (%)
Cereal production¹	425.6	433.2	414.0	-4.4
<i>excluding India</i>	182.2	190.5	181.2	-4.9
Utilization	449.3	461.3	463.7	0.5
Food use	364.1	371.7	376.9	1.4
<i>excluding India</i>	174.6	179.2	182.1	1.6
Per caput cereal food use (kg per year)	146.4	146.9	146.4	-0.3
<i>excluding India</i>	144.7	145.1	144.0	-0.8
Feed	33.0	34.7	34.5	-0.7
<i>excluding India</i>	19.9	21.1	20.5	-2.5
End of season stocks²	92.6	94.1	80.9	-14.0
<i>excluding India</i>	38.7	40.4	35.6	-11.9

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

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

² **The Low-Income Food-Deficit Countries (LIFDCs)** group includes net food deficit countries with annual per caput income below the level used by World Bank to determine eligibility for IDA assistance (i.e. USD 1 945 in 2011). The new list of the LIFDCs stands at 54 countries, one less than in 2014 list but with some changes. These are: the Republic of the Congo, the Philippines and Sri Lanka, which all graduated out based on income criterion (for the Philippines in particular this is part due to the World Bank revision of income data). The 2015 list of LIFDCs now also includes South Sudan, for which data had previously been unavailable, and the Syrian Arab Republic, which had previously been taken off the list, but now fails to satisfy the tree criteria for exclusion. For full details see: <http://www.fao.org/countryprofiles/lifdc/en/>

reduced outputs of the main first season, which concluded in September. As a result, the subregional aggregate production, including the second season crops to be harvested from December, is forecast at a below-average level of 1.9 million tonnes.

LIFDC aggregate cereal import forecast to increase

The aggregate cereal import requirement of LIFDCs in the 2015/16 marketing year (July/June) is forecast at 54.6 million tonnes (including rice in milled terms), fractionally above last year's level. Although the volume at the aggregate level remains nearly unchanged, variations exist at the subregional level.

The largest year-on-year subregional increase is forecast in *Southern Africa*, mostly reflecting increased requirements for **Zimbabwe** following a steep production decline in 2015. In *East Africa*, aggregate cereal imports are also expected to rise, mainly on account of lower anticipated harvests in **Ethiopia** and **the Sudan**. In *West Africa*, imports are foreseen to fall slightly

Table 5. Cereal production¹ of LIFDCs
(million tonnes)

	2013	2014 estimate	2015 forecast	Change: 2015 over 2014 (%)
Africa (37 countries)	108.3	117.5	107.2	-8.8
East Africa	43.8	48.9	42.4	-13.2
Southern Africa	9.9	11.5	9.1	-21.4
West Africa	49.9	52.5	51.4	-2.1
Central Africa	4.7	4.6	4.3	-6.5
Asia (12 countries)	315.1	314.1	305.0	-2.9
CIS in Asia	10.3	10.2	10.6	4.2
Far East	294.0	294.0	283.5	-3.5
- India	243.4	242.6	232.8	-4.0
Near East	10.7	10.0	10.9	9.2
Central America (3 countries)	2.2	1.6	1.9	19.0
Oceania (2 countries)	0.0	0.0	0.0	0.0
LIFDC (54 countries)	425.6	433.2	414.0	-4.4

Note: Totals and percentage change computed from unrounded data.

¹ Includes rice in milled terms.

compared to the previous year reflecting the generally good prospects for the 2015 crop. Cereal imports in *Central Africa* are projected to rise, with increasing domestic requirements out-pacing production.

In *Asia*, total imports in 2015/16 are anticipated to rise marginally from the previous year's high level. This reflects

higher import forecasts in **India**, **Nepal** and the **Syrian Arab Republic**, that more than outweighed a significantly reduced import forecast in **Bangladesh**. Elsewhere, in *Central America and the Caribbean*, *CIS in Asia* and *Oceania*, imports are expected to remain close to their levels of the previous year.

Table 6. Cereal import position of LIFDCs
(thousand tonnes)

	2013/14 or 2014	2014/15 or 2015				2015/16 or 2016	
		Requirements ¹		Import position ²		Requirements ¹	
		Actual imports	Total imports:	of which food aid	Total imports:	of which food aid deliveries ³	Total imports:
Africa (37 countries)	30 916	30 757	1 155	21 236	603	30 899	1 367
East Africa	10 020	9 534	656	7 647	428	9 812	918
Southern Africa	3 027	2 662	67	2 662	37	3 176	39
West Africa	16 107	16 851	282	9 883	94	16 080	260
Central Africa	1 762	1 710	149	1 044	45	1 831	149
Asia (12 countries)	17 917	20 771	515	18 939	428	21 116	714
CIS in Asia	4 022	4 109	1	3 936	0	4 106	1
Far East	4 368	6 485	171	6 278	31	6 658	282
Near East	9 527	10 177	343	8 725	397	10 352	431
Central America (3 countries)	1 905	2 044	98	2 044	8	2 120	98
Oceania (2 countries)	443	477	0	223	0	467	0
Total (54 countries)	51 181	54 049	1 768	42 443	1 039	54 602	2 179

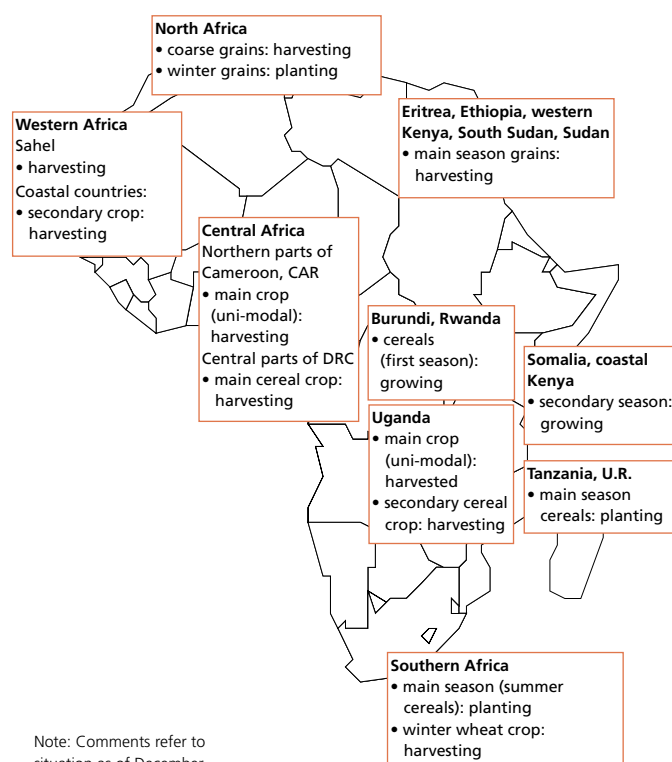
Note: Totals computed from unrounded data.

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

² Estimates based on information available as of early November 2015.

³ Refers to food aid deliveries to WFP country offices, bilateral transfers, and deliveries by other UN agencies and NGOs.

Regional reviews



Above-average cereal crop gathered in 2015

Despite excessive hot weather (up to 45 degrees Celsius) in parts of the subregion in May 2015, total wheat production, which accounts for just over half of the aggregate cereal output, was estimated at 20.6 million tonnes, almost 17 percent above 2014's output. **Tunisia** suffered significant heat damage that resulted in a 1 million tonne decrease in production compared to 2014. The lower output in Tunisia was more than offset by increases in **Morocco** (over 4 million tonnes) and to a lesser extent in **Algeria** (600 000 tonnes). **Egypt's** production remained on par with last year's harvest. Provisional estimates indicate an aggregate subregional cereal output (including paddy rice) of 39 million tonnes, an increase of about 12.5 percent on last year's output and 9 percent on the five-year average. The coarse grains harvest is provisionally estimated at 12.5 million tonnes, about 5 percent above the five-year average and about 15 percent higher than last year.

Cereal imports forecast to remain high in 2015/16

Even in good harvest years, *North African* countries rely heavily on cereal imports to cover their consumption needs, with **Egypt** being the world's largest wheat importer. On average, in the last five years, between 45 percent (in **Egypt** and **Morocco**) and 90 percent (in **Libya**) of total domestic cereal requirements (including food and feed) were met through imports. With a slightly above-average harvest estimated in 2015, the subregion's aggregate cereal import requirement for the 2015/16 marketing year (July/June) is estimated at approximately 43 million tonnes, slightly below last year's level but about 9 percent above the average of the previous five years. Wheat accounts for almost 60 percent of cereal imports. The above-average 2015 harvest in **Morocco** lowered the forecasted cereal imports to 4.9 million tonnes (30 percent below 2014/15 volumes), while a reduced crop increased the import requirement in **Tunisia** by 17 percent compared to last year.

NORTH AFRICA

Favourable planting conditions for 2016 winter crops

Planting of the 2016 winter wheat and coarse grains crops is underway throughout the subregion under favourable weather conditions, with drier weather facilitating fieldwork following a wet start in the autumn. Most planting activities are usually carried out in November to benefit from seasonal rainfall.

Table 7. North Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	Change: 2015/2014 (%)
North Africa	20.3	17.6	20.6	11.5	10.8	12.5	6.1	6.3	6.0	37.9	34.7	39.0	12.5
Algeria	3.3	2.0	2.4	1.6	1.3	1.5	0.0	0.0	0.0	4.9	3.3	3.9	18.0
Egypt	8.8	8.8	9.0	6.5	6.6	6.8	6.1	6.2	5.9	21.4	21.6	21.7	0.3
Morocco	7.0	5.1	8.0	2.9	1.9	3.7	0.0	0.0	0.1	9.9	7.1	11.8	66.6
Tunisia	1.0	1.5	1.0	0.3	0.8	0.3	0.0	0.0	0.0	1.3	2.3	1.3	-42.7

Note: Totals and percentage change computed from unrounded data.

Food price inflation varies

Food price inflation in the subregion in October 2015 ranged from slightly over 3 percent in **Tunisia** and **Morocco** to almost 13 percent in **Egypt**. **Algeria** reported a food price inflation of 7 percent in September 2015 (latest available data). The reported variations are largely in response to changes of prices of non-subsidized products, with bread prices generally subsidized across the subregion.

In **Libya**, where the overall yearly inflation is estimated at over 12 percent, the increases are driven by supply chain disruptions offsetting the downward pressure from high fuel and food subsidies. Civil insecurity, fuelled by the presence of armed groups, resulted in the destruction to public infrastructure, and caused disruptions to the procurement and distribution systems.

WEST AFRICA

An above-average 2015 cereal crop expected in the Sahel

The 2015 coarse grains harvest is nearly complete in the Sahel, while in the coastal countries along the Gulf of Guinea, harvesting of the second season cereal crops has just started. The joint inter-agency Crop Assessment Missions (CMA) to the nine Sahelian countries (Burkina Faso, Cabo Verde, Chad, the Gambia, Guinea-Bissau, Mali, Mauritania, Niger and Senegal) and eight coastal countries (Benin, Côte d'Ivoire, Ghana, Guinea, Liberia, Nigeria, Sierra Leone and Togo) have recently been concluded. The missions reviewed the evolution of the 2015 cropping season and preliminary cereal production estimates prepared by the national agricultural statistics services. FAO participated in most of these missions.

According to preliminary findings, an above average aggregate cereal output is anticipated in the Sahelian countries following beneficial rains since July over the main producing areas of the subregion. Specifically, production is expected to recover significantly in the Sahelian countries that were affected by irregular rains in 2014 and experienced a steep drop in production last year. Compared to last year's outputs, 2015 cereal production is estimated to have increased by 81 percent in **Senegal**, 28 percent in **Guinea-Bissau** and

13 percent in the **Gambia**. In Cape Verde, production is estimated to have recovered significantly from the drought-reduced harvest of the previous year. A record crop is anticipated in **Mali**, while an above-average output is expected in **Burkina Faso**.

In coastal countries along the Gulf of Guinea, increased rainfall in recent weeks has reduced moisture deficits caused by irregular precipitation earlier in the season in the southern parts of **Benin**, **Côte d'Ivoire**, **Ghana**, **Nigeria** and **Togo**. However, maize yields were still adversely affected in parts. As a result, compared to 2014, cereal outputs are expected to decline by over 10 percent in **Ghana**, 9 percent in **Benin** and 3 percent in **Togo**. In **Nigeria**, cereal production is expected to remain at the same level as in 2014.

In the countries affected by the Ebola Virus Disease (EVD) outbreak, **Guinea**, **Liberia** and **Sierra Leone**, harvesting of rice and coarse grain crops is underway and will be completed in December. Production is estimated to have recovered from last year's Ebola-affected levels. The crops benefited from favourable climatic conditions during the sowing and vegetative periods. Moreover, the EVD that significantly affected farming activities last year has been largely controlled. Liberia and Sierra Leone have been declared free of the Ebola virus transmission to the human population, and Guinea reported no confirmed cases of EVD up to the week of 15 November.

The aggregate cereal harvest in *West Africa* is expected to be about 10 percent above the average of the previous five years, mostly reflecting good outputs in the Sahelian countries.

Coarse grain prices continued to show mixed trends in coastal countries, but remained generally stable in the Sahel

In coastal countries along the Gulf of Guinea, harvesting of the first season crops has put significant downward pressure on prices in some countries, particularly in **Nigeria**, where millet prices dropped by 15 percent between July and September. By contrast, in **Benin** and **Togo**, although maize prices remained

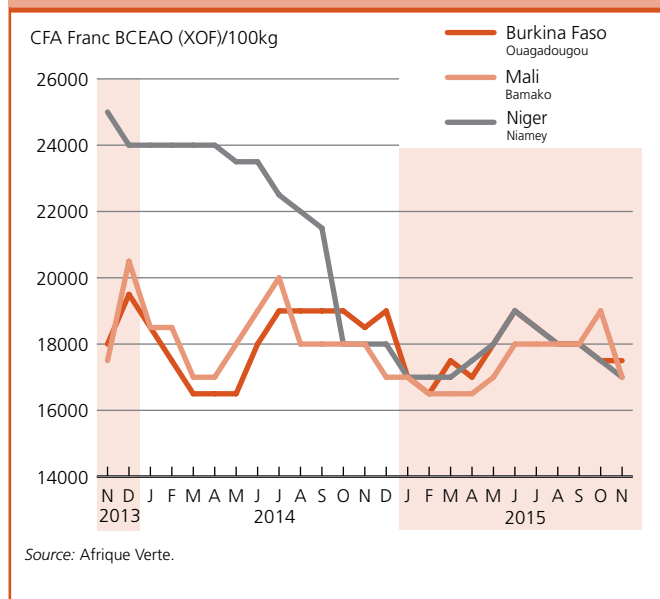
Table 8. West Africa cereal production
(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals ¹			
	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	Change: 2015/2014 (%)
West Africa	41.1	43.5	42.3	13.8	14.0	14.1	55.0	57.6	56.5	-1.9
Burkina Faso	4.6	4.1	4.2	0.3	0.3	0.4	4.9	4.5	4.6	2.1
Chad	2.2	2.4	2.3	0.4	0.3	0.3	2.6	2.7	2.5	-8.1
Ghana	2.2	2.2	1.9	0.6	0.6	0.6	2.7	2.8	2.4	-11.9
Mali	3.5	4.8	4.8	2.2	2.2	2.4	5.7	7.0	7.2	3.7
Niger	4.3	4.8	4.5	0.0	0.1	0.1	4.3	4.9	4.6	-5.1
Nigeria	18.4	19.5	19.2	4.7	4.9	4.6	23.2	24.4	23.9	-2.2

Note: Totals and percentage change computed from unrounded data.

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

Figure 3. Millet prices in selected West African markets



mostly stable or declined in September, the steep upward trend followed by prices over the previous few months meant that they have remained well above their year-earlier levels. Maize prices increased by 91 percent and 128 percent in the year to September 2015 in Malanville (Benin) and Anie (Togo), respectively. The upward price pressure was largely a result of uncertain crop prospects in the southern part of these countries, due to irregular rainfall. In the Sahel belt, coarse grain prices remained mostly unchanged in September and October in **Burkina Faso, Niger** and **Mali** after declining for two consecutive months. Similarly, in **Chad**, coarse grain prices have stabilized in recent months in most parts of the country, with the exception of Moussoro and N'Djamena, where significant increases in millet and sorghum prices were observed.

Food security affected by civil insecurity and infectious disease outbreaks

In spite of the expected above-average 2015 cereal harvest, humanitarian assistance is still needed in several parts, mostly due to the continuing civil conflict in northern Nigeria and the **Central African Republic (CAR)** that has resulted in large population displacement in the subregion. Specifically, the escalation of the conflict in northern Nigeria has resulted in increasing population displacements internally and in the neighbouring countries of **Cameroon, Chad** and **Niger**. Over 1.8 million people have been displaced in northeast Nigeria. In addition, over 105 000 people are estimated to have left Nigeria for the Diffa Region of Niger, while nearly 57 000 people have taken refuge in northern Cameroon. Moreover, according to the Office of the United

Nations High Commissioner for Refugees (UNHCR), an additional 15 000 Nigerians fled to Chad. Similarly, in **Chad**, civil conflict in the Sudan, the CAR, Nigeria and Libya, has increased the number of refugees and returnees. Overall, over 460 000 refugees are estimated to be currently living in Chad, while about 340 000 Chadians have returned to their country. The refugee crisis has exacerbated an already fragile food situation.

Moreover, the areas affected by irregular rains this year will experience increased food insecurity and malnutrition in the 2015/16 marketing year. In addition, in spite of the relatively low impact of EVD on 2014 agricultural production at the national level, its impact on economic activities and livelihoods has severely affected household food security in **Guinea, Liberia** and **Sierra Leone**. Similarly, since December 2014, HPAI (avian influenza) has been affecting several poultry farms and live bird markets in **Nigeria, Burkina Faso, Niger, Côte d'Ivoire** and **Ghana**. As of September, over 1.5 million chickens were culled in Nigeria as a result of the disease, which is already causing major economic losses in the poultry sector. This could severely impact on the livelihoods of the local communities and threaten hundreds of thousands of poultry farmers and sellers, thus jeopardizing commercial poultry production and seriously impeding regional and international trade, as well as market opportunities. As a result of the shocks mentioned above, over 8 million people are estimated to be in Phase 3: "Crisis" and above in *West Africa* between October and December according to the latest "Cadre Harmonisé" analysis. That number is forecast to rise to over 10.7 million between June and August 2016. More than half of the people in need of food assistance live in Nigeria.

CENTRAL AFRICA

Average to below-average crop prospects in 2015, amidst continued conflict in some countries

In the **Central African Republic (CAR)**, the bulk of the cereal harvest was concluded in the last several weeks. In some areas of the south, the secondary season crops will be harvested from December. Civil insecurity continued to negatively affect crop production due to a significant reduction in planted area following the abandonment of a substantial number of farms. According to preliminary findings from a multi-agency Emergency Food Security Assessment (EFSA) carried out in September 2015, about 34 percent of the farmers interviewed indicated that they could not engage in agricultural activities during the current season, mainly as a result of insecurity-related land access constraints. A joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM) is currently visiting the country to estimate the 2015

crop production and assess the overall food security situation.

In **Cameroon**, harvesting of the 2015 main maize crop was completed in October in bi-modal southern areas, while in northern uni-modal areas (North and Far North regions) harvesting of millet and sorghum crops was completed in November. In central and southern cropping zones, abundant rains from March to May were followed in parts by erratic and below-average rainfall from June to September, with negative impacts on long-cycle main season crops and early-planted second season crops. Above-average rainfall in October reduced moisture deficits and improved vegetation conditions in affected areas. In northern uni-modal areas, early season dryness in April and May caused a delay in planting operations and negatively impacted on crop establishment. While average to above-average rainfall in the following months reduced moisture deficits, as of October, remote sensing analysis still indicated below-average vegetation conditions in parts. In addition, in the Far North Region, civil insecurity severely disrupted agricultural activities and caused a reduction in the planted area. According to an EISA, conducted in June 2015, 60 percent of farmers in the region indicated major land access constraints on account of civil insecurity.

In **the Democratic Republic of Congo (DRC)**, harvesting of the main 2015 maize crop has recently been completed in northern areas and is currently underway in the centre, while crops in southern regions are still at the vegetative stage and will be harvested early next year. According to remote sensing analysis, vegetation conditions are favourable in most cropping areas following adequate rainfall. In **the Republic of the Congo** and **Gabon**, harvesting of the main season maize crop normally starts in December. Crops benefited from a timely onset of seasonal rains in October, except in some coastal areas where early season dryness may have affected planting operations. However, in both countries, the bulk of the national cereal requirement is met through imports. The 2015 cereal output is forecast to fall by about 4 percent compared to the previous year.

High food prices in CAR negatively impact dietary diversity and overall food security

In **the CAR**, prices of maize, the most consumed cereal, declined by 25 percent in October in the capital, Bangui, reflecting increased supplies from the main harvest. October prices were 12 percent below the levels of a year earlier and around their pre-crisis levels of October 2012. In Bangui, prices of cassava, the

main staple, were stable in recent months and lower than their pre-crisis levels, largely on account of augmented supplies due to trade disruptions that restricted the flow of cassava away from the producing regions surrounding Bangui. By contrast, prices of groundnuts in October, sourced from northern prefectures and imported from Chad, were almost 30 percent higher than 12 months earlier and 74 percent higher than their pre-crisis levels. Prices of bovine meat in October were at the same levels of a year earlier but almost two times above their pre-crisis levels, due to the massive livestock lootings which occurred in 2013. Similarly, prices of fish in October were, on average, about 70 percent above their pre-crisis levels due to damage to infrastructures and insecurity that hindered fishing activities. In **the DRC** and in **the Republic of the Congo**, rates of inflation in 2015 remained around a low 1 percent in 2015. Similarly, in **Cameroon**, the inflation rate in 2015 remained around a low of 2 percent. In **Gabon**, rates of inflation, which increased from a low 0.5 percent in 2013 to 4.5 percent in 2014 on account of increasing food prices, declined in 2015 to 0.6 percent due to lower oil prices and a reduction in Government spending.

The dire food security situation in CAR continued to deteriorate due to protracted conflict

Continued civil insecurity in **the CAR** and in eastern **DRC** has resulted in massive population displacements and hindered access to food for the affected population. As of late September, about 454 000 refugees from the CAR have sought refuge in neighbouring Cameroon (253 000), the DRC (97 000), Chad (84 000) and the Republic of the Congo (30 000), straining the already limited resources of hosting communities. The IDP caseload in the CAR, which decreased to 378 000 in late August from 400 000 in May due to an improvement in security in some areas of the country, sharply increased again to about 400 000 in mid-October resulting from the resurgence of inter-communal violence in the capital, Bangui, and in other areas of the country. Since 2013, in **the DRC**, the escalation of civil conflict, especially in the eastern provinces, severely damaged local livelihood

Table 9. Central Africa cereal production
(million tonnes)

	Coarse grains			Rice (paddy)			Total cereals ¹			
	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	Change: 2015/2014 (%)
Central Africa	4.4	4.3	4.1	0.5	0.6	0.5	4.9	4.9	4.7	-4.1
Cameroon	2.9	2.8	2.7	0.2	0.2	0.2	3.1	3.0	2.9	-6.0
Central African Rep. Dem.Rep.of the Congo	0.1	0.1	0.1	0.0	0.0	0.0	0.2	0.1	0.1	0.0
	1.3	1.3	1.3	0.3	0.3	0.3	1.6	1.6	1.6	-1.2

Note: Totals and percentage change computed from unrounded data.

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

systems and caused massive displacement. As of September 2015, the IDP caseload was estimated at 1.6 million, with about 47 and 20 percent of the displaced population located in North Kivu and South Kivu provinces, respectively. In addition, since mid-April about 18 000 individuals moved to the DRC from Burundi following the election-related conflict.

In **Cameroon**, as of late October, the Far North Region is hosting about 63 000 refugees fleeing from civil unrest in Nigeria, which has spread into the region and has also resulted in the displacement of 81 700 Cameroonians. In addition, 21 000 individuals have been affected in the Far North Region in October. In **the CAR**, recent violence has worsened an already dire humanitarian situation, impeding the ability of humanitarian agencies and aid partners to gain access and assist the thousands of internally-displaced people. According to the preliminary results of an EFSA, about 1.82 million people (50 percent of the population residing in 14 out of 17 prefectures where security conditions allowed the survey to be carried out), are food insecure (“moderately food insecure” and “severely food insecure”), almost 70 percent more than in 2014, when an estimated 30 percent of the population was food insecure. The sharp deterioration of the food security situation is confirmed by the percentage of households re-engaging in negative coping strategies (including the sale of productive assets and begging), which increased from 43 percent in 2014 to 68 percent in 2015. In **the DRC**, according to the latest available Integrated Food Security Phase Classification (IPC)³ analysis, that covers the period from September 2015 to March 2016, the number of people in acute food insecurity and livelihood crisis Phase 3: “Crisis” and Phase 4: “Emergency” was estimated at about 4.5 million. The areas most affected by food insecurity are the conflict-affected Maniema, Katanga and North Kivu provinces, where 18, 16 and 13 percent of the total food insecure population, respectively, reside. In **Cameroon**, the number of food insecure people was estimated in September 2015 at 1.27 million, 18 percent up from January 2015 and more than three times higher than two years earlier. The area most affected by food insecurity is the Far North Region, where one out of three people are food insecure. In this region, according to the

recently conducted EFSA, 32 percent of IDPs and 22 percent of the local population have exhausted their food stocks and the percentage of households relying on humanitarian assistance increased from 6 percent in 2014 to 33 percent in 2015.

EAST AFRICA

Severe drought caused significant livestock deaths in Ethiopia, while poor pasture conditions diminished productivity in Uganda's Karamoja region

Poor pasture conditions are persisting in southern Afar and northern Somali regions in **Ethiopia** where poor and erratically-distributed July to September “*karan/karma*” rains led to a drop in livestock production and caused thousands of livestock deaths. Access to pasture and water will continue deteriorating until March 2016 when the next “*diraac/sugum*” rainy season starts. Consequently, livestock body conditions and milk productivity are expected to further decline, while mortality rates are likely to increase. A similar situation is reported in all districts of **Uganda's** Karamoja region, where grazing resources are almost completely depleted after unfavourable weather conditions in 2015 and pastoralists are now facing a long and harsh dry season, with the next rainy season expected to start in April 2016.

Abundant October-December “*short-rains*” have generally improved pasture conditions and water availability in southern central **Somalia**, southern **Ethiopia**, **Kenya**, **South Sudan**, **Uganda**, **Rwanda** and **Burundi**. However, floods in some riverine and lowland areas have caused displacements and losses of livestock with increasing risk of waterborne diseases which could seriously impact on livestock productivity and pastoralist livelihood systems.

Table 10. East Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Total cereals ¹			
	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	Change: 2015/2014 (%)
East Africa	4.9	5.3	4.6	37.0	41.4	35.7	44.8	50.0	43.5	-13.0
Ethiopia	4.0	4.2	3.6	18.5	19.2	16.6	22.6	23.6	20.3	-14.1
Kenya	0.5	0.4	0.4	3.7	3.0	3.7	4.3	3.5	4.3	21.0
Sudan	0.2	0.5	0.4	2.6	7.4	4.2	2.9	7.9	4.7	-41.0
Tanzania U.R.	0.1	0.1	0.1	6.5	6.2	6.0	8.8	8.9	8.5	-4.7
Uganda	0.0	0.0	0.0	3.3	3.3	3.1	3.5	3.5	3.3	-5.5

Note: Totals and percentage change computed from unrounded data.

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

³ The **Integrated Food Security Phase Classification (IPC)** brings together a set of standardized tools that aims at providing a universal measure to classify the severity and magnitude of food insecurity. For further information please visit: <http://www.ipcinfo.org/>

Drought negatively impacts on cereal production in parts of Ethiopia, the Sudan, South Sudan, Kenya, Eritrea and Uganda

Harvesting of the 2015 main season cereal crops is underway in **Ethiopia, the Sudan, South Sudan**, western **Kenya, Eritrea** and the Karamoja region of **Uganda**. FAO's preliminary estimates of the subregion's 2015 aggregate cereal output, including a forecast for the secondary season harvest to be gathered early next year, stand at about 43.5 million tonnes, 13 percent below last year's record harvest and slightly below the average of the previous five years.

At the country level, production prospects are mixed as several cropping areas experienced severe rainfall deficits between July and August, with negative and irreversible effects on crops. In **Ethiopia**, although production prospects for the main "*meher*" season crops are generally favourable in western key-growing areas, yields in eastern Amhara, central/eastern Oromia and eastern Tigray have been severely affected by erratic June to September "*kiremt*" rains. In most bi-modal rainfall lowlands of Tigray and Amhara regions, production of long-cycle crops is expected to decline significantly following the poor performance of the 2015 secondary "*belg*" rainy season (March/July), which prevented the timely preparation of land. Similarly, erratic seasonal rains affected crops in central highlands of Debub, Maekel and east Gash Barka zobas in **Eritrea**, while the production outlook is more favourable in Anseba zoba. In **the Sudan**, despite recent above-average rainfall, sorghum production in key cropping areas of Gadarif, Sennar and Kassala states, as well as in parts of North Kordofan, North Darfur and East Darfur states, is forecast to decline substantially due to late and erratic rainfall that affected the planted area and yields. An ongoing nationwide government-led crop assessment will provide detailed production estimates. In **South Sudan**, the late start of the second rainy season affected early-planted crops in bi-modal rainfall areas of Central and Eastern Equatoria states and in parts of southern Jonglei state. By contrast, late-planted crops are benefitting from abundant rains which resumed in early October and production prospects are favourable. Harvesting of long cycle late-maturing sorghum crops in uni-modal rainfall areas of Greater Bahr El Gazhal is about to start and an average output is expected. National production estimates for 2015 will be provided by an FAO/WFP Crop and Food Security Assessment Mission (CFSAM) currently deployed in the country. In Uganda, production is preliminary forecast at a well below-average level in uni-modal rainfall agro-pastoral areas of the Karamoja region, on account of frequent dry spells throughout the season.

In **Kenya**, harvesting of the 2015 "*long-rains*" season maize crop is ongoing in western main agricultural areas of Rift Valley and Central provinces. Production is expected at average to above-average levels following favourable March-May rains and

some increases in the planted area, partly reflecting government input subsidies. However, late and extended heavy rains could cause damage to both standing and harvested crops. In northwestern **Somalia**, harvesting of "*gul-karan*" sorghum crops has just started and prospects are favourable following good rains since the end of August. In bi-modal rainfall southern and central areas of **Uganda**, harvesting of 2015 second season crops is about to start and, although the rainy season started very late, production is estimated at average to above-average levels due to abundant rains since mid-October. In **Burundi** and **Rwanda**, the 2016A season crops are about to be harvested and production prospects are generally good in most cropping areas. In Burundi, some reduction in plantings is reported in areas affected by civil unrest and insecurity.

The 2015 secondary season crops, for harvest from early next year, are progressing well in southern and central **Somalia** ("*deyr*" season), southern coastal lowlands of **Kenya** ("*short-rains*" season) and the bi-modal **the United Republic of Tanzania** ("*vuli*" season). Under the strong influence of the current El Niño weather phenomenon, the October-December "*deyr*" short rains have been abundant so far, with generally positive effects on the planted area and yields of most staple crops. However, localized crop losses due to water-logging and increased incidences of pests and diseases are expected in flood-prone areas of the subregion, particularly in Shabelle and Juba Valleys in Somalia, coastal, central and western areas of Kenya and northern bi-modal rainfall areas of the United Republic of Tanzania from the Victoria Basin to the coast.

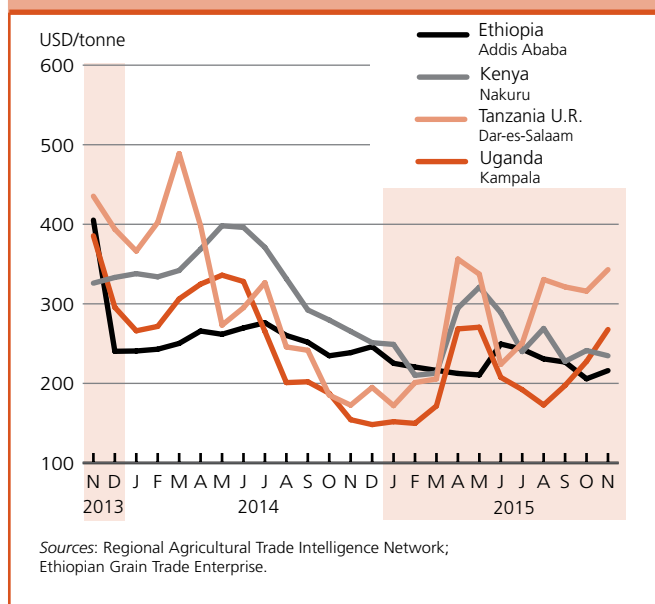
Prices of locally-produced cereals followed mixed trends in October

October maize prices were well above their year earlier levels in **Uganda** and **the United Republic of Tanzania** as normal seasonal increases, ahead the start of the second season harvests, were compounded by strong regional demand from neighbouring Kenya. Elsewhere, cereal prices started to decline with the beginning of the 2015 main season harvests and are generally similar or below their level of October 2014.

In **Uganda**, maize prices increased by between 35 and 60 percent from August to October and, as a result, October maize prices were, on average, 50 percent higher than 12 months earlier. In **the United Republic of Tanzania**, prices were generally firm in September and October partially due to sales from the National Food Reserve Agency. However, October prices were more than double their levels of 12 months earlier due to reduced 2015 cereal production and increased exports to Kenya.

In **the Sudan**, prices of locally-produced sorghum and millet increased between June and October by up to 30 percent in some markets, following normal seasonal patterns but also

Figure 4. Maize prices in selected East African markets



compounded by concerns about the performance of the ongoing harvest. However, in October, coarse grain prices were still about 30 percent lower than 12 months earlier, due to the abundant supply from the record 2014 cereal production. Similarly, prices of imported wheat increased by 8-12 percent between June and October in Khartoum, but were still 10-12 percent below their levels of last year. In **Kenya**, maize prices, after having peaked in August, decreased between September and October by 10-30 percent in most markets as local supplies increased as a result of harvesting of the “long-rains” crops in key-growing areas of the Rift Valley, substantial imports from neighbouring countries and the release of stocks from the National Cereals and Produce Board’s strategic grain reserve. Prices in October were at about the same levels as a year earlier or lower, except in Nairobi, where they were about 30 percent higher due to sustained strong local demand. In **Ethiopia**, maize prices generally declined in October with the start of 2015 “meher” main season harvest. October cereal prices were below their year-earlier levels, despite the reduced 2015 “belg” secondary harvest, completed in August, due to ample availabilities from the above-average 2014 cereal production. In **South Sudan**, sorghum prices declined by 10-15 percent in most markets outside conflict-affected areas following the record high levels registered in August, but they were still between two and four times higher than 12 months earlier. Steeper declines were registered in Bentiu and Malakal markets, up to 50 percent, following substantial food aid distribution. In **Somalia**, prices of locally-produced maize and sorghum showed mixed trends

in October, but remained below their year-earlier level as 2015 “gu” off-season crops were still being commercialized in most markets.

Food security improves with new 2015 harvests, but major concerns remain for people in areas affected by drought and conflict

The lean season is over in most crop producing areas of the subregion and food security conditions have gradually improved as newly-harvested main season crops were made available for consumption. However, severe food insecurity remains a major concern in areas affected by drought in Ethiopia as well as by conflict and civil insecurity in parts of Somalia, the Sudan, South Sudan and Burundi. In particular, food security conditions are expected to deteriorate further for pastoral and agro-pastoral communities in southern Afar, northern Somali, eastern Amhara, central/eastern Oromia and eastern Tigray regions in **Ethiopia** as a consequence of severe dry weather conditions in 2015 which affected both “belg” and “meher” crop production as well as grazing resources. In **South Sudan**, according to the latest IPC analysis, pending ongoing field assessments, the current number of severely food insecure people is projected at about 2.4 million. Although it shows a substantial decrease if compared to the near 4-million people in need of humanitarian assistance during the peak of the 2015 lean season (between July and September), the current figure is 60 percent above the same period in 2014 and more than double the December 2013 level, just before the eruption of the conflict. Most food insecure people are concentrated in conflict-affected areas of the Greater Upper Nile region, in particular in Unity State, where insecurity and displacements have severely disrupted local livelihood systems. In **the Sudan**, food insecurity remains of great concern among IDPs in conflict-affected states of Darfur, South Kordofan and Blue Nile. In addition, these states are expected to experience an increased concentration of livestock due to pasture shortages in other wet-grazing areas of the country with increasing risk of conflict over local natural resources. In **Burundi**, food security is worsening in the provinces of Kirundo, Muyinga and Makamba as a consequence of the ongoing civil unrest and insecurity, which affected the last two cropping seasons with reduced area plantings and yields, as well as disrupted trade flows, contributing to higher food prices.

Currently, the number of people in need of humanitarian assistance in the subregion is estimated at 17 million (including 8.2 million in Ethiopia, 3.9 million in the Sudan, 2.4 million in South Sudan, 1.1 million in Kenya, 1 million in Somalia, 295 000 in Uganda and 120 000 in Djibouti). At this level, the number is over 50 percent more than the December 2014 estimate of 11 million people.

SOUTHERN AFRICA

Delayed rains impact planting of 2016 cereal crops

Planting of the 2016 cereal crops is well underway across the subregion under generally dry conditions, associated with the prevailing El Niño episode, in most areas. Precipitation since the start of the rainy season (October-March) has been low and poorly distributed, compounding the impact of water deficits in 2014/15 that contributed to the current depleted soil moisture levels. The developing early season dryness has interrupted planting activities and, where sowing has taken place, adversely affected early crop development. Although improved rains in the next weeks could allow for crop recovery, weather forecasts indicate a higher probability of continued below-average rainfall through to March 2016 in large portions of the subregion, further aggravated by expected higher temperatures.

Planting estimates for 2016 cereal crops are not yet available, with most government-led surveys conducted in December/January. In **South Africa**, early planting intentions for the maize crop indicate a 4 percent year-on-year decrease. The decline is mostly attributed to dry conditions, despite the current high maize prices that tend to positively influence the planted area. As a result of the water deficits, the provinces of North-West, Kwazulu-Natal, Free State, Limpopo and Mpumalanga which represent the main producing areas of the country, were declared drought-related disasters. Elsewhere, lower grain supplies from 2015's reduced output may constrain the planted area due to reduced availability of seeds. Moreover, crop losses last year also incurred additional costs for farmers, constraining their purchasing power, which could further negatively weigh on farmers' ability to access adequate input supplies. Governments' input support programmes are continuing in 2015/16 to ameliorate input access for farmers, with large-scale programmes in Malawi and

Zambia targeting 1.5 million and 1 million farmers respectively. However, input costs have increased, particularly for imported fertilizer, partly owing to a depreciation of national currencies in several countries. The lower expected area in South Africa, and potentially in the rest of the subregion, will put more emphasis on weather conditions this season.

The subdued production outlook for 2016 cereal crops follows a steep 27 percent drop in the aggregate 2015 maize crop, which accounts for nearly 80 percent of the subregional cereal output. Estimated at 20.5 million tonnes, the 2015 maize production is also 16 percent below the five-year average. All countries were estimated to have reduced harvests, with notable declines in the large producing countries of **South Africa, Malawi and Zambia**. Livestock conditions also deteriorated in many parts of the subregion, on account of poor rangeland conditions and depleted water reserves.

South African and Zambian maize exports help bridge larger national deficits

The maize import requirement in the 2015/16 marketing year (generally May/April) is forecast at double the level compared to the below-average volume of 2014/15. The bulk of the increase is on account of higher expected imports in **South Africa and Zimbabwe**. Although South Africa remains a large exporter, particularly for Botswana, Lesotho, Mozambique, Namibia and Swaziland, tight yellow maize supplies due to low carryover stocks and the reduced 2015 harvest, prompted increased imports this year. Approximately 700 000 tonnes of yellow maize are expected to be imported, while between 70 000 to 100 000 tonnes of white maize are forecast to be imported, mainly sourced from Central and South America. Larger import volumes are forecast in the deficit-producing countries of **Botswana, Lesotho, Namibia and Swaziland**, with needs expected to be satisfied by South African grain supplies, as in previous years. The sharply reduced 2015 output in **Zimbabwe** resulted in a large

Table 11. Southern Africa cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	Change: 2015/2014 (%)
Southern Africa	2.2	2.0	2.0	23.9	29.5	21.7	4.2	4.6	4.2	30.3	36.1	27.9	-22.7
- excl. South Africa	0.4	0.3	0.3	10.9	13.9	10.6	4.2	4.6	4.2	15.4	18.8	15.1	-19.5
Madagascar	0.0	0.0	0.0	0.4	0.4	0.4	3.6	4.0	3.7	4.0	4.3	4.1	-6.8
Malawi	0.0	0.0	0.0	3.8	4.1	2.9	0.1	0.1	0.1	3.9	4.2	3.0	-29.4
Mozambique	0.0	0.0	0.0	1.8	2.2	2.0	0.3	0.4	0.4	2.2	2.6	2.4	-5.1
South Africa	1.9	1.8	1.7	13.0	15.6	11.1	0.0	0.0	0.0	14.9	17.3	12.8	-26.2
Zambia	0.3	0.2	0.2	2.6	3.4	2.7	0.0	0.0	0.0	2.9	3.7	3.0	-19.3
Zimbabwe	0.0	0.0	0.0	1.0	1.7	0.8	0.0	0.0	0.0	1.0	1.8	0.9	-50.4

Note: Totals and percentage change computed from unrounded data.

national deficit in 2015/16 and maize imports are forecast at approximately 700 000 tonnes, most of which is expected to be met with supplies from Zambia. **Malawi** has already imported nearly 70 000 tonnes from Zambia to bolster domestic supplies.

South Africa normally covers the bulk of the subregion's import requirement, however, maize exports, mostly yellow maize, are forecast to decline in 2015/16 on account of the tighter supplies. Between May and October 2015 about 325 000 tonnes of maize were exported, compared to 1.6 million tonnes in the corresponding period in the previous year; most of the decrease is on account of reduced yellow maize exports. Zambia has emerged as a major exporter this year, with approximately 320 000 tonnes exported between April and August 2015, about 77 percent of this volume was shipped to Zimbabwe. The depreciation of the Zambian kwacha in 2015, while adding inflationary pressure, has increased export competitiveness and partly lessened costs for importing countries.

Prices of maize increased significantly

Maize prices have continued to rise reflecting the tight supply situation, while uncertain production outlook for the 2016 cereal crop, and weaker currencies in some countries, has also contributed to the firming up of prices. In **South Africa**, price increases have slowed somewhat in October following sharp gains earlier in the year. At their October levels, yellow and

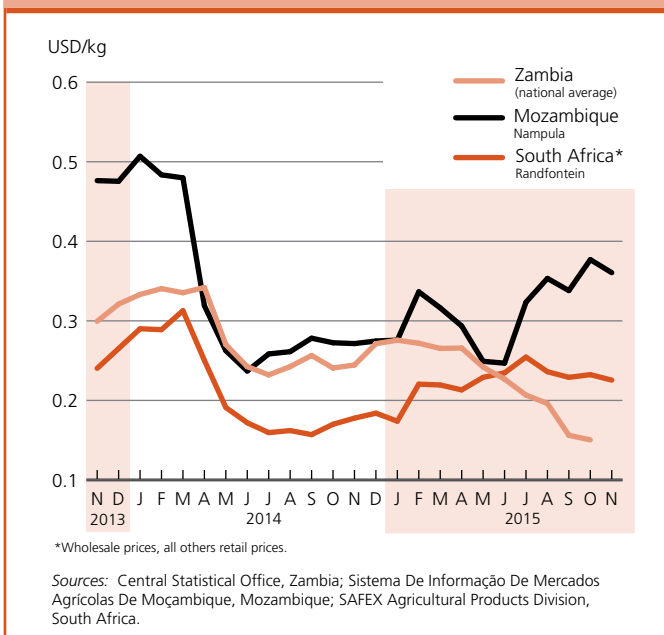
white maize (wholesale) prices were 65 and 82 percent up on their year earlier values and trading closer to import parity levels. These higher prices are largely being driven by the reduced 2015 production, while a weaker currency also supported the overall increasing trend. The subdued production outlook for the 2016 crop provided further upward pressure. In **Malawi**, steep price gains persisted mostly reflecting the sharp contraction in the 2015 output and the national average price was almost double the year-earlier level in October. In **Zambia**, despite a reduced harvest, ample carryover stocks contributed to subdued seasonal price increases and maintained stable levels between June and September. However, in October 2015, large volumes of exports and institutional purchases by the Food Reserve Agency (completed in October), led to sharp price rises. In import-dependent **Lesotho** and **Swaziland**, while maize meal prices were stable in September they remained up on their year-earlier levels reflecting higher South African prices and lower domestic outputs.

Acute food security conditions in 2015/16

Food security conditions worsened this year, mostly driven by the reduced 2015 cereal output which constrained food availability and access. Countries face the risk of a successive poor cereal harvest in 2016, due to the current El Niño episode, and this could lead to an increase in the number of food secure and the severity of conditions in 2016.

According to the results from the national Vulnerability Assessment Committees' (VAC) 2015 evaluations, the number of vulnerable people was estimated at about 6.3 million, compared to 3.2 million in 2014⁴. All countries of the subregion, except for Mozambique and Swaziland, registered an increase in the number of persons requiring assistance. In **Malawi**, damage to crops and livelihoods following floods and a dry spell resulted in an estimated 2.8 million people (double the level of the previous year) requiring humanitarian assistance for a period between three to eight months. In **Namibia** just over 370 000 people require food assistance, reflecting the steep cereal production decline, particularly in the subsistence sector. While in **Zimbabwe**, the national VAC estimates that nearly 1.5 million persons, up from a low of 560 000 in 2014, will require assistance during the peak lean period between January and March 2016. Most of the vulnerable households in Zimbabwe are located in the southern and western parts, which suffered the sharpest cereal production decreases this year. In **Madagascar**, the Crop and Food Security Assessment Mission, conducted earlier in the year, estimated that 1.89 million people are food insecure, including about 400 000 people who are severely food insecure and require

Figure 5. White maize prices in selected Southern African markets



⁴ This figure excludes Angola, Madagascar and South Africa.

immediate assistance. The southern regions, which have suffered successive poor cereal harvests, are the most affected. In **Angola**, the number of food insecure is estimated at 800 000 people, with particularly poor conditions in the southern provinces, which were affected by prolonged dry periods in early 2015.

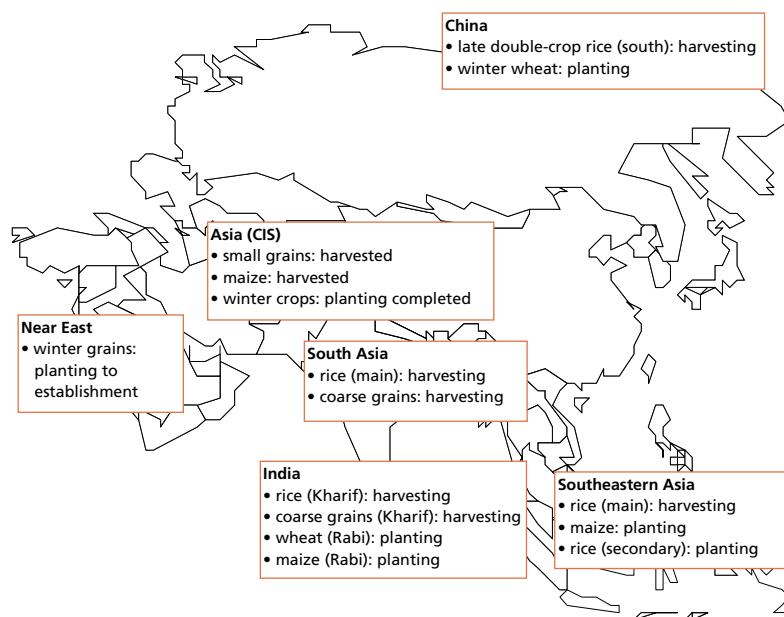
With food supplies becoming increasingly tighter and the majority of poor households dependent on market supplies, food security conditions will remain stressed until the start of the 2016

harvest (expected to begin in February/March). Government and humanitarian programmes are underway to address the food needs of the most vulnerable households. However, if prices, particularly of the main staple maize, continue to increase steeply, this could further aggravate the food security situation. National food security assessments are currently being conducted to provide an updated analysis and are expected to be available by the end of the year.

FAR EAST

Aggregate cereal production in 2015 to fall marginally from last year's record level due to dry weather in several parts of the subregion

In Northern Hemisphere countries, harvesting of the 2015 main season rice and maize crops, which account for the bulk of the subregion's cereal production, is nearing completion and planting for the 2015/16 winter wheat and secondary rice crop is underway. Southern Hemisphere countries of the continent, namely **Indonesia, Sri Lanka** and **Timor-Leste** as well as **Viet Nam** have almost concluded the 2015 offseason paddy and maize harvests and are currently engaged in the 2016 main season planting. FAO's forecast for the subregional aggregate cereal harvest in 2015 has been lowered in recent weeks by 12.4 million tonnes, to 1 239 million tonnes (including rice in paddy terms), which would represent a marginal decrease (0.3 percent) compared to the 2014 bumper level. A decline in production of wheat (-3.9 million tonnes) and rice (-3 million tonnes) is expected to be partially offset by a higher maize output (+4.5 million tonnes). Belated and erratic rains during the cropping season impaired the development of crops in **India, Cambodia, the Democratic People's Republic of Korea (DPRK), Mongolia, Nepal, Lao People's Democratic Republic, the Philippines** and **Thailand**. By contrast, overall favourable weather conditions boosted cereal production to record highs in **Bangladesh, China** and **Sri Lanka**.



Note: Comments refer to situation as of December.

Production of paddy rice, the major staple in the subregion, is forecast at 664.3 million tonnes, 2.3 million tonnes less than projected in the previous issue of this report in October. At this level, the subregion's 2015 paddy production would be 3 percent below the 2014 reduced level, implying a second consecutive decline. At the country level, most of the projected contraction, in absolute terms, is anticipated in **Thailand**, where poor seasonal rains may cause planting and yield reductions of both the main and secondary season crops. As a result, FAO forecasts this year's rice crop to be 12 percent below the 2014 result and at an eleven-year low. In **India**, despite largely steady plantings,

Table 12. Far East cereal production

(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	Change: 2015/2014 (%)
Far East	244.3	253.0	249.0	325.3	322.0	325.7	670.4	667.3	664.3	1 240.0	1 242.3	1 239.0	-0.3
Bangladesh	1.3	1.3	1.4	2.6	2.6	2.6	51.2	51.8	52.5	55.0	55.7	56.5	1.4
Cambodia	0.0	0.0	0.0	0.9	0.5	0.5	9.4	9.3	9.2	10.3	9.9	9.6	-2.6
China	121.9	126.2	129.9	228.0	225.2	231.0	205.2	208.2	209.0	555.1	559.7	569.9	1.8
India	93.5	95.9	88.9	43.2	42.0	40.1	160.0	157.2	155.7	296.7	295.0	284.7	-3.5
Indonesia	0.0	0.0	0.0	18.5	19.0	19.6	71.3	70.8	73.0	89.8	89.9	92.6	3.0
Japan	0.8	0.9	0.9	0.2	0.2	0.2	10.9	10.8	10.7	11.9	11.8	11.8	-0.3
Korea Rep. of	0.0	0.0	0.0	0.2	0.2	0.2	5.6	5.6	5.8	5.8	5.9	6.0	2.3
Myanmar	0.2	0.2	0.2	2.0	2.1	2.2	28.3	28.9	28.4	30.5	31.2	30.8	-1.3
Nepal	1.9	2.0	1.9	2.6	2.6	2.5	5.0	4.8	4.6	9.6	9.4	9.0	-4.4
Pakistan	24.2	26.0	25.5	5.6	5.2	5.2	10.2	10.5	9.9	40.0	41.7	40.6	-2.6
Philippines	0.0	0.0	0.0	7.3	7.8	7.6	18.8	18.9	17.9	26.2	26.7	25.4	-4.7
Thailand	0.0	0.0	0.0	5.0	5.0	4.9	36.8	33.2	29.3	41.8	38.2	34.2	-10.5
Viet Nam	0.0	0.0	0.0	5.2	5.2	5.3	44.0	45.0	45.1	49.2	50.2	50.4	0.5

Note: Totals and percentage change computed from unrounded data.

irregular monsoon rains prevented a potentially larger main "kharif" season paddy crop, and the latest official estimates put paddy production at 135.9 million tonnes, close to the 2014 level. Assuming that the current reduced irrigation supplies in the main reservoirs negatively impacts planting activities of the irrigated 2015/16 "rabi" secondary crop, FAO forecasts the 2015 aggregate paddy production in **India** at 155.7 million tonnes, 1 percent below last year's reduced level. Similarly, smaller paddy harvests are forecast in **Cambodia, DPRK, Lao People's Democratic Republic, Nepal, and the Philippines**, following prolonged dry weather during the cropping period, while floods damaged crops in **Myanmar**. In **Indonesia**, prolonged dry weather between May and September across southern and eastern parts of the country caused secondary crop losses in rainfed areas. As a result, FAO has recently lowered its forecast for the 2015 aggregate paddy production by 2.6 million tonnes, to 73 million tonnes. Pending more detailed information on the full extent of the damage to the 2015 off-season crop, FAO's current forecast still implies a 3 percent expansion from 2014's slightly reduced level, mainly due to the record 2015 main harvest gathered earlier in the year. By contrast, overall favourable weather conditions and government support are expected to result in record 2015 rice harvests in **Bangladesh, China, the Republic of Korea, Malaysia, Sri Lanka and Viet Nam**.

The subregion's 2015 aggregate maize production forecast has also been revised downward since October by 8.6 million tonnes. Most of this revision concerned **China**, where poor rains, strong winds and insect infestation damaged crops in the key-producing northeastern provinces. However, the FAO forecast for China still points to a record level of 221 million tonnes, 5.4 million tonnes or 3 percent above last year's record crop, mainly as a result of a slight expansion in area planted due to strong domestic demand. The subregional 2015 wheat crop, harvested in the first half of the year, is estimated at 249 million tonnes, 2 percent down from the previous year, with a 7 million-tonne decline in production in **India**, partially offset by a record wheat harvest in China.

Planting prospects for the 2016 wheat crop generally favourable but some concerns for India

Planting of the largely irrigated winter 2016 wheat crop, to be harvested next year, is currently underway in most countries of the subregion. In **China**, weather conditions so far have been favourable in the main producing areas, including the North China Plain and parts of the Yangtze Valley, facilitating

fieldwork and benefitting establishment of the earliest planted crops. In **India**, a 6 percent increase in wheat production is targeted after the reduced 2015 crop. However, lower irrigation supplies in the main reservoirs compared to the previous year and the ten-year average, particularly in the important northwestern producing states, has significantly delayed planting activities and is expected to negatively affect yields of the early-planted crops. In **Pakistan**, the early official forecast of production in 2016 points to a record output of 26 million tonnes, slightly up from the 2015 bumper level, under expectations that good water availability in the main reservoirs and adequate supply of quality seeds, fertilizers and herbicides will increase yields.

Cereal trade in the 2015/16 marketing year to decrease from last year's record

The forecast of the subregion's aggregate cereal imports in the 2015/16 marketing year has been raised by 3.3 million tonnes to 120.4 million tonnes, still 4 percent below the 2014/15 record but 18 percent above the five-year average. The contraction mainly reflects reduced demand for feed cereals, namely barley, maize and sorghum from **China**, whose total cereal imports are currently foreseen to fall by over 10 percent (4.4 million tonnes) compared with the exceptionally high level in the preceding year on account of the record domestic harvests and large carryover stocks. Aggregate rice imports in 2016 are forecast at 15.1 million tonnes, slightly above the 2015 level. Anticipated lower imports from **Bangladesh, China and Sri Lanka**, are expected to more than offset increased deliveries to **Indonesia, DPRK, Nepal and the Philippines**.

Aggregate cereal exports in 2015/16 are forecast to decrease by 10 percent from the previous year and reach 42.2 million tonnes. The bulk of the decrease is expected from **India**, whose shipments (mostly wheat) may drop by 21 percent compared with the previous year, as a result of the estimated decrease

Table 13. Far East cereal production and anticipated trade in 2015/16¹
(thousand tonnes)

	Avg 5-yrs (2010/11 to 2014/15)	2014/15	2015/16	2015/16 over 2014/15 (%)	2015/16 over 5-yr avg (%)
Cereals - Exports	43 829	46 849	42 183	-10.0	-3.8
Cereals - Imports	101 579	125 631	120 371	-4.2	18.5
Cereals - Production	981 270	1 018 084	1 015 811	-0.2	3.5
Rice-milled - Exports	33 244	35 939	37 139	3.3	11.7
Rice-milled - Imports	12 074	15 538	15 137	-2.6	25.4
Rice-milled - Production	436 409	443 112	441 121	-0.4	1.1
Wheat - Exports	5 395	5 036	2 756	-45.3	-48.9
Wheat - Imports	37 266	40 031	39 782	-0.6	6.8
Wheat - Production	239 506	252 960	248 977	-1.6	4.0

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

in this year's production and rising domestic demand under the ongoing National Food Security Act. Regarding rice, the subregion's main cereal export, shipments in 2016 are forecast to increase by 3 percent. Lower anticipated exports from **India**, the subregion's main exporter, are expected to be more than offset by large deliveries from **Thailand** and **Viet Nam**. Rice exports from **Cambodia**, **Myanmar** and **Pakistan** are also projected to increase during 2016.

Rice prices relatively stable and lower than a year earlier in most countries

Domestic prices of rice, in local currencies terms, remained generally stable in the past few months and were below their year-earlier levels with a few exceptions. In several countries of the subregion, expectations of reduced outputs and procurement purchases partially offset the downward pressure from the ongoing 2015 main harvests. In **Thailand**, domestic rice prices eased only marginally in November as an expected reduction in the 2015 main season crop, due to dry weather, offset the downward pressure from the ongoing harvest. In **India**, domestic rice prices were largely stable since September and overall lower than at the same time last year. Large procurement purchases since the beginning of the 2015/16 marketing season in October offset seasonal pressure from the ongoing 2015 main "kharif" harvest. In **China**, rice prices remained virtually unchanged supported by the minimum purchase price. In **Myanmar**, domestic prices of rice declined significantly in November for the second consecutive month with new supplies from the ongoing 2015 main season harvest. Prices, however, remained well above their year-earlier

Figure 6. Rice retail prices in selected Far East countries

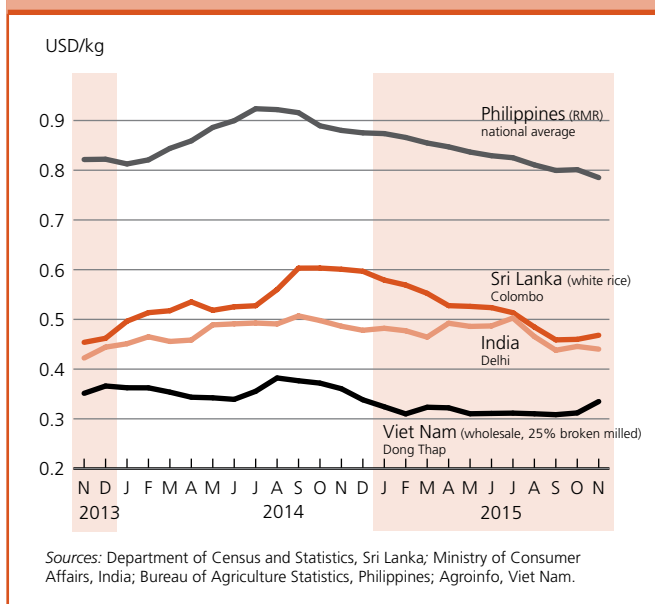
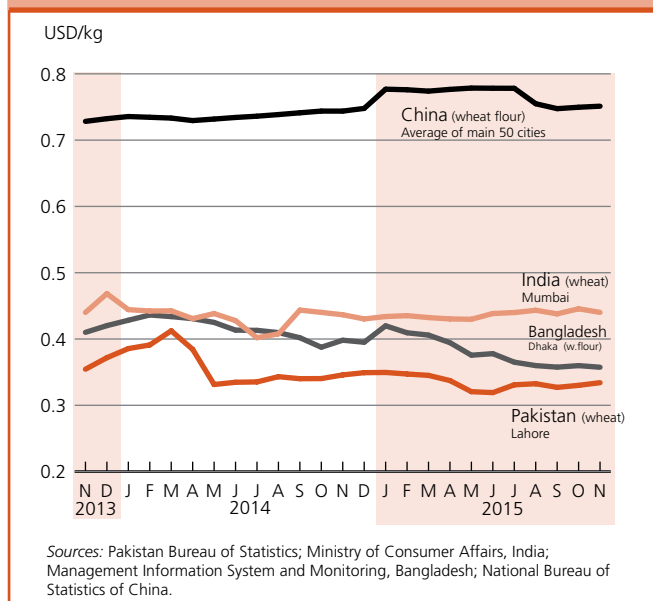


Figure 7. Wheat and wheat flour retail prices in selected Far East countries



levels, mainly due to an anticipated reduction in the current season's output following crop losses after severe floods in July and early August. In **Viet Nam**, large government-to-government deals with the Philippines and Indonesia underpinned increases in rice prices in October and November, which, however, remained lower than their year-earlier levels following two consecutive years of bumper outputs. In **Indonesia**, rice prices strengthened for the sixth consecutive month reaching record highs in November largely supported by lower-than-earlier expected 2015 off-season output. Concerns over the slow planting progress of the 2016 main season crop, due to widespread dry weather associated with the El Niño phenomenon, also provided upward pressure. In **Bangladesh**, rice prices declined moderately with the harvest of the "aman" crop, which accounts for approximately 40 percent of the annual output. Prices were well below their year-earlier levels as a result of abundant supplies from the bumper 2015 "boro" output and imports by the private sector, especially from India. In **Sri Lanka**, rice prices increased slightly in November for the second consecutive month following normal seasonal patterns and were lower than a year earlier as a result of the bumper output this year, which recovered from last year's drought-reduced level. Prices of wheat and wheat products followed mixed trends in the past few months. In **Pakistan**, prices of wheat strengthened in November for the second consecutive month following seasonal patterns, while they remained virtually unchanged in **India** and **China**. In wheat importing countries, **Bangladesh** and **Sri Lanka**, prices of wheat flour eased somewhat in November and were well below their year-earlier levels, mainly reflecting large volumes of imports.

NEAR EAST

Planting of the 2016 winter season crops is underway

Land preparation and planting of the 2016 winter cereal crops are proceeding under favourable conditions following a wet October which boosted soil moisture for winter grain planting and establishment. Some heavier rains were reported locally in western **Turkey** and the western **Islamic Republic of Iran** temporarily hampering fieldwork.

Above-average 2015 winter cereal crop harvested despite ongoing conflict in parts negatively impacting agriculture

The aggregate subregional 2015 cereal output (including paddy rice) is put at 76.5 million tonnes, an increase of about 9 percent and 5 percent on last year and on the five-year average, respectively, owing to timely and abundant rains. In **Turkey**, affected by drought in 2014, official estimates indicate an 18 percent increase in cereal production in 2015 compared to last year, to about 38.6 million tonnes, including 22.6 million tonnes of wheat (19 percent increase on last year) and 15 million tonnes of coarse grains (16 percent improvement). Harvests in **Afghanistan** and the **Islamic Republic of Iran** in 2015 slightly exceeded those of the previous year. By contrast, in the **Syrian Arab Republic**, **Iraq** and **Yemen**, conflict continues to negatively impact on crop production. The continued conflict resulted in significant damage to agricultural machinery, irrigation systems and storage facilities together with disruptions in electricity supplies and lack of inputs (such as improved seeds, fertilizer and fuel) which, in turn, seriously hampered agricultural production.

The above-average aggregate cereal production resulted in a lowering of the forecasted cereal import requirement to about 61 million tonnes, nearly 10 percent down on last year and the five-year average.

Civil unrest affects food security of large numbers of people

In the **Syrian Arab Republic**, approximately 13.5 million people continue to be in need of urgent humanitarian assistance within the country, including more than 6.5 million people who are internally displaced. Over 1.2 million people have been displaced so far this year, many for the second or third time. Around 4.5 million people reside in areas categorized as hard-to-reach. As of mid-November 2015, almost 4.2 million refugees are registered in the region covering **Egypt**, **Iraq**, **Jordan**, **Lebanon** and **Turkey**. In addition, a large share of the population lives abroad without seeking refugee registration.

In **Yemen**, the IPC indicative analysis released in June 2015 by FAO, WFP, government and other partners, classified ten (out of 22) governorates (Saa'da, Aden, Abyan, Shabwa, Hajjah, Hodeidah, Taiz, Lahj, Al Dhale'e and Al Baida) as facing a food insecurity Phase 4: "Emergency", all affected by the ongoing armed conflict. Nine governorates were classified as facing a food security Phase 3: "Crisis" (Amran, Dhamar, Sana'a, Sana'a City, Ibb, Mareb, Rayma, Al Mahweet and Al Jawf). Of the 12.9 million food insecure people across the country, about 6.1 million were in Phase 4: "Emergency", while 6.8 million were in Phase 3: "Crisis". The level of food insecurity increased by 21 percent compared to the previous year. Around 21.2 million people 82 percent of the population require some kind of humanitarian assistance to meet their basic needs or protect their fundamental rights. With the rapid escalation of the conflict and insecurity, the disruption of markets, employment opportunities and rural livelihoods, the food security situation continues to deteriorate significantly. Humanitarian assistance has been seriously constrained by the lack of access and shortages of fuel, as well as the challenging security situation.

In **Iraq**, as of June 2015, there were at least 4 million people internally displaced, of whom nearly 2 million have been displaced since January 2014. Conflict continues to negatively affect food security of the Iraqi population. One out of four IDP households is using negative coping strategies. Food security conditions are

Table 14. Near East cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	Change: 2015/2014 (%)
Near East	48.0	44.7	48.2	24.4	21.0	23.5	4.6	4.7	4.8	77.0	70.4	76.5	8.8
Afghanistan	5.2	5.4	5.4	0.7	0.7	0.7	0.8	0.8	0.8	6.7	6.9	6.9	0.5
Iran (Islamic Rep. of)	14.0	14.0	14.0	5.8	4.5	4.6	2.5	2.6	2.8	22.2	21.1	21.3	1.2
Iraq	3.3	3.5	3.3	1.2	1.2	1.1	0.5	0.4	0.3	5.0	5.1	4.7	-8.1
Syrian Arab Republic	2.4	1.9	2.4	1.1	0.8	1.1	0.0	0.0	0.0	3.5	2.6	3.6	35.5
Turkey	22.1	19.0	22.6	14.5	12.9	15.1	0.9	0.8	0.9	37.5	32.8	38.6	17.8

Note: Totals and percentage change computed from unrounded data.

likely to deteriorate with a large number of IDPs putting strain on hosting communities, in particular, as a large share of IDPs have fled towards cities in the Kurdish Region of Iraq.

CIS IN ASIA⁵

Planting of the 2016 winter grain crops is nearly complete under favourable weather conditions

Planting of the 2016 winter cereal crops, to be harvested next year, was reported to be mostly complete as of late November under generally favourable weather conditions. Early estimates indicate that the total area planted is slightly lower than the previous year's level, due to the diversification to other crops in several countries, namely **Armenia, Azerbaijan, Kazakhstan** and **Tajikistan**. However, the outcome of the 2016 subregional cereal harvest will depend largely, as always, on the production of **Kazakhstan**, accounting for more than half of the subregion's aggregate output, where the bulk of the crop will be sown next spring.

Improved export availabilities in 2015/16 following a recovery in 2015 aggregate cereal output

The 2015 cereal harvest has been concluded in all countries of the subregion and the aggregate cereal output is estimated at 33.8 million tonnes, 6.5 percent up from last year's level and some 5.8 percent above the five-year average. Wheat output is estimated at 26.6 million tonnes, representing 79 percent of the aggregate cereal crop.

The bumper 2015 cereal harvest mainly reflects increased production in **Kazakhstan**, the main producer in the subregion, where the latest estimate puts the output at about 17.6 million tonnes, some 6 percent up from last year's below-average output. Increased yields in some oblasts of northern Kazakhstan, reflecting abundant soil moisture during the early growth stages, more than offset a contraction of over 4 percent in the area sown resulting from a shift to

alternative crops such as oilseeds and fodder. Wheat output, which accounts for over 80 percent of annual cereal production, is estimated at 14 million tonnes, about 8 percent up from last year, representing the largest crop since the bumper harvest of 2011. As a result, the exportable surplus of wheat in the 2015/16 marketing year is expected to rebound from last year's low level. In **Kyrgyzstan**, the 2015 cereal production is estimated at the near-record level of 1.7 million tonnes, almost 26 percent up from last year's reduced output, mostly reflecting particularly favourable weather conditions in the main producing provinces of Batken, Osh, Chuy and Jalal-Abad as well as a significant increase in area planted to barley. Significant increases in cereal production are reported also in **Azerbaijan** and **Turkmenistan**, where outputs rose by 16 and 14 percent, respectively, mainly driven by higher yields compared to last year's low levels as growing conditions were satisfactory during the cropping season. Cereal production also increased in the other countries of the subregion, namely **Armenia, Georgia, Uzbekistan** and **Tajikistan**, although at a slower rate. Increased yields, resulting from favourable weather conditions for rainfed crops and adequate availability of water for irrigation during the growing season, contributed to the improved cereal outputs.

Wheat flour prices stable or declining in importing countries

In importing countries of the subregion, prices of main staple wheat flour remained stable or declined in recent months and, in November, they were overall slightly above their year-earlier levels. In **Tajikistan**, prices of wheat flour declined significantly in November. Good supplies from the 2015 wheat harvest and lower year-on-year quotations in Kazakhstan, the country's

Table 15. CIS in Asia cereal production
(million tonnes)

	Wheat			Coarse grains			Total cereals ¹			
	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	Change: 2015/2014 (%)
CIS in Asia	26.4	24.9	26.6	6.4	6.0	6.3	33.6	31.7	33.8	6.5
Armenia	0.3	0.3	0.4	0.2	0.2	0.2	0.5	0.5	0.6	3.2
Azerbaijan	1.9	1.7	2.0	0.9	0.8	0.9	2.8	2.5	2.9	16.1
Georgia	0.1	0.1	0.1	0.4	0.3	0.3	0.5	0.4	0.4	4.1
Kazakhstan	14.0	13.0	14.0	3.3	3.2	3.2	17.6	16.6	17.6	6.1
Kyrgyzstan	0.8	0.7	0.8	0.8	0.7	0.9	1.6	1.4	1.7	26.3
Tajikistan	0.9	0.8	0.8	0.3	0.3	0.3	1.2	1.1	1.1	1.3
Turkmenistan	1.6	1.2	1.4	0.1	0.1	0.1	1.8	1.4	1.6	14.4
Uzbekistan	6.9	7.2	7.3	0.4	0.4	0.4	7.5	7.8	7.9	0.7

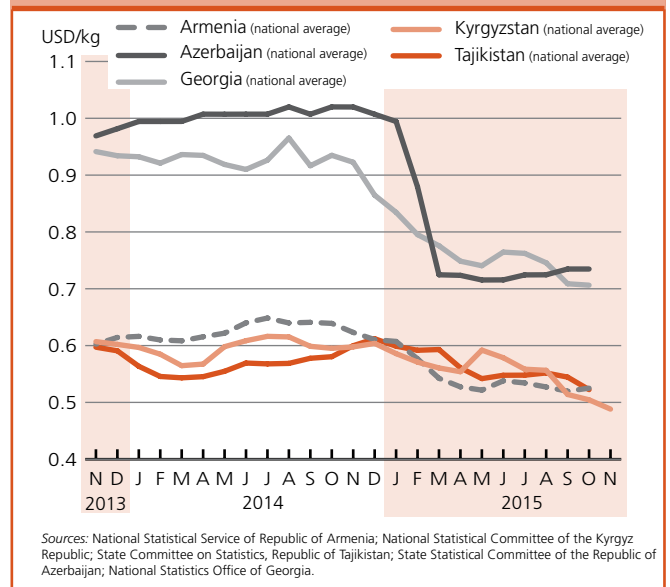
Note: Totals and percentage change computed from unrounded data.

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.

main supplier, pressured prices. Reduced fuel costs added to the downward pressure on prices. In **Kyrgyzstan**, prices of wheat flour in November remained relatively unchanged, despite the good 2015 crop, mainly supported by the further depreciation of the national currency in November, given the high dependence on imports of wheat grain and flour. In **Azerbaijan**, wheat flour prices remained stable in October reflecting large volumes of wheat imports since the beginning of the year, well above the level in 2014. In **Georgia**, which also heavily depends on wheat imports, average prices of wheat flour declined in October for the second consecutive month, reflecting lower year-on-year prices from the Russian Federation, the country's main supplier. Prices of wheat flour have remained stable in recent months in **Armenia** and **Uzbekistan**, reflecting adequate supplies from the 2015 good harvests. In **Kazakhstan**, domestic food prices rose in October, following the sharp depreciation of the national currency in late August. As a result, inflation climbed from 4 percent in September to 9 percent in October.

Figure 8. Retail wheat flour prices in selected CIS in Asia countries



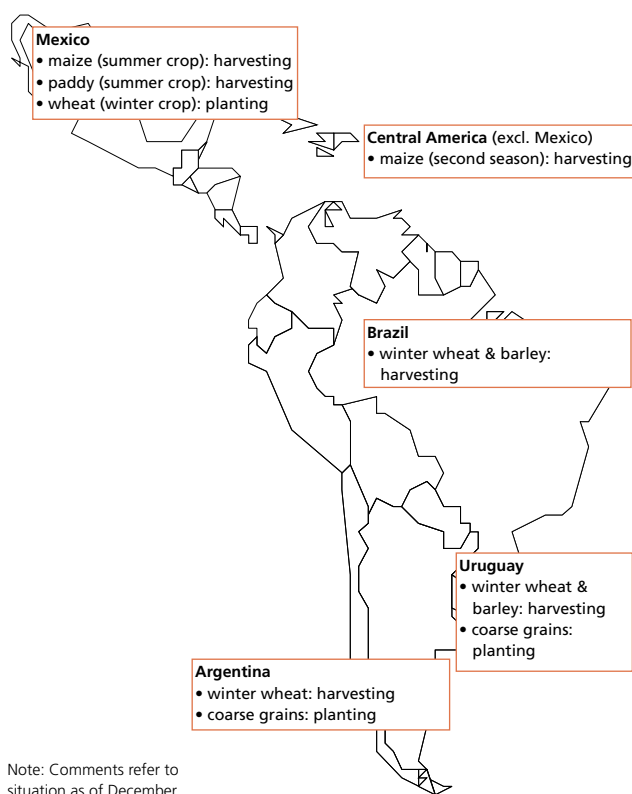
CENTRAL AMERICA AND THE CARIBBEAN

Wheat production in 2015 down but still above average

In **Mexico**, virtually the only wheat producer in the subregion, the 2015 wheat harvest, concluded in June, is officially estimated at 3.6 million tonnes (including the autumn-winter and minor spring-summer seasons), slightly down from earlier expectations. Despite a significant increase in the planted area, this year's output remained slightly below the high level of 2014 as a result of lower yields.

Record 2015 maize production forecast in Mexico but prolonged dry weather expected to reduce outputs in most other parts of the subregion

FAO's estimate of the subregion's aggregate 2015 maize production stands at almost 31 million tonnes, 10 percent up from last year's level. This reflects increased production in **Mexico**, which accounts for about 86 percent of the subregion's total maize output. Official forecasts point to a record output of close to 27 million tonnes, mainly due to an expansion of the planted area. Elsewhere in the subregion, prolonged and severe dry weather associated with El Niño reduced outputs during the main first season, which concluded in September, particularly in **El Salvador, Guatemala, Haiti, Honduras and Nicaragua**. Prospects for the second season crops, to be harvested from December, have improved reflecting beneficial weather since the planting period, particularly in November which experienced above-average rainfall. However, cumulative precipitation volumes remain below last year's already sharply reduced levels which may have affected crop development. FAO forecasts the aggregate 2015 maize output, excluding Mexico, at 4.1 million tonnes. This



Note: Comments refer to situation as of December.

estimate, however, only takes into account the reduced outputs of the first season. At this level, the maize output is virtually unchanged from last year's already drought-reduced level.

Cereal imports forecast at high levels in 2015/16

Cereal imports in the 2015/16 marketing year (September/August) are forecast at 27.4 million tonnes, slightly below last year's near-record level but above the subregion's five-year average. The small year-on-year decrease reflects lower maize imports by Mexico. However, excluding Mexico, cereal imports, mostly maize and rice, for the rest of the subregion are forecast

Table 16. Latin America and Caribbean cereal production (million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	Change: 2015/2014 (%)
Central America & Caribbean	3.4	3.7	3.6	35.9	36.4	39.2	3.2	3.0	2.9	42.4	43.1	45.7	6.0
El Salvador	0.0	0.0	0.0	1.0	1.0	0.8	0.0	0.0	0.0	1.1	1.0	0.8	-14.4
Guatemala	0.0	0.0	0.0	1.8	1.8	1.7	0.0	0.0	0.0	1.8	1.9	1.8	-4.6
Honduras	0.0	0.0	0.0	0.6	0.4	0.6	0.1	0.1	0.1	0.7	0.5	0.6	25.2
Mexico	3.4	3.7	3.6	30.7	31.8	34.6	0.2	0.3	0.2	34.3	35.8	38.4	7.4
Nicaragua	0.0	0.0	0.0	0.6	0.4	0.5	0.5	0.5	0.5	1.2	0.9	0.9	2.7
South America	19.2	24.7	21.1	141.2	137.6	145.4	24.3	24.7	25.6	184.7	187.1	192.1	2.7
Argentina	9.2	13.9	10.5	40.9	39.9	41.5	1.6	1.6	1.6	51.7	55.4	53.5	-3.3
Brazil	5.7	6.3	6.2	83.5	82.9	88.8	11.8	12.1	12.4	101.1	101.3	107.5	6.1

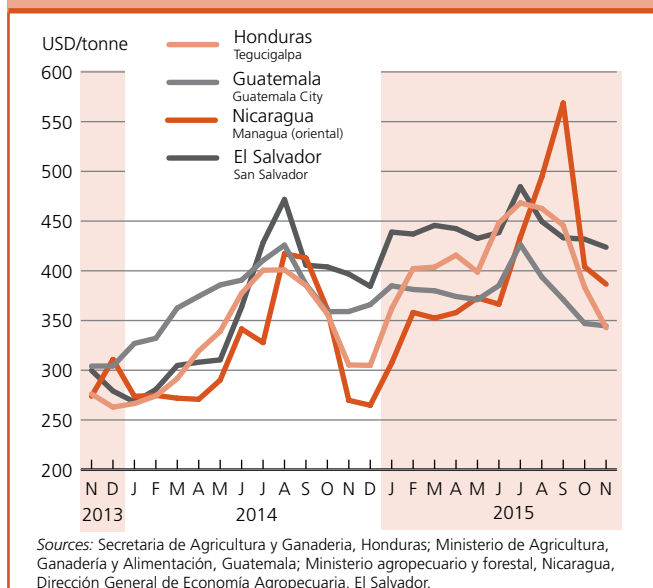
Note: Totals and percentage change computed from unrounded data.

to reach a record 11.4 million tonnes, as a result of the expected drought-reduced outputs.

Maize prices decreased sharply in October but remained at high levels

Wholesale prices of white maize generally decreased sharply in October with the conclusion of the 2015 main season harvests and flows of supplies from Mexico, the subregion's main producer, as well as imports from the United States of America into the other countries. Prices, however, remained well above their levels of a year earlier in most countries of the subregion supported by the reduced first season outputs and concerns about the second season harvests which will begin from late November, as a result of the severe dry weather associated with the El Niño phenomenon during the planting period. The sharpest decline in maize prices was observed in **Nicaragua**, which also led to a decline in prices of tortillas, the basic food staple. Strong price declines were also reported in **Honduras**. In both countries, however, prices remained more than 10 percent above their levels of a year earlier. In **Guatemala**, white maize prices declined by 7 percent in October and were slightly lower than at the same time last year, mainly reflecting increased imports from Mexico. In **El Salvador**, prices remained relatively unchanged and above their levels in October last year. In **Mexico**, prices remained stable in October but above their year-earlier values despite a bumper harvest, mostly due to a weak local currency. In **Haiti**, maize meal prices were overall unchanged but well above their year-earlier levels as a result of unfavourable prospects for this year's production due to prolonged dry weather associated with the El Niño phenomenon.

Figure 9. Wholesale white maize prices in selected countries in Central America



SOUTH AMERICA

Maize production in 2015 estimated at a record level, 2016 sowings anticipated to be lower

Maize production in South America is estimated to have reached a record high of 132 million tonnes in 2015. In **Argentina** and **Brazil**, which together account for 91 percent of the subregional maize output, increased plantings and high yields, reflecting particularly favourable mid-season weather conditions, led to record outputs in both countries. Elsewhere in the subregion, production remained at high levels, particularly in **Bolivia** and **Colombia**. Sowing of the 2016 crop is underway in the subregion. While no official estimate yet exists of the area planted, early indications point to a reduction in plantings in response to the high levels of maize stocks and depressed prices.

Wheat production forecast at a high level in 2015 despite significant reductions in plantings and yields in key producers

Harvesting of the 2015 wheat crop is well advanced and initial forecasts have been revised slightly downward to 21.1 million, about 15 percent below last year's level. The downward revision reflects a lower-than-previously anticipated output in **Argentina**, which accounts for half of the subregional output. Low precipitation during the season reduced plantings and yields. Preliminary forecasts point to an output of 10.5 million tonnes, well below last year's high level and the five-year average. However, after accounting for domestic needs, the exportable surplus should still be sufficient to meet subregional demand. In **Brazil**, which accounts for more than one-third of the subregional output, the latest official forecast points to a bumper crop of about 6.2 million tonnes, lower than initially anticipated as yields were affected by reduced precipitation during key periods of the season. Elsewhere in the subregion, outputs are expected to remain high, particularly in main importers **Bolivia** and **Chile**.

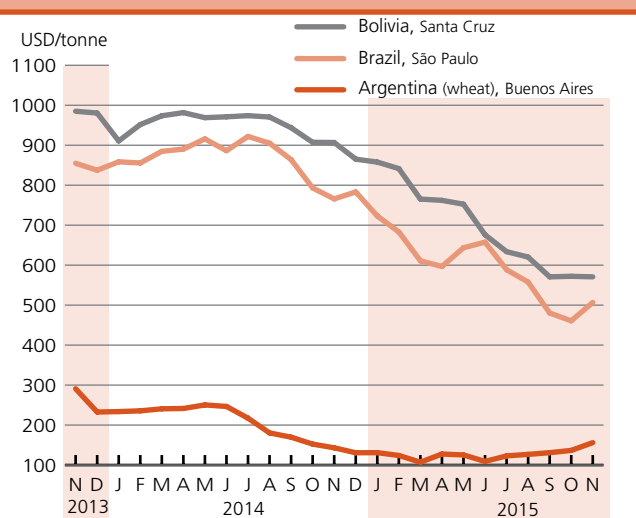
Wheat flour prices followed mixed trends, those of yellow maize generally increased

Domestic prices of wheat and wheat flour followed mixed trends in October but remained, in general, below or around their year-earlier levels reflecting adequate availabilities from last year's good harvests. In **Argentina** and **Chile**, prices continued to seasonally increase in October and weak local currencies provided further support. However, supplies from last year's good outputs contributed to keep prices generally unchanged from a year earlier. In **Bolivia**, **Brazil**, **Peru** and **Uruguay**, prices of wheat flour declined in October and were below their year-earlier levels. Ample carryover stocks, adequate levels of imports and relatively

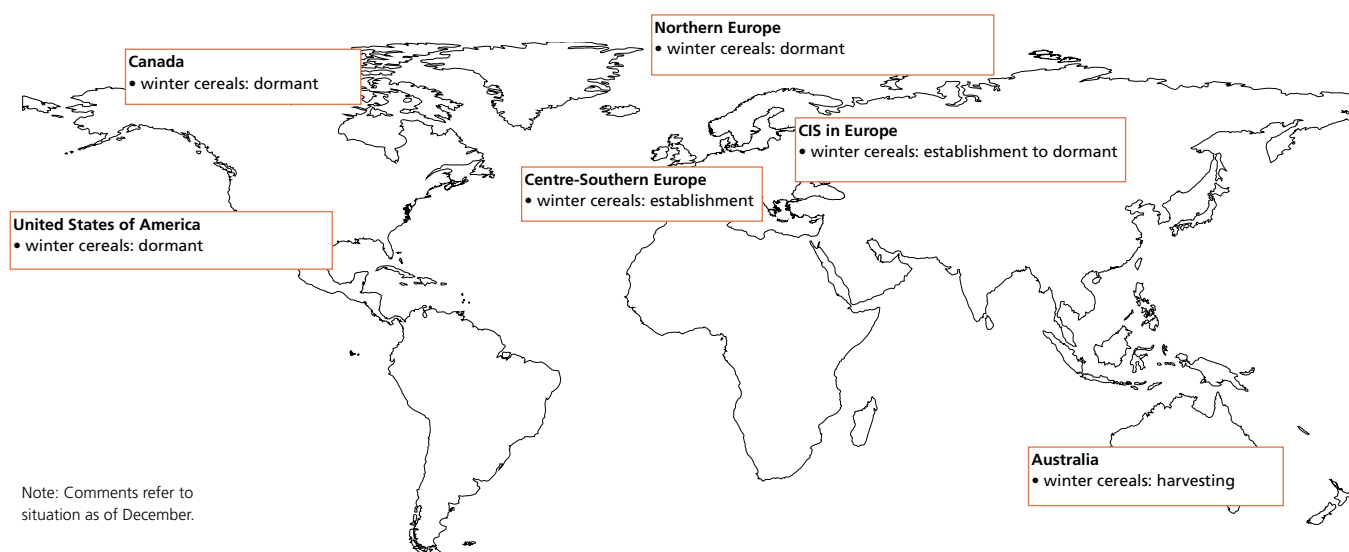
good prospects for the upcoming 2015 harvests contributed to the price declines. In **Colombia**, the weak local currency, despite a recent strengthening, continued to support prices. In **Ecuador**, wheat flour prices in October remained relatively unchanged from their level of the previous month and a year earlier reflecting adequate imports.

Yellow maize prices increased in most countries of the subregion in October. In **Argentina** and **Brazil**, prices increased sharply and were well above their year-earlier levels despite bumper harvests this year and adequate carryover stocks. Prices were underpinned by a strong depreciation of the local currencies coupled with a robust export demand. In **Bolivia**, prices increased in the main market of Santa Cruz, but remained well below their levels in October last year as a result of good supplies from the 2015 harvest and adequate import levels. Prices strengthened also in **Ecuador** and **Chile**, while they declined in **Peru**. Overall, prices of yellow maize remained below their levels in October last year, with the exception of **Colombia**, which heavily depends on imports to satisfy its consumption requirements, due to the depreciation of the national currency.

Figure 10. Wholesale wheat flour prices in selected countries in South America



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



NORTH AMERICA

Early indications suggest little change in winter wheat area for 2016 harvest but some crops stressed by dry conditions

In **the United States of America**, winter wheat planting for the 2016 harvest was reported to be virtually complete by late November and the condition of the crop is rated as mostly fair to good, with the exception of some parts of the southern Plains where some crop stands are stressed by dry conditions and more precipitation would be beneficial. Although final estimates are not available yet, early indications suggest that the area sown to winter wheat, which accounts for over 80 percent of the country's total wheat area, is likely to be little changed

compared to the previous year. A slight reduction in the hard red winter wheat area could be offset by increased plantings of soft red winter wheat after a sharp fall last year. Regarding coarse grains, the latest official estimate puts the 2015 maize output at 346 million tonnes, 4 percent down from last year's record crop. In **Canada**, the bulk of the wheat is planted in spring and the 2016 crop will not be sown until March-April next year. Latest information regarding the 2015 cereal harvest puts the total wheat output at about 26 million tonnes, 11 percent down from last year's output and the smallest crop since 2011. A slight increase in harvested area was more than offset by lower yields due to unfavourably dry weather early in the growing season. The maize crop, mostly grown in Eastern Canada, increased this year to some 12 million tonnes, about the average of the past five years.

Table 17. North America, Europe and Oceania cereal production
(million tonnes)

	Wheat			Coarse grains			Rice (paddy)			Total cereals			
	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	2013	2014 estim.	2015 f'cast.	Change: 2015/2014 (%)
North America	95.6	84.6	81.9	396.3	399.6	392.1	8.6	10.0	8.7	500.5	494.2	482.7	-2.3
Canada	37.5	29.4	26.1	28.8	22.1	23.6	0.0	0.0	0.0	66.4	51.5	49.7	-3.4
United States	58.1	55.1	55.8	367.4	377.6	368.5	8.6	10.0	8.7	434.1	442.7	433.0	-2.2
Europe	225.5	248.6	252.1	252.4	270.8	240.3	4.1	4.0	4.2	482.0	523.4	496.6	-5.1
Belarus	2.0	2.5	2.4	5.3	6.0	5.8	0.0	0.0	0.0	7.3	8.5	8.2	-3.7
EU	143.6	157.1	158.5	158.9	172.0	151.3	2.9	2.9	2.9	305.4	332.0	312.8	-5.8
Russian Federation	52.1	59.7	59.8	36.6	41.7	40.0	0.9	1.0	1.2	89.6	102.5	101.0	-1.4
Serbia	2.7	2.4	2.5	6.6	7.2	6.5	0.0	0.0	0.0	9.3	9.6	8.9	-7.1
Ukraine	22.3	24.1	26.4	40.5	39.5	33.0	0.1	0.1	0.1	62.9	63.7	59.4	-6.6
Oceania	25.6	24.0	24.6	13.9	11.6	13.3	1.2	0.8	0.7	40.7	36.4	38.7	6.1
Australia	25.3	23.7	24.3	13.4	11.1	12.8	1.2	0.8	0.7	39.8	35.5	37.8	6.3

Note: Totals and percentage change computed from unrounded data.

EUROPE

European Union

Early indications suggest little change in EU winter wheat area for harvest in 2016

As of late November, the bulk of the winter grain crops for harvest in 2016 have been sown throughout the **European Union (EU)**. Conditions have predominantly been very favourable for emergence and early development of crops, reflecting above average temperatures and satisfactory moisture availability. The major exception was in Poland, where soil conditions were adversely dry for sowing. However, conditions have improved there since the early part of the season with the arrival of beneficial rains. Early indications suggest that the EU area sown to winter wheat is similar to that in the previous year. The EU's cereal output in 2015 is now estimated at 312.8 million tonnes, 5.8 percent down from 2014. The decrease is largely on account of a sharp reduction in maize output due to low yields achieved because of adverse weather. Wheat output increased by about 1 percent from the previous year to 158.5 million tonnes.

CIS in Europe

Unfavourable dry weather delayed winter grain planting in some countries but recent rains improved crop conditions ahead of winter dormancy

In **the Russian Federation**, as of late November, it was reported that some 16 million hectares had been planted to winter grains (mostly wheat), close to the previous year's level. The official winter grain planting target is set at 17 million hectares, close to last year's level. Dry weather conditions at the beginning of the season delayed planting, mainly in the Central, South and Volga federal districts, raising concerns over the establishment of crops. However, beneficial rains arrived in late October, in time to improve crop conditions ahead of winter dormancy. In **Ukraine**, winter grains (mostly wheat) have been planted on an estimated 8 million hectares, slightly up from the previous year's level. Planting conditions are reported to be generally satisfactory in western and northern parts. By contrast, generally dry weather in central, eastern and southern regions, particularly Kherson, delayed planting activities and may have impaired crop emergence and establishment. The arrival of good rains in November will have been beneficial for the establishment of the crops ahead of the winter. In **Belarus**, the area planted to winter cereals is officially estimated to be close to last year's level and weather and soil conditions were reported to be favourable for crop emergence and establishment. Similarly, in **Moldova**, weather conditions benefitted the emergence and early growth of winter cereals.

Below-average cereal production in 2015

Harvesting of the 2015 cereal crops is complete in the subregion and aggregate output is estimated at 170.7 million tonnes. This would be 4 percent below last year's bumper level, despite an overall slight increase in the area planted to cereals, but still almost 17 percent above the average of the past five years. Unfavourable weather conditions adversely affected yields, mainly in the Russian Federation and Ukraine. In **the Russian Federation**, the 2015 cereal output is estimated at approximately 101 million tonnes, slightly below the 2014 bumper production but almost 22 percent above the five-year average. The wheat output, which accounts for almost 60 percent of the total cereal production, remained virtually unchanged from the 2014 bumper level, with an increase in harvested area offsetting slightly lower yields achieved this year. The 2015 cereal harvest of **Ukraine** is estimated at 59.4 million tonnes, 6.6 percent down from the 2014 record level but well above the five-year average. Of the total, wheat is estimated to account for 26.4 million tonnes, a record high level and almost 10 percent up from last year's bumper crop, reflecting an increased area planted and high yields. By contrast, conditions for cereal production in 2015 were less favourable in **the Republic of Moldova**, where output is estimated at about 2 million tonnes, 22 percent down from the 2014 above-average level, mainly reflecting reduced yields.

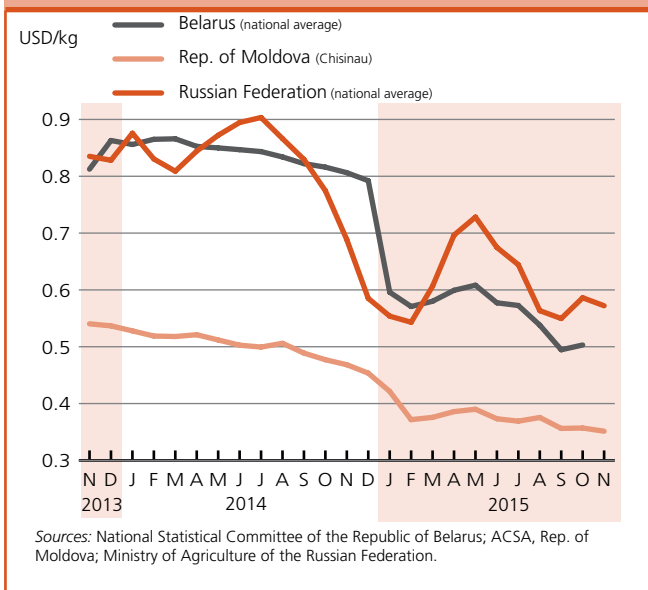
Cereal exports in 2015/16 marketing year forecast to decrease from last year's record level

Aggregate cereal exports from the subregion in the 2015/16 marketing year (July/June), mostly wheat and maize, are forecast at 63.8 million tonnes, 2.4 percent down compared to the 2014/2015 record level but 39 percent above the average of the previous five years. The bulk of the increase, compared to the average, is on account of higher expected wheat exports from Ukraine, while those from the Russian Federation are also forecast to increase but to a lesser extent.

Prices of wheat and wheat flour on the increase

In most countries of the subregion, domestic prices of wheat and wheat flour increased in recent months. In **Ukraine**, the depreciation of the national currency, which supported export demand, underpinned prices, while in **the Russian Federation** prices were supported by the ongoing intervention purchases at increased prices and a rebound in export demand. Continuous concerns about the impact of dry weather conditions on the 2016 wheat crop provided additional support. In these countries, prices were well above their year-earlier levels. In **the Republic of Moldova**, prices of wheat grain have been on the increase in the past several months underpinned by the reduced 2015 output. In **Belarus**, prices of wheat flour remain stable reflecting adequate supplies from the 2015 good harvest.

Figure 11. Retail wheat flour prices in Belarus, Russian Federation and Republic of Moldova



OCEANIA

Prospects deteriorate for 2015 winter grains harvest due to persisting dryness

Prospects for the upcoming **Australian** winter grains harvest have deteriorated further due to persisting dry weather and above-normal temperatures linked to the El Niño weather pattern. As of late October, the official forecast for the 2015 wheat output stood at about 24 million tonnes, 1 million tonnes down from the previous forecast in early September. The reduction has been made to account for below-normal rainfall in late September and the first part of October and forecasts indicating little likelihood of improvement in the rainfall situation throughout the remainder of October. Although no firm information is available yet, the predominantly dry and hot weather in the latter part of the spring has undoubtedly had an adverse impact also on prospects for the summer grain crop (mainly sorghum and maize) for harvest in 2016.

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Table A1. Global cereal supply and demand indicators

	Average 2008/09 - 2012/13	2011/12	2012/13	2013/14	2014/15	2015/16
1. Ratio of world stocks to utilization (%)						
Wheat	28.0	28.9	25.5	26.3	27.9	28.9
Coarse grains	18.0	17.6	15.6	18.3	20.9	20.4
Rice	30.3	30.9	33.3	34.8	34.4	32.6
Total cereals	23.4	23.7	22.0	23.8	25.6	25.0
2. Ratio of major grain exporters' supplies to normal market requirements (%)						
	119.6	118.6	108.1	121.5	123.2	121.1
3. Ratio of major exporters' stocks to their total disappearance (%)						
Wheat	18.9	18.2	13.8	13.8	15.6	17.4
Coarse grains	12.6	11.1	8.6	11.2	13.7	13.4
Rice	23.7	25.1	27.8	28.8	23.6	17.2
Total cereals	18.4	18.1	16.7	17.9	17.6	16.0
	Annual trend growth rate 2005-2014	2011	Change from previous year			2015
			2012	2013	2014	
4. Changes in world cereal production (%)						
	2.5	4.2	-2.1	9.8	1.5	-1.3
5. Changes in cereal production in the LIFDCs (%)						
	3.6	2.0	3.8	1.2	1.8	-4.4
6. Changes in cereal production in the LIFDCs less India (%)						
	5.2	-3.5	5.6	1.1	4.5	-4.8
	Average 2008-2012	2011	Change from previous year (%)			2015*
			2012	2013	2014	
7. Selected cereal price indices:						
Wheat	191.1	31.8	-4.8	-4.9	-6.6	-20.0
Maize	220.5	57.6	2.2	-12.9	-25.8	-12.1
Rice	247.0	6.6	-4.6	0.8	0.8	-10.3

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.

Major wheat exporters are Argentina, Australia, Canada, the EU, Kazakhstan, the Russian Federation, Ukraine and the United States of America; major coarse grain exporters are Argentina, Australia, Brazil, Canada, the EU, 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.

Normal market requirements for major grain exporters are defined as the average of domestic utilization plus exports in the three preceding seasons.

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

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-November average.

Table A2. World cereal stocks¹
(million tonnes)

	2011	2012	2013	2014	2015 estimate	2016 forecast
TOTAL CEREALS	526.7	550.3	532.5	596.3	646.5	643.5
Wheat	197.5	198.4	177.1	188.2	203.0	207.0
held by:						
- main exporters ²	52.3	43.8	37.8	41.8	48.1	53.9
- others	145.2	154.6	139.3	146.4	154.9	153.1
Coarse grains	199.4	205.5	194.4	236.5	271.7	270.9
held by:						
- main exporters ²	62.8	59.5	47.6	69.1	86.4	85.3
- others	136.6	146.0	146.8	167.4	185.3	185.6
Rice (milled basis)	129.8	146.4	161.0	171.6	171.8	165.6
held by:						
- main exporters ²	33.8	41.3	46.6	49.4	42.2	30.7
- others	96.0	105.1	114.4	122.2	129.6	134.9
Developed countries	160.0	154.8	119.6	141.9	169.4	175.7
Australia	11.1	9.0	6.8	6.8	6.5	6.4
Canada	11.2	9.4	8.2	15.0	9.9	7.1
European Union	32.5	32.7	25.8	33.5	43.0	45.2
Japan	5.4	5.5	6.2	5.6	5.4	5.8
Russian Federation	20.2	16.4	5.8	5.3	6.7	8.0
South Africa	4.0	2.5	2.3	1.6	3.3	2.4
Ukraine	5.9	10.4	6.1	8.3	9.7	8.2
United States	57.3	49.3	44.2	51.4	69.0	75.2
Developing countries	366.7	395.6	412.9	454.4	477.1	467.8
Asia	301.7	328.3	354.5	382.2	396.4	392.6
China	182.6	194.9	212.5	234.0	245.8	258.2
India	44.8	50.3	53.3	53.9	53.6	45.2
Indonesia	10.0	10.6	11.4	11.2	11.4	11.6
Iran (Islamic Republic of)	4.0	2.6	6.9	8.0	10.7	8.8
Korea, Republic of	3.7	3.7	3.3	3.7	4.1	4.6
Pakistan	3.4	5.2	3.5	3.9	4.4	3.4
Philippines	3.7	2.9	3.1	3.1	4.1	3.8
Syrian Arab Republic	3.8	3.5	2.6	2.1	1.3	1.5
Turkey	3.6	4.2	4.3	5.5	4.9	5.3
Africa	36.2	39.6	37.2	39.0	41.2	35.7
Algeria	4.2	4.9	5.4	6.4	6.8	6.5
Egypt	5.8	8.1	6.0	6.4	6.2	5.4
Ethiopia	1.9	2.0	1.8	2.2	2.2	1.7
Morocco	4.2	4.8	3.4	5.7	5.6	6.9
Nigeria	1.4	2.1	1.4	1.5	1.8	1.4
Tunisia	0.8	0.8	1.3	1.1	1.3	1.0
Central America	6.9	5.6	5.8	6.6	7.0	7.2
Mexico	3.8	2.3	2.7	3.3	3.6	3.8
South America	21.5	21.7	15.1	26.2	32.1	31.9
Argentina	5.4	4.8	2.1	5.9	8.5	7.4
Brazil	8.4	9.1	5.7	11.5	14.0	14.3

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

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

² Major wheat exporters are Argentina, Australia, Canada, the EU, Kazakhstan, the Russian Federation, Ukraine and the United States of America; major coarse grain exporters are Argentina, Australia, Brazil, Canada, the EU, 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. Prot. 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)						
2003/04	161	149	154	115	109	118
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
Monthly						
2013 - November	317	274	353	199	207	196
2013 - December	301	267	340	197	212	207
2014 - January	288	248	330	198	215	216
2014 - February	303	261	328	209	218	224
2014 - March	334	285	340	222	226	228
2014 - April	340	281	361	224	229	226
2014 - May	345	271	372	217	224	223
2014 - June	314	235	365	202	204	220
2014 - July	294	218	287	182	192	203
2014 - August	284	219	270	175	181	183
2014 - September	279	204	248	164	166	174
2014 - October	289	223	242	165	171	189
2014 - November	280	236	252	178	179	197
2014 - December	289	261	251	178	197	217
2015 - January	262	233	254	176	184	231
2015 - February	252	221	241	174	178	230
2015 - March	250	219	228	173	169	226
2015 - April	239	209	225	172	168	223
2015 - May	231	199	228	166	168	217
2015 - June	242	211	226	170	173	224
2015 - July	238	208	229	179	176	223
2015 - August	216	190	227	163	160	180
2015 - September	218	195	223	166	161	177
2015 - October	221	208	223	172	164	182
2015 - November	211	201	210	166	167	173

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. Cereal import requirements of Low-Income Food-Deficit Countries¹, 2014/15 or 2015 estimates
(thousand tonnes)

	2013/14 or 2014				2014/15 or 2015			
	Marketing year	Commercial purchases	Food aid	Total commercial and aid	Total import requirements (excl. re-exports)	Total commercial and aid	Food aid deliveries ³	Commercial purchases
AFRICA		29 633.5	1 282.3	30 915.8	30 757.4	21 236.1	603.0	20 633.1
East Africa		9 170.0	850.2	10 020.2	9 534.1	7 646.8	427.6	7 219.2
Burundi	Jan/Dec	125.5	9.9	135.4	138.4	17.6	2.8	14.8
Comoros	Jan/Dec	57.7	0.0	57.7	70.0	31.6	0.0	31.6
Djibouti	Jan/Dec	161.8	8.7	170.5	184.7	170.6	1.6	169.0
Eritrea	Jan/Dec	416.7	0.0	416.7	427.0	306.0	0.0	306.0
Ethiopia	Jan/Dec	630.4	304.3	934.7	621.4	337.8	24.4	313.4
Kenya	Oct/Sep	2 555.3	108.6	2 663.9	2 930.3	2 930.3	74.3	2 856.0
Rwanda	Jan/Dec	141.3	3.7	145.0	108.7	27.5	0.0	27.5
Somalia	Aug/Jul	446.5	99.3	545.8	588.0	588.0	37.9	550.1
South Sudan	Nov/Oct	n.a.	n.a.	545.0	545.0	n.a.	n.a.	n.a.
Sudan	Nov/Oct	2 741.7	232.2	2 973.9	2 342.5	1 952.3	257.3	1 695.0
Tanzania U.R.	Jun/May	810.2	48.3	858.5	1 171.7	1 171.7	27.5	1 144.2
Uganda	Jan/Dec	537.9	35.2	573.1	406.4	113.4	1.8	111.6
Southern Africa		2 963.9	63.4	3 027.3	2 662.3	2 662.3	37.1	2 625.2
Lesotho	Apr/Mar	166.0	7.0	173.0	224.6	224.6	2.0	222.6
Madagascar	Apr/Mar	553.0	17.4	570.4	560.4	560.4	10.4	550.0
Malawi	Apr/Mar	210.0	4.1	214.1	134.8	134.8	12.7	122.1
Mozambique	Apr/Mar	1 251.0	25.0	1 276.0	1 241.0	1 241.0	2.2	1 238.8
Zimbabwe	Apr/Mar	783.9	9.9	793.8	501.5	501.5	9.8	491.7
West Africa		15 882.1	224.4	16 106.5	16 850.8	9 882.6	93.7	9 788.9
Coastal Countries		11 908.5	121.5	12 030.0	12 603.0	7 238.2	13.8	7 224.4
Benin	Jan/Dec	354.5	2.0	356.5	317.0	317.0	0.3	316.7
Côte d'Ivoire	Jan/Dec	1 756.1	4.4	1 760.5	1 840.5	1 270.6	5.3	1 265.3
Ghana	Jan/Dec	892.0	8.0	900.0	900.0	635.3	2.1	633.2
Guinea	Jan/Dec	624.9	7.6	632.5	612.0	449.6	6.1	443.5
Liberia	Jan/Dec	290.0	70.0	360.0	432.0	232.9	0.0	232.9
Nigeria	Jan/Dec	7 420.0	0.0	7 420.0	7 920.0	3 940.0	0.0	3 940.0
Sierra Leone	Jan/Dec	296.0	29.0	325.0	356.0	194.4	0.0	194.4
Togo	Jan/Dec	275.0	0.5	275.5	225.5	198.4	0.0	198.4
Sahelian Countries		3 973.6	102.9	4 076.5	4 247.8	2 644.4	79.9	2 564.5
Burkina Faso	Nov/Oct	493.6	11.8	505.4	485.0	117.7	3.5	114.2
Chad	Nov/Oct	100.0	42.2	142.2	144.6	77.0	31.2	45.8
Gambia	Nov/Oct	209.9	0.6	210.5	212.5	102.3	0.7	101.6
Guinea-Bissau	Nov/Oct	69.4	4.9	74.3	94.3	15.4	2.5	12.9
Mali	Nov/Oct	338.8	6.4	345.2	375.9	221.0	4.9	216.1
Mauritania	Nov/Oct	511.2	10.8	522.0	524.5	521.4	6.9	514.5
Niger	Nov/Oct	495.4	18.1	513.5	505.0	117.6	28.3	89.3
Senegal	Nov/Oct	1 755.3	8.1	1 763.4	1 906.0	1 472.0	1.9	1 470.1
Central Africa		1 617.5	144.3	1 761.8	1 710.2	1 044.4	44.6	999.8
Cameroon	Jan/Dec	886.2	2.6	888.8	827.0	789.7	11.2	778.5
Cent.Afr.Rep.	Jan/Dec	53.9	21.1	75.0	75.0	16.0	4.9	11.1
Dem.Rep.of the Congo	Jan/Dec	659.7	120.3	780.0	790.0	232.1	28.3	203.8
Sao Tome and Principe	Jan/Dec	17.7	0.3	18.0	18.2	6.6	0.2	6.4

Source: FAO

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

² Estimates based on information as of early November 2015.

³ Refers to food aid deliveries to WFP country offices, bilateral transfers, and deliveries by other UN agencies and NGOs.

Table A4b. Cereal import requirements of Low-Income Food-Deficit Countries¹, 2014/15 or 2015 estimates
(thousand tonnes)

	Marketing year	2013/14 or 2014 Actual imports			2014/15 or 2015 Import position ²			
		Commercial purchases	Food aid	Total commercial and aid	Total import requirements (excl. re-exports)	Total commercial and aid	Food aid deliveries ³	Commercial purchases
ASIA		17 367.9	548.7	17 916.6	20 770.7	18 939.2	428.1	18 511.1
Cis in Asia		4 021.9	0.2	4 022.1	4 108.9	3 935.8	0.3	3 935.5
Kyrgyzstan	Jul/Jun	565.9	0.2	566.1	574.9	560.5	0.3	560.2
Tajikistan	Jul/Jun	1 028.0	0.0	1 028.0	1 081.0	1 069.5	0.0	1 069.5
Uzbekistan	Jul/Jun	2 428.0	0.0	2 428.0	2 453.0	2 305.8	0.0	2 305.8
Far East		4 220.6	146.9	4 367.5	6 484.8	6 278.2	31.1	6 247.1
Bangladesh	Jul/Jun	3 173.4	75.6	3 249.0	5 286.0	5 286.0	12.1	5 273.9
Bhutan	Jul/Jun	82.9	0.0	82.9	86.0	86.0	0.0	86.0
D.P.R. of Korea	Nov/Oct	269.9	70.2	340.1	361.0	141.9	15.4	126.5
India	Apr/Mar	26.9	0.0	26.9	38.2	51.2	0.0	51.2
Mongolia	Oct/Sep	69.8	0.0	69.8	81.8	81.3	0.0	81.3
Nepal	Jul/Jun	597.7	1.1	598.8	631.8	631.8	3.6	628.2
Near East		9 125.4	401.6	9 527.0	10 177.0	8 725.2	396.7	8 328.5
Afghanistan	Jul/Jun	1 841.0	16.0	1 857.0	2 247.0	2 247.0	15.2	2 231.8
Syrian Arab Republic	Jul/Jun	3 263.5	316.5	3 580.0	3 830.0	3 830.0	294.4	3 535.6
Yemen	Jan/Dec	4 020.9	69.1	4 090.0	4 100.0	2 648.2	87.1	2 561.1
CENTRAL AMERICA		1 818.2	87.1	1 905.3	2 043.9	2 044.3	8.1	2 036.2
Haiti	Jul/Jun	588.0	80.1	668.1	710.1	710.3	2.7	707.6
Honduras	Jul/Jun	782.6	5.8	788.4	873.8	873.8	3.9	869.9
Nicaragua	Jul/Jun	447.6	1.2	448.8	460.0	460.2	1.5	458.7
OCEANIA		443.0	0.0	443.0	477.2	223.4	0.0	223.4
Papua New Guinea	Jan/Dec	420.2	0.0	420.2	420.2	210.1	0.0	210.1
Solomon Islands	Jan/Dec	22.8	0.0	22.8	57.0	13.3	0.0	13.3
TOTAL		49 262.6	1 918.1	51 180.7	54 049.2	42 443.0	1 039.2	41 403.8

Source: FAO

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² Estimates based on information as of early November 2015.

³ Refers to food aid deliveries to WFP country offices, bilateral transfers, and deliveries by other UN agencies and NGOs.

Table A5. Cereal import requirements of Low-Income Food-Deficit Countries¹, 2015/16 estimates*
(thousand tonnes)

	Marketing year	2014/15 Actual imports			Total import requirements (excl. re-exports)	2015/16 Import position ²		
		Commercial purchases	Food aid	Total commercial and aid		Total commercial and aid	Food aid deliveries ³	Commercial purchases
AFRICA		7 175.5	238.2	7 413.7	7 371.0	909.6	14.8	894.8
Eastern Africa		4 550.3	201.1	4 751.4	4 195.0	79.4	0.0	79.4
Kenya	Oct/Sep	2 856.0	74.3	2 930.3	2 770.0	0.0	0.0	0.0
Somalia	Aug/Jul	550.1	99.3	649.4	600.0	0.0	0.0	0.0
United Rep. of Tanzania	Jun/May	1 144.2	27.5	1 171.7	825.0	79.4	0.0	79.4
Southern Africa		2 625.2	37.1	2 662.3	3 176.0	830.2	14.8	815.4
Lesotho	Apr/Mar	222.6	2.0	224.6	233.0	34.2	0.0	34.2
Madagascar	Apr/Mar	550.0	10.4	560.4	513.0	12.7	7.6	5.1
Malawi	Apr/Mar	122.1	12.7	134.8	222.0	195.5	0.2	195.3
Mozambique	Apr/Mar	1 238.8	2.2	1 241.0	1 220.0	267.1	1.3	265.8
Zimbabwe	Apr/Mar	491.7	9.8	501.5	988.0	320.7	5.7	315.0
ASIA		15 823.5	325.6	16 149.1	16 545.8	2 122.0	46.8	2 075.2
CIS in Asia		3 935.5	0.3	3 935.8	4 106.2	879.0	0.0	879.0
Kyrgyzstan	Jul/Jun	560.2	0.3	560.5	580.2	32.2	0.0	32.2
Tajikistan	Jul/Jun	1 069.5	0.0	1 069.5	1 089.0	252.5	0.0	252.5
Uzbekistan	Jul/Jun	2 305.8	0.0	2 305.8	2 437.0	594.3	0.0	594.3
Far East		6 120.6	15.7	6 136.3	6 147.6	906.1	2.1	904.0
Bangladesh	Jul/Jun	5 273.9	12.1	5 286.0	4 440.0	506.9	0.1	506.8
Bhutan	Jul/Jun	86.0	0.0	86.0	79.0	0.0	0.0	0.0
India	Apr/Mar	51.2	0.0	51.2	610.0	396.2	0.0	396.2
Mongolia	Oct/Sep	81.3	0.0	81.3	162.8	0.0	0.0	0.0
Nepal	Jul/Jun	628.2	3.6	631.8	855.8	3.0	2.0	1.0
Near East		5 767.4	309.6	6 077.0	6 292.0	336.9	44.7	292.2
Afghanistan	Jul/Jun	2 231.8	15.2	2 247.0	2 102.0	149.4	0.0	149.4
Syrian Arab Republic	Jul/Jun	3 535.6	294.4	3 830.0	4 190.0	187.5	44.7	142.8
CENTRAL AMERICA		2 036.2	8.1	2 044.3	2 120.1	218.2	0.2	218.0
Haiti	Jul/Jun	707.6	2.7	710.3	730.1	38.6	0.0	38.6
Honduras	Jul/Jun	869.9	3.9	873.8	895.0	151.4	0.2	151.2
Nicaragua	Jul/Jun	458.7	1.5	460.2	495.0	28.2	0.0	28.2
TOTAL		25 035.2	571.9	25 607.1	26 036.9	3 249.8	61.8	3 188.0

Source: FAO

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

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This report is based on information available as of mid-November 2015.

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